



DESIGN STRATEGIES FOR THE HUMAN EXPERIENCE

Gensler

Everything we do is guided by our mission:
To create a better world through the power of design.



Atlantic Park, Virginia Beach, Va.
On the cover: Willis Tower, Chicago

Despite ongoing challenges, an enduring resilience is defining the built environment.



After almost two years of pandemic-infused stops and starts, we're seeing you, our clients, usher in a new era with a new kind of resilience. We're witnessing optimistic investments and plans to define the future of buildings and places with projects that respond to the new way that people work and live and that reflect the most influential issues we're facing today in climate change, inclusion, and community. This optimism is happening in spite of the pandemic, not because we've gotten past it.

Innovation is accelerating

The challenges you face remain significant. Across industries and time zones, companies like yours are feeling the pinch of supply chain woes and labor shortages. Climate change and its economic fallout have become a constant threat. Issues of equity and inclusion remain top of mind.

And yet, there's reason to be hopeful. The past two years have shown how tough times can accelerate innovation. New tools, techniques, and research have been able to bring people back together in purposeful, inclusive, and resilient spaces. Experience is the key to reinvigorating physical spaces — especially the workplace — and if you're looking to bring people back to the office or any physical space, you must create destinations rather than obligations. People are looking for twice the experience as before.

Shaping the future of cities

Likewise, cities must also look at the challenges they face through the lens of human experience. To position themselves as places where people want to live, cities must create convenient and walkable 20-minute neighborhoods, healthy green spaces

that promote wellness, buildings that have low-carbon footprints, and connected communities that embrace inclusivity for everyone.

Holistic design for the human experience

The most valued places prioritize the human experience, which is why human experience design is such a powerful opportunity for you and your communities. By taking a holistic approach to design, Gensler is creating places that feel inclusive, healthy, and purposeful — places that honor local context, while considering the health of occupants and planet alike.

This year's Design Forecast focuses on design strategies that will define the future of the human experience for the coming years. You'll find strategic advice, research, data, and projects from all 28 of Gensler's practice areas. We hope the trends in this publication will help you prepare for a new era of human experience.

DIANE HOSKINS
FAIA, IIDA | Co-CEO

ANDY COHEN
FAIA | Co-CEO



A
NEW
ERA
OF
HUMAN

EXPERIENCE

The resiliency and innovation we've witnessed across industries has given us a roadmap for how to move forward.

We're setting a new stage for how we live now.

In the past two years, the world has faced generational challenges. Lives have been changed, and that change is here to stay. And yet, optimism is in the air.

Design has offered innovative solutions to many of the challenges we've been facing, and the resiliency and innovation we've witnessed across industries has given us a roadmap for how to move forward. Our resourcefulness is slowly, but surely lifting the heavy veil of the pandemic.

We're not in the clear yet. Global instability, climate change, and social inequity remain difficult challenges, while the longer impacts of COVID — supply chain issues, labor shortages, and inflation — are driving competition as the world learns to live with some form of the virus for the foreseeable future.

While we are being confronted with tough new realities, we see a bright future ahead. It's a future where human experience is defined through the power design in the spaces we frequent, the communities in which we live together, and the air we breathe. Real estate is the stage on which life is lived, and because of that, its value is directly tied to how we experience the spaces where we live, work, and play. The path forward is the one designed with people at the center.

The impacts of COVID continue to disrupt the global supply chain and transform the workplace.

With the pandemic entering its third year, we're beginning to see new impacts of the virus, including supply chain issues, labor shortages, and inflation — all of which are driving competition for materials, talent, and resources like never before.

DESIGNING A MORE RESILIENT SUPPLY CHAIN ECOSYSTEM

We are taking action to improve the long-term resilience and sustainability of the building industry supply chain.

Across industries and time zones, our clients are facing delays and bottlenecks in the shipping of construction materials and furnishings for their properties. This is resulting in construction delays and ballooning costs. At Gensler, we are taking action to improve the long-term resilience and sustainability of the building industry supply chain by developing a new blueprint for specifying quality, low-carbon products. These new "green specifications" prioritize materials that reduce construction-related emissions, and promote locally extracted and manufactured materials. This initiative will help businesses avoid the fallout of unexpected bottlenecks by creating new systems that help to ensure the long-term health of our clients' portfolios with properties that already meet emerging safety, health, compliance, sustainability, and insurance requirements.

THE CRITICAL ROLE OF THE OFFICE FOR TALENT RECRUITMENT AND RETENTION

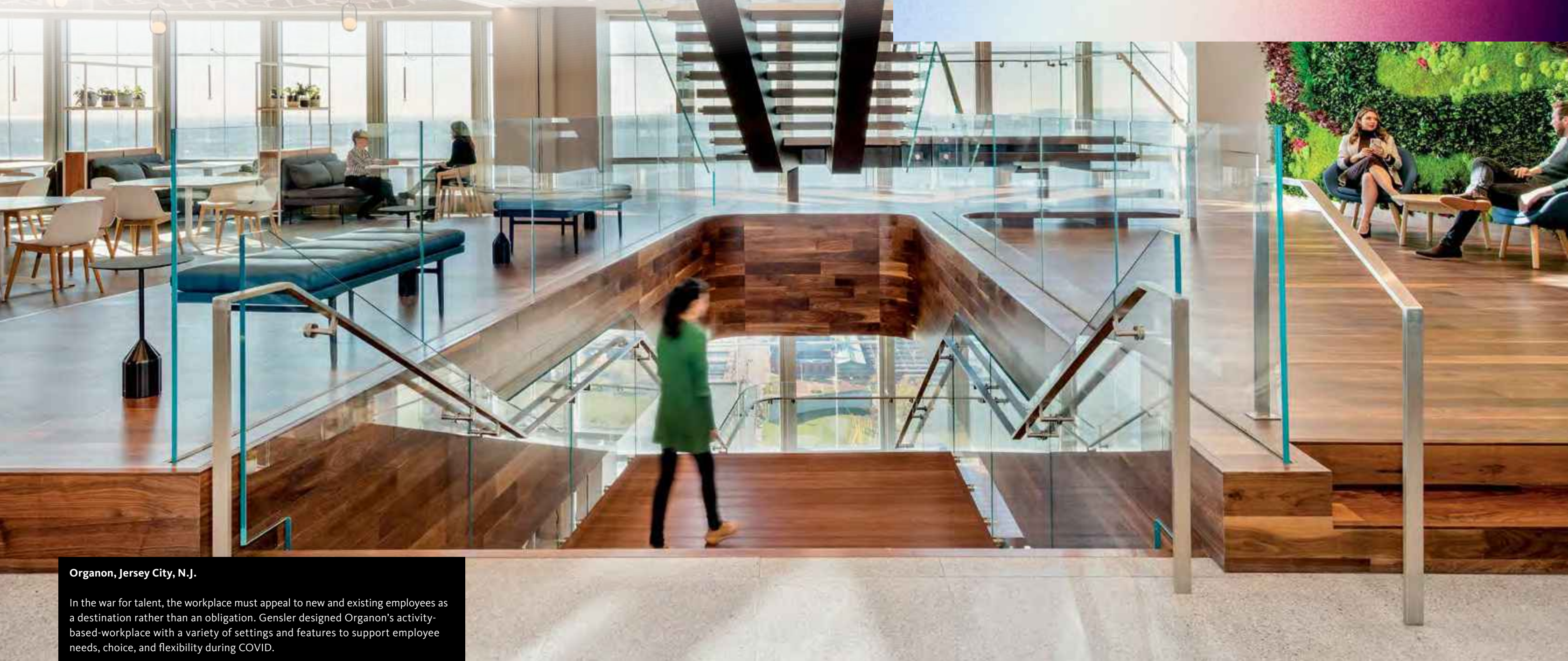
Organizations of all kinds are seeing large amounts of turnover in their staff. According to a survey by PwC of 1,000 U.S. workers, some 65% are looking for a new job. Competition for talent is at an all-time high, and until companies can fully staff up, they remain in limbo.

We see design playing a significant role in attracting and retaining top talent. In a time of increased hybrid and flexible work schedules, the physical workplace remains a critical asset. This is where companies can support and improve the health, happiness, productivity, and overall well-being of employees. In our 2021 U.S. Workplace Survey, Gensler researchers found that employees at top-performing companies in the U.S. consider their organization's workplace to be the best place for a wide range of activities. In fact, top-performing companies are three times as likely to increase their real estate footprint in the coming years. By reimagining the office as a destination rather than an obligation, and by creating a space that embodies company values and culture, companies can attract new hires while inviting existing team members back into an environment that truly prioritizes the human experience.

3x

Top-performing companies are three times as likely to increase their real estate footprint.

Source: Gensler U.S. Workplace Survey 2021



Organon, Jersey City, N.J.

In the war for talent, the workplace must appeal to new and existing employees as a destination rather than an obligation. Gensler designed Organon's activity-based-workplace with a variety of settings and features to support employee needs, choice, and flexibility during COVID.

Never has there been a greater opportunity for the building industry to act on climate change.

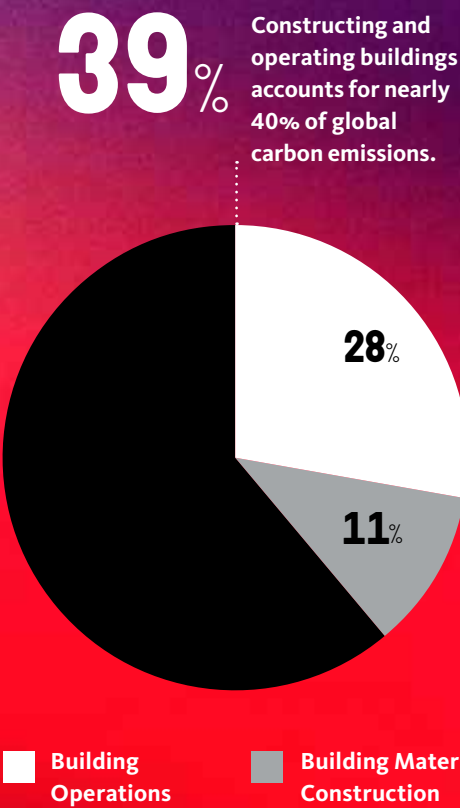
Extreme weather events — including heat waves, droughts, and floods — are now commonplace, and the grave impact of climate change will continue to have a profound impact on human life.

For those of us in the real estate sector, rising sea levels and extreme weather events are also putting property portfolios at risk. Even so, many in the industry have yet to admit that buildings are as responsible for carbon as cars.

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

The real estate industry makes up 39% of global carbon emissions when accounting for construction and building performance. Most carbon reduction efforts in the building sector have focused on operational efficiency, but we can no longer ignore that building materials account for half of a building's total lifetime carbon footprint. To become carbon neutral, we need to eliminate or offset the impact of both operating and embodied energy.

To become carbon neutral, we need to eliminate or offset the impact of both operating and embodied carbon.



Source: Architecture 2030

The Old Post Office, Chicago (rooftop)

Adapting and reusing existing buildings is a critical step on the path a net zero future. Chicago's Old Post Office, designed by Gensler and Hoerr Schaudt Landscape Architects, is the largest adaptive reuse project in the U.S. By reusing the existing structure and materials, we saved 87% of construction waste from the landfill.



Design will be the instrument of change in our cities and spaces.

We believe that design has the power to transform lives. The challenges we face now are not new, but they have taken on new sense of clarity and urgency because of the context in which we face them.

Over half the world's population now lives in cities. This massive shift will continue, so that by 2050 almost 70% of people will live in major urban centers around the world. This influx, combined with the impacts of COVID, climate change, and issues around social equity, have led to new scrutiny of urban life. According to the Gensler Research Institute's City Pulse Survey, less than half of the people we surveyed in 15 locations felt optimistic about their city's future.

To position themselves as places where people want to live, cities must embrace design as a way to create better experiences. Only then will we be able to create convenient and walkable 20-minute neighborhoods, healthy green spaces that promote wellness, buildings that have low-carbon footprints, and connected communities that embrace inclusivity for everyone.

Design is unique in its ability to address changing expectations and tackle the toughest challenges facing cities. We know we can make a difference. As we help our clients address climate change, social equity, supply chain issues, and labor shortages, we have to be smarter and more purposeful than ever before, and laser-focused on the human experience.

The challenges cities face now are not new, but they have taken on new sense of clarity and urgency because of the context in which we face them.

49%

Only 49% of people feel optimistic about their city's future.

Source: Gensler City Pulse Survey Fall 2021

Fifth + Broadway, Nashville, Tenn.

This entertainment district in the rising city of Nashville addresses some of what people want from their cities: convenience, community, and accessibility. Fifth + Broadway weaves together a mixed-use ecosystem of workplace, residential, sports and music venues, restaurants, and retail.

SECTION PAGES

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CITIES WORK

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HEALTH


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CITIES & URBAN DESIGN
CRITICAL FACILITIES
EDUCATION

CONSUMER GOODS
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MEDIA
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OFFICE BUILDINGS: REPOSITIONING
PRODUCT DEVELOPMENT
PROFESSIONAL SERVICES
REAL ESTATE & CONSULTING
TECHNOLOGY

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

HEALTHCARE
SCIENCES
SENIOR LIVING
WELLNESS



THE FUTURE OF CITIES

ENHANCING THE URBAN EXPERIENCE

Great neighborhoods, employment opportunities, affordability, and multimodal transportation are the foundations of a great city. But cities have their work cut out for them. The lasting impacts of COVID, and the health scare that came with the virus, have led people to question urban living. To position themselves as places where people want to live, cities must embrace design as a way to create better experiences.

Health and wellness will continue to be a priority. To attract talent, cities and urban developers must focus on affordability and racial and socioeconomic disparities. Concepts like the 20-minute neighborhood will continue to gain traction, as will new more-accessible modes of transportation.

Finally, as the effects of climate change cause larger and more-damaging weather events, investments in weather mitigation strategies and sustainable building practices will continue to reshape the urban experience for the better.

META TRENDS

Here are five key metatrends impacting the cities sector, and how design is responding:

Confidential Mixed-Use District
previous page: Block 7, Abu Dhabi

01

**A FLEXIBLE PUBLIC REALM
WILL DELIVER A MORE
RESILIENT FUTURE**

Cities have an opportunity to take the positive parts of our urban pandemic experience — open streets, outdoor dining, fewer cars — and bring them forward to create a more resilient future with people at the center.

02

**20-MINUTE NEIGHBORHOODS
WILL DRIVE EQUITY**

For the 20-minute neighborhood to be applied through a lens of equity, investment strategies from both the public and private sector need to be put in place. This investment will attract development to these neighborhoods in ways that residents can benefit from and participate in.

03

**CLIMATE ACTION DEMANDS
WILL ADVANCE THE PATH
TO NET ZERO**

In the face of pressure to reduce their carbon footprint, airports, academic campuses, and data centers will continue to embrace new carbon-neutral and sustainability goals that will allow them to set industry standards.

04

**CITIES AND ORGANIZATIONS
WILL FOCUS ON REGENERATION
AND REUSE**

To respond to climate change, cities and organizations must strive to create sustainable, regenerative environments that make more efficient use of existing spaces and materials, thereby reducing waste and carbon emissions.

05

**INNOVATION DISTRICTS
WILL CONTINUE TO THRIVE**

Campus planning used to be inward focused; now, institutions are looking at how they interact with surrounding communities. To spur innovation and create new synergies, developments have expanded from single-use facilities to mixed-use ecosystems.

AVIATION

OVERVIEW

The aviation industry has been grappling with uncertainty, but it has invested in changes that will further transform the passenger experience. In the coming years, airports will continue to invest in core infrastructure, new technologies, resilience strategies, and “front door” experiences. These public-facing spaces in and around airports can generate new revenue sources and serve as their own destinations, much like town centers.



TRENDS

01

Airports are focused on a carbon-neutral footprint for the future.

Social awareness on climate change will push airports to aggressively push for responsible solutions. This extends well beyond LEED certification. Airport facilities will look to wind, geothermal, and solar power to not only reduce carbon emissions, but to create self-sustaining facilities that do not rely on the grid for power. New carbon-neutral and sustainability goals will allow airports to set industry standards.

02

Airports will become more like town centers to generate new sources of revenue.

The idea of diversified revenue generation is moving toward the front door of the airport, with airports considering how their landside spaces can encourage non-travelers to come to the airport. This includes using adjacent land to create public space, such as public parks, mixed-use facilities, or amphitheaters. This is the concept of airports as town centers, and it's gaining momentum and will become the norm.

03

Growth opportunities for airports are through more efficient use of existing space, rather than adding capacity.

Airports are not feeling the need to add gates to increase capacity. Rather, the trend is to increase capacity by looking holistically at a better passenger experience in the terminal. While that may mean growing holdroom areas, it can also involve the better use of space by using technology to give confidence that passengers will smoothly get from landside to airside.



FEATURED PROJECTS

A. Clay Lacy Aviation, Costa Mesa, Calif.

B. Toronto Pearson International Airport Terminal 1 Redevelopment & Expansion Programme, Mississauga, Canada

C. JAL Check-in Area, Haneda Airport, Tokyo



04

To support future growth, airports will invest in core infrastructure.

Airports will invest heavily in the core infrastructure within the terminals, such as upgraded electrical and information technology (IT) to support future growth. This is important as the industry shifts to a completely touchless process that includes biometric technologies to help speed up the check-in, screening, and customs processes. Local laws will require terminals to self-generate certain amounts of power. As part of its Terminal Modernization Program, Pittsburgh International Airport has established a first-of-its-kind on-site microgrid using solar and natural gas to fully power the airport terminals, airfield, and additional buildings.

FEATURED PROJECTS

D. San Francisco International Airport
T1 Expansion, San Francisco

E. JFK Terminal 1
Redevelopment,
New York

“The airport will no longer be solely a place for coming and going, but a community hub where people come to interact and gather — a new town square in the heart of the airport.”

— Dialogue Blog by Tim Hudson, “Reimagining the Airport as the New Town Square”



05

The new focus for airports will be for on-the-ground experiences.

In lieu of using available funds on building new airspace and gate capacity, airports will focus on the ground experience, such as additional transit systems. Rail can be a connectivity point, with public transit systems designed to address door-to-door mobility from home to the airport. Integrating those different modes into a single location and providing smooth connections between them will drive a better passenger experience.

4



San Francisco International Airport T1 Expansion, San Francisco

Strategies for cities and airports to revitalize their facilities in a post-pandemic world

The way people think about travel is changing. At the same time, people are reexamining their relationships with their cities. This presents an opportunity to rethink how people want to travel in the future.

Here are four strategies we've developed that cities and airports can use to revitalize their facilities in the post pandemic world:

1 ANCHOR DESIGN IN LOCAL CONTEXT

The degradation of airports is typically caused by the inability to provide basic passenger needs. The opportunity to build a new facility or reimagine a terminal may only happen once in a generation, so design anchored in the city context is critical to long-term relevancy. Cities should reimagine airports as modern gateways, connecting people and building resiliency.

3 EXPERIMENT, TEST, AND LEARN

Spaces within a terminal are typically assigned and rented based on a long-term lease agreement. Rethinking that lease strategy will allow for experimentation. Airports could begin to think like modern tech companies where physical space becomes malleable to meet operational needs and stay ahead of trends, instead of being reactionary.

2 MAXIMIZE THE BUILDING, NOT THE PASSENGER OR AIRCRAFT COUNT

Most existing airports are constrained for space, particularly on the airside. Elimination of a gate could change the space allocated within the terminal. Layer in a more efficient gate utilization system with quicker aircraft turns. This way, the loss of gate capacity could be overcome via technology, instead of space, while maximizing passenger comfort.

4 REIMAGINE THE AIRPORT AS A DESTINATION

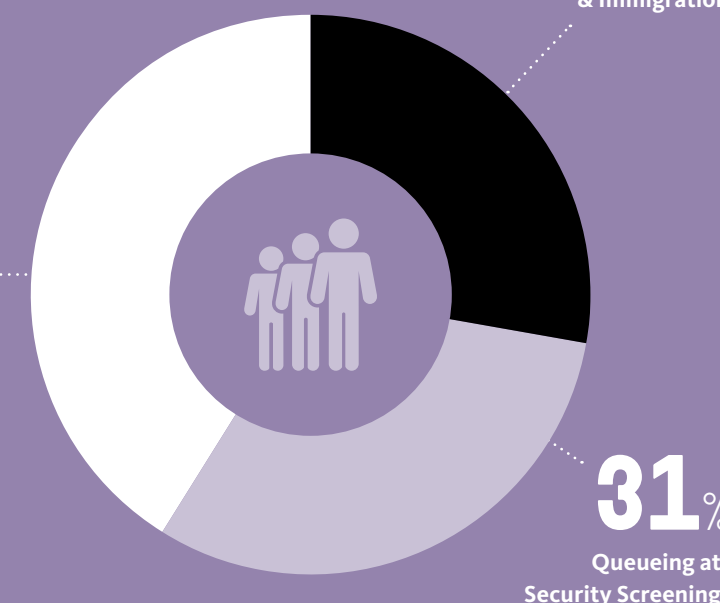
Instead of trying to move guests away quickly, airports can bring the city closer to the airport. The airport becomes less about airline branding and more reflective of the community fabric and regional tourism. The incorporation of regional materials, local makers, local chefs, and live entertainment make the airport a vibrant destination in itself.

STRATEGIES & RESEARCH

More than half of passengers say queuing at boarding has to improve.

Source: Schengen Visa

41%
Queueing at
Boarding



Passengers' responses on immediate areas to improve for reducing queueing at airports

Domestic travel demand is on the rise.

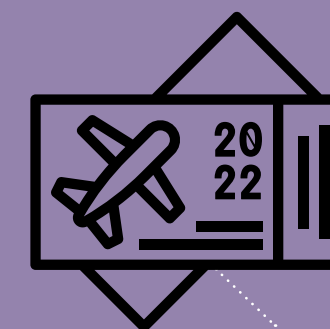
Source: Reuters

93%

Domestic travel demand is estimated to reach 93% of the pre-pandemic level in 2022 — an improvement of 20 percentage points from 2021.

Passenger revenue in 2022 is expected to jump about 67% year-on-year to \$378 billion.

Source: IATA



\$378 BIL

CITIES & URBAN DESIGN

OVERVIEW

Cities are at an inflection point. As concerns about global health continue and remote work trends take hold, people are beginning to question the need to live in big cities, especially as urban centers struggle with issues of affordability, low levels of transit ridership, overcrowding, and more. Cities can use this moment to imagine a new community-focused model for growth, one that is more convenient, inclusive, resilient, and healthy.



TRENDS

01

More cities will think regeneratively to combat climate change.

To address climate change, pollution, and natural resource depletion, a more regenerative, resilient approach is required to planning and developing cities. Urban centers with circular metabolisms, or “circular cities,” minimize sprawl, repurpose waste, and increase biodiversity. Green infrastructure and natural resource conservation are critical strategies. The engineered urban environment should be in balance with the carrying capacity of natural systems.

02

To reimagine downtown cores, cities will need to adopt a mixed-use mindset.

The trend away from single-use Central Business Districts (CBDs) into places with a greater mix of uses will continue. Diversity in building types and uses, and diversity at many different levels (city, neighborhood, building) are key. For example, more residential and pedestrian-oriented uses with more green space can be infused into CBDs to make them more inclusive, resilient, sustainable, and healthy. Cities should also adopt mixed-income and multigenerational communities to become more diverse and inclusive.



03

Equity and accessibility will continue to define the 20-minute neighborhood.

The 20-minute neighborhood concept is a tool to create social cohesions and strengthen sense of community, so equity is a critical part of the conversation. Equitable transportation, housing, employment, and technology infrastructure are key parts to well-rounded neighborhoods. Investing in accessible and affordable high-speed internet as a public utility is critical.

04

Investing in parks and flexible streets can create healthier cities.

Designers and urbanists will continue to prioritize pedestrian-oriented urban spaces over car-centric developments, which means outdoor spaces will be a key ingredient. Access to nature through landscaped public plazas, green spaces, sidewalks, and urban parks increases health benefits and creates community by reducing stress and depression, promoting positive emotions, and facilitating cognitive functioning. Privately owned public spaces (POPs) that connect to the public realm also help in creating these healthy places.

“Because remote workers can now go pretty much anywhere, cities are going to have to start focusing on attracting residents, particularly millennials, and that means providing that smaller city experience, and not just focusing on attracting businesses.”

— Sofia Song, Global Cities Lead, Gensler

FEATURED PROJECTS

A. Confidential
Mixed-Use District

B. Al Bustan, Madinah,
Saudi Arabia

05

Rising cities will provide compelling alternatives.

Rising cities are booming as people seeking more value and space look to relocate from large cities to more affordable, less dense places. To be a compelling alternative, a rising city should build arts and culture, look for ways to create more equity and diversity, and celebrate its local DNA in new developments.



06

Mobility's next phase will advance our cities.

From e-scooters to e-bikes, improvements in vehicles powered by an electric motor and battery are transforming first- and last-mile mobility. Beyond the benefits for tackling climate change, the shift to electrification has even broader implications for how we might reimagine our urban environments and city streets. For example, gas stations and parking garages could be repurposed for new uses that promote health and wellness. Using mobility innovation as a catalyst, we can remake our cities toward a much more human-centric model.



FEATURED PROJECTS

C. Adams Street
Activation Study,
Phoenix

D. The Ave on Chicago
Avenue, Chicago

“To address climate change, pollution, and natural resource depletion, we must take a more regenerative, resilient approach to planning and developing our cities.”

Source: Dialogue Blog by Carlos Cubillos and Daquan Zhou, “Why Circular Cities Play a Critical Role in Restoring Ecologies”

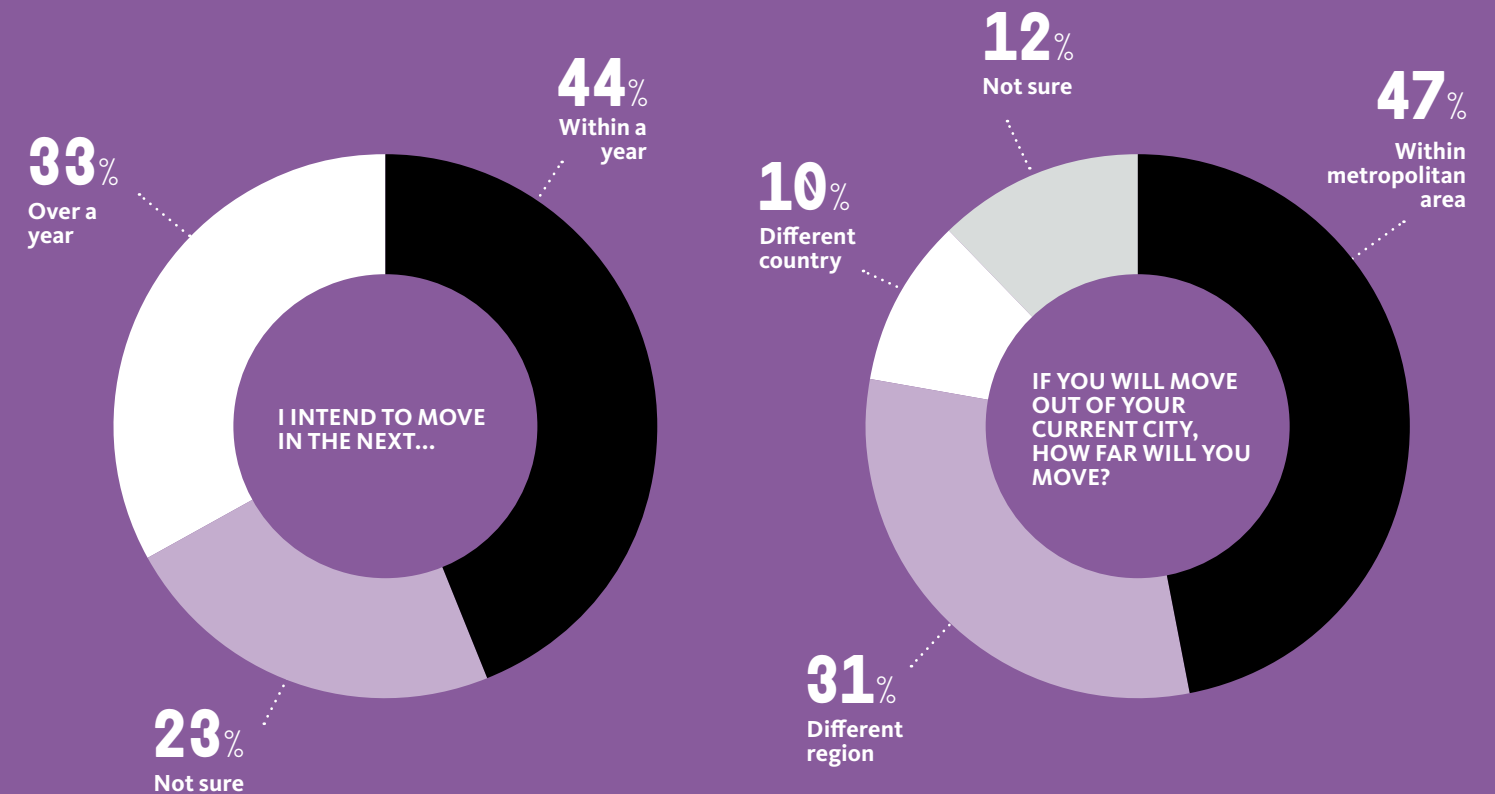
An average of 55% of people in the 10 cities we surveyed said their city is becoming less affordable.

Source: Gensler City Pulse Survey Fall 2021



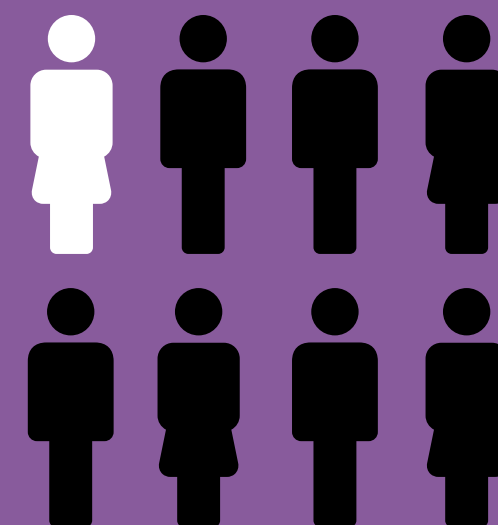
Of those who want to move out of their city, most intend to move in the next year within their metropolitan area.

Source: Gensler City Pulse Survey Fall 2021



Only one in eight urban residents are considering moving to a larger city; the most popular destination is a smaller city.

Source: Gensler City Pulse Survey Fall 2021



37% of respondents are living paycheck to paycheck.

Source: Gensler City Pulse Survey Fall 2021



CRITICAL FACILITIES

OVERVIEW

As demand for data continues to surge with no end in sight, data centers are playing an increasingly critical role in enabling and scaling rapid change. The shape, location, and size of these facilities are adapting to handle greater volume and improve speed-to-market capabilities, while becoming more resilient to meet market demands to address climate change.

With no decrease in demand for data, as well as increasing demand for colocation and hybrid cloud opportunities, the data center market is poised for growth over the next several years.

— CRN



TRENDS

01

Hyperscale leads the charge.

Spurred by explosive demand for digital cloud services, Amazon, Microsoft, and Google now account for 50% of all investments in data centers across the globe, and they are rapidly expanding their footprints. For hyperscale data centers, the focus on simplification, scale acceleration, and infrastructure optimization will continue as speed-to-market is more important than ever.



FEATURED PROJECTS

A. Databank - Georgia
Tech Data Center,
Atlanta

B & C. Future Digital
Data Systems

02

Edge data centers are the next frontier.

Data center clients are marrying hyperscale cloud computing with edge computing, which locates more processing power closer to the end user. This is improving performance, reducing costs, and helping to fuel the growth of next-generation technologies and applications such as 5G and Internet of Things (IoT).

03

Net zero strategies will influence design.

The market is increasingly demanding a more sustainable approach to the creation and operation of data centers, which have a massive carbon footprint. This demand is leading many large data center clients to embrace low-impact materials, heat-waste recovery, and emerging technologies, such as liquid cooling and renewable energy.

04

Immersive cooling could reshape the industry.

In seeking new ways to decrease carbon impacts and make data centers more efficient, designers are beginning to look closer at immersion cooling, an approach that submerges servers in liquid to cool them. This technology has the potential to radically change the shape, location, and size of data centers.

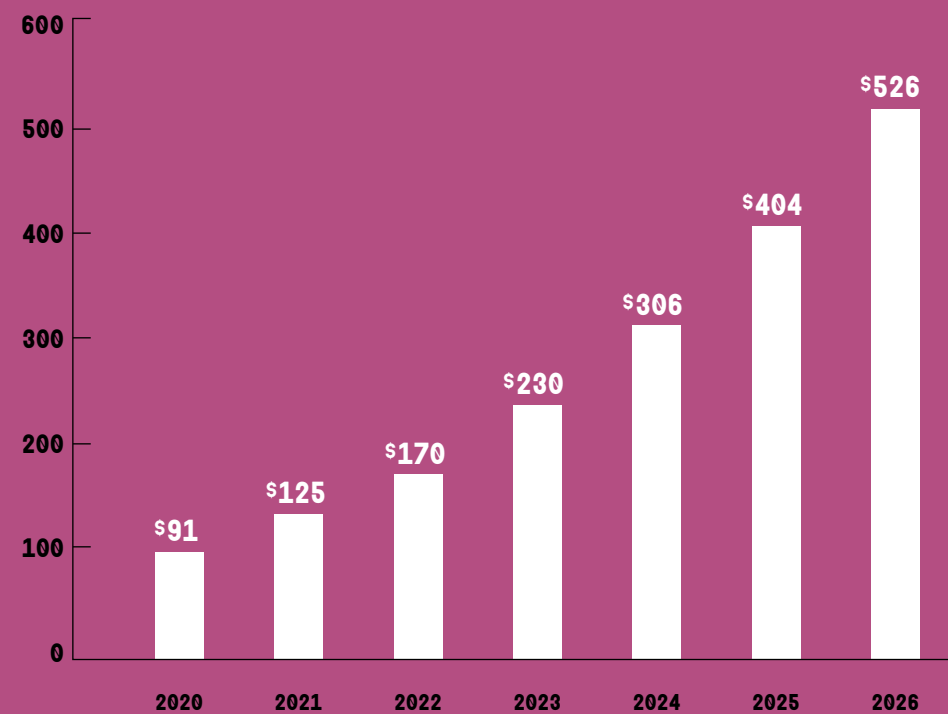
By 2023, over 50% of new enterprise IT infrastructure deployed will be at the edge, rather than corporate data centers, up from less than 10% today.

Source: IDC

The cloud is dominating the sector.

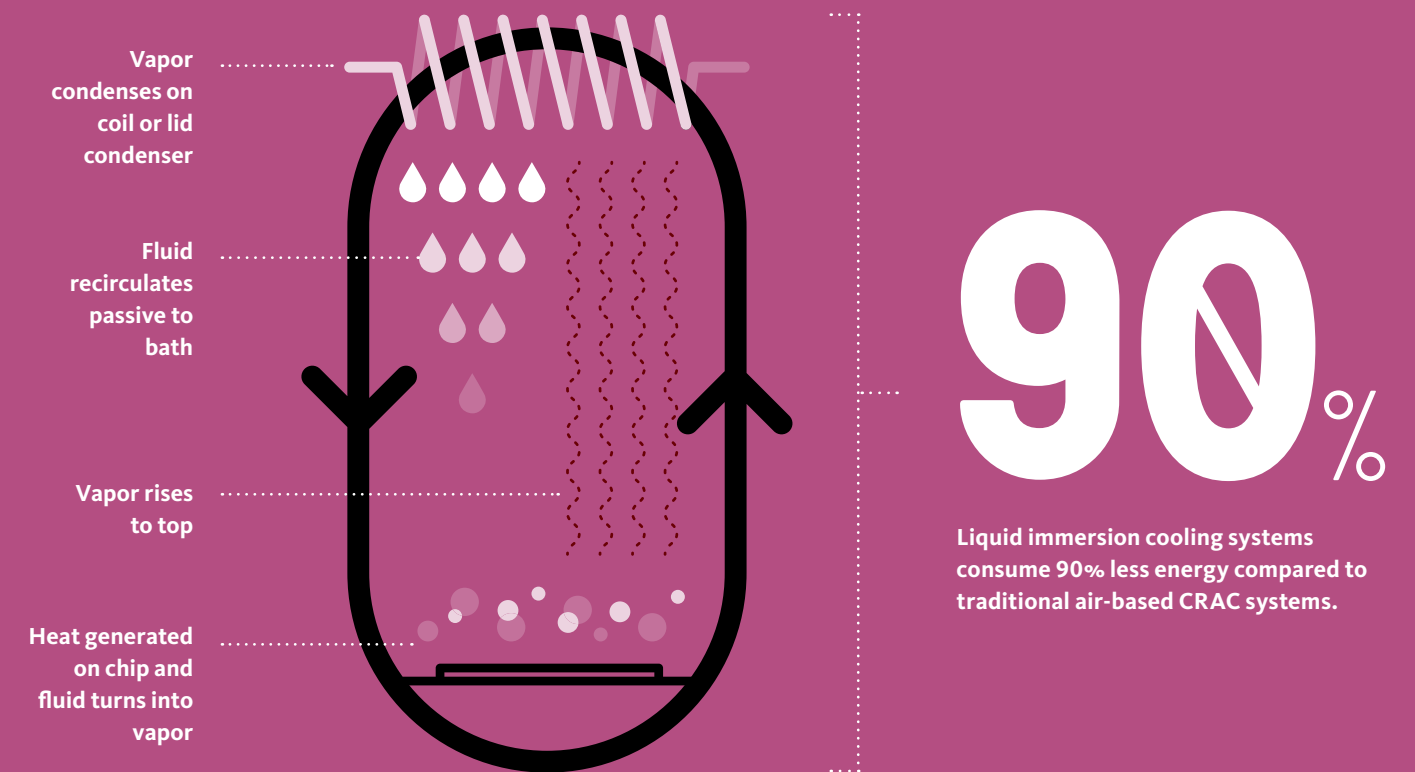
Source: Structure Research

Total cloud revenue (in USD billions):
2020 – 2026



Liquid immersion cooling reduces power consumption.

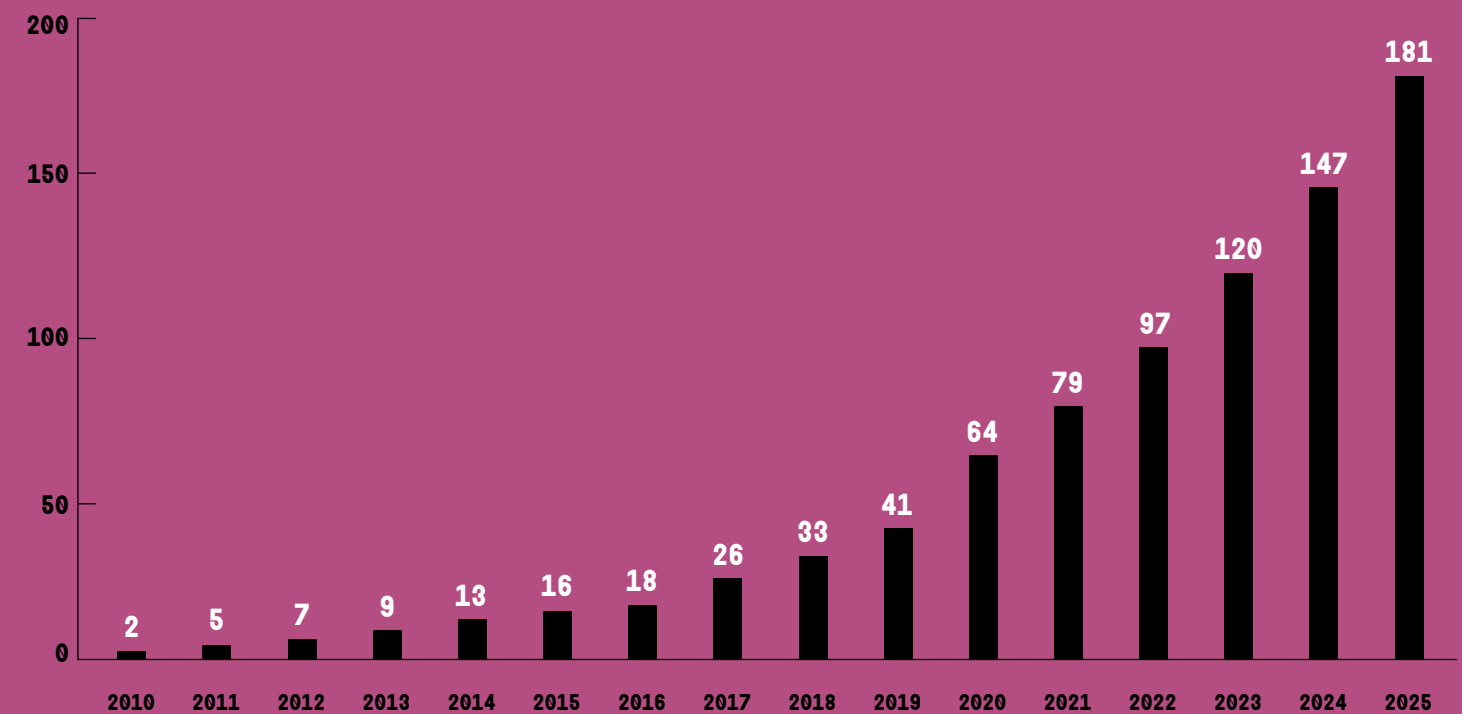
Source: Business Wire/Graphic courtesy of 3M



The global datasphere will continue to grow exponentially.

Source: IDC

Volume of data created and replicated worldwide
(Data volume in zettabytes)



EDUCATION

OVERVIEW

Learning institutions are evolving to meet students' needs and adapt to a hybrid learning experience. As students look to schools not just as places of learning — but as places to feel safe, engaged, and included — there will be an ongoing emphasis on educating and nurturing the whole student and their well-being.



TRENDS

01

Future hybrid learning environments must embrace choice.

According to Gensler's Education Engagement Index, 68% of students and 74% of educators want a hybrid approach — a model that includes a combination of in-person and remote learning methods. For schools, this means designing for hyper-flexible and tech-enabled learning environments that can provide students and educators a choice. There is no one-size-fits-all approach. Technology allows institutions to engage with students in a personalized way, providing flexibility and agility.



FEATURED PROJECTS

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

B. Georgetown Day School, Washington, D.C.

C. Columbia College, Chicago

02

Equity, safety, and engagement will be key design considerations.

To ensure success and address inequities in education, the post-pandemic school will need to address both equity and engagement, along with safety, belonging, and basic needs. Gensler's research has shown that the "average learner" is a myth, and instead of designing one optimal universal learning experience, it is imperative to design for multiple pathways for engagement for each student.

03

Creating wellness ecosystems on campus is essential.

To adapt to the post-COVID needs of students, schools, colleges, and universities need to explore how the concept of wellness can be integral to everyday campus life. Whether designing a new facility, creating a new master plan, or developing programs, solutions must be holistically student-centric and stigma-free. Building an ecosystem around wellness provides different access points for students on and off campus, and in virtual and physical settings.

04

The evolution of the academic workplace will impact campus planning.

Academic institutions are taking cues from other industries by planning and designing campuses that can welcome faculty and staff into a healthier, more engaging, and more effective workplace. In addition to workstations and offices, academic institutions should consider a toolkit of spaces that support creativity, collaboration, focus, and engagement with students and colleagues.



"If we are to design for all learners, our goal should not be to design one optimal and fixed experience for all students, but to design for diverse and evolving ways to engage."

— Dialogue Blog by Erin Cubbison, Patricia Nobre, Kyle Sellers, Allison Bulgart, "5 Considerations for Designing the Future of Higher Education"

5



University of San Diego Learning Commons, San Diego

Considerations for designing the future of higher education

Our Education Engagement Index 2021 research, which examined the experience of students and educators in learning and teaching during the pandemic, holds critical considerations for what the future of higher education might look like.

Here are five key findings:

1 STUDENTS FEEL LESS SUCCESSFUL ACADEMICALLY THAN BEFORE THE PANDEMIC

All learning modes suffered as a result of the pandemic, and nearly half (44%) of students now feel less successful academically — illustrating the deep impacts on learning.

4 RELATIONSHIPS CAN IMPACT STUDENTS' MOTIVATION AND WELL-BEING

Students with positive relationships reported higher scores for all motivational and emotional well-being factors. Institutions must recognize the connection between the health of relationships and learning outcomes, and consider how relationships can be supported in a hybrid model.

2 INSTRUCTORS MAY NOT UNDERSTAND THE SCOPE OF THE PROBLEM

Instructors overestimated students' self-reported effectiveness across all six learning modes at home. An empathetic lens for the student experience is necessary as administrators consider a future of in-person, mixed-interaction, and online learning.

5 COLLABORATION IS A TOP DRIVER FOR RETURNING TO CAMPUS

While the campus is essential for in-person classes, it is even more valued for connecting with others and facilitating daily routines. Hands-on activities and small class lectures are among the activities that students said they would return to campus for.

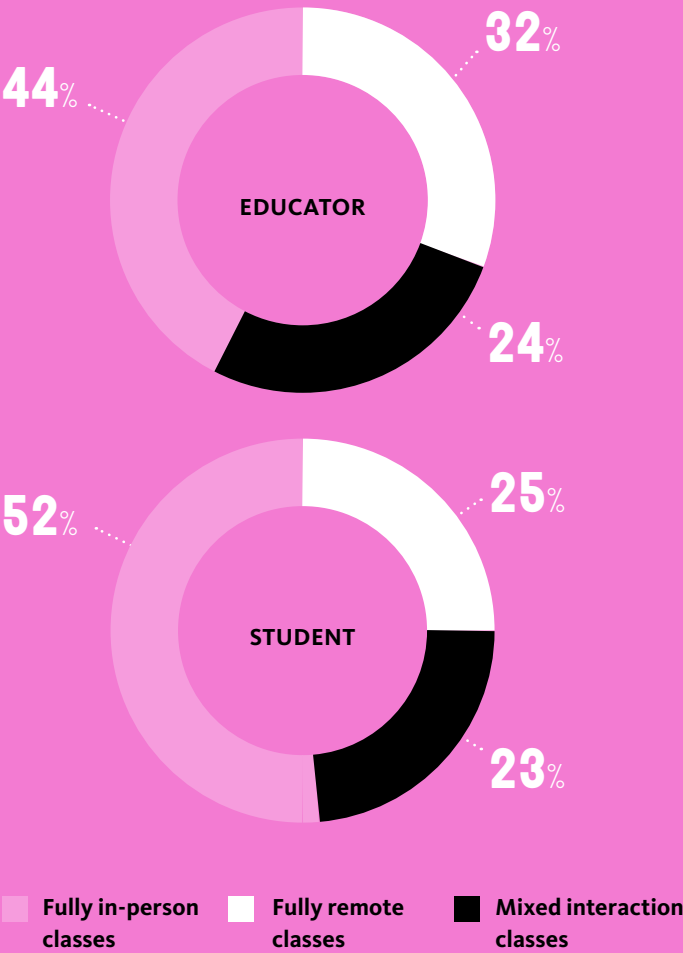
3 DESPITE CHALLENGES, HYBRID LEARNING IS PREFERRED FOR THE FUTURE

Although most report that learning was more effective on campus before the pandemic, 68% of students and 74% of educators want a hybrid approach — a model that includes a combination of in-person and remote learning methods.

STRATEGIES & RESEARCH

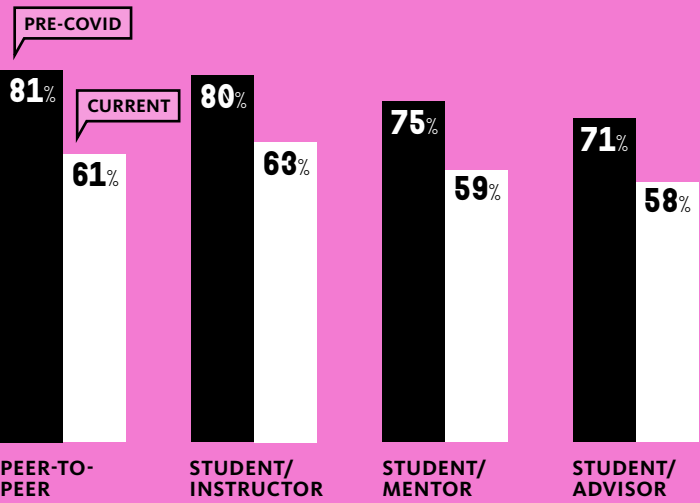
68% of students and 74% of educators want a hybrid approach — a model that includes a combination of in-person and remote learning methods.

Source: Gensler Education Engagement Index 2021



Students report a decline in all types of relationships.

Source: Gensler Education Engagement Index 2021

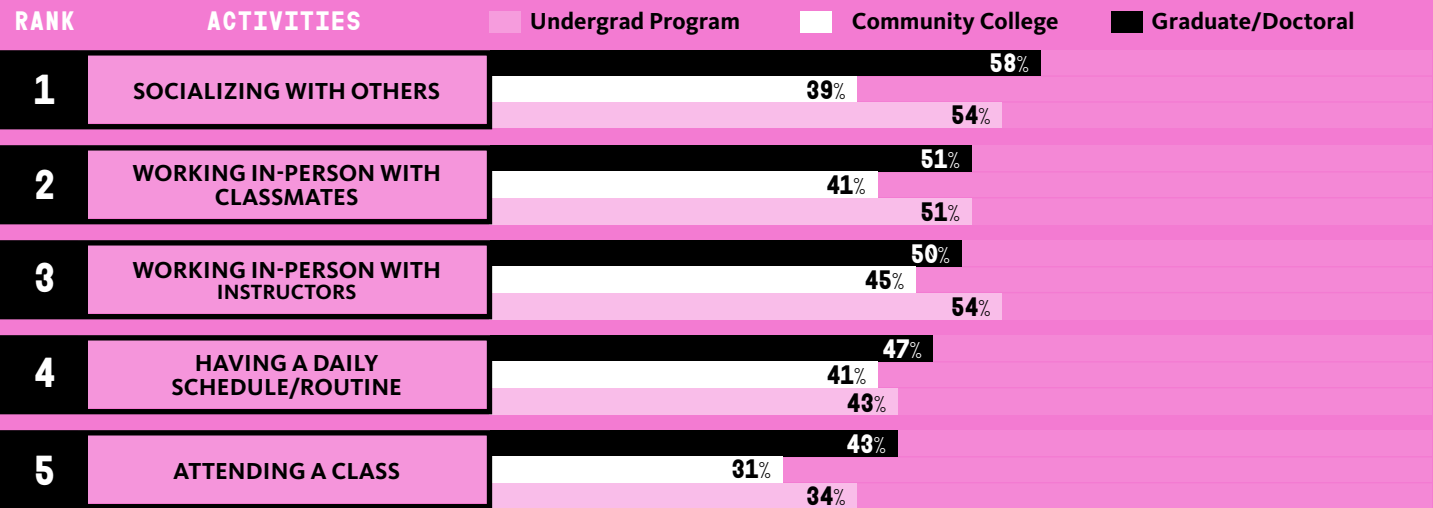


62%

62% of the students report feeling less motivated, less engaged, or that they are growing less academically since before the pandemic.

Among different learning activities, hands-on and small group activities rank as the most valuable to do in-person on campus.

Source: Gensler Education Engagement Index 2021





THE FUTURE OF

WORK

THE WORKPLACE EXPERIENCE

The workplace is changing at an unprecedented pace. Across the globe, we've seen a fundamental shift in how and where work happens. Amid these profound shifts, organizations, developers, and landlords want to know what they can do to optimize their real estate.

What will set them apart is the experience they design for tenants and employees. We know that workers around the world still place a great deal of value in the physical workplace for social interaction, mentorship, deep concentration, and collaborative work. We also know that to compete in a war for talent, companies must also support an ecosystem of workspaces — both in and out of the office — where talent can thrive.

This is an opportunity to rethink the physical workplace to offer a unique and fulfilling experience that can attract people, whether that's through new technologies or new types of spaces.

META TRENDS

Here are five key metatrends impacting the work sector, and how design is responding:

01

THE WORKPLACE MUST BECOME A COMPELLING DESTINATION

We're seeing a shift to the new role of the workplace as a "destination" — creating experiences that employees can't get working remotely. Top-performing companies understand the power of the physical workplace for their people to thrive, as well as drive creativity and innovation.

02

EXPERIMENTATION, PROTOTYPES, AND LEARNING ARE THE NEW NORMAL

We're entering a phase of experimentation, piloting, and learning. The new workspaces must be driven by purpose and research to dig in and figure out what is working, what is not working, and analyze outcomes. A key piece of successful piloting is to test and measure.

03

THE NEW WORKPLACE ECOSYSTEM WILL INCLUDE THIRD SPACES

Today's workers want an ecosystem of places to work both in and out of the office. Third places and coworking spaces are increasingly preferred for a variety of work activities. Developers and landlords should create spaces such as working lobbies or outdoor workspaces.

04

THE WORKPLACE WILL PLAY A CRITICAL ROLE IN FOSTERING EQUITY AND INCLUSION

Companies should extend equity beyond race, gender, and generations to create equitable work experiences for employees who are working in-person and remotely to create a culture of inclusivity and belonging.

05

INVESTMENTS IN HEALTH AND WELL-BEING WILL DELIVER VALUE FOR EMPLOYEES

Employers should focus not only on enhancing workers' physical health through biophilia and wellness design, but also building personal and professional relationships for mental well-being.

CONSUMER GOODS

OVERVIEW

A consumer goods organization's workplace is increasingly expected to be a conduit to its consumers with engaging touchpoints bridging the gap between internal and external experiences. Companies are beginning to seek out design expertise that begins with workplace design services and then digs deeper — making sustainability commitments outwardly visible, telling comprehensive brand stories, and putting the product development process on full display.



TRENDS

01

All-in-one real estate can blend product innovation with consumer engagement.

Consumer goods real estate is moving toward the development of holistic experience centers. These all-in-one sites blend workplace, research, and product showcasing. They help brands better understand their target audiences and provide consumers with a peek behind the curtain to learn how their favorite products are made.

02

Sustainable products will continue to attract consumers.

A concerted movement is underway to decarbonize as many products as possible, inclusive of the supply chains and workplaces that produce them. Among consumers on the hunt for ways in which their spending decisions can positively impact the environment, companies that commit to net zero real estate and workplaces will get high marks.

FEATURED PROJECTS

A. Knoll Chicago Showroom, Chicago

B. Pladis Global 2020 - New HQ Design, London

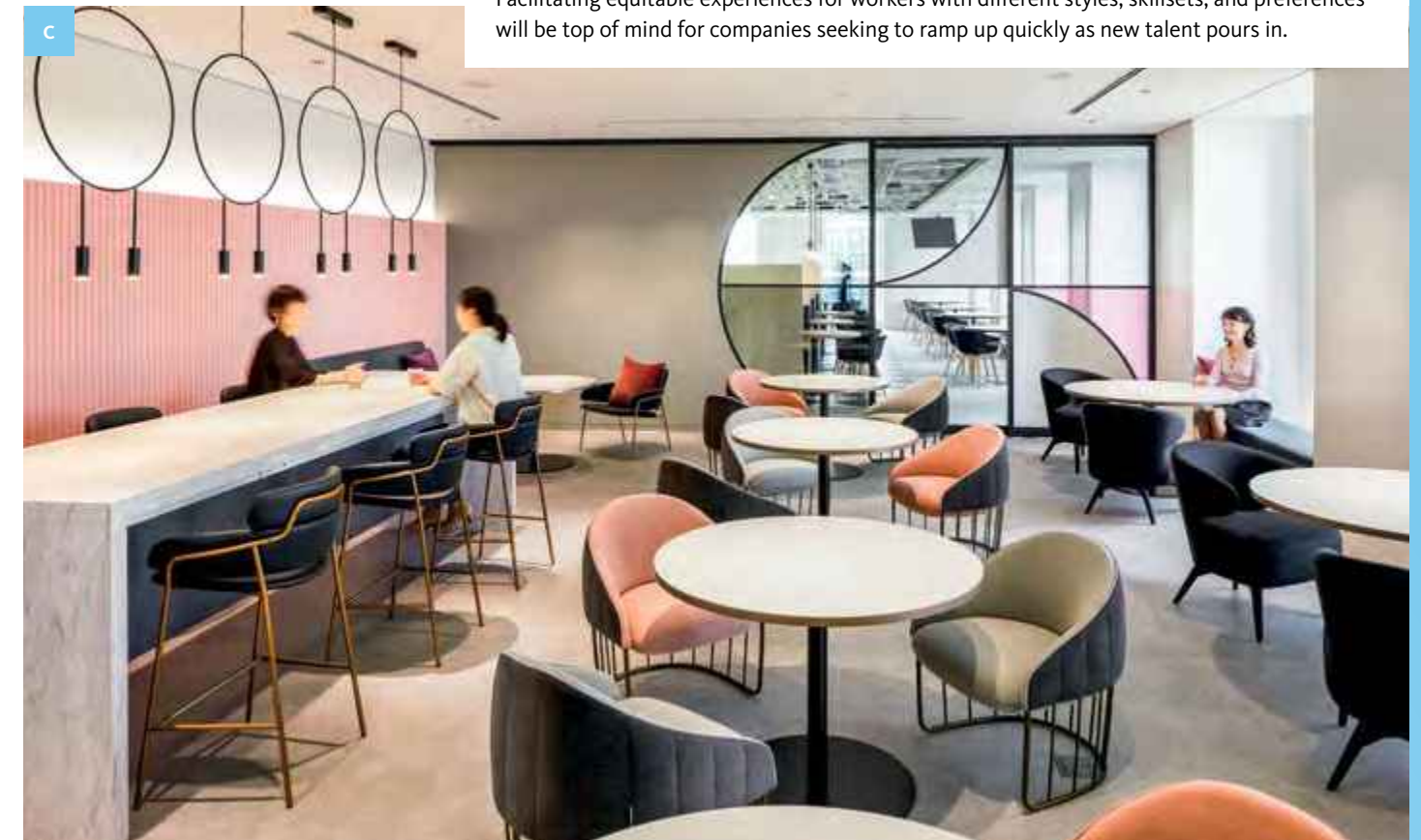
C. Shiseido Global HQ Renovation, Tokyo



03

Consumer goods companies are now competing for tech talent.

The acceleration of e-commerce has consumer goods companies competing for talent that understands and can create virtual experiences — typically the domain of technology companies. Facilitating equitable experiences for workers with different styles, skillsets, and preferences will be top of mind for companies seeking to ramp up quickly as new talent pours in.



“[T]here is immense hunger from employees to engage on topics that give them a sense of purpose — and decarbonization is a top-of-mind topic for many.”

— McKinsey

04

The workplace will continue to morph.

Consumer goods companies are constantly searching for new ways to engage customers, both in person and across various social media platforms. One growing trend in the industry is to use the office to create fully integrated, high-tech broadcast spaces that can generate engagement and set unique stages for product stories straight from consumers.

05

Real estate will continue to support a brand's mission and purpose.

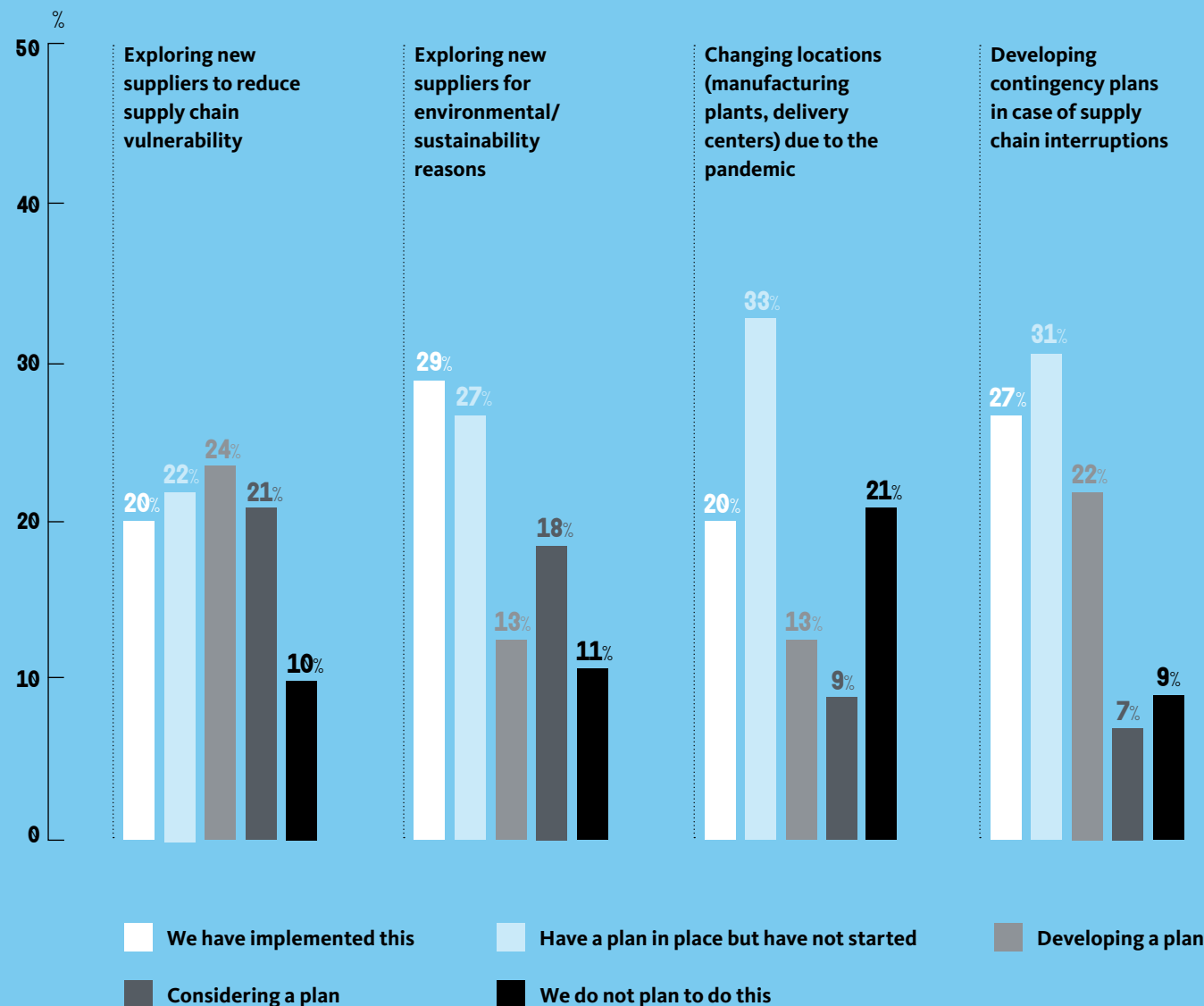
There is an increase in demand for curated spaces that celebrate a brand's heritage and history, while also reflecting on the future of the business. Within consumer goods, such spaces serve a dual role, reinforcing a company's mission among its workers while also conveying it to consumers.

“Real estate’s new source of value is that it is the platform outside of the home for experiences beyond the virtual.”

Source: World Economic Forum article by Gensler Co-CEO Diane Hoskins

Both supply chain interruptions and the environment are driving COO’s to explore new suppliers, though contingency plans remain underdeveloped.

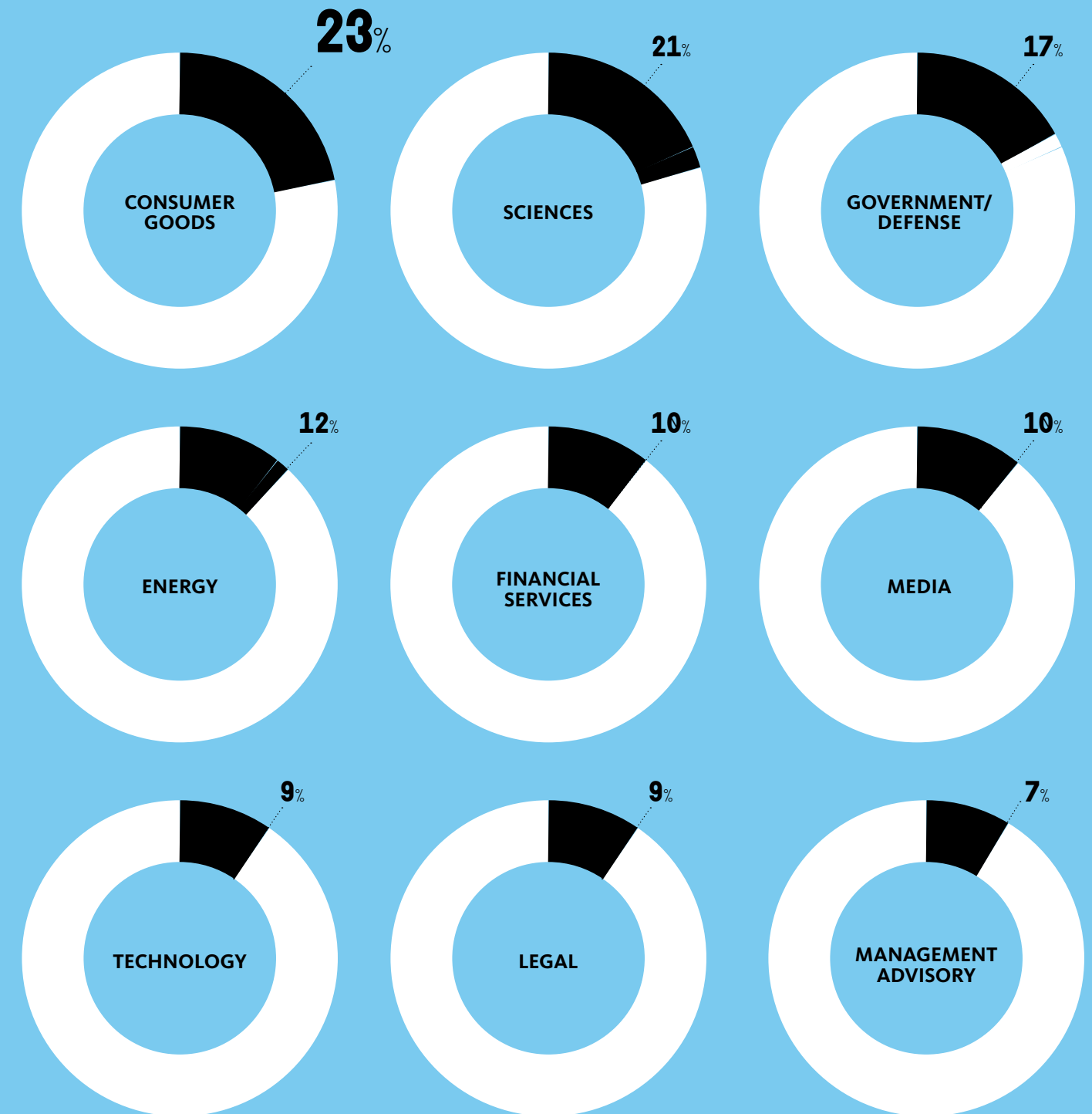
Source: PwC



More consumer goods workers would prefer to be in the office full time than in any other industry.

Source: Gensler U.S. Workplace Survey Summer 2021

Full time in the office



There are clear differences in work location preferences by industry.

ENERGY

OVERVIEW

A focus on sustainability and energy security will demand new solutions throughout the energy sector. The industry will continue to expand its offerings, including renewable energy, energy efficiency, renewable fuels, smart grid technologies, and energy storage systems as sub-sectors.



TRENDS

01

Investments in a sustainable future have become paramount.

A focus on sustainability has become a prerequisite for the oil and gas industry as pressure mounts to promote renewable energy, sustainability, and the energy transition. In the coming years, we will see many more companies embed resilience within projects to minimize environmental impact and increase operational efficiencies. These investments will also include worker health and safety, and community engagement.

02

Artificial intelligence will accelerate energy transformation.

Over the next 30 years, energy systems will need to change dramatically to meet climate goals. Decarbonization efforts and renewable energy generation is already growing rapidly. The next step is to leverage AI to enable more efficient and cost-effective decision-making for smart grids, sensor-connected power plants, and wind turbines. Smart technology will help the industry transition quickly and efficiently to a low-carbon global energy system.

FEATURED PROJECTS

A. Confidential Client,
San Ramon, Calif.

B. Confidential Client,
Midland, Texas





03

Resilience strategies will become essential for mitigating risk.

The energy sector must become increasingly resilient in addressing aging infrastructure and decarbonization. Additionally, the sector must prepare for and adapt to risks, such as supply chain disruption, cyberattacks, and the extreme weather associated with climate change. The transformation must take into account the inequities among low-income communities who might lack the resources to withstand or rebound after crises.

FEATURED PROJECT

C. Confidential Client,
Houston

04

Flexible, purposeful spaces are fundamental to future success.

The energy industry can spur innovation with workplaces that are a collection of flexible and purposeful spaces, supplied with optimal technology. This will create an equitable experience for all workers, whether they're participating virtually or in-person. New space typologies should be introduced as an extension of the workplace rather than just a transition, with opportunities to pause, have a conversation, and work indoors and outdoors.

STRATEGIES & RESEARCH

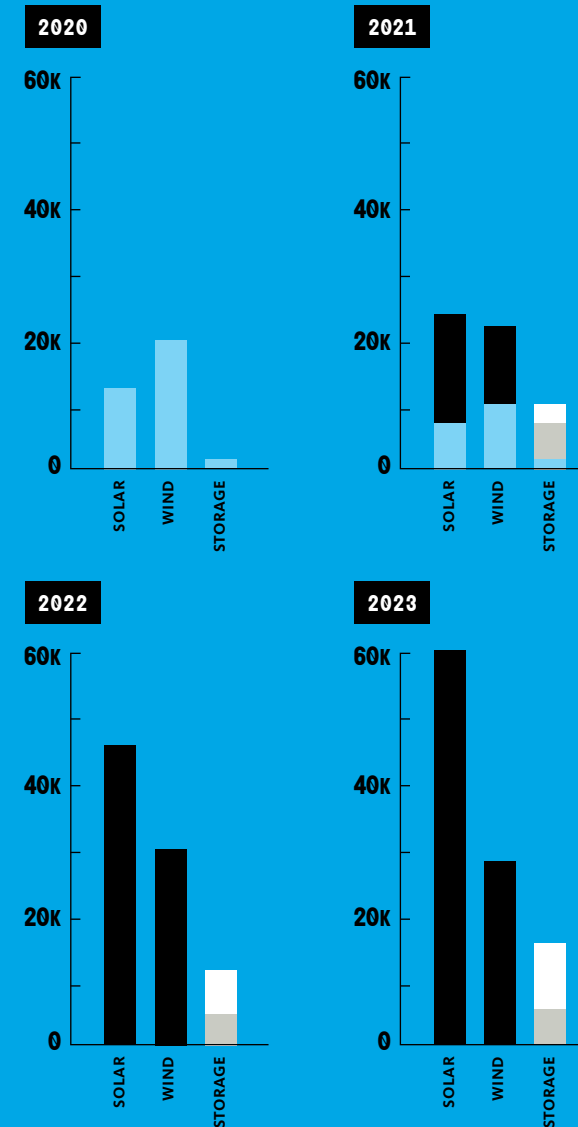
“Renewable energy generation is growing rapidly, driven by falling costs and growing investor interest.”

Source: World Economic Forum

Renewable energy development in the U.S. continues to gain pace.

Source: S&P Global Market Intelligence

Operating
Planned
Planned stand-alone
Planned paired storage



Energy-related emissions need to drop 30% below 2019 levels by 2030, and 75% by 2040, to reach net zero in 2050.

Source: BloombergNEF

Drop in emissions by 2030 relative to 2019

30%
to reach net zero in 2050

Drop in emissions by 2040 relative to 2019

75%
to reach net zero in 2050

Rate of emissions reduction to 2030

3.2%
year over year

FINANCIAL SERVICES FIRMS

OVERVIEW

In an industry where place — and the expectation to be present in that space — have defined company culture and the client experience for years, financial services firms are redefining how to enable employees to do their best work while reevaluating their real-estate portfolios. As the war for talent heats up, firms have an opportunity to lean into new, culture-defining space typologies to enhance the employee experience.



TRENDS

01

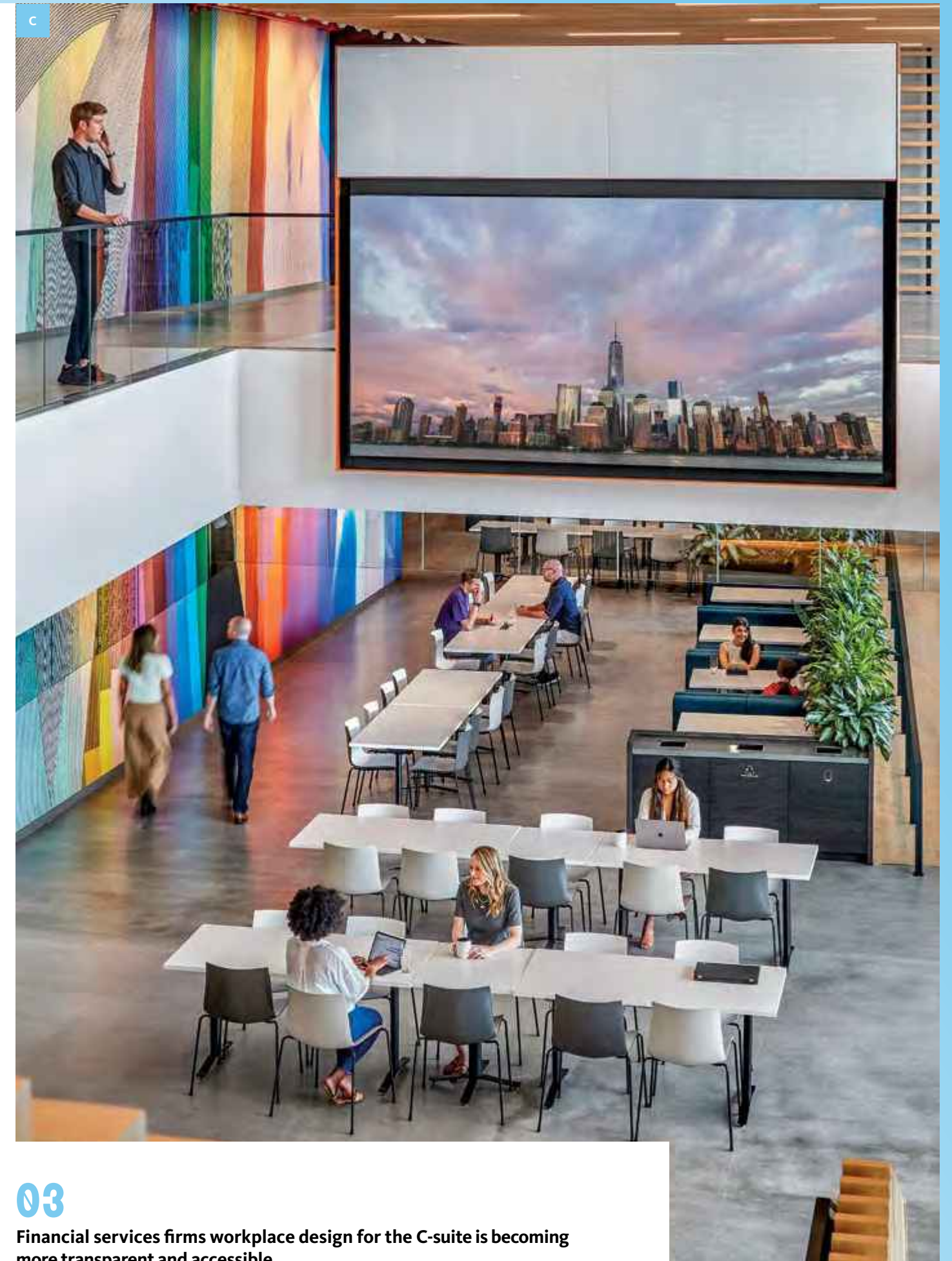
Space and policy can help win the war for talent in the years to come.

Amid upheaval, financial services firms are rethinking how they can deepen connections with employees and attract new talent from the tech sector. Banks have already started to reevaluate their cultures. Some will reconnect with the traditional workday prior to the pandemic, while others will embrace the agility and productivity that the pandemic brought to drive innovation and appeal to new talent.

02

Hybrid work will continue to reshape the trading floor.

New technology has enabled hybrid forms of collaboration, and this is influencing the space itself. Those executing trades will still need dedicated seats on the trading floor, but other supporting functions can be more agile on the floor, enabling organizations to add new types of spaces, such as informal collaboration rooms and decompression areas.



03

Financial services firms workplace design for the C-suite is becoming more transparent and accessible.

Today's workers expect leaders to be more accessible, and design is shifting to meet this. Executives are embracing a more collaborative workstyle and becoming more visible to the organization. In addition to evolving executives' individual workspaces, some firms are reconfiguring floor plans so that executives are closer to high-traffic zones.

FEATURED PROJECTS

A. Elliott Davis
Interiors, Greenville,
S.C.

B. Confidential
Financial Services
Client, Tokyo

C. Hudson River Trading 3
WTC Relocation,
New York

“After seeing first-hand that the pandemic disproportionately affected younger workplace generations in terms of advancement and mentorship, financial organizations are doubling-down on spaces for learning, training, and networking with younger workers in mind.”

— Gensler Financial Services Industry Briefing, Fall 2021



04
The shift from individual to collaboration spaces will continue.

In the post-pandemic era, financial services firms are taking a critical look at improving enclosed spaces with a shift from “individual” to “team.” As firms lean into hybrid working, large, dedicated offices can no longer be justified. Instead, single-size offices are making way for enclosed rooms that are designed with collaboration in mind.

FEATURED PROJECT

D. Confidential Financial Client, New York

05
Firms will continue to integrate ESG goals into their portfolios.

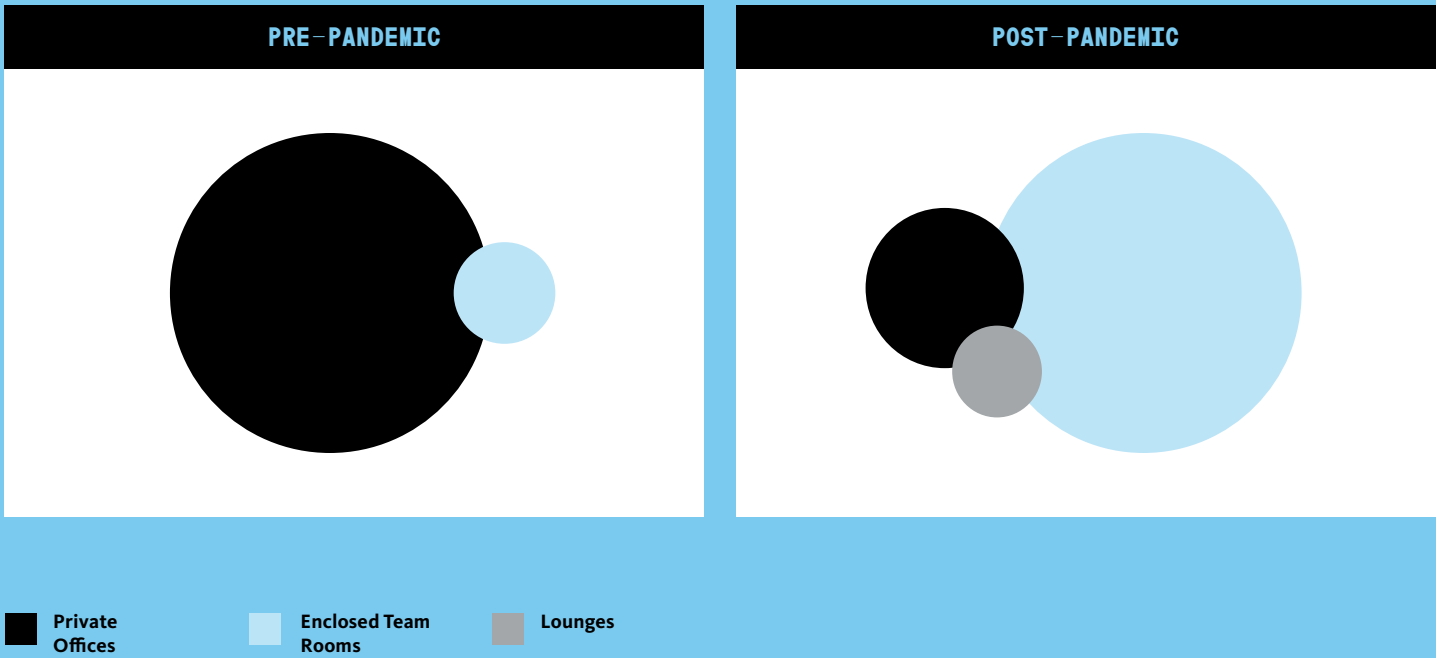
With heightened regulatory, stakeholder, and policy pressures, financial services firms are grappling with how to respond to Environmental, Social, and Governance (ESG) concerns. Clients are in varying stages of maturity in their ESG commitments, but most are seeking guidance for how to integrate their aspirations on climate action and issues of social equity.

STRATEGIES & RESEARCH

Share of enclosed team rooms will likely increase, while private offices decrease post-pandemic.

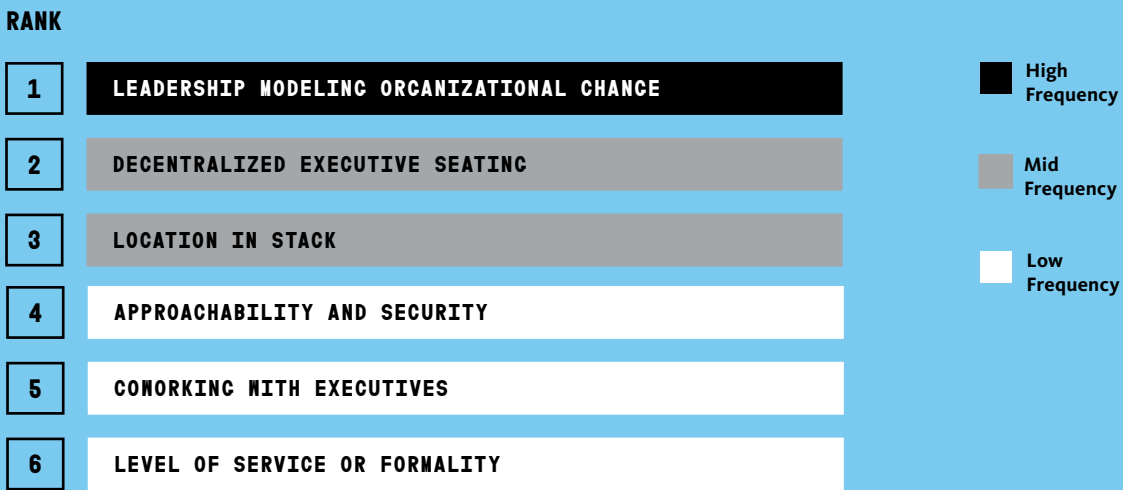
Source: Gensler Financial Services Industry Briefing, Fall 2021

THE DIAGRAMS BELOW SHOW THAT THE SHARE OF ENCLOSED SPACES IS STILL THE SAME — IT’S JUST BEING REPURPOSED TOWARD THE TEAM.



Top 6 Changes in C-suite Design

Source: Gensler Financial Services Industry Briefing, Fall 2021



FOUNDATIONS, ASSOCIATIONS & ORGANIZATIONS

OVERVIEW

In many ways, associations, nonprofits, and like-minded organizations feel socioeconomic changes most acutely because they are so closely embedded in their local communities. These local ties inspire a greater sense of responsibility for the relationships with their community and for the well-being of their employees. Organizations will continue to leverage their real estate to further their mission, support their members, and encourage citizenship in the community.



TRENDS

01

Virtual programming leads to expanded opportunities, locally and globally.

Connecting to membership and the broader community, convening spaces cast a larger net, create equitable experiences, and foster a deeper connection through increased programming, events, and organizational awareness. A new perspective has evolved, centered around funding opportunities and outreach. This perspective also strengthens the organization's mission, while fostering connection to the surrounding communities.

02

As the workplace becomes more diverse, wellness must be integrated into a variety of spaces.

The future of work involves people being more nomadic as they seek out diverse environments in which to work — quiet corners, meeting rooms, social hubs, and restorative outdoor experiences, which can encourage daily movement, and inspire and delight. This reflective period has led organizations to an integration of health and wellness in all aspects of the workplace, and with more ardent conversations around resilience.



FEATURED PROJECTS

A. REACH LA,
Los Angeles

B. APTA Centennial
Center Headquarters,
Alexandria, Va.

C. Plywood People,
Atlanta



“The long-term effects of the COVID-19 pandemic will keep rippling out across our politics, economy, and culture, including affecting the funding landscape for nonprofits.”

— Anna Galland, former executive director of MoveOn Civic Action, in the Stanford Social Innovation Review

03

Data and metrics will drive real estate decisions.

There is a deepening need for data and metrics to understand what like-minded organizations are doing to better support their teams and communities in order to drive decisions around their space needs. Organizations continue to use real estate to embody the organization's mission and serve its membership in new and innovative ways, establishing the office as a social hub with shared purpose and a connection to the mission.



04

Self reflection and recentering leads to higher relevance and purpose.

As advocates and leaders in diversity, equity, and inclusiveness, organizations lead with human experience and continue to quantify impact and increase focus on action by creating a range of DEI policy and design considerations leading to accountability, agency, and a fuller embodiment of their mission.

FEATURED PROJECT

D. Oxford Finance
Interiors, Alexandria, Va.

STRATEGIES & RESEARCH

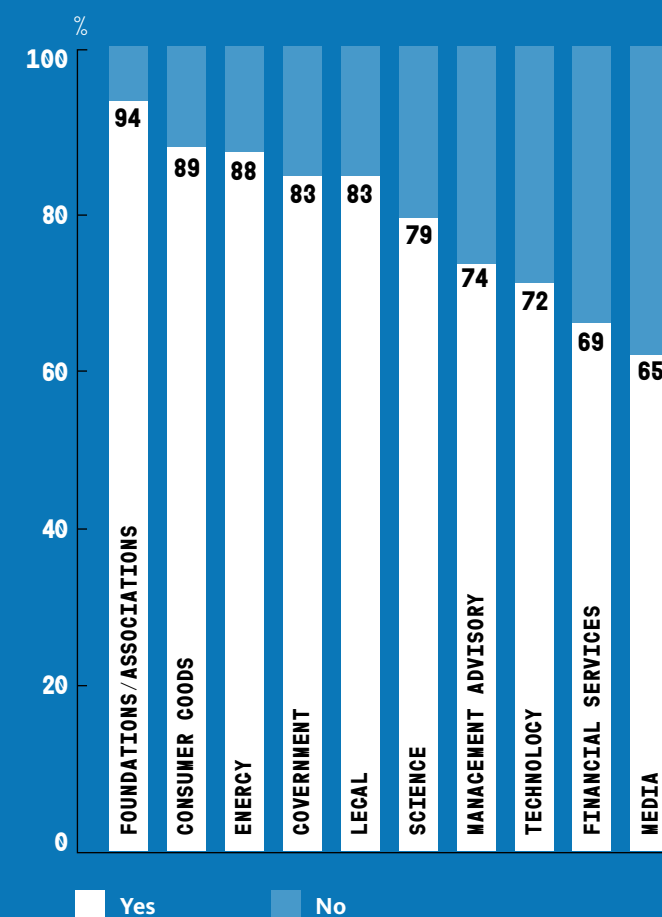
“This is a time to think about how our cities and communities can be places that celebrate diversity, support our residents, and lead with human experience.”

Source: Bevin Savage-Yamazaki, Foundations, Associations & Organizations leader, Gensler

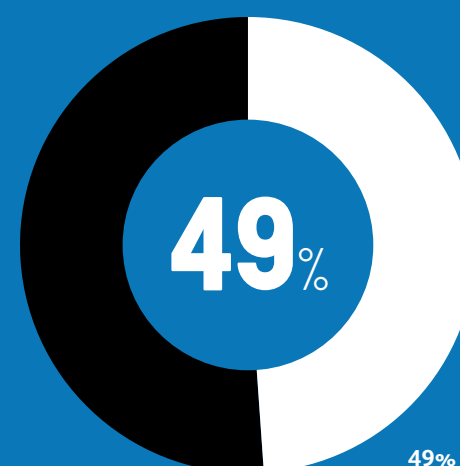
The portion of workers who have returned varies widely by industry — foundations/associations employees are most likely to have returned to the office.

Source: U.S. Workplace Survey Fall 2021

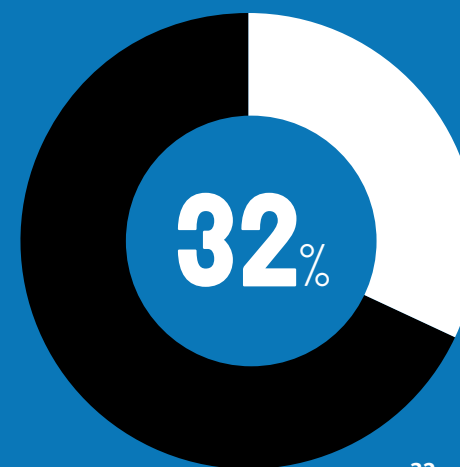
HAVE YOU WORKED FROM YOUR OFFICE AT ANY POINT SINCE THE PANDEMIC STARTED?



Source: Salesforce Nonprofit Trends Report



49% of nonprofits said that over the past 12 months their organization has changed its approach to DEI.



32% of all nonprofits surveyed said ensuring the mental health and well-being of their employees was a major issue for them over the past year.

GOVERNMENT & DEFENSE

OVERVIEW

Both government operations and the physical offices supporting them have entered a new era. Governments will be expected to lead on net zero carbon strategies, and their security approaches are evolving to incorporate measures to anticipate and survive climate change events. With walk-in services going virtual and workers embracing hybrid office strategies, many agencies will downsize offices and rethink how they allocate real estate in order to provide communities with critical services in more equitable ways.



TRENDS

01

Walk-in government services are going virtual, prompting redesigns.

Among walk-in services where governments have traditionally had in-person contact with the public — think permit reviews, driver's license renewals, and even social services such as counseling — hybrid and virtual models are taking hold. Governments are reimagining the offices that provide such services and reducing square footage. As this trend plays out, equity concerns will be paramount, as virtual services enhance convenience but risk excluding citizens without technology access.



02

As governments reevaluate square footage needs, many will downsize offices.

State, federal, and local governments are diving into a concerted review of their true square footage requirements. Governments have traditionally adopted conservative real estate strategies, but now many are embracing hybrid work environments. Many agencies are moving forward with renovations, lease renewals, and new office construction under the assumption that fewer workers will occupy the office full time in the future.

03

Security concerns will continue to redefine government buildings.

Increasing numbers of data breaches and more incidents of domestic political unrest will significantly affect the security infrastructure of government buildings. Design will play a key role in maintaining the balance between openness and security, promoting safety and democratic values. Vehicle barriers can take the form of well-designed benches, other street furniture, and landscape features, which can enhance the public realm. Crowd control barriers can be designed as easily erected elements that interrupt access only when needed.

04

Government will move toward resilient, “net zero ready” facilities.

Government facilities have an opportunity to lead on environmentally conscious design and construction, such as mass timber, and many have begun funneling investments in this direction. Businesses and nonprofits will look to governments to “walk the talk” on carbon reduction commitments, and to make green designs publicly visible. Extreme weather events will continue to threaten operations continuity, requiring resilient designs that can adapt to rising waters, high winds, the disruption of energy grids, and other emergencies. Governments that remain operational in times of crisis will gain public trust and, ultimately, save lives.



05

Public-private partnerships will reshape public real estate.

In addition to accommodating business offices, governments have started to rethink the use of public property to include space for housing and other social needs, often via public-private partnerships. On the local level, awareness is growing around the importance of locating resources close to the people who need them; successful implementation of the 20-minute city concept will therefore include ready access to government services.

FEATURED PROJECTS

A. LA County Department of Mental Health, Vermont Corridor, Los Angeles

B. U.S. Embassy, London

C. Wheaton Town Center, Montgomery County offices, Wheaton, Md.

D. City of Austin Permitting and Development Center, Austin

“We must balance security and openness to keep our public buildings public, and not close them off from the people they serve.”

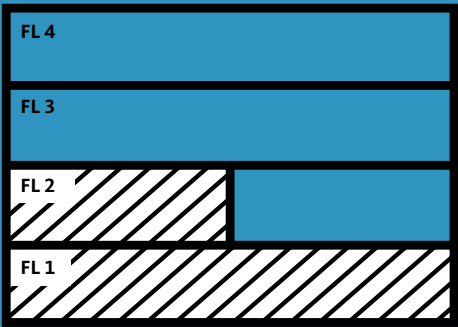
Source: Dialogue Blog by Robert A. Peck, “Security and Democracy: Designing Public Buildings for Safety and Accessibility”

Separating visitor areas from employee areas can keep public buildings open to the public.

Source: Security and Democracy: Designing Public Buildings for Safety and Accessibility | Gensler

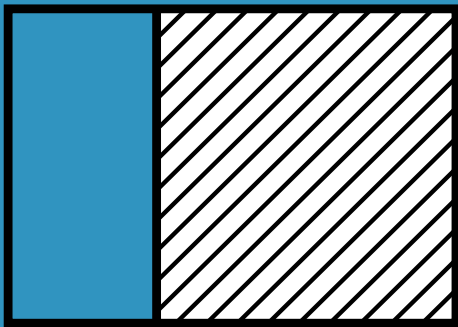
SECURITY ZONING

SECURITY BY VERTICAL SEPARATION



Locate public functions on floors one and two to limit traffic to staff floors.

SECURITY BY PHYSICAL SEPARATION



Isolate public space from private staff space with a combination of physical boundaries and security measures.

- Private Staff
- Public Area

“Inside, we can provide security best by separating visitor areas from employee areas horizontally, vertically, or both. The goal is to welcome citizens and unobtrusively limit access to non-visitor areas.”

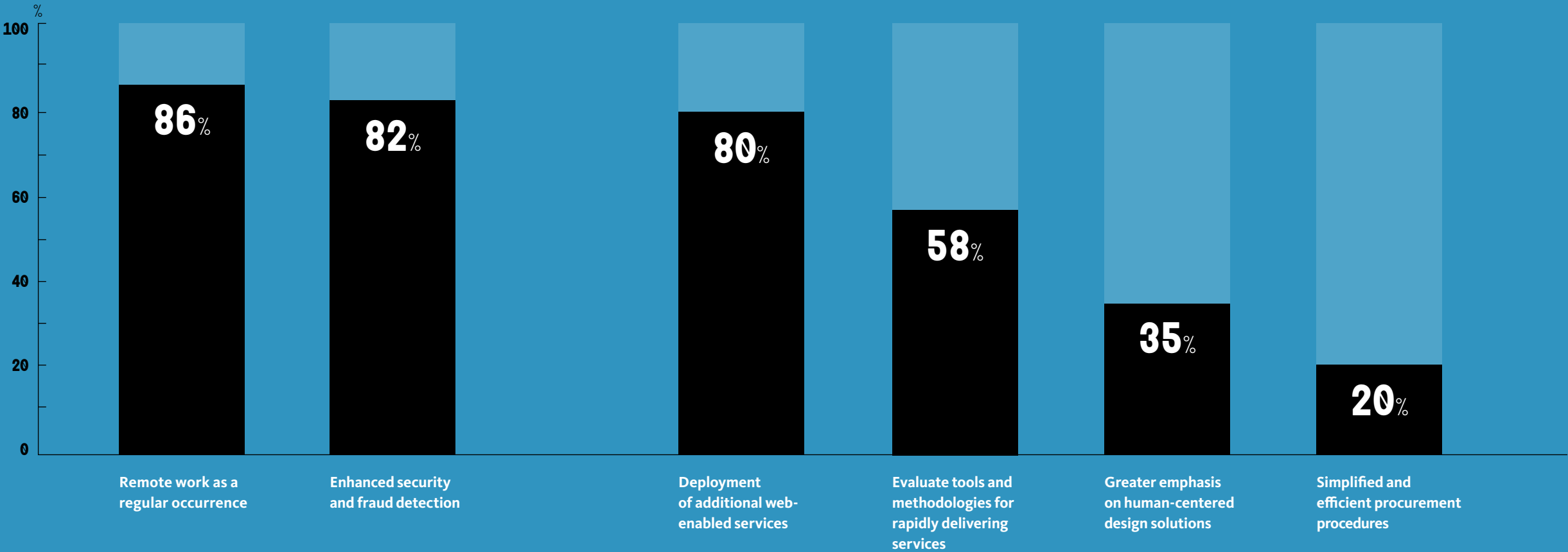
— Robert A. Peck, Government & Defense leader, Gensler

State government employees expect remote work to stay. Many also report that it has created new challenges for cybersecurity.

Source: National Association of State Chief Information Officers

WHAT DIGITAL SERVICES AND WORK PRACTICES INSTITUTED DURING THE PANDEMIC DO YOU EXPECT TO RETAIN?

(Respondents were directed to select all that apply)



MEDIA

OVERVIEW

The rate of change in the media industry has accelerated over the last year with the shift to tech-enabled streaming services, 5G, and digitization. The drive to attract and retain consumers is leading to a sharp focus on a constant supply of high-quality, differentiated, fresh, and diverse content. Creating indelible, immersive, brand-aligned experiences for employees, clients, partners, and customers will be key.



TRENDS

01

The race for content will define the media workplace.

Widespread global adoption of streaming platforms has set the global media industry on a trajectory of accelerated growth to meet rising consumer demand for fresh and diverse content. In addition to streaming video, providers are now adding games, music, and podcasts to capture more market share. The industry is in need of agile and adaptable workplaces that support a variety of content creation workflows and allow for seamless collaboration and cross-pollination between creatives.

02

The adoption of sustainable designs is growing rapidly.

The focus on sustainability and resiliency in the built environment has impacted the media industry in a big way. In the coming years, companies will embrace innovative adaptive reuse and energy efficiency strategies. As more data moves to the cloud, media companies are also able to reduce on-site operational systems, as well as the amount of square footage required to house these systems.

FEATURED PROJECTS

A & B. NFL Media,
Los Angeles

C. Confidential Client



“As companies race to meet consumers where they are with an ever-expanding range of products, services, and experiences, the entertainment and media industries will grow more pervasive, more immersive, and more diverse.”

— PwC

The Culver Studios Innovation Plan, Culver City, Calif.

The innovation plan seeks to transform a 14.3-acre site into a dynamic, state-of-the-art media campus. With the addition of five new digital media buildings and redesigned flexible space, the plan seeks to sustain Culver Studios' prominent role at the cutting edge of innovation, essential to the production of entertainment and digital media for future generations.





03

Geographical diversification in real estate will become essential.

U.S. and global consumers are looking for diverse, differentiated, and fresh content. This consumer demand is driving production teams and facilities to hire more diverse talent and move to diverse geographies. Geographical diversification can also mitigate the impact of future crises since companies can always have production locations in the event one or more can't operate.

FEATURED PROJECTS

D. Confidential Client,
Los Angeles

04

There will be a heightened focus on a distinctive employee experience.

As flexible work options become more widespread, there is a heightened focus on the employee experience in the workplace to make it a desirable place to be. To make themselves attractive to tech and media workers, media organizations need to create a workplace that is agile and adaptable to a fluid technology workflow. Alignment of values, and authentic communication of these values in the space, is essential to the employee experience and a key differentiator.

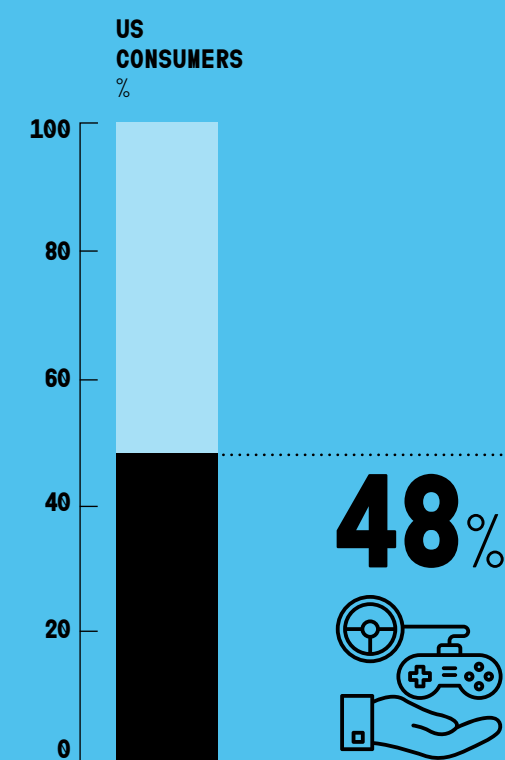
STRATEGIES & RESEARCH

“Streaming is not just displacing traditional sources of entertainment revenue such as pay-TV and linear broadcasting, it is actually expanding the global marketplace for video.”

Source: Streaming Media Europe

Gaming is on the rise.

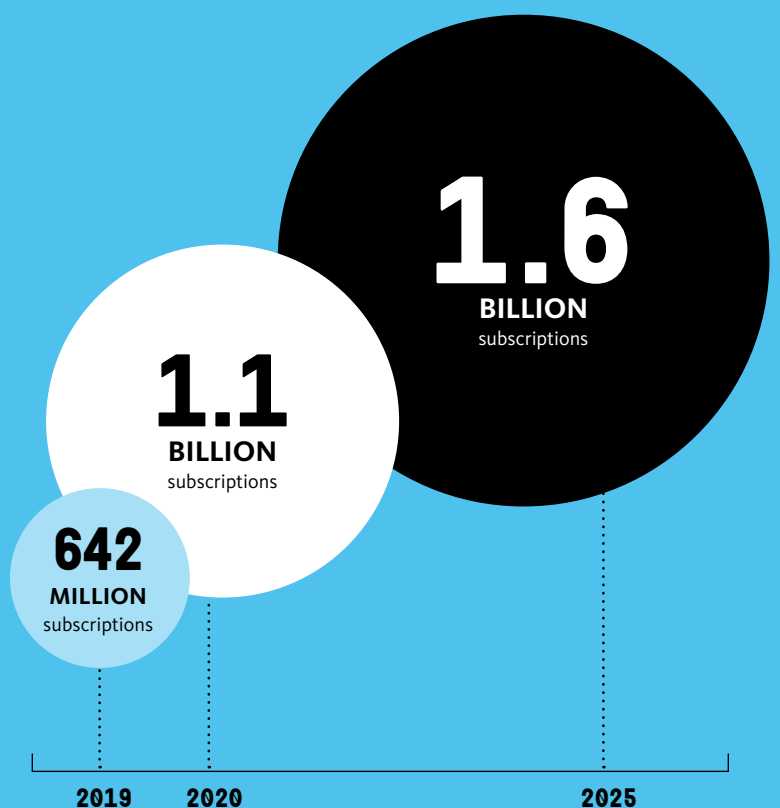
Source: Deloitte



SINCE THE COVID-19 PANDEMIC BEGAN, 48% OF U.S. CONSUMERS HAVE PARTICIPATED IN SOME FORM OF VIDEO GAMING ACTIVITY.

A deluge of new streaming platforms is transforming consumption.

Source: Global SVOD Forecasts 2021, Motion Picture Association's 2020 Annual Report



OFFICE BUILDINGS: DEVELOPER

OVERVIEW

As the role of the workplace evolves, new office buildings must provide workers with meaningful, immersive experiences that they cannot get while working at home or in older office buildings. How a building supports company culture, promotes wellness, and connects with the local community are the new drivers for great design and the new benchmarks for tenants.



TRENDS

01

New buildings must be adaptable and multiuse.

To adapt to uncertainty in the market and appeal to a larger range of tenants, developers should look to create more spaces with built-in flexibility that could work for the office or other, more specialized uses, such as life sciences. Core and shell design for office buildings is increasingly allowing for a multitude of uses through greater structural loading, higher floor-to-floor heights, expanded stairwells, and a focus on back-of-house operations.

02

Tenants want more common spaces for socialization that lead to casual collaboration.

Open stairways, lounges, and activated lobbies in common areas are in high demand because of the way they encourage movement, facilitate social interactions, and spur casual collisions with various companies within multi-tenant buildings. On-site public gardens also provide opportunities for meetings and collaborations among tenants and neighbors.

FEATURED PROJECTS

A. 225 Wyman,
Waltham, Mass.

B. 333 North Green,
Chicago

C. Confidential
Headquarters, Chengdu,
China



03

ESG, wellness, and biophilia will attract tenants.

To respond to tenant demands for spaces that contribute to health and wellness, developers are incorporating biophilia and other WELL Building Standard elements into the core and shell. Elevated and landscaped decks and outdoor zones, operable windows for fresh air, and open stairways are the types of enhancements that can increase a building's value and help developers position their projects as Environmental, Social, and Governance (ESG) investments.

04

Hybrid work will continue to influence office building design.

We are seeing the role of the office building change to adapt to a hybrid lifestyle where workers split their time between home and the office. This means we have an opportunity to design the office with more residential and hospitality elements and find ways to incorporate more services that offer convenience and efficiency.



Whole Foods Market East Block Office Building, Austin

The 140,000 square-foot build-to-suit office building turns the Whole Foods Market headquarters into an amenity-rich urban campus. The building's extended floor plates help with its energy efficiency by providing protection from sun exposure. Interior public spaces promote casual collaboration and incorporate biophilic elements to enhance the employee and visitor experience. An outdoor terrace offers an alternative workplace.

4



Morphable Office, Baltimore

Drivers impacting the future of office development

Work from home will continue as part of a hybrid work model, so the office no longer needs to be a container for people who can do focused work anywhere — instead, office buildings must support new ways of working and foster memorable experiences for the tenants who use them.

Based on our research, here are four strategies developers can take to drive future office buildings:

1 SUPERCHARGE EXPERIENCE TO BOOST CULTURE AND CREATIVITY

Culture, creativity, and innovation need in-person interaction; therefore, the office must focus on collaboration and connection, fostering long-lasting, memorable experiences.

3 USE GROUND FLOORS TO CONNECT TO THE COMMUNITY

Office buildings should be contributing to their surrounding neighborhoods, even when workers are not present. By integrating their ground floors into the community, office buildings will become anchors of the 20-minute city.

2 CONNECT TO THE OUTDOORS TO APPEAL TO NEW TALENT

To appeal to today's workers, office buildings must have connections to high-performance outdoor space — including areas equipped with mechanical systems, such as radiant heating and cooling to support meetings, focus space, and more.

4 INCREASE VALUE WITH ESG INVESTMENTS

Consider the broader impact these buildings have as investments. Incorporate sunshades, overhangs, energy recovery, and other features and systems that improve performance. As power generation shifts to more renewable sources, your building will maximize its long-term value.

STRATEGIES & RESEARCH

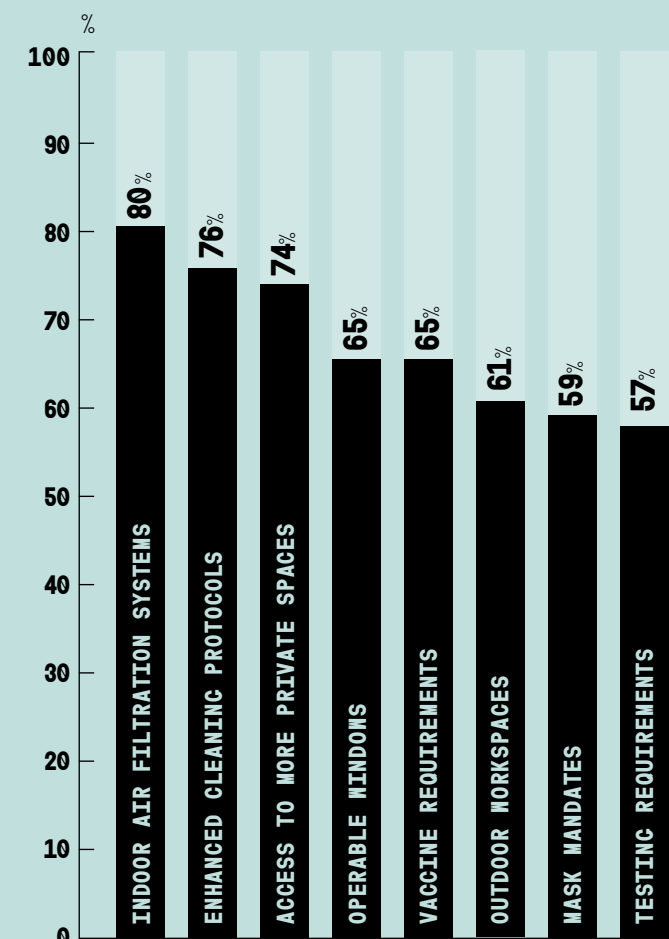
“The best offices will be where employees will want to go, regardless of the commute.”

Source: Dialogue Blog by Dean Strombom, “Vuja De: Seeing the Office With Fresh Eyes”

Enhanced air filtration, cleaning, and privacy would make those employees who have not yet worked in the office more comfortable.

Source: U.S. Workplace Survey Fall 2021

WHAT WOULD MAKE YOU MORE COMFORTABLE GOING INTO THE OFFICE NOW?



Work will not be the primary driver in bringing people back to their business districts; people want their business district to be a lifestyle hub.

Source: Gensler City Pulse Survey Fall 2021

WHAT ACTIVITIES DOWNTOWN DO PEOPLE MOST WANT TO DO POST-PANDEMIC?

RANK	ACTIVITY
1	GO SHOPPING
2	VISIT PARKS
3	SIMPLY HANG OUT
4	DINE OUT
5	CULTURE & ENTERTAINMENT
6	GO TO WORK
7	RUN ERRANDS
8	SEEK HEALTHCARE
9	VISIT FRIENDS/FAMILY WHO LIVE IN THE AREA
10	ATTEND PROFESSIONAL EVENTS
11	GO TO BEAUTY SALONS/SPAS
12	GO TO GYMS/FITNESS CENTER

OFFICE BUILDINGS:

REPOSITIONING & LANDLORD SERVICES

OVERVIEW

The lifestyle and wellness choices of today's workforce are the major factors influencing the office market and will continue to do so in the years to come. Markets will continue to place a premium on spaces that support flexibility, resiliency, and quality of life. Landlords and building owners will continue to have opportunities to convert or reuse existing buildings in order to address these needs.



TRENDS

01

Resilient buildings will become easier to finance and lease.

The influence of Environmental, Social, and Governance (ESG) will continue to drive innovation. As such, socially and environmentally responsible office buildings will become both easier to finance and easier to lease to tenants who are increasingly demanding workplaces that support the health and well-being of occupants and the planet. Adaptive reuse of older buildings is a key resilient strategy and selling point.

FEATURED PROJECTS

A. The Post Office,
Chicago

B. Cargo Crossrail,
London

C. The Link, Denver



02

Well-being and inclusivity can offer tangible benefits.

Landlords and owners are realizing the tangible outcomes of creating “healthy” and inclusive buildings. Research shows that better indoor air quality leads to increased productivity and reduced sick leave. Biophilic design can lower stress and anxiety and can also attract sought-after tenants and higher rental yields. Addressing equity and inclusion with core elements, such as gender-neutral restrooms and other common areas for an increasingly diverse workforce, is also a tenant draw.

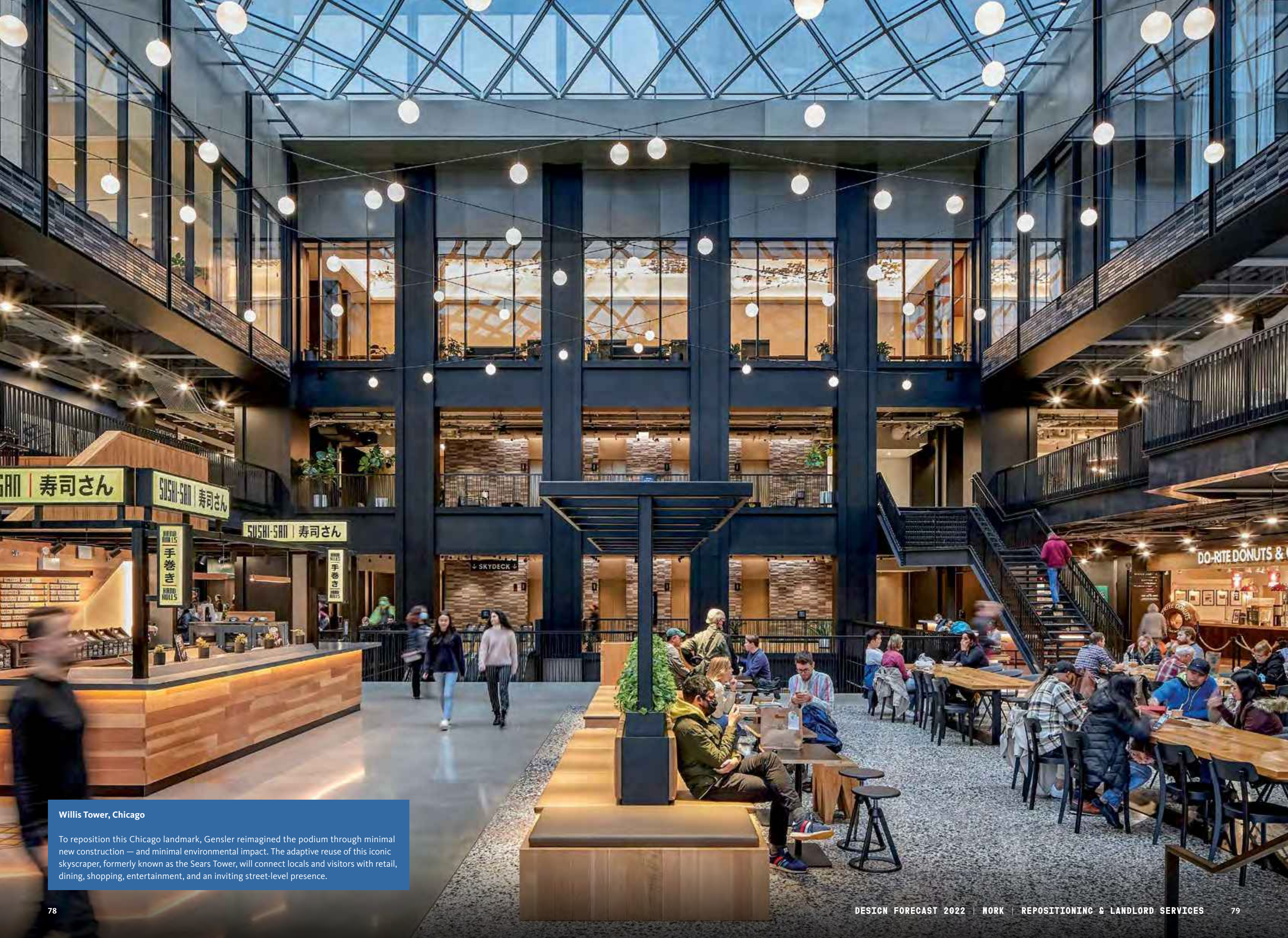
03

The demand for quality experiences in the workplace will continue.

In a competitive market with more flexible attendance policies, buildings must provide special experiences that are different from the home to bring people into the office. Tenants will continue to seek out more modern, amenity-rich, and sustainable spaces. Opportunities for adaptive reuse and building conversions will continue to grow.

BEFORE





Willis Tower, Chicago

To reposition this Chicago landmark, Gensler reimagined the podium through minimal new construction — and minimal environmental impact. The adaptive reuse of this iconic skyscraper, formerly known as the Sears Tower, will connect locals and visitors with retail, dining, shopping, entertainment, and an inviting street-level presence.

5



Park Point Business Park, Durham, N.C.

Conversion strategies for office buildings

In today's evolving office market, how can developers and building owners assess whether to upgrade an older, poorly performing building as office space or convert an existing office building to other uses, in order to get a better return on their investments?

Here are five strategies for enlivening assets and driving performance:

1 MULTIPLE ENTRIES SUPPORT A MIX OF USES

Buildings with multiple entries can help future-proof a building to support an anchor tenant private entry or a mixed-use entry for residential or other use.

3 CONSIDER INDUSTRIAL BUILDINGS FOR CONVERSION

Growth in emerging cities has pushed development into former industrial areas, which are often attractive to the creative class and create a need for nontraditional office space. Industrial buildings, with their wide spans and high bays, can be good targets for conversion to life science and creative campus tenants.

5 ADD PLENTY OF COMMUNAL SPACES

Adding communal spaces (both indoors and out) that apply urban forms, such as main streets and courtyards, can help former industrial spaces come alive when converting for mixed-use, office, or residential uses.

2 SPLIT ELEVATOR BANKS CAN PROVIDE FLEXIBILITY

Buildings with split elevator banks support a good foundation for a mixed-use building. Splitting residential and commercial across the low-rise and high-rise banks provides great flexibility.

4 SMALL FLOOR PLATES CAN EASILY BE SUBDIVIDED

Office buildings with small floor plates — around 8,000 to 10,000 square feet — are generally very desirable and can be easily subdivided into a good mix of residential units.

STRATEGIES & RESEARCH

“Far and away the best way to reduce carbon is to reuse existing buildings. By recycling structure, we can save up to 40% of emissions. These targets are achievable now.”

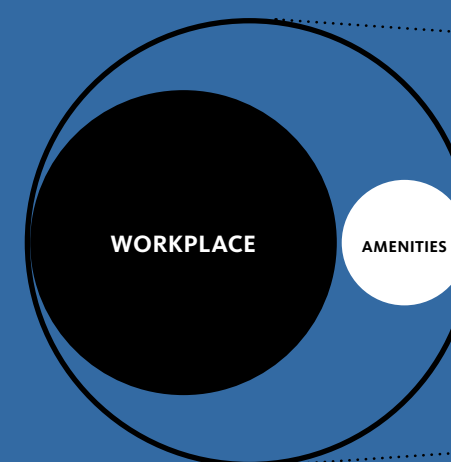
— Juliette Morgan, former head of Sustainable Development, British Land

The Evolving Role of Amenities

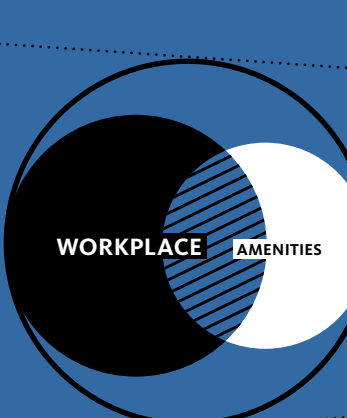
Source: Gensler

What amenities might deliver the greatest returns in today's evolving work landscape? Many agree that collaborative environments, fluid locations, access to outdoors, proximity to food & beverage, and healthy enjoyable experiences will attract and retain talent, and drive well-being. These are the attributes that will drive the workplaces of the future.

SUPPLEMENTING BUSINESS 2010 – 2015



OPTIMIZING BUSINESS 2016 – 2019



DRIVING BUSINESS 2020 – CURRENT



Company's real estate densities

Amenity Tipping Point

PRODUCT DEVELOPMENT

OVERVIEW

Furniture, interior finishes, and other products are most valuable when they respond to end-user demand quickly and include the kind of insights that can address a broad set of needs. As the market evolves, clients are looking for a larger scope of services — including sustainability consulting, ADA compliance reviews, and design visualization — to enhance the impact of their products.



TRENDS

01

In-office and home office furnishings will support flexibility more than ever.

Office spaces are becoming dynamic hubs of innovation and connectivity. As such, office furnishings are evolving to support greater flexibility, allowing for enhanced collaboration, as well as individual work. At the same time, with more people working from home, the demands on the home office will continue to evolve, and consumers' performance expectations for home office equipment are projected to increase.

02

Hygiene protocols and wellness safeguards are here to stay.

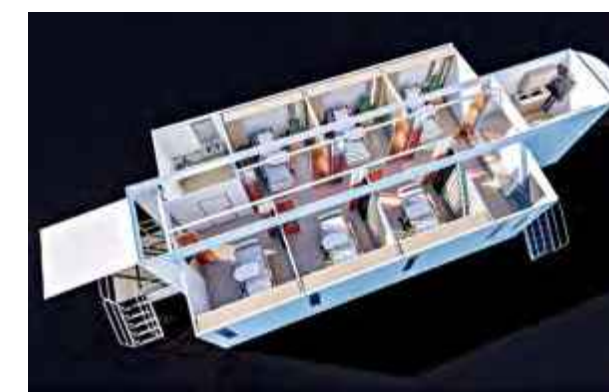
The realization that COVID-19 will be an ongoing global health battle is prompting a long-term expectation and demand for heightened hygiene protocols and wellness safeguards in the places people visit and occupy. Manufacturers that address these concerns through smarter, more hygienic, and more inclusive products will gain a competitive edge.



03

The climate crisis will continue to drive resilient product solutions.

The climate crisis has accelerated the need for resilient product solutions that minimize the impact on the planet and the people who use them. Issues related to climate action, well-being, and the circular economy are driving product development strategy. Manufacturers that reduce carbon emissions and improve material transparency will benefit occupants and positively impact their bottom line.



04

More new products will focus on user safety and wellness.

COVID-19 and the resulting global health crisis proved the need for greater preparedness and greater respect for measures that ensure life safety. Air quality, safety protocols, and general cleanliness are among the most important considerations for people to feel comfortable and safe in returning to the office. Addressing these safety elements will help companies prepare for future crises.

FEATURED PROJECTS

A. Stylex Free Address Furniture

B. PBA Hands-Free Pulls

C. Amerlux Active-CLEAN Lighting

D. Craftsmen Mobile Modular Hospitals



FEATURED PROJECTS

E. L&M Architectural
Signs 60|30 Glass Films

F. Stylex Free Address
Furniture

STRATEGIES & RESEARCH

“Post-pandemic, people’s focus on hygiene will continue to be elevated, so it’s no surprise that many of Gensler’s endeavors are focused on products that will foster a cleaner built environment.”

Source: Dialogue Blog by Scott Star, “Product Design in Times of Crisis”

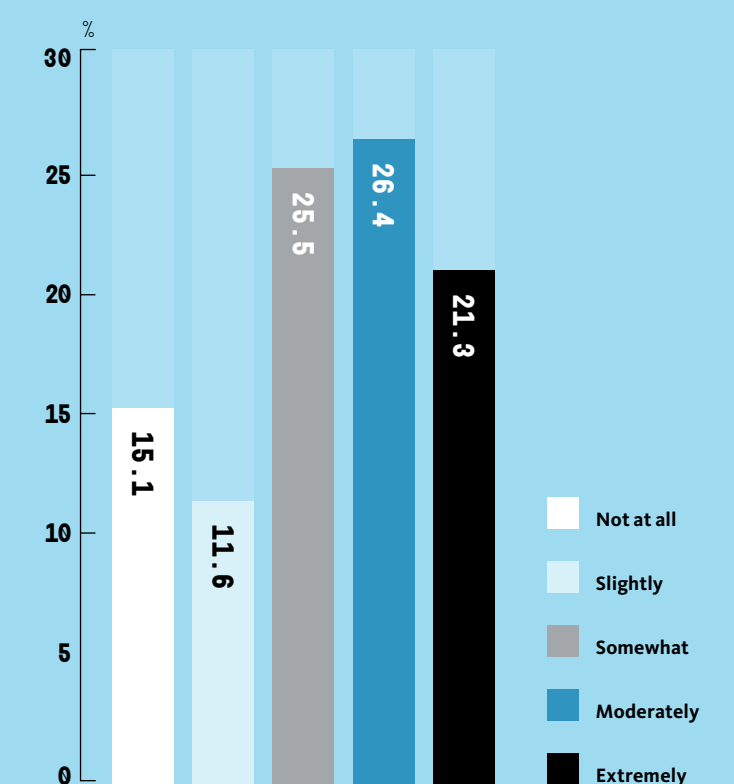
92%

of office workers feel that hygienic, easy-clean materials are important relative to the comfort and enjoyment of their work environment.

Source: Gensler Consumer Research Survey

To what extent has your perception of the hygiene/cleaning protocols in place in your company’s office impacted your decision to return to the office instead of working exclusively from home?

Source: Gensler Consumer Research Survey



PROFESSIONAL SERVICES FIRMS

OVERVIEW

For professional services firms, the pandemic has opened up key areas of change: mobility, choice and variety of spaces in the office, and health and well-being. By building upon these core principles in the years to come and focusing on the employee experience, management advisory and legal firms can attract the best talent and deliver great experiences for a diverse, multigenerational workforce.



TRENDS

01

Diversity and well-being will continue to prioritize inclusive design.

A broad definition of inclusive design embraces cultural diversity, as well as the mental and physical well-being of all employees. To attract and retain diverse talent, professional services firms should create an empowered work experience based on choice and flexibility that is inclusive. Gender-neutral restrooms, mothers' rooms, and other spaces are increasingly common to accommodate diverse needs.



02

The future legal office should support collaboration and social gathering.

To attract and keep talent, the legal industry must think of the office as a destination — or a type of work club. Spaces that promote knowledge sharing, mentorship and coaching, meetings, and collaboration will be the hallmarks of the new law office.

“Smart professional services firms are looking to incorporate a hybrid work model that embraces mobility, increases amenities, and delivers a great workplace experience for a multigenerational workforce.”

— Dialogue Blog by Barbara Dunn, “Reset: The Future Law Firm Workplace”

03

Reframing the office as a destination will remain an industry driver.

As the primary purpose of the workspace shifts to accommodate more collaboration, mentoring, and impromptu social gathering, professional services firms will continue to experiment with amenities. Team rooms, food service areas, work-focused lounges, informal meeting areas, and outdoor connections will continue to be part of the mix.

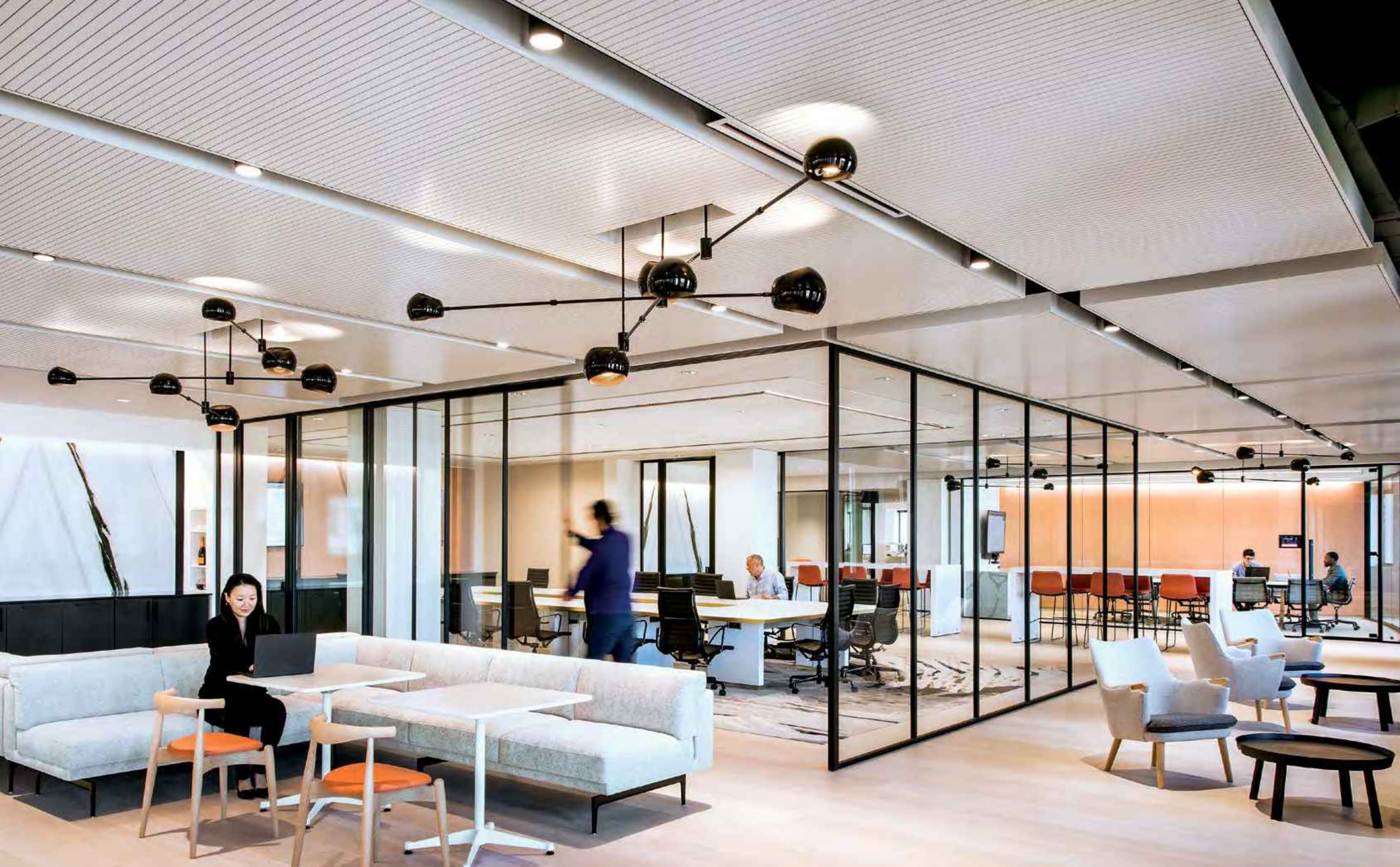
04

Operating in beta mode is a worthwhile investment.

As clients reexamine their portfolios, being in “beta mode” will become part of real estate thinking. Testing ideas by launching pilot programs can be low-risk, high-reward solutions that enable clients and designers to experiment and then pivot. By embracing new technologies and ways of working, professional services firms can better understand staff needs, find new ways of building and promoting firm culture, and test drive new concepts.

FEATURED PROJECTS

A. The Manor, McCann Worldgroup, London B. Confidential Client, Washington, D.C. C. Gensler Raleigh



Buccini/Pollin Group Headquarters Renovation, Wilmington, Del.

This commercial real estate developer's headquarters exemplifies how purpose-driven design can breathe new life into older buildings. With a modern, hospitality-influenced design aesthetic, the newly renovated workplace reflects the company's brand and position as a leading office landlord while showcasing the site's potential to future tenants.



05

Now is the time to turn corporate net zero carbon commitments into action.

As pressure mounts to take action to prevent the worst effects of climate change, a growing number of management advisory firms have made net zero carbon commitments. Now is the time for real estate teams within these firms to establish a workplace design sustainability roadmap that aligns with these commitments and identifies measurable criteria. Roadmaps will prove to be invaluable, providing a prioritized set of applicable sustainability strategies, performance criteria, implementation methods, and clear governance.

FEATURED PROJECT

D. Confidential Client,
New York

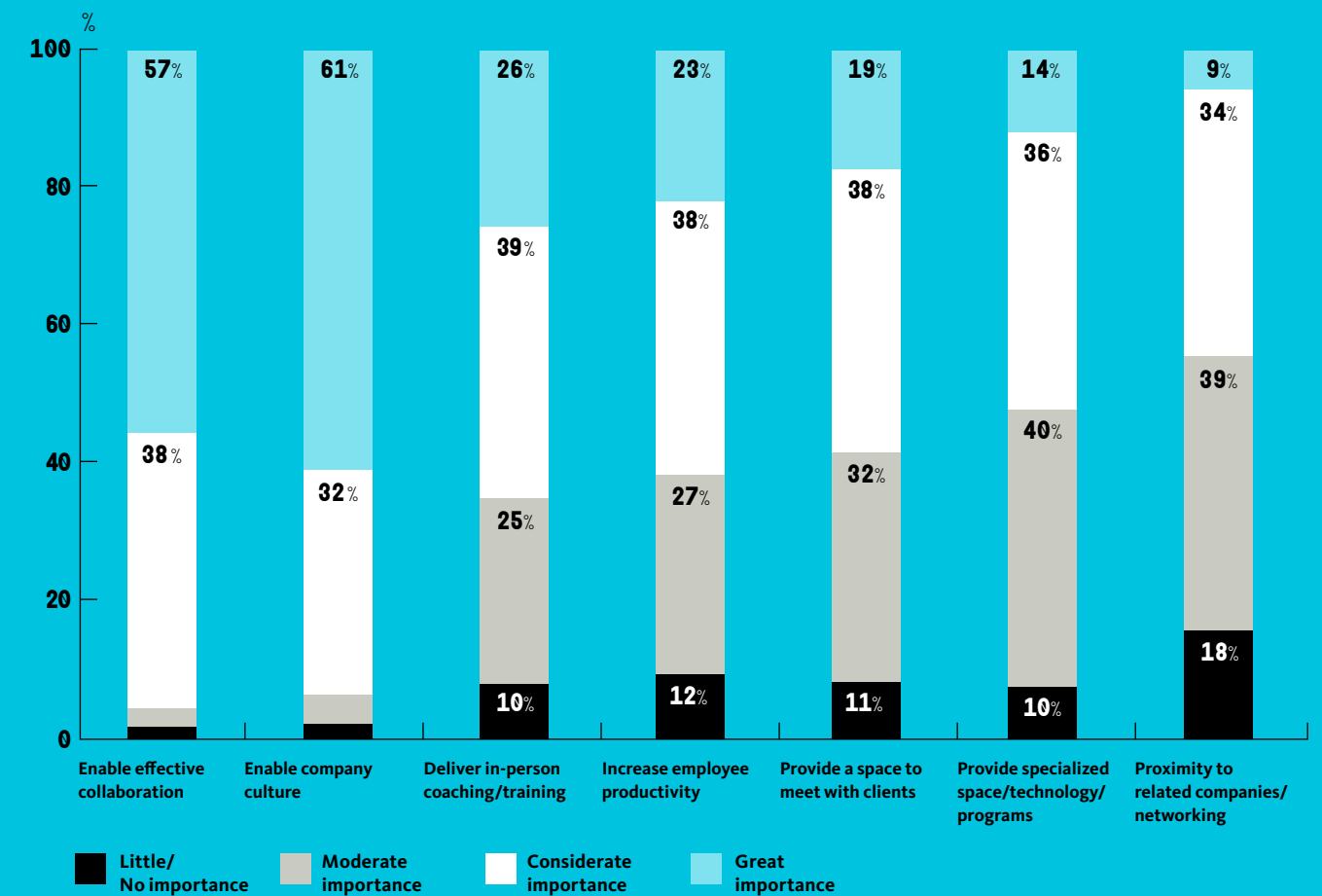
STRATEGIES & RESEARCH

“As we continue with a hybrid model, combining remote and in-the-office work, professional services firms will need to develop planned activities and programs that connect people and build culture and comradery.”

Source: Dialogue Blog by Barbara Dunn, “Reset: The Future Law Firm Workplace”

What will be the primary value drivers for companies to maintain a future physical office footprint?

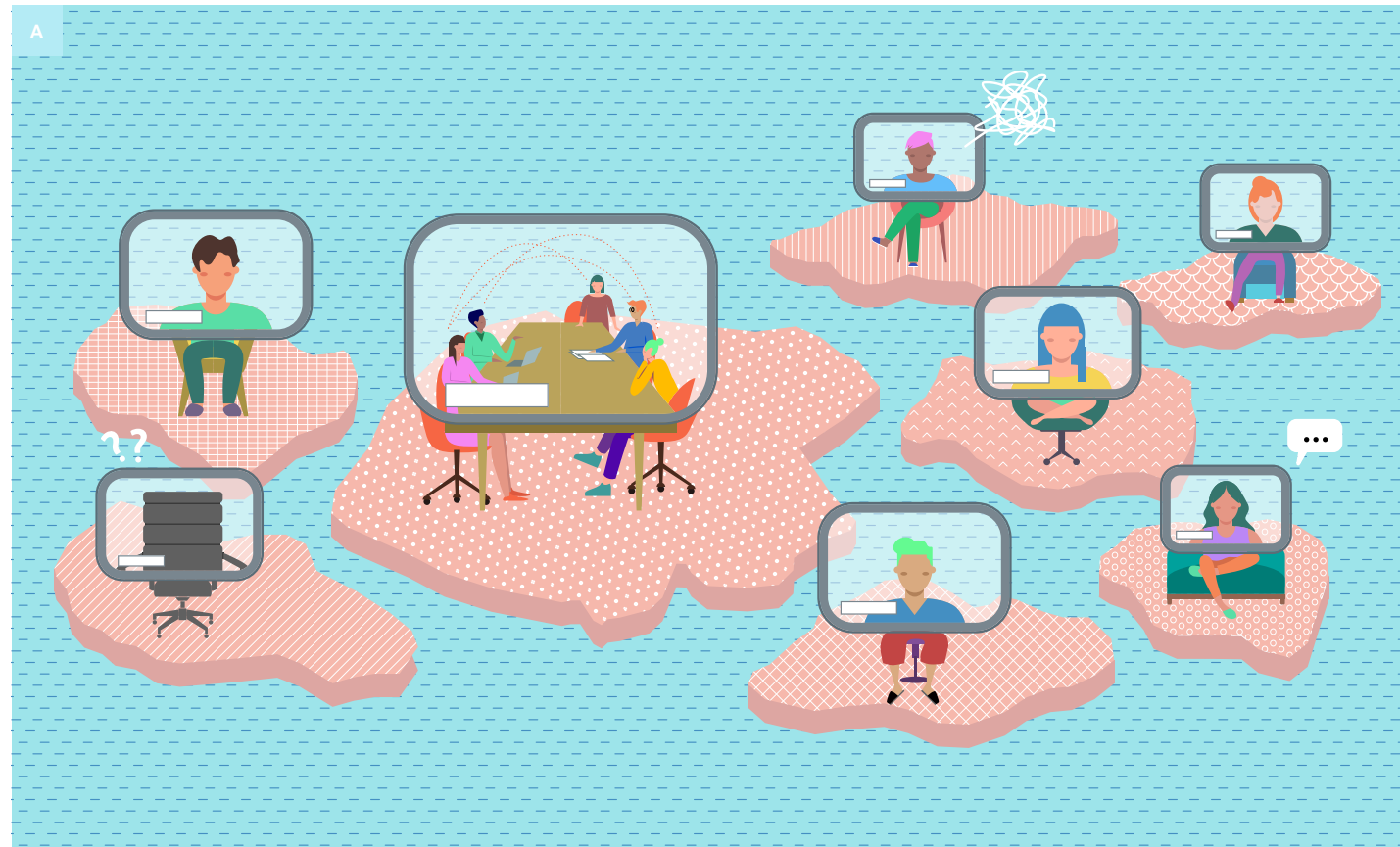
Source: PwC and ULI, Emerging Trends in Real Estate 2022



REAL ESTATE & CONSULTING

OVERVIEW

In the coming years, organizations will operate with a deeper understanding of how the world's challenges, such as climate change, global health, and social inequality intersect with one another, and how they impact real estate. By helping organizations understand these intersections, we can unlock the potential for real estate decisions to meaningfully respond to change both within and across cultures.



TRENDS

01

The need for empathy in the workplace will remain front and center.

Many diversity, equity, and inclusion (DEI) initiatives are still in their infancy. Over time, these taskforces and roles will formalize, taking on more permanent institutional functions. Understandings of inclusivity will expand beyond race to encompass more nuanced attitudes around gender, cultural background, neurodiversity, and the benefits of an intergenerational workforce.

02

Matching mission to action will enable organizations to stand out.

How should companies align social justice, public health, and environmental demands with economic objectives? For many companies, living up to their socially conscious missions will mean investing in spaces that can have a positive local impact, such as walkable areas, outdoor recreation places, and other public features that build community.

03

The Great Resignation will keep reframing conversations around talent.

The 2021 labor shortage and Great Resignation will continue to push organizations to rethink their fundamental understandings of talent. An emerging focal point is psychological well-being. Workplace real estate will become more flexible and responsive to work-life balance, burnout, and mental health. Designs that address these things will shift in priority from "nice to have" to "must have."

FEATURED PROJECTS

A. Hybrid Dystopia, Singapore

B. Gensler Miami

04

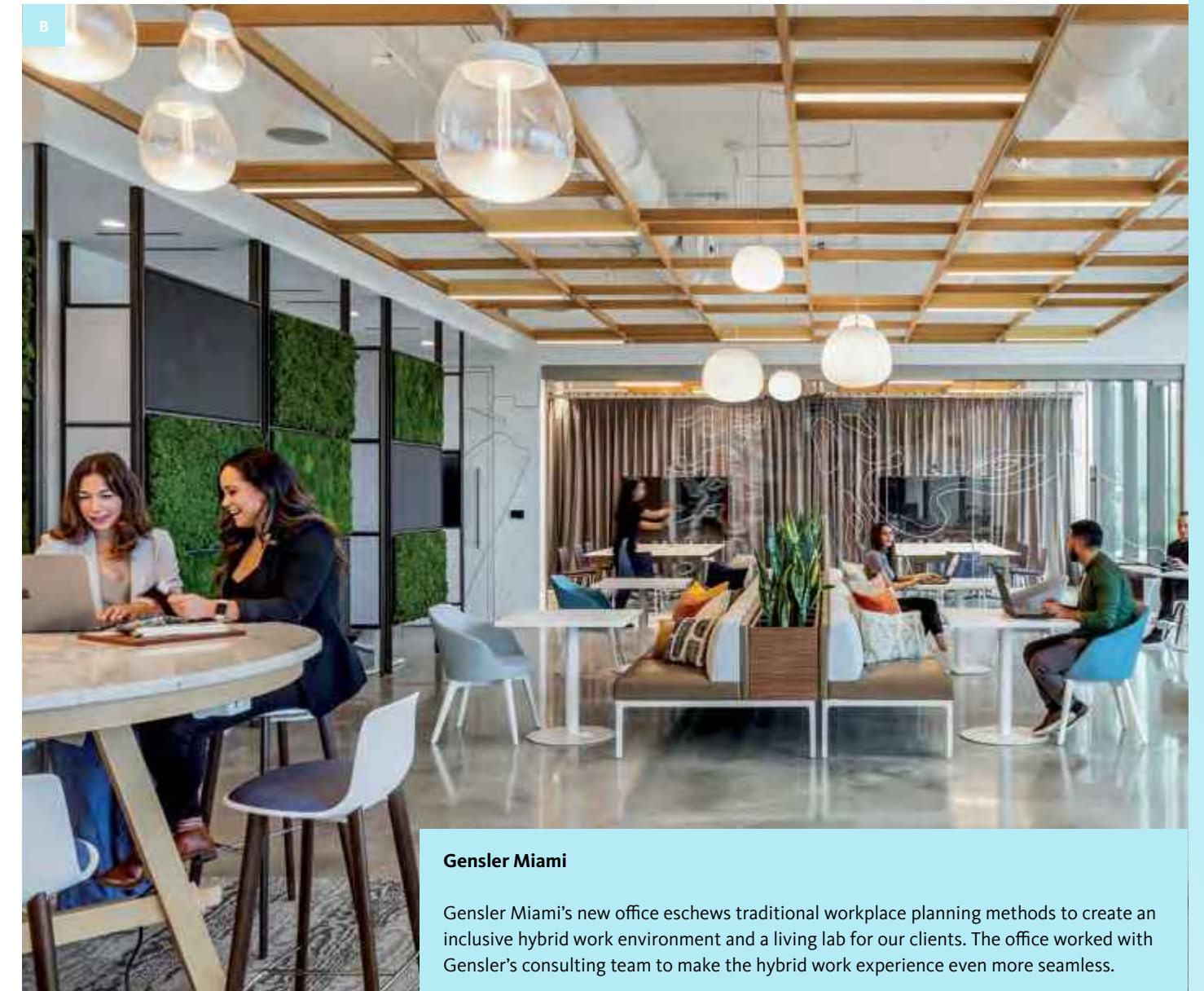
Pilot spaces will grow in value in an evermore hybrid landscape.

The future will not be static. In the years to come, we'll see more hybrid-distributed workplaces that allow workers to live in more affordable towns and cities. Optimizing company culture in this new hybrid reality will be a decades-long challenge that will constantly evolve with the emergence of new communications tools. Within this context, the importance of experimentation will increase, as will the relevance of pilot spaces.

05

New work patterns are driving tenants to look beyond their traditional building preferences.

In this new environment, tenants will gravitate toward the properties that best solve for flexibility, adaptability, and well-being. In response, building owners and developers should explore new real state design strategies that can differentiate them from the competition and adapt to this new marketplace.



Gensler Miami

Gensler Miami's new office eschews traditional workplace planning methods to create an inclusive hybrid work environment and a living lab for our clients. The office worked with Gensler's consulting team to make the hybrid work experience even more seamless.

"Pilot spaces enable both clients and designers to test concepts about which they aren't 100% sure, and then pivot if they don't love the results. This allow us and our clients to experiment more radically than we otherwise would because the risks are much lower."

— Dialogue Blog by Cheryl Duvall, "The Power of the Pilot: A Low-Risk, High-Reward Real Estate Solution"

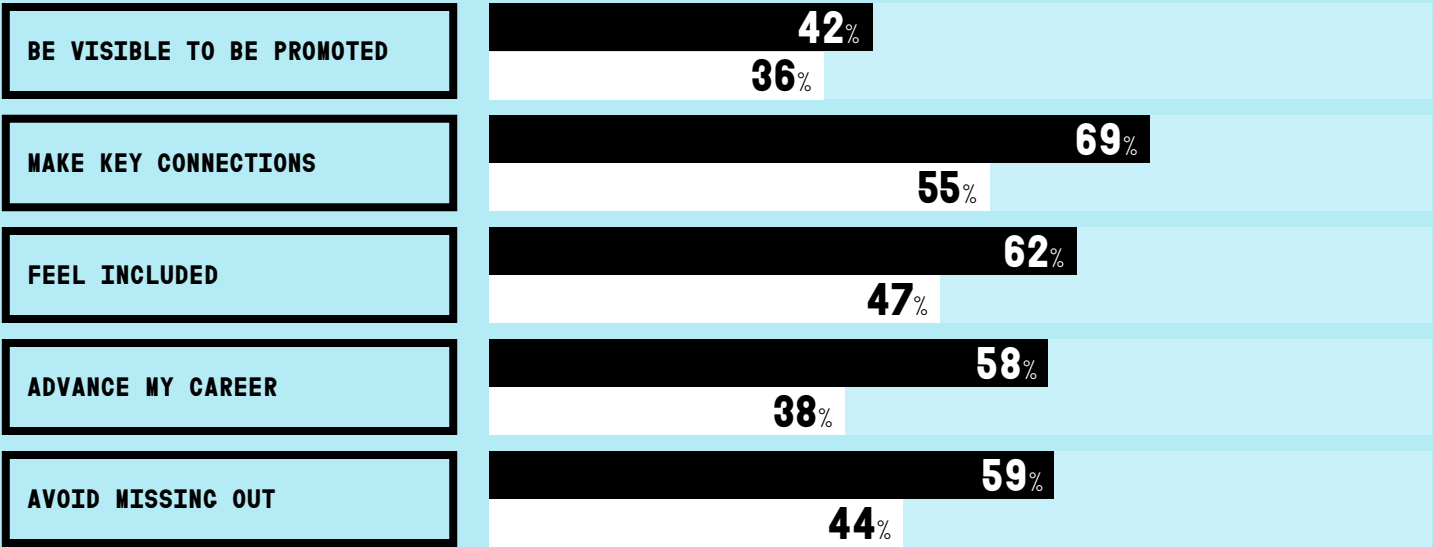
“It is important to emphasize that workplace strategy is never a one-size-fits-all solution. A cultural norm may work in one place but not another, especially depending on how leadership shows the way and normalizes the change.”

Source: Dialogue Blog by Elizabeth Baudler, “Three International Lessons for U.S. Workplace Well-being”

People who have worked in the office see it as more crucial to inclusion, career development, and FOMO.

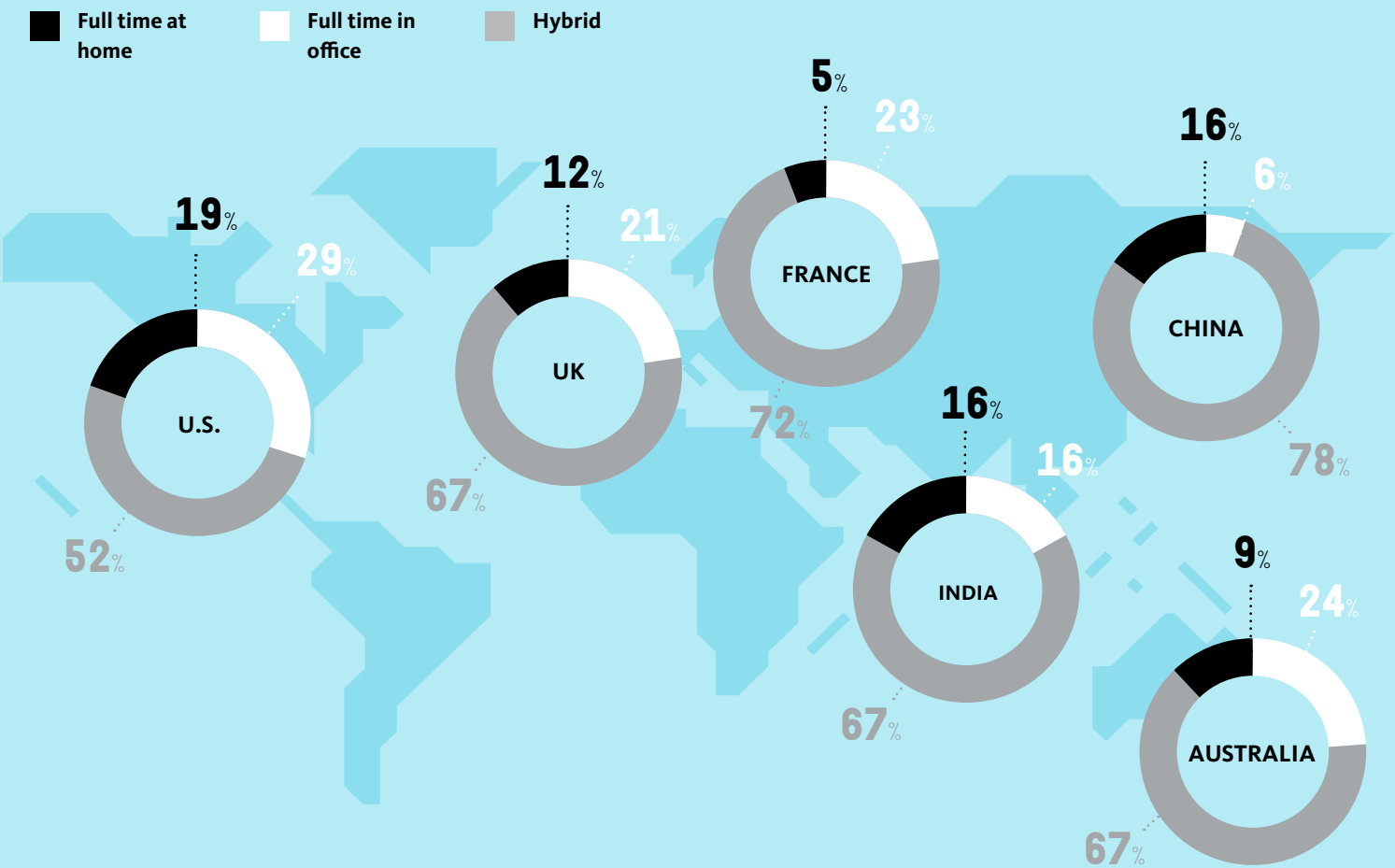
Source: U.S. Workplace Survey Fall 2021

IN THE FUTURE, I FEEL LIKE I NEED TO BE IN THE OFFICE TO...



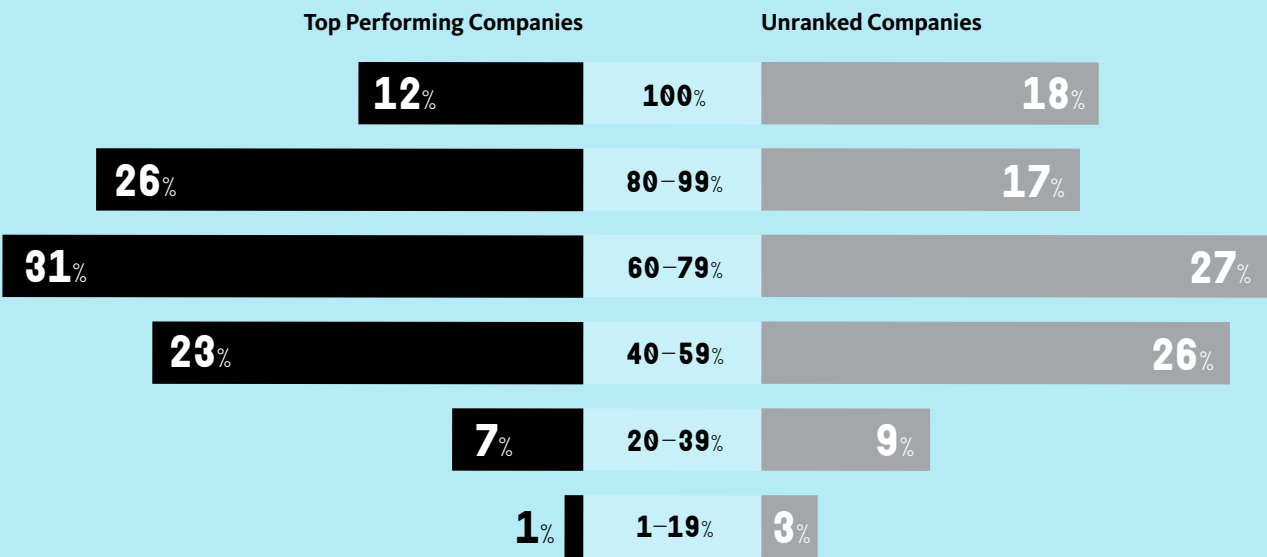
Hybrid WFH demand is varied and is leading to more nuanced future solutions.

Source: Gensler Global Workplace Surveys 2021



Top-performing companies are more likely to expect the majority of staff in the office concurrently in the future.

Source: Gensler U.S. Workplace Survey Summer 2021



TECHNOLOGY

OVERVIEW

The tech industry is facing scrutiny from all angles, while also undergoing big changes in work practices and resilience strategies. There's never been a more critical time to experiment with new work models and embrace initiatives that rebuild community and trust, both within their workplaces and with the world at large.



“As we look ahead and reexamine policies, there’s an urgent need to craft new routines that reinstate work/life boundaries.”

— Dialogue Blog by Brian Stromquist, “Meet the New 9-to-5: An Enhanced Approach to Hybrid Work”

TRENDS

01

Pilot projects and test labs will be the norm.

Pre-pandemic, pilot projects were occasionally used but often effective opportunities to temporarily test out different workplace models without investing in an office-wide makeover. Now, they’re becoming more widely used — and more permanent. They allow companies to explore new furniture systems, experiment with inclusive collaboration technologies, investigate modular architecture, and explore sustainable workplace strategies, such as low-carbon building materials.



FEATURED PROJECTS

A. Confidential Client,
San Francisco

B. Confidential Client,
Sunnyvale, Calif.

C. Confidential Client,
New York

02

Design will help tech become a better member of the community.

Meaningful design and inclusive programming will help the tech workplace focus on spaces that bring the community in. These public-facing space types — reception, all-hands, and culinary spaces — are opportunities for programming that establish tech as good neighbors and contributing members of the cities and suburbs in which they establish themselves.

03

Ongoing interest in health will push wellness amenities.

The pandemic has resulted in a heightened interest in wellness in the workplace, a trend which continues to increasingly focus on mental health, personal relationships, and self-care. The next generation of wellness amenities will stitch together quiet rooms, prayer and meditation rooms, and biophilic spaces to create a wellness ecosystem that provides opportunities for reflection and self-betterment in an uncertain and unpredictable world.



04

Workplace metrics graduate from basic algebra.

Instead of basing programming metrics on a single workplace population (such as in-office workers), the tech industry is taking a much more nuanced approach to developing program calculators that address both a variety of work populations and a variety of workplace postures. The new metrics not only address a shift in workplace demographics and patterns of attendance, but they also provide a new set of levers that allow for unprecedented experimentation and flexibility — critical given the unknowns both now and post-pandemic. When linked with utilization sensors and dashboards, they allow for agile, real-time adjustments of sharing ratios, furniture settings, and attendance policies.



LinkedIn, Omaha, Neb.

This technology company's campus creates an inviting, inclusive space for employees to connect with global teams. The dynamic, hybrid work environment supports autonomy and choice with places to focus, connect, and express team identity, such as focus zones, coworking neighborhoods, respite rooms, and unique food and beverage offerings.

“We’re seeing a lot of clients want to test a site or location that has a variety of people to simulate what a future work environment is going to be.”

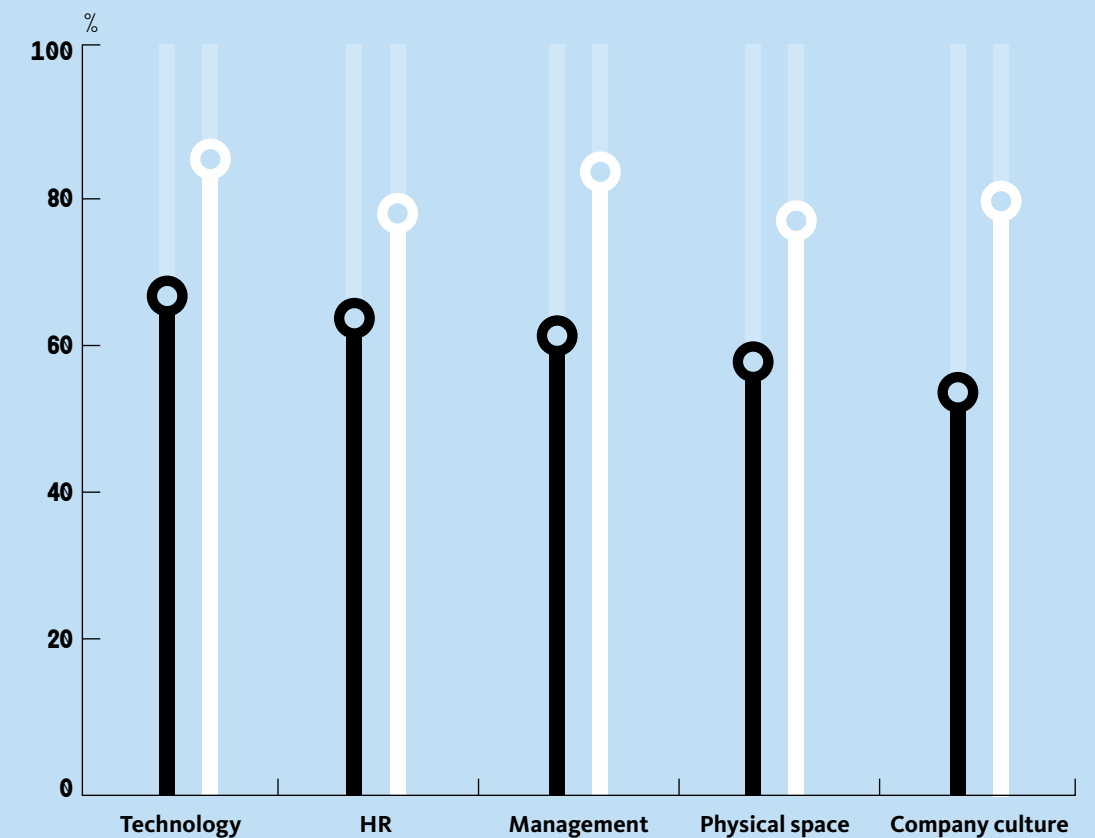
Source: Natalie Engels, global work sector leader

Top-performing companies are more prepared for a hybrid future.

Source: U.S. Workplace Survey Fall 2021

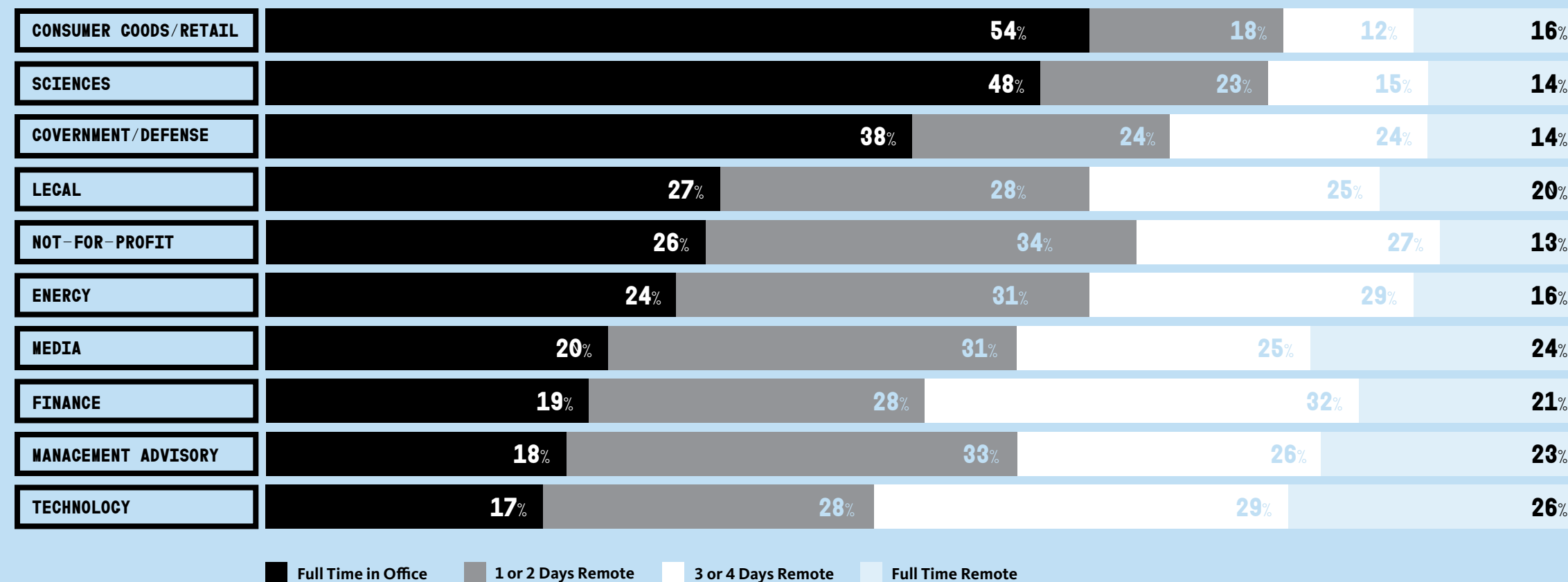
MY COMPANY IS PREPARED FOR HYBRID WORK IN THE FOLLOWING AREAS...

■ Average
■ Top-Performing Companies



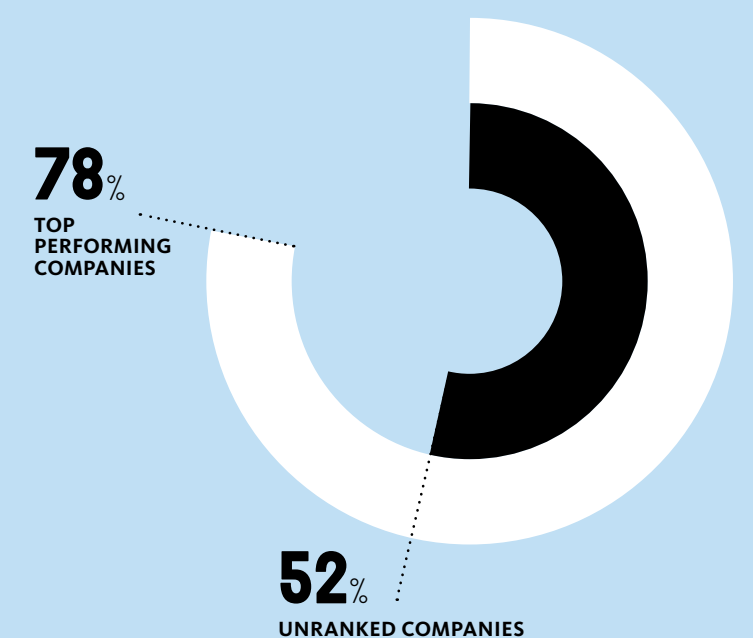
Technology, management advisory, and finance report the highest preference for hybrid or full-time remote work.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020 (Gensler Global Workplace Comparison)



Employees at top-performing companies feel that their companies are better prepared for hybrid work.

Source: U.S. Workplace Survey Fall 2021





THE FUTURE OF LIFESTYLE

CREATING AN AUTHENTIC COMMUNITY EXPERIENCE

Lifestyle brands have long taken pride in having a deep understanding of their consumers' needs and expectations. Today, that's as important as it's ever been, especially because of the momentous shifts the world has experienced in the past two years because of the impacts of COVID, climate change, and social equity.

For lifestyle brands to succeed and deliver better experiences, they must understand this new context and be better at anticipating what's next. At the top of the list for brands looking to attract and keep consumer's attention: community, belonging, and cultural relevancy.

Lifestyle companies will increasingly look to design spaces that can be flexible and multipurpose in order to serve multiple functions for the people and communities they're in.

META TRENDS

Here are five key metatrends impacting the lifestyle sector, and how design is responding:

01

BELONGING AND PLACEMAKING WILL BRING PEOPLE TOGETHER

Strategies that incorporate brand, culture, and place are a means to draw people from diverse backgrounds to come together. In an increasingly distributed world, brands and companies should cultivate a strong sense of belonging for everyone and meet them wherever they are.

02

AMENITIES THAT DRIVE COMMUNITY WILL BE HIGHLY VALUED

The amenities race is back, but the focal point has changed to prioritize space types that drive collaboration, community, and health and well-being — from gathering hubs and food & beverage services, to inclusive wellness spaces, such as prayer and meditation rooms.

03

FLEXIBILITY WILL BECOME A CRITICAL INVESTMENT

Flexible spaces that allow different uses and events are a huge asset. Developers should build in flexibility and sustainability so they can pivot and adapt to market needs — converting aging office stock to housing, or programming outdoor space. Spaces need to be agile to accommodate different groups of people.

04

DIGITAL AND PHYSICAL WILL BLEND TO DELIVER CONNECTED EXPERIENCES

Clients are clamoring for technology infrastructure and strategic planning to bring a much nimbler, equitable, and more connected ecosystem of experiences to their end users. Integrating technology on-site can provide more seamless, self-service, and personalized experiences.

05

PLACES FOR GATHERING WILL BECOME NEIGHBORHOOD CATALYSTS

Places that bring people together while making them feel safe — from museums to libraries — are becoming neighborhood catalysts and anchors for revitalization. Developers have an opportunity to reimagine single-use spaces as multiuse destinations that serve diverse communities.

BRAND DESIGN

OVERVIEW

Brands must do more than “just say the right thing” — they must deliver on their promise to the greater public. Companies and organizations are connecting with their audience through more outspoken public stances, and they’re being rewarded with increased customer loyalty and more passionate employees.

TRENDS

01

Brands must keep promises, not just make them.

During the protests of 2020, many companies pledged to confront social issues and contribute to solving them. Consumers and employees took notice — and they still haven’t forgotten. Such promises cannot be treated like just another marketing campaign; brands must follow through on their pledges to help fix longstanding inequities.

02

Organizations will be expected to show their impact.

Millennials and Gen Z expect companies to clearly demonstrate their public purpose, so brands are increasing transparency and showing measurable accomplishments to cultivate trust from the communities they serve. In addition, an organization’s facilities, company culture, and products must visibly champion issues of public concern, from climate change to social equity.



03

Engaged employees will define your brand purpose.

Brands are built from within. The culture of an organization, whether product or service-oriented, drives reputation. A strong culture strengthens a brand’s purpose and builds community inside and out (internally and with customers).



04

Brands will continue to find value in brick-and-mortar experiences.

Brick-and-mortar is not dead. Online spaces are great to reach a wider audience, but the most effective brands are using their digital presence as a segue to real-world experiences. Companies and organizations are maximizing brand engagement by designing their physical spaces to incorporate digital experiences.

FEATURED PROJECTS

A. Coca-Cola Northpoint Experience Tour Brand Design, Houston

B. The Ford Foundation Center for Social Justice, New York

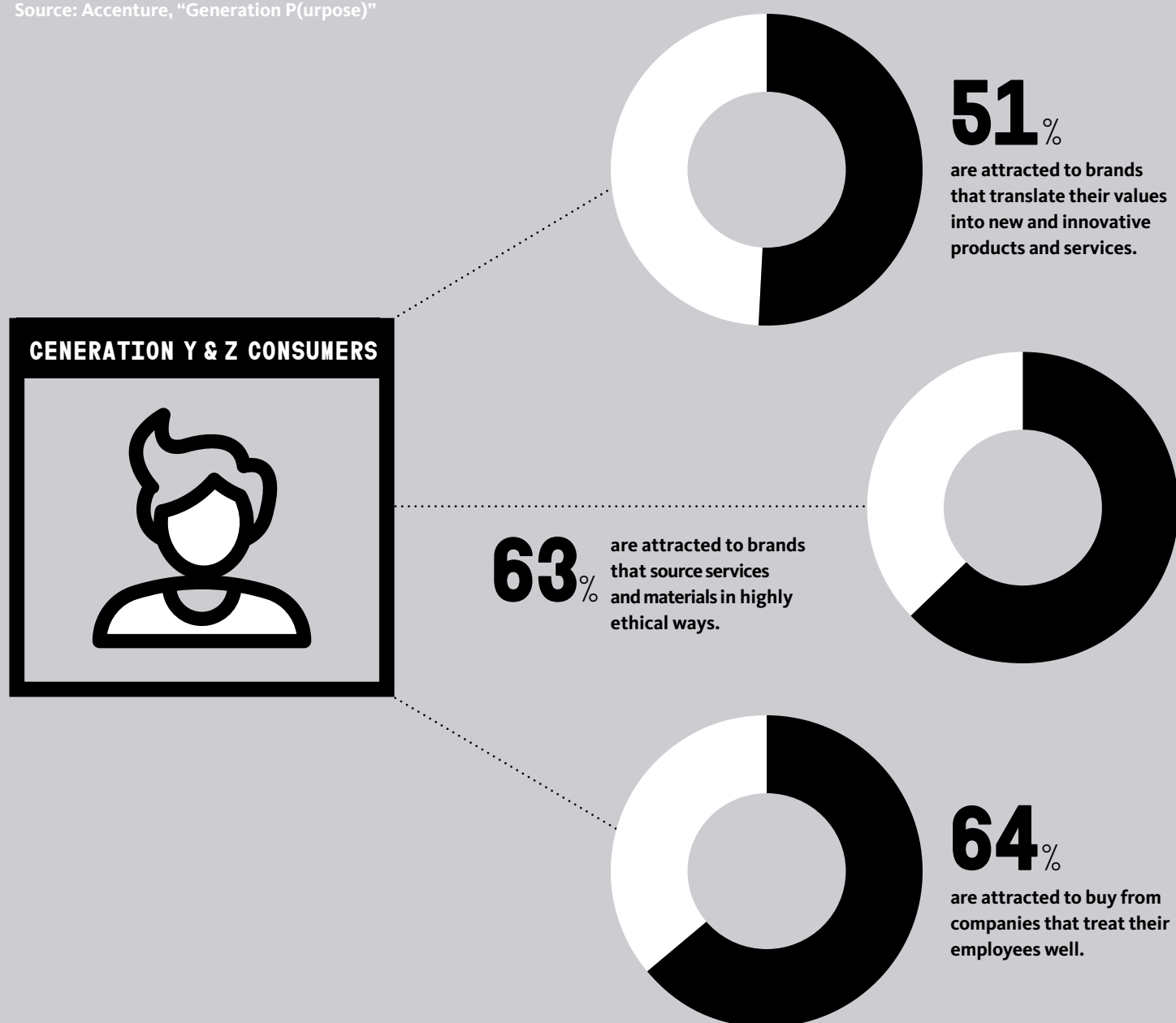
C. SFO Sustainability Campaign, San Francisco

D. Inspire Brands Headquarters, Atlanta



“A majority of consumers — and especially those in the Gen Y and Z cohorts — expect brands to be rooted in a greater purpose and companies to make their commitments known in multiple ways.”

Source: Accenture, “Generation P(urpose)”



Organizations with a distinctive culture have better business outcomes.

Source: PwC, “Organisational culture: It’s time to take action”

Survey respondents who say they have a distinctive culture were more likely than those who do not say they have a distinctive culture to see an increase in:



Brand trust drives growth.

Source: Edelman, “Trust, the New Brand Equity”

CONSUMERS ARE . . .



CULTURE & MUSEUMS

OVERVIEW

During the disruptions and shutdowns of the past two years, cultural institutions redesigned their physical spaces and overhauled their operations. Now that normal activities are slowly resuming, they plan to retain the best lessons learned during the pandemic to maximize attendance and reimagine their role in the community.

“Venues that curate unique experiences for an ever-widening group of users will increase repeat visits.”

— Dialogue Blog by Kai Westermark and Stella Donovan, “The Future of Live Music Venues”



TRENDS

01

Flexible design is an important consideration for future planning.

More diverse audiences mean cultural spaces need to be agile enough to accommodate different groups of people. Design plans for such institutions are keeping versatility in mind to provide experiences to visitors from widely varying backgrounds and incorporating them into the mission. Spatial flexibility is now a fundamental design principle.

FEATURED PROJECTS

A. LaGrange Art Museum Expansion, LaGrange, Ga.

B. Frisco Public Library, Frisco, Texas

C. Gallery 90220, Los Angeles



02

Outdoor spaces are here to stay.

Most institutions opened outdoor spaces during the pandemic out of necessity. Now, they're here to stay after organizations realized the benefits. In the coming years, venues will renovate outside areas to offer a wider range of attractions and accommodations, essentially becoming extensions of their main facilities. This also helps “future-proof” their operations in the event of further disruptions.

03

Audiences will continue to get more diverse.

Cultural institutions realize that their mission must include visitors who traditionally have not been on their radar. Museums are designing new spaces dedicated to more diverse communities and appointing executive staff who can sincerely cater to overlooked audiences.





04

Virtual exhibits will remain a valuable part of the program.

Greater relevance is fueled by a greater audience — whether in-person or online. Many venues discovered that virtual spaces were another pandemic pivot that grew their visitor base beyond the usual boundaries. Now, cultural pillars like the Louvre are erasing geographic limits by opening their entire collections to anyone with an Internet connection.

FEATURED PROJECT

D & E. International Center of Photography (ICP), New York
artwork featured: (D) James Coupe, “Warriors: Sixty Thousand Soldiers,” March 20, 2020 | (E) Tyler Mitchell, “Laundry Line,” March 20, 2020

STRATEGIES & RESEARCH

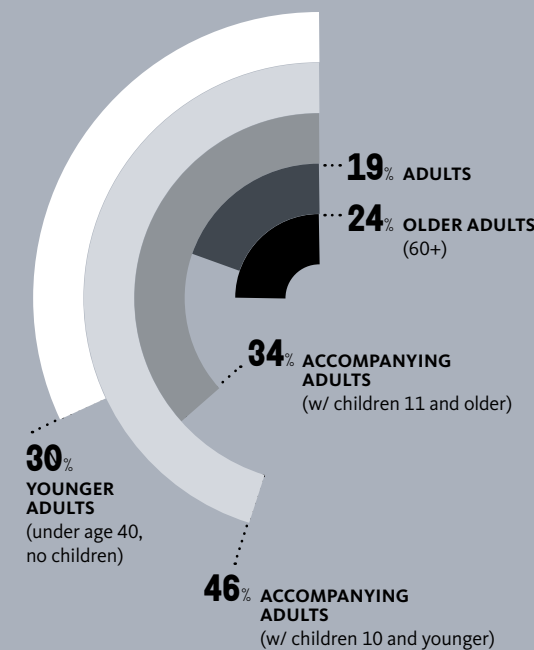
“The reality is that people who visit museums come from lots of different demographic backgrounds. And more casual visitors to museums are more diverse across different demographic criteria than more frequent museum visitors.”

Source: Gensler Museums Experience IndexSM

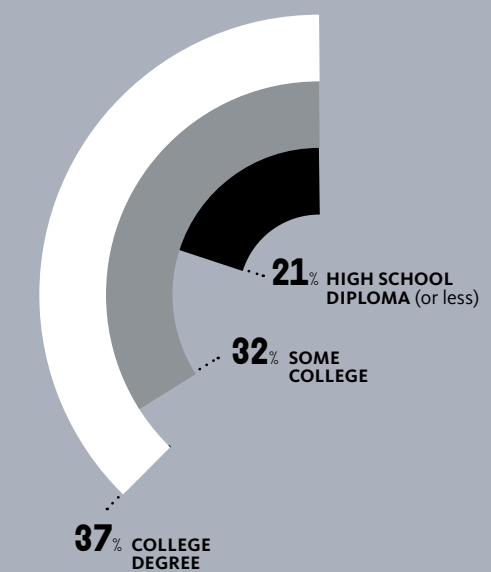
A closer look at museum visitors

Source: Wilkening Consulting

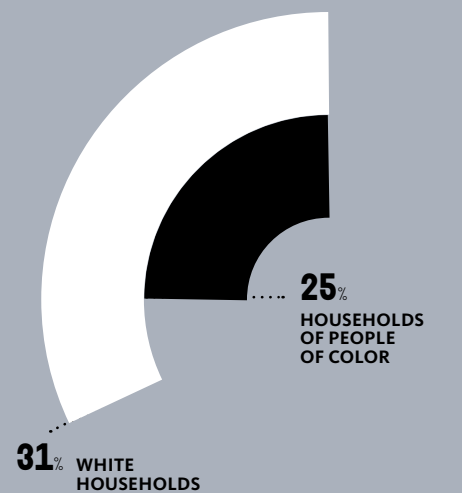
AGE



EDUCATION



RACE & ETHNICITY





Newark Community Museum of Social Justice, Newark, N.J.

The community-driven museum highlights Newark's history of activism against racial injustice and provides a focus for community aspirations. Gensler worked with the City of Newark to convert the 1st Police Precinct, the flashpoint of the 1967 Newark Rebellion, into a community museum dedicated to learning, healing, storytelling, and an equitable future.

DIGITAL EXPERIENCE DESIGN

OVERVIEW

Designing the most sought-after experiences for people in built environments increasingly means integrating digital experiences into our physical spaces. The more tech-savvy people become, the more they will expect the places they visit to accommodate their connected needs. And as work becomes more hybrid and our workplaces evolve, companies will need thoughtful digital design to mix virtual and in-person experiences.

TRENDS

01

Customers will want more data transparency.

Customers love personalized experiences, but they have grown more wary of how their personal data can be misused, and this trend will only continue. Businesses should continue to emphasize data security, while drafting clearer policies for how customers' personal information is collected, protected, and applied in their interactions.

02

The “connected commute” will become part of the new workplace experience.

As offices reopen, it will be common for employees to commute irregularly and at off-hours. Commuters will also rely more on transit apps to provide real-time information on schedules, traffic, and transportation availability. Cities and developers will need to leverage such digital solutions as they reimagine the commute experience and plan for future innovations in travel-related technology.



A



B

03

Mobility design has come to workspaces.

As employees routinely split time between home and the office, companies are prioritizing mobility in their workspace designs. Mobile integration is becoming part of the master planning process rather than retrofitting layouts after the fact. The result is a more agile work environment and a more seamless experience for employees.

04

The tech ecosystem will continue to drive design decisions in the workplace.

Companies are no longer focused on single-point workplace technology, like hot desking or conference room booking systems. Instead, they're adopting more holistic tech ecosystems to unify employees under a common connected experience. This trend will continue to grow as businesses become more departmentally and geographically diverse.

FEATURED PROJECTS

A. Confidential
Client

B. 88 Kearny,
San Francisco



AT&T Headquarters Lobby at the AT&T Discovery District, Dallas

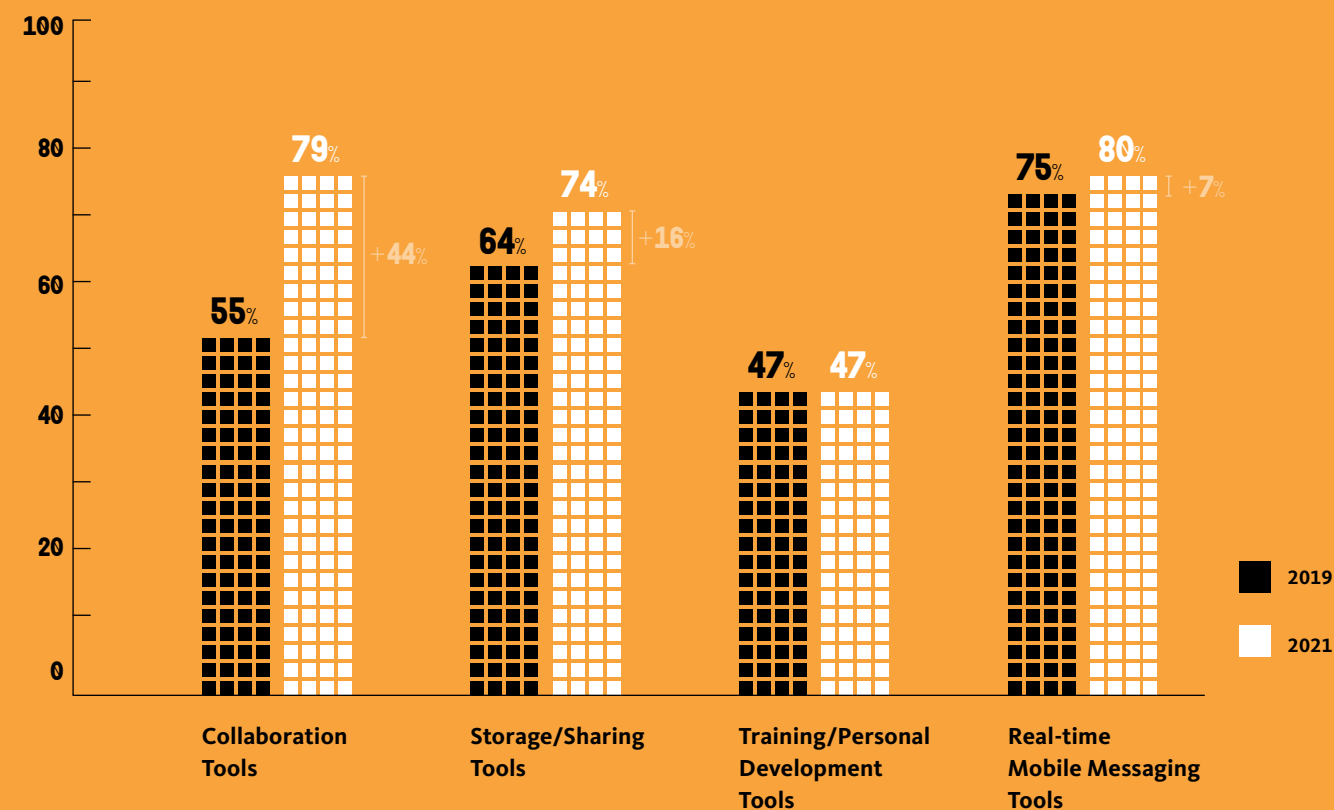
The AT&T headquarters lobby creates an immersive visual and audio experience for employees and the public. Serving as a gateway to the AT&T Discovery District, the 20,000-square-foot lobby, visible through a 30-foot glass façade with custom-created content on display, dissolves the boundary between architecture and media — unifying the campus.

“While having a digital touchpoint might help retailers meet minimum consumer expectations, they should look for additional capabilities to differentiate themselves as customer acquisition costs rise.”

Source: Deloitte, “2021 Retail Industry Outlook”

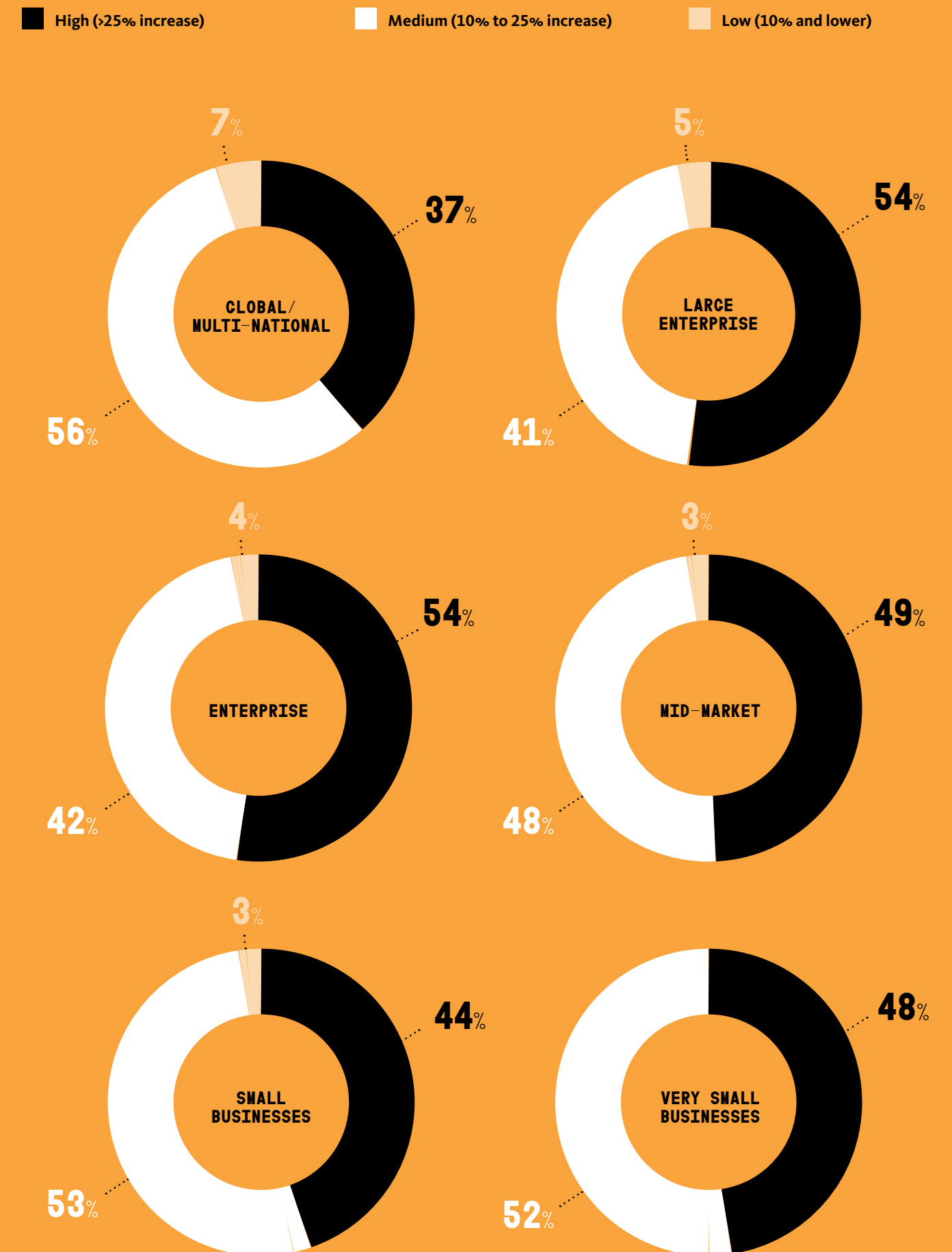
Digital workplace technologies will be essential for enabling innovation in a hybrid workforce.

Source: Gartner, “Gartner Survey Reveals a 44% Rise in Workers’ Use of Collaboration Tools Since 2019”



From 2020-2025, how much do you expect your customer data platform (CDP) budget to grow?

Source: The Segment (Twilio), “The CDP Report 2021: A new era for Customer Data Platforms”



HOSPITALITY

OVERVIEW

The hospitality sector is notoriously slow at adopting new changes. Nevertheless, the pandemic provided a long-overdue catalyst for hotels to reimagine the experiences they provide and the roles they play in their communities. As the industry recalibrates, versatile layouts and innovative design will be key to long-term sustainability.

TRENDS

01

Remote work is attracting new guests and driving a new demand.

Many employers are implementing flexible work policies as a result of the pandemic. Now, hotels are seeing a rise in guests with travel-friendly hybrid work arrangements. As more people enjoy the perks of remote work, they will book extended trips beyond what traditionally may have been a quick weekend getaway.

02

Hybrid conventions will be the new norm.

As business travel resumes, hotels are reimagining their meeting rooms and multipurpose areas. Instead of indoor exhibition halls, hotels will host “hybrid conventions” with more virtual connectivity and seamless integration with outdoor areas. Flexibility will continue to be essential when designing alternate options within existing spaces to maximize usage and revenue.



03

Tech-savvy travelers will drive new types of personalized experiences.

Hotels have started to integrate technology into their designs to future-proof their establishments. By offering a hybrid “physical-digital” experience, hotels will be able to cultivate guest loyalty with thoughtfully personalized service. New technology will also help free up physical spaces for renovation as more functions, such as concierge services and wayfinding, are offloaded to virtual platforms.

04

The hospitality industry will cover more types of needs.

Multiuse hospitality developments are on the rise to accommodate a wider array of visitors. The sector is looking to incorporate coworking spaces, extended-stay hotels, and branded residences to better serve the evolving needs of guests and increase profitability.



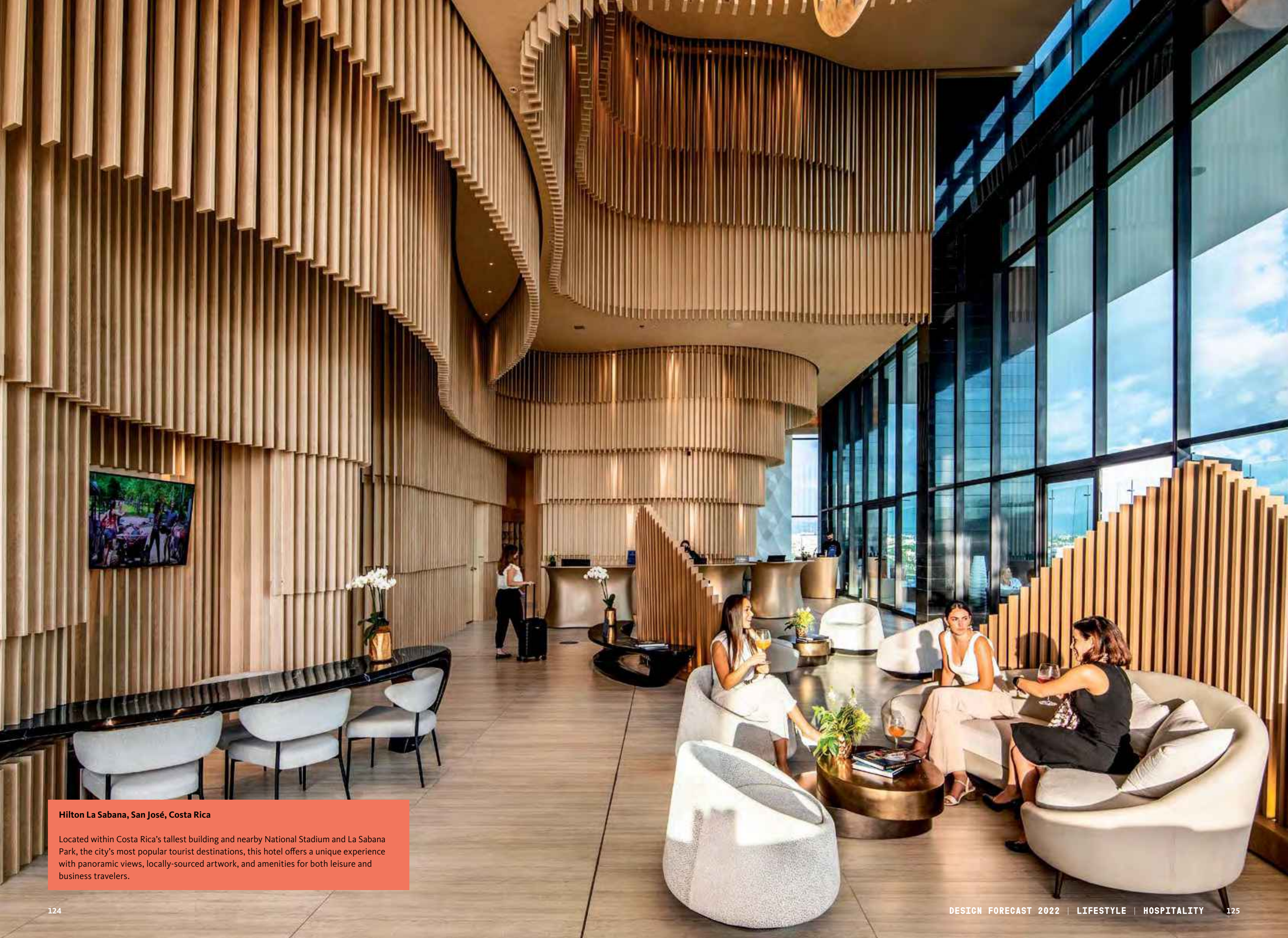
FEATURED PROJECTS

A. citizenM Seattle South
Lake Union, Seattle

B. Cocoa Beach Westin,
Cocoa Beach, Fla.

C. Crystal Palace
Lobby, The Londoner
Macao, Macao

D. Hyatt House
Kanazawa, Ishikawa,
Japan



Hilton La Sabana, San José, Costa Rica

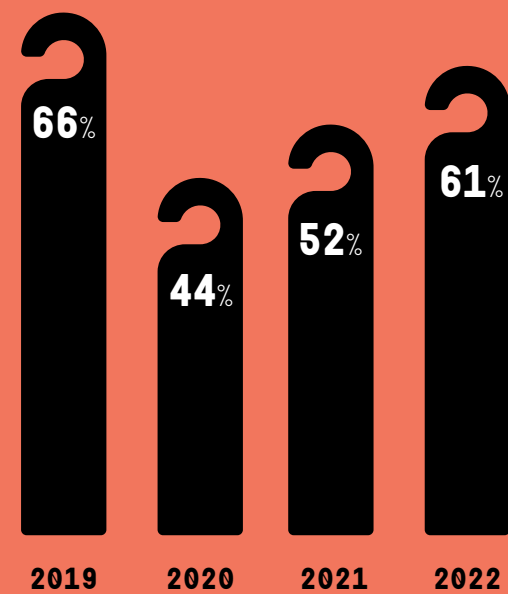
Located within Costa Rica's tallest building and nearby National Stadium and La Sabana Park, the city's most popular tourist destinations, this hotel offers a unique experience with panoramic views, locally-sourced artwork, and amenities for both leisure and business travelers.

“Many travelers are ready to return to shared spaces and common areas — but they still also want access to fresh air.”

Source: Gensler U.S. Hospitality Pulse Survey 2021

Hotel Room Occupancy

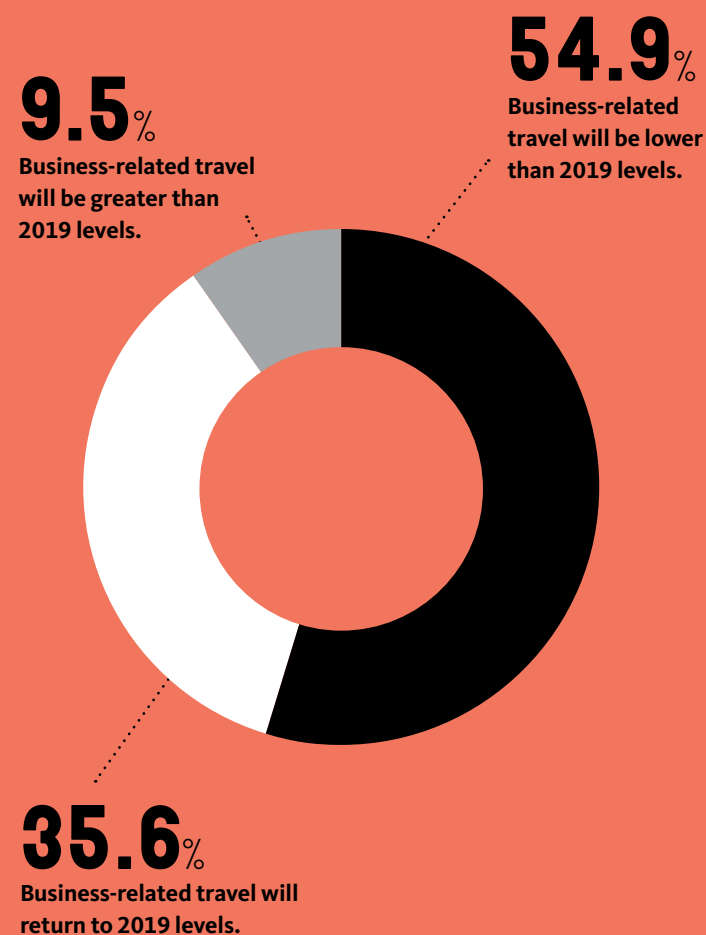
Source: American Hotel & Lodging Association State of the Hotel Industry 2021



In 2021, hotel occupancy is projected to average just 52%, compared to 66% in 2019.

People don't expect business travel to bounce all the way back to 2019 levels.

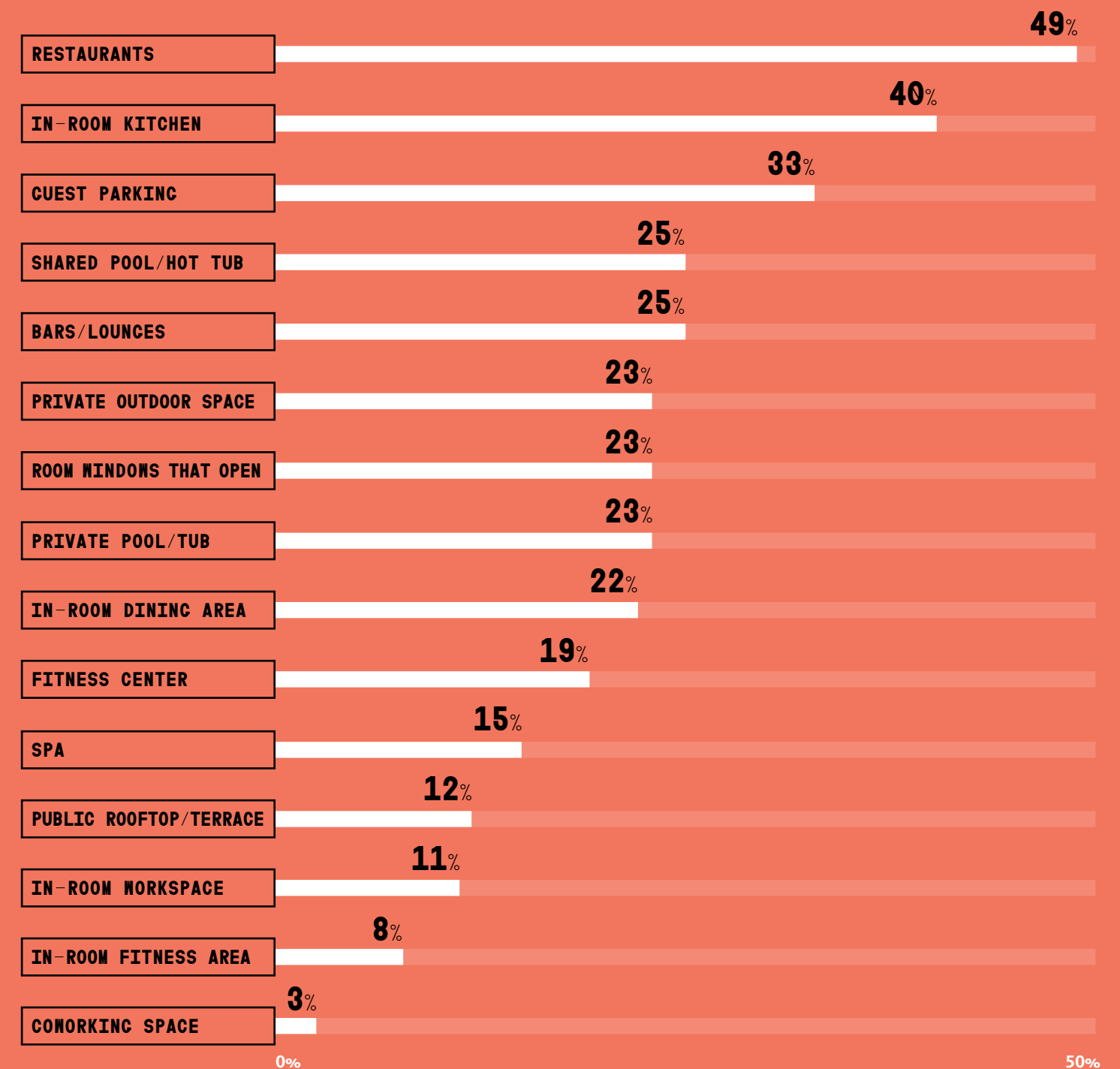
Source: PwC and ULI, Emerging Trends in Real Estate 2022



Restaurants and shared spaces are among top amenities that travelers booking hotels are looking for.

Source: Gensler U.S. Hospitality Pulse Survey 2021

What sorts of spaces, features, and facilities were most important to you when choosing your upcoming accommodations?



Total Exceeds 100% because respondents could select up to 5 options.

MIXED USE & RETAIL CENTERS

OVERVIEW

Mixed-use developers have an increasingly keen understanding of how their developments contribute to and benefit the overall community. Residents, guests, and customers are now conscious of how their own neighborhoods affect their health and happiness. Mixed-use developers are following suit with the perks and flexibility needed to best accommodate people and businesses alike.

A



FEATURED PROJECTS

A. The Hub on Causeway, Boston

B. Fifth + Broadway, Nashville, Tenn.

C. Toyota Music Factory, Irving, Texas

TRENDS

01

Open space has become a necessary asset.

The pandemic forced retailers to reprioritize open space as an essential part of their layouts. Open space allowed businesses to stay running during the pandemic shutdowns. Now it's a way to future-proof for potential disruptions since it readily can be adapted for new uses. Communities have come to value open areas for their mixed-use capabilities and seamless integration into the public ecosystem.

02

Biophilic design principles are trending up.

Biophilic design principles are increasingly driving design plans because of their prioritization of public health and sustainability. Integrated green spaces encourage better mental health and well-being by promoting more human reconnection with nature, and they can turn urban industrial spaces into ecologically beneficial areas. The result is a design that is better received by the public and the natural environment.

03

Communities increasingly want 20-minute neighborhoods.

Mixed-use spaces are crucial for achieving "20-minute neighborhoods," a concept in which every commercial, residential, and institutional need is within a 20-minute walk or bike ride of each other. Mixed-use developments help facilitate walkability by reimagining single-use residential and commercial blocks as multiuse spaces that cater to a variety of needs and experiences.

B



C



04

Micromobility will continue to displace car traffic.

New mixed-use projects are being designed with micromobility in mind from the start, specifically favoring hop-on shuttles, electric scooters, and bike shares. Many cities now require new developments to be sustainable or net zero, so reducing car traffic is an easy way to meet such mandates. As a result, street space is being reclaimed for parks, outdoor dining, and a variety of uses besides driving and parking.



The Central Park, Phoenix

This catalytic mixed-use development offers a rich experience for tenants, residents, and visitors, giving new life to Phoenix's mid-town market. The integrated live, work, and play community includes office, hotel, residential, and retail space, as well as an outdoor plaza. The design fuses nature, culture, and leisure to produce a distinct sense of place.

5



The Highlight at Houston Center, Houston

Principles for retail center repositioning

With the massive transformation of real estate spurred by the pandemic, retail centers will emerge as one of the most valuable asset classes in a post-pandemic landscape, as building owners, investors, and developers look to reposition aging, vacant, or underutilized properties — converting them into vibrant, mixed-use developments that will unlock latent value and meet consumers' rapidly changing demands.

Here are five principles to reposition retail centers for a more resilient future:

1 MODIFY THE ANCHORS

The traditional anchors are changing. Experience, culture, and open space are the new draws. These aspects are increasingly important in a post-COVID landscape as people are seeking to reconnect with each other and their communities. The new anchors are communal and healthy: entertainment venues, elevated food and beverage, wellness facilities, and large outdoor social spaces.

4 ENERGIZE THE SOFT SPOTS

Analyze the existing plan to prioritize the adjustment of "soft spots," or challenged retail spaces, and reexamine how to reposition them from a program perspective to potentially generate new revenue streams. Whether spaces in isolated interior areas or on levels above grade, retail that is set up to fail should be prioritized for change of use or reconfiguration.

2 MIX IT UP

Resilient developments are diverse in use, providing an economic buffer, bringing a new diversity of users, and varied experiences to the centers. Educational institutions, medical offices, coworking spaces, assisted living communities, and fitness studios are all examples of new users looking for space in distributed suburban locations close to large residential populations.

5 ACTIVATE LANDSCAPES

Open spaces are now an integral part of the value proposition for both new and repositioned buildings. Actively programmed, healthy, and equitable outdoor environments are crucial across all types of developments.

3 REIMAGINE MOBILITY

Seek to connect existing networks and accommodate increases in ride share and other forms of transportation and micro-mobility, including bicycles, scooters, and the critical last mile for transportation. As our communities evolve to rely less on automobile ownership, mixed-use environments must look to the future. In the short term, sites must accommodate more ride-share vehicles, both in queuing and incentivizing.

STRATEGIES & RESEARCH

Places that support a variety of activities and behaviors yield better experiences overall. The best environments support a diversity of activities and experiences.

Source: Gensler Residential Experience Index 2021

Features of a 20-Minute Neighborhood

Source: The Conversation



RESIDENTIAL

OVERVIEW

The past two years have reemphasized the central role of the home in people's lives. Residential amenities are not as important as they used to be. Instead, people are willing to forgo the extras for the right balance of affordability, quality, and space in their units. In the coming months and years, there will also be a big push to identify and design for middle-income residents in the form of workforce housing.

TRENDS

01

In-unit experience now matters more than outside amenities.

Developers traditionally have enticed tenants with building amenities and neighborhood attractions. However, residents now prioritize the in-unit experience more than outside perks. Specifically, residents value well-designed units with features like natural light, storage space, and in-unit laundry over communal amenities like multipurpose spaces, children's play areas, or proximity to local landmarks.

02

Well-designed space is better than more space.

Residents like space, but they're willing to trade it for better unit design — especially if the design retains a feeling of more space. As a result, developers are finding new ways to optimize living space within a finite area. The most effective ways to accomplish this are unit designs that offer more storage, better layouts, and reduced noise levels.

“In pursuit of more affordable housing solutions, people are open to making tradeoffs when it comes to building amenities.”

— Gensler Residential Experience Index 2021

FEATURED PROJECTS

A. Mira, San Antonio

B & C. Central Park House, Burnaby, Canada



B



03

Developers will continue to balance amenities with affordability.

No matter their income, people want more affordable ways to live. A majority of residents across nine global markets say they're willing to make trade-offs with building amenities for lower rent. Consequently, developers are seeing higher levels of tenant satisfaction and retention by designing experiences that thoughtfully balance amenities and services with residents' own priorities.

04

The best residential experience will be one that prioritizes flexibility.

Residents' tastes are not universal. Every tenant likes to personalize their space for their own lives, and developers are responding with more flexible designs. It will be crucial for developers to understand their audience and tailor designs to provide a more fulfilling residential experience. User-centric homes can better accommodate the diverse lifestyles, interests, and long-term expectations of residents.

C



3



Aspire Post Oak, Houston

Insights driving the future of residential design

The pandemic has fundamentally altered residential experiences. Remote work creates new needs for residential units, and rising housing costs forces compromise on what to prioritize. Among the factors impacting people's decisions about where to live, what matters most? Gensler's Residential Experience Index unpacks this question, investigating residents' housing experiences and asking what they value for the future.

Here are three insights driving the future of residential design:

1 AFFORDABILITY IS THE PRIMARY DRIVER FOR RESIDENTS

Affordability fundamentally permeates residents' housing decisions. It is the top driver behind people's housing decisions and the home they will choose next. While some spaces are more important to residents, many would be willing to sacrifice extraneous amenities and features in exchange for a reduction in their housing costs.

2 DESIGN HAS AN ENORMOUS IMPACT ON SATISFACTION, ESPECIALLY WITHIN THE UNIT

After affordability, a home's design quality is the top priority. Recently, residential design has concentrated innovation on shared spaces and amenities, but the largest opportunity lies within the unit design and experience — driving 53% of overall home satisfaction.

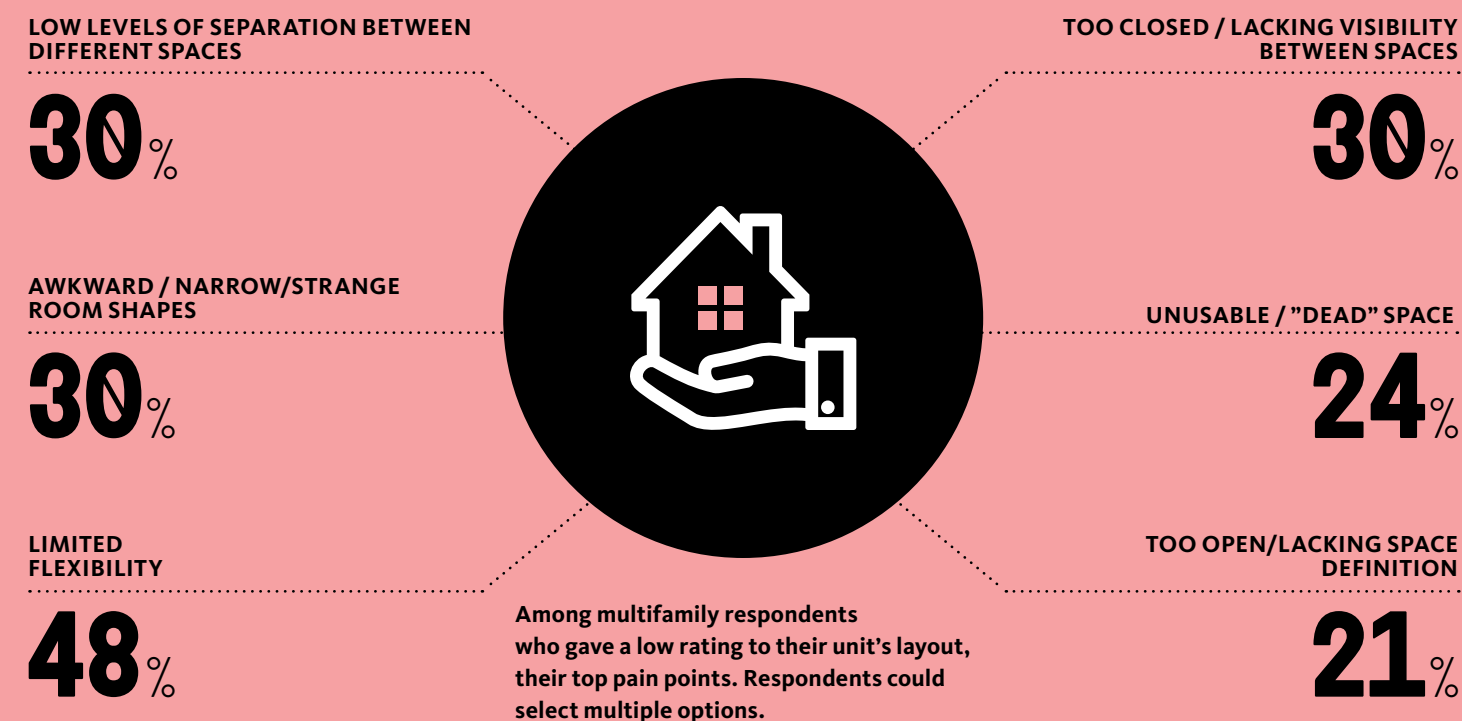
3 UNITS NEED TO SUPPORT WELL-BEING — AND WORKING FROM HOME

In creating homes that support well-being, developers will also support key needs of remote workers. Homes that support well-being are about more than just integrating the outdoors — those with higher unit safety and diverse establishments nearby are also considered optimal.

STRATEGIES & RESEARCH

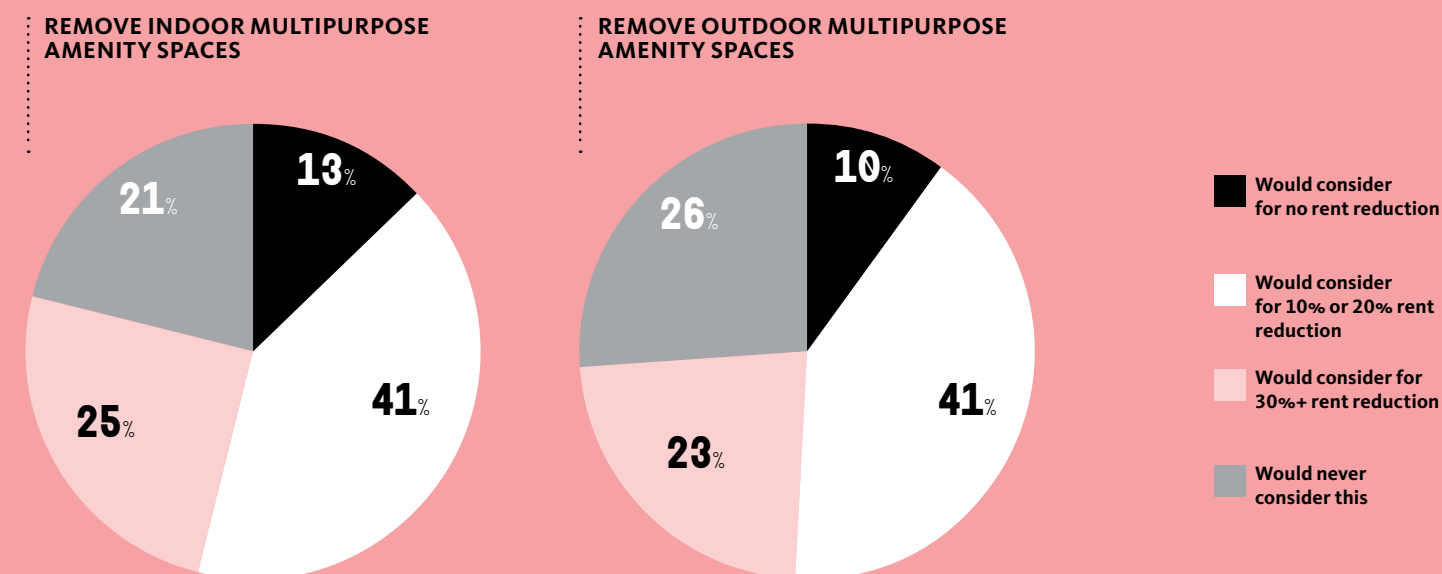
The design of residential units is ripe for innovation. Creative unit layouts could improve the resident experience when increased footprints are not feasible or affordable.

Source: Gensler Residential Experience Index 2021



The perceived value of common amenity areas is debatable.

Source: Gensler Residential Experience Index 2021



Among multifamily renter respondents, their willingness to consider removing amenity spaces they currently have in exchange for a rent reduction, calculated based on their disclosed monthly rent.

RETAIL

OVERVIEW

The retail industry has undergone profound upheavals over the past couple years, but many brands are emerging stronger than ever. Successful retail brands are embracing new opportunities to connect with their customers. Now, retailers are more aware of the need to readily adapt to new changes, and the most successful ones are always thinking of ways to improve their consumer experience through new mediums and methods of engagement.

TRENDS

01

New types of agility will be essential.

Retailers are accustomed to regularly changing layouts between seasons, holidays, or even weekly promotions. The pandemic reiterated how agility needs to be extended to new challenges like inflation, workforce shifts, or supply chain disruptions. The most effective retailers will design agility into their spaces through a test and learn process. The most effective designs can scale up quickly.



02

Retailers will provide shopping experiences in new worlds.

As new audiences grow in online video games and the still-nascent “metaverse,” retailers will design their in-store experience to meet customers in whichever “world” they live. This is more than an online shop — it’s a blending of physical retail with new, immersive virtual spaces to engage customers in ways that haven’t yet been fully imagined.

03

New types of connectivity will create a new baseline.

Customers expect retailers to be communicative and responsive through multiple channels. Stores will implement a new baseline of connectivity with social shopping, WhatsApp direct-message shopping, and livestreamed personal shopping as available services from their physical locations. This will expand retailers’ potential audiences in terms of geography and accessibility.

04

A variety of space types will cater to many different types of people.

Retailers are increasingly managing a wider portfolio of typologies to better serve consumers across a variety of needs. Each space has its own specific purpose, duration, and activations to offer a more “right-sized” and tailored experience. In the coming years, different typologies will range anywhere, from physical to mobile to virtual. The aim is to create an environment that is best suited for any given target audience.

“The world of retail has undergone a massive acceleration, and the shifts are unlikely to slow down.... Retailers that can adopt agile ways of working and fast decision-making will have better odds of thriving in the future.”

— McKinsey, “Why Retail Outperformers Are Pulling Ahead”

FEATURED PROJECTS

A. Heritage Bank,
Castle Hill, Australia

B. JBL Store,
New York



TOCA Social, London

Branded socializing experiences will begin to take over as the new anchors, as illustrated in this concept for TOCA Social. Gensler partnered with TOCA Social to create an interactive leisure and hospitality destination that invites visitors to experience the journey of a pro footballer through multisensory spaces immersed in the color and energy of the game.





FEATURED PROJECTS

C. Weltmeister West
Nanjing Road Experience
Center, Shanghai

D. Studio Three,
Chicago

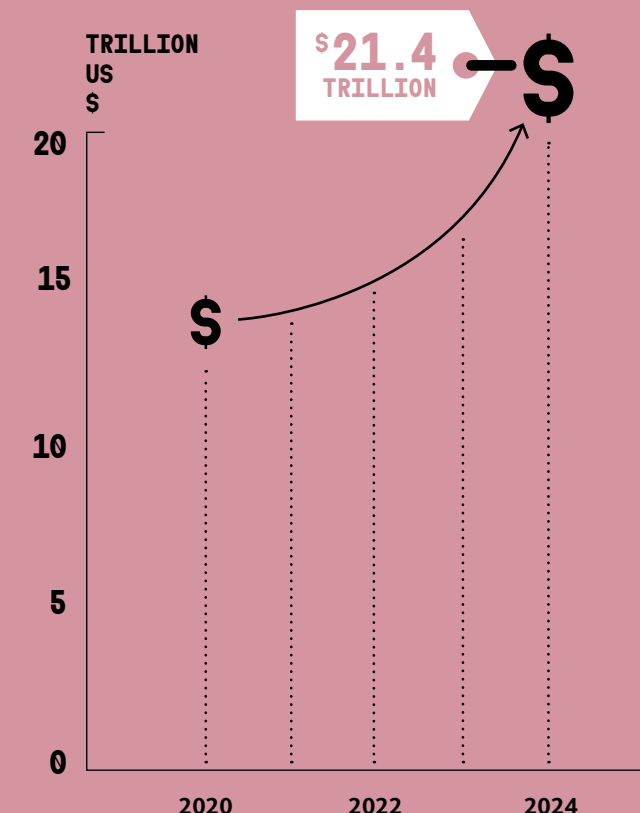
STRATEGIES & RESEARCH

“E-commerce is booming, but physical stores remain important. Forward-thinking companies have been using their stores to educate consumers, reinforce their brands’ positioning, and support e-commerce sales.”

Source: McKinsey, “Into the Fast Lane: How to Master the Omnichannel Supply Chain”

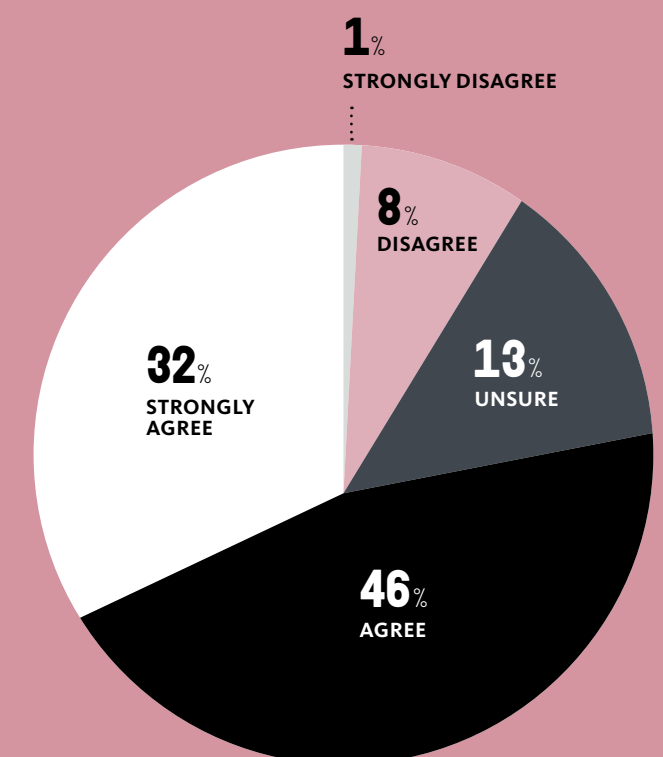
In-store sales are expected to reach \$21.4 trillion globally by 2024.

Source: Statista



COVID-19 accelerated the shakeout among retailers that likely would have occurred over the next few years anyway.

Source: PwC and ULI, Emerging Trends in Real Estate 2022



SPORTS

TRENDS

01

The demand for unique experiences for a variety of fans will continue.

While a game or event may get fans to the venue, a range of event-day experiences keeps them coming back. Our core value for design centers around creating experiences for everyone who walks into the building. We achieve this by differentiating places in the building for a variety of premium product offerings — from clubs, to suites, to sponsor zones — that appeal to every level of guest.



02

Design for sports and entertainment venues must be informed by data.

The sports and entertainment industry is constantly evolving. Curating a more impactful design must be based in data-driven research. Research informs every facility we design — from player recovery technology, to food service automation, to financial models for premium seating products.

FEATURED PROJECTS

A. Chase Center, San Francisco

B. University of Texas at Austin, Moody Center Basketball Arena, Austin

OVERVIEW

Experience is at the forefront of the business of sports. To that end, teams and organizations are in need of designs and renovations that can incorporate the latest changes in technology and social dynamics. Spectators, sponsors, athletes, and a stadium's surrounding community want meaningful and sustainable destinations.

“Sports is about bringing people together: bringing people together on the field, that teamwork and that chemistry, and bringing the fan base together in and around a venue, the energy and excitement that creates.”

— Jonathan Emmett, design director, Gensler Sports

03

The return of live music presents an opportunity to deliver diverse, immersive experiences.

The absence of live music venues over past couple years has driven an immediate demand for fans to reclaim that essential experience. Our research suggests that venues providing expanded offerings, diverse seating options, immersive experiences, and advanced technology will have the most opportunity going forward. Venues that incorporate outdoor space will build in resilience and create opportunities for flexibility in the event of future disruptions.





“Today, the emphasis on pure physical training is transitioning into a more balanced approach that includes a player’s mental health and well-being.”

— Jonalyn Abraham, project architect, Gensler Sports

04

Training facilities and performance centers will need dedicated, healthy spaces.

The sports industry has shifted beyond pure training facilities to establish performance centers that take a more holistic approach to achieving “total performance” through dedicated spaces that support conditioning, treatment, recovery, and rehabilitation. Healthy environments take advantage of indoor-outdoor spaces and flexible environments to promote wellness, and balance individual and team success.



FEATURED PROJECTS

C. Los Angeles Chargers Training Facility, El Segundo, Calif.

D. Austin FC St. David's Performance Center, Austin

E. Milwaukee Bucks Entertainment Block, Milwaukee



05

There is an ongoing need for public-private partnerships and sports-anchored districts.

From campuses to cities, sports and entertainment venues have become catalysts for economic and urban renewal. Sports- and entertainment-anchored districts have greater success at reactivating and engaging local communities. Public universities are relying more on public-private partnerships to expedite and achieve essential capital programs in the face of limited public funding.



FEATURED PROJECT

F & G. Q2 Stadium,
Austin

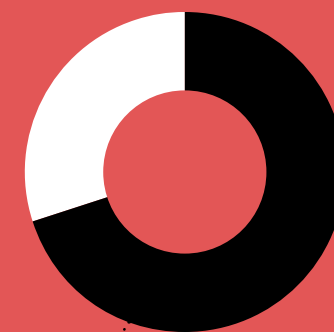
STRATEGIES & RESEARCH

“More than 60% of fans say a great ‘year-round experience’ would make them more likely to be more engaged with the team in the coming season, and 55% say it would make them more likely to purchase a ticket in the future.”

Source: Deloitte, "Sports marketing strategies to stay connected year-round"

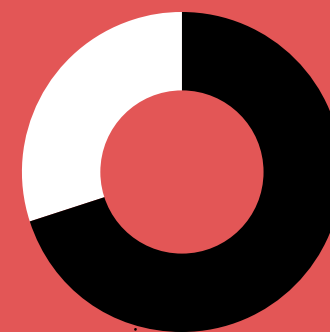
Sports fans want brands and rights holders to show support.

Source: World Economic Forum, "How the power of sport can bring us together and drive social justice"



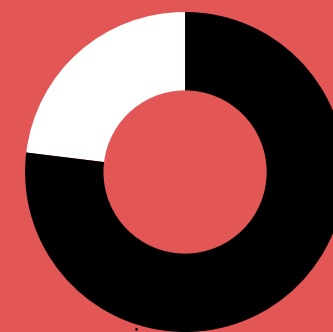
70%

indicate teams and leagues should support athlete protests and initiatives



70%

believe teams and leagues should create marketing campaigns to support diversity



77%

believe brands are more powerful when they partner with sports organizations to help influence social change



64%

have an increased interest in brands that join the fight against racial inequality



THE FUTURE OF HEALTH

DESIGNING A HEALTHIER HUMAN EXPERIENCE

Awareness of how the built environment impacts human health is at an all-time high. As humanity continues to face several formidable challenges directly related to health, this awareness gives us hope. Environments can be a tool with which to make people healthier, a fact that forward-thinking healthcare providers, science organizations, and mission-driven companies are recognizing.

In the coming years, wellness practices will grow to become the touchstones of successful cultures. Investment in resilient solutions will spike as organizations look to shore up operations against external shocks and accommodate new technologies to future-proof their operations. As digital and physical worlds blend, it will be crucial for design to emphasize our common humanity and shared purpose.

The context for these trends is one unignorable demographic shift: the aging of the population that will soon place unprecedented demands on all sectors to support a healthy and intergenerational future.

META TRENDS

Here are five key metatrends impacting the health sector, and how design is responding:

01

DESIGN FOR RESILIENCE AND DESIGN THAT ELEVATES HUMAN HEALTH ARE ONE AND THE SAME

Increases in extreme weather events due to climate change are already straining healthcare systems. Facilities must integrate resilient and sustainable strategies in order to expand crisis response capacity as they think about their overall environmental impact.

02

MORE OF THE POPULATION WILL BE OVER 65 THAN UNDER 18 FOR THE FIRST TIME IN HUMAN HISTORY — THIS CHANGES EVERYTHING

As lifespans increase, spaces must support active, meaningful lifestyles for older adults. Work, travel, hospitality, and housing will require designs that empower all individuals.

03

SCIENCE ORGANIZATIONS WILL SET THE TONE FOR HOW WE ACT ON CLIMATE CHANGE AND HEALTH

As organizations seek to create positive change, they will look to the sciences, brought front and center by the pandemic, for best practices and inspiration, both in how they support their workforces and maximize the impact of their space portfolios.

04

EXISTING, AGING BUILDING STOCK CANNOT BE IGNORED

These industries — health and sciences in particular — occupy a disproportionate share of the world's inventory. A solution to repurpose (rather than discard) this building stock is essential, and will create new potential sources of return on investment.

05

DESIGNING “TO THE EDGES” WILL CREATE MORE WELCOMING AND SUPPORTIVE ENVIRONMENTS

Inclusionary design that addresses the edges of society, embracing formerly ignored and misunderstood populations, will be a hallmark of organizations looking to match their missions to their real estate.

HEALTHCARE

OVERVIEW

The healthcare industry is creating new experiences and interactions between patients, caregivers, and technologies that will enable healthcare institutions to pursue design strategies that merge virtual and in-person care delivery. The use of data to track the performance of new delivery models will be key to evaluating their effects on local communities. The industry's most salient long-term challenge will be to successfully deliver care to communities as extreme weather events become more frequent.



TRENDS

01

The evolution of clinical technologies will decentralize care.

Healthcare providers, from academic medical centers to primary care providers, will further prioritize consumer access to care in the coming years. The increasing capabilities and operational simplicity of clinical technologies allow formerly complex procedures, such as hip replacements, to be delivered in outpatient settings. The resulting real estate trend will be to migrate clinical services, to the greatest extent possible, from hospitals to primary- and secondary-service areas in local communities.

02

Now is the time to build resilient systems to withstand climate change.

Healthcare providers across the U.S. and around the world are already seeing their ability to provide care impacted by major climate events. Sustainable real estate strategies will protect investments in health systems, reduce risk, and empower providers to support their communities in the immediate aftermath of such events. Such strategies will also reduce the healthcare industry's notoriously high energy usage and help address the climate crisis at its root cause.

FEATURED PROJECTS

A. Northwestern
Medicine Lake Forest
Hospital, Lake Forest, Ill.

B. Dallas Medical
Research Park
at Parkland, Dallas

C. Confidential
Medical Center,
Pembroke Pines, Fla.



03

Research will drive changes in healthcare experience design.

The experiences of staff and patients are equally important, and healthcare providers are demanding data-driven real estate solutions that cater to both groups. On the provider side, investing in the wellness of workers will help address retention challenges, especially among nursing staff. On the consumer side, providers will need to offer more convenient and comprehensive care, so they don't lose market share to other organizations.

“Digital-first hospitals and clinics will learn from retail and hospitality to create more seamless, personalized digital patient experiences — both remotely and in person.”

— Dialogue Blog by Scot Latimer and Richard Tyson, “Digital Transformation of Healthcare Design”



04

Telehealth is here to stay, but in-person interactions will define the industry's future.

Adoption of telehealth spiked during the pandemic's early stages, then plateaued. Though telehealth will continue to play a significant role for some forms of care such as psychiatry, in-person interactions that require access to specialized technology will continue to comprise the overwhelming majority of healthcare interactions.

05

The lines between physical and digital healthcare delivery will continue to blur, requiring flexible spaces.

Physical, in-person care delivery will continue to integrate with platforms designed for virtual consumer engagement and telemedicine. But this integration will be uneven over time, because healthcare technologies will emerge in a piecemeal fashion, meeting some needs before others. Healthcare facilities will therefore require planning and design that provides flexibility, enabling them to confidently build spaces and networks to support care teams and local communities well into the future.



Bill Richards Center for Healing at Aquilino Cancer Center, Rockville, Md.

This first-of-its-kind facility offers a purpose-built space for cancer patients to explore trial psychedelic therapies. A multidisciplinary team came together to understand the choreography of these therapies and how space can impact the outcome, creating a safe, supportive, and biophilic environment. The patient experience was designed to create the ideal setting for guided spiritual journeys.

4



Columbia Primary Care - Manhattan Valley, New York

Principles for designing digital-first healthcare

New digital platforms and health technologies are becoming an integral part of future-ready healthcare. Emerging digital solutions that are blended with physical spaces can help make care more personalized, responsive, and effective. By designing with digital in mind, we have an opportunity to reconsider care delivery through the lens of human experience.

We've identified four fundamental principles to ensure better outcomes for clients and their communities:

1 ANCHOR DESIGN IN THE PHYSICAL-DIGITAL JOURNEY

With digital and mobile technologies, people can engage with their health anywhere — whether they're commuting, working at home, or traveling. Understanding how the clinician's workflow and the patient journey coincide online and onsite will be critical.

3 MAKE DATA AND ANALYTICS PART OF THE DESIGN PROCESS

Applying data to support design decisions, model opportunities, and measure design performance is now essential. Advances in technology are not just transforming the clinical healthcare experience — these advancements are giving us much richer data and more powerful tools for applying analytics.

2 DESIGN SPACE, SERVICES, AND DIGITAL ENGAGEMENT TOGETHER

By using experience analytics, we can better understand the patient journey. Gensler is integrating advanced spatial analytics to support programming, design evaluation, and quantified journey-mapping to improve the effectiveness of future clinics and hospitals, and to establish new ways to evaluate healthcare facilities today.

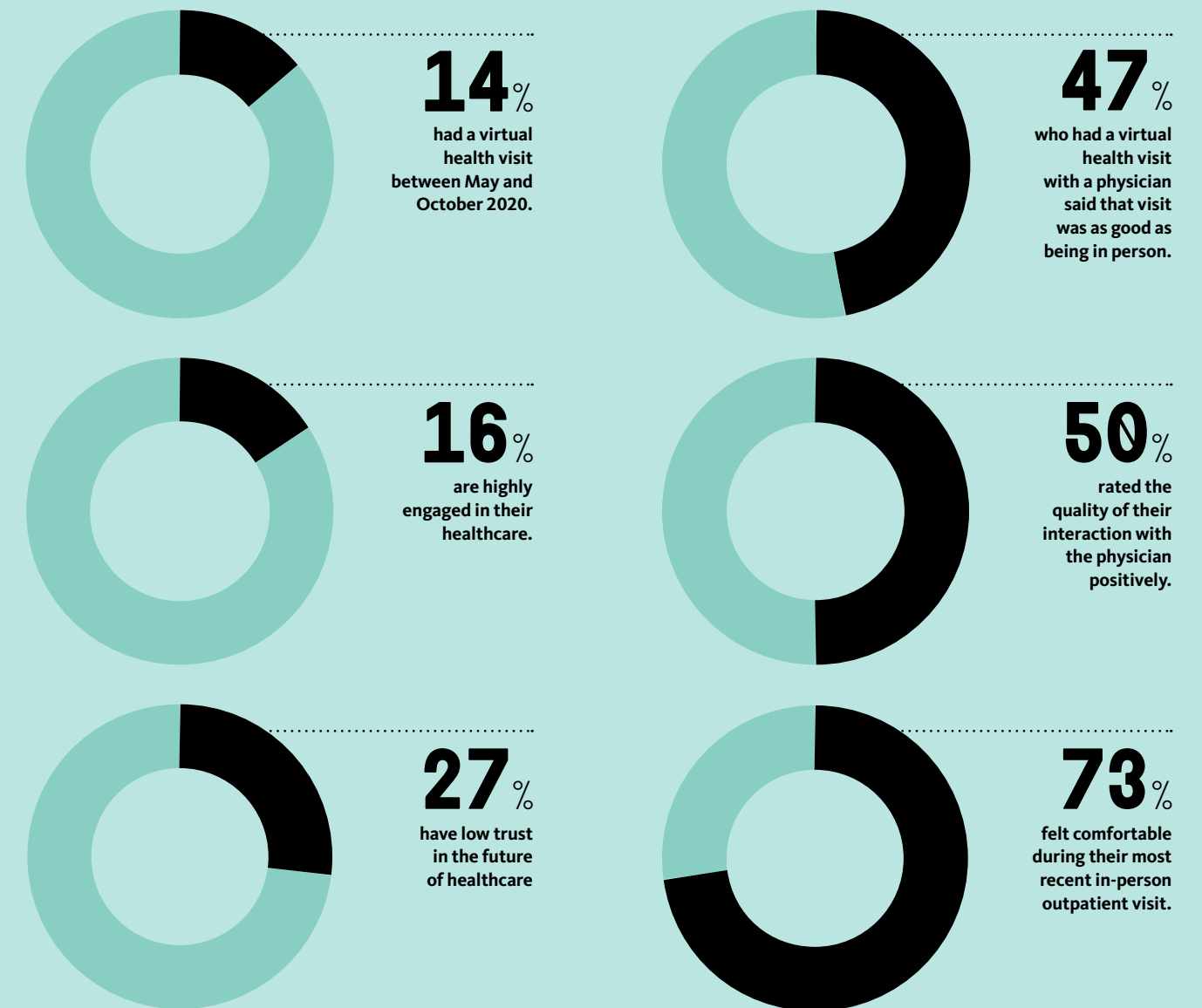
4 DIFFERENTIATE WITH PHYSICAL + DIGITAL EXPERIENCE

Focusing on the human journey with integrated design and advanced analytics has more advantages than just better design and performance — it also supports unique opportunities to differentiate from the competition, build brand equity, and develop powerful approaches to real estate strategy.

STRATEGIES & RESEARCH

Addressing issues of trust and quality is key to the future of outpatient care. Of patients in the U.S. who received outpatient healthcare:

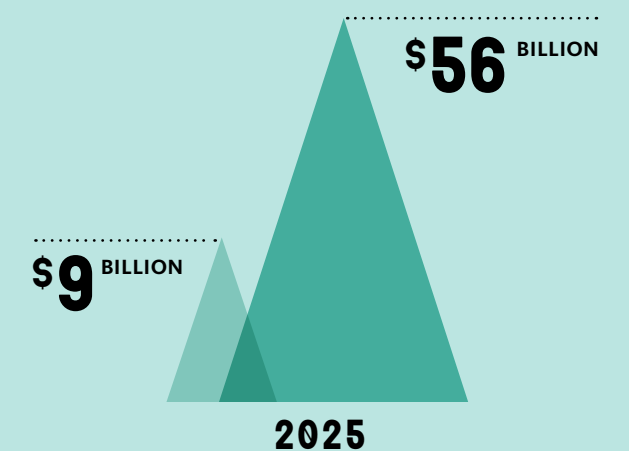
Source: Gensler Outpatient Healthcare Experience Index



Digital therapeutics such as mobile health apps and software will grow exponentially, shaking up the industry's space requirements.

Source: Insider Intelligence

In 2020, Insider Intelligence expected the digital therapeutics space to hit nearly \$9 billion by 2025, but its revised forecasts amid the pandemic put it closer to a \$56 billion global opportunity by 2025.



SCIENCES

OVERVIEW

Science organizations will continue to see rapid growth. Collaborations across research disciplines and geographies will lead to more rapid advances. To keep up with the pace of growth, clients are implementing lab and workplace solutions that can flex to meet demand, adapt to technology, and offer enhanced amenities to attract and retain talent.



03

Energy usage will drive innovation in lab development.

Science buildings consume between five and 10 times the energy of a normal office building. Given this high rate of energy use, even incremental improvements in performance yield substantial savings. In many regions, the need for innovative climate action has been accelerated as municipalities adopt requirements for net zero energy buildings.



TRENDS

01

Development for science clients will continue to attract attention.

There is tremendous interest in repositioning existing office buildings and expanding research-capable development in and near major science clusters. Industry leaders are thinking beyond the basics of functional, lab-ready space and differentiating their real estate through amenities and services that are dialed into science tenants' needs.

02

Science organizations are keeping their supply chain and manufacturing operations close.

As companies advance their innovations to production scale, the traditional hurdles of R&D-focused science clusters like high rents, logistics concerns, and nonindustrial zoning are being outweighed by the desire to maintain consistency and security of production and to promote more collaboration between manufacturing and research teams.

04

Scientists jobs are changing — so will their workplaces.

Changes in how scientists interact with and share data are unlocking new ways of advancing science. The ability of automation to collect more accurate scientific data at greater volume is leading to reductions in laboratory space. At the same time, scientists are interacting with data differently, using computational modeling, machine learning, and advanced collaboration and visualization tools. Cutting-edge science spaces will streamline interactions with data, while also facilitating person-to-person collaborations and connections.

05

Science organizations will keep growing into new markets.

Secondary markets are in growth mode along with neighborhoods at the periphery of major hubs like Boston, London, San Francisco, and Shanghai. Given that vacancy rates are below 5% in major hubs, emerging markets with strong university research presence offer more real estate options, reduced cost of living, and lower rents for earlier stage companies.

FEATURED PROJECTS

A. Genmab
U.S. Headquarters,
Princeton, N.J.

B. USF Research
Foundation Mixed Use,
Tampa, Fla.

B. Organon,
Jersey City, N.J.



Lab Building of the Future Concept

This concept of the next generation of lab buildings prioritizes flexibility, well-being, and climate readiness. Mass timber framing and natural ventilation result in a building that uses 30% less energy, reduces up to 75% less construction waste, and saves up to 80% less carbon than a conventional lab building.



“The future for the industry is to blend a science lab with the collaborative elements of tech workplaces, which are masterful at creating synergies between people.”

— Dialogue Blog by Chad Yoshinobu, “The New Hybrid Sciences Office Will Blend Tech Workplace, Hospitality, Brand Design, and Storytelling”



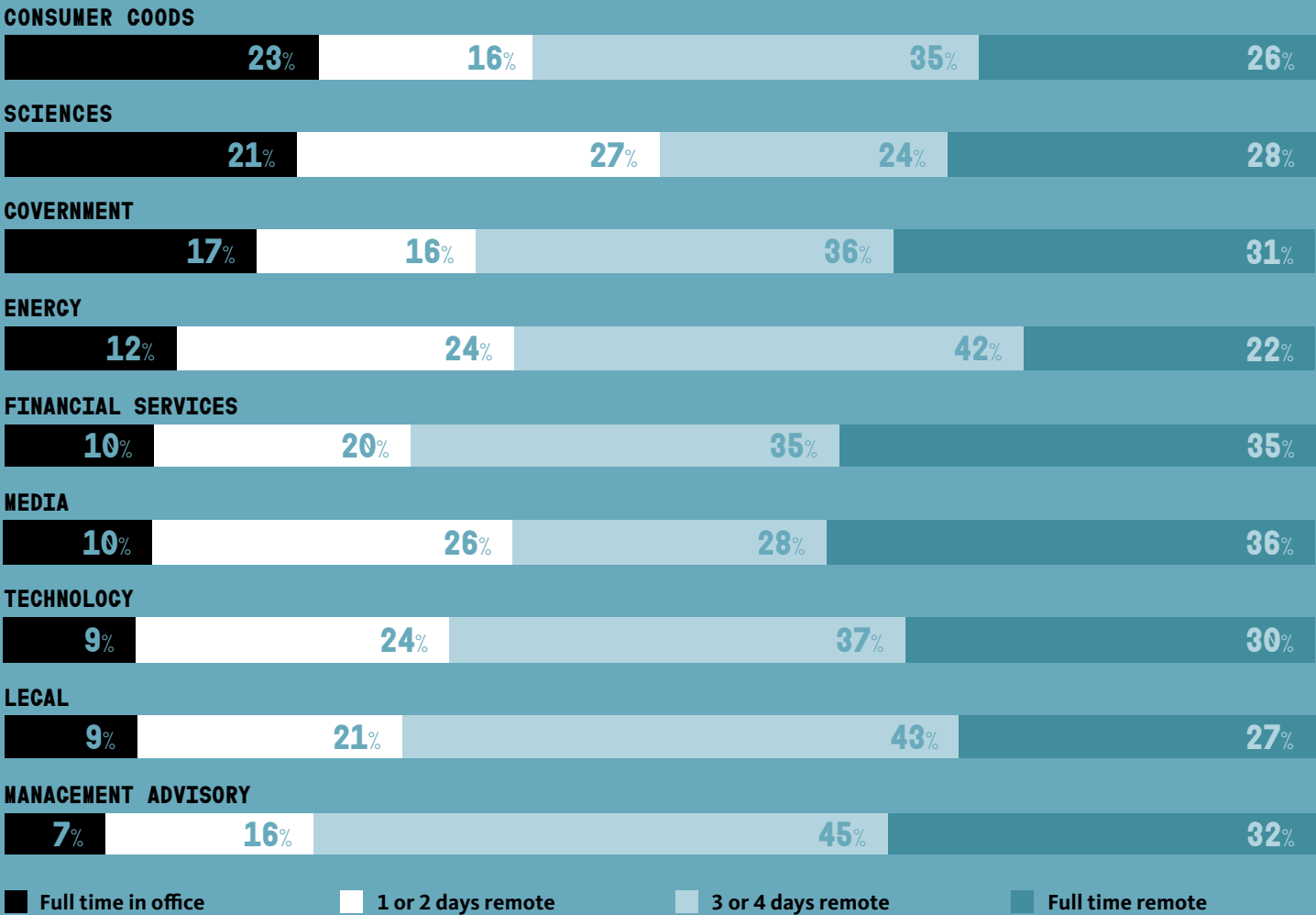
FEATURED PROJECT

D & E. JPL FEIF Building,
Pasadena, Calif.

STRATEGIES & RESEARCH

Sciences show a preference for more in-person work than most industries.

Source: Gensler U.S. Workplace Survey Summer 2021



Life sciences growth now surpasses tech.

Source: U.S. Life Sciences Mid-Year Report 2021, CBRE

16%

“Life sciences employment reached a record high in March 2021, driven by biotechnology and other industry advancements. The industry’s 16% total job growth since April 2017 when CBRE first produced this annual report has surpassed that of the technology sector.”

Biotechnology-driven therapeutics are experiencing exponential growth.

Source: JLL

1,400,000,000,000

Pharmaceutical sales are expected to reach 1.4 trillion by 2026.

SENIOR LIVING

OVERVIEW

The number of people age 65 or older will double in the next 20 years, while average lifespans also increase. As we think about creating spaces for older adults, we must consider the fact that our communities will become more multigenerational, and the places we design for the oldest members of the community must emphasize holistic wellness, purpose, and activity in order to foster greater connections across our urban and social fabrics.



TRENDS

01

Housing for older adults can foster meaningful connections to urban life.

According to the Gensler Residential Experience Index, 69% of older adults want to stay in their current home, and many also want to live in urban areas, which can offer active and social resources that allow residents to thrive. A growing number of projects are focused on allowing older adults to age in place and continue to live in the cities they love.

FEATURED PROJECTS

A & B. Bosque House, San José, Costa Rica

C. Fountainview at Gonda Westside, Playa Vista, Calif.

D. Willow Valley Mosaic, Lancaster, Pa.



02

Mixed-use, mixed-income, and multigenerational lifestyle developments are emerging as new models.

Flexible residential units that can reconfigure to connect an adjacent unit for a live-in caretaker is a boon for someone who wishes to stay in their home later in life. But they can also attract all walks of life, such as a couple starting a family, or a group of friends looking to share an apartment after college. As the costs of senior living facilities continue to rise, so will demand for affordable alternatives that enable people to age in place.

03

Designing elevated experiences for caregivers is a big opportunity.

With the overwhelming majority of assisted living facilities reporting staff shortages, the senior living industry is at a turning point. The caregiver experience has seldom been a primary design driver for senior living in the past, but that will change as facilities explore new retention strategies. To this end, the industry can adopt lessons from across healthcare, hospitality, and other industries to create great places to work.



“Advancements in health and medicine mean that age 100 will become more common. If people still retire around age 65, as many will, that could leave 40 years of life for which to design.”

— Dialogue Blog by Tama Duffy Day, “Charting a Better Course for Senior Living”

04

Gerontechnology will extend aging-in-place.

As people age, the use of technology to maintain and regain independence is critical. Gerontechnology integrates technology for health, housing, communication, leisure, and work for older adults. More older adults have embraced digital technologies than ever before, from telemedicine, to sensory aids, to assistive technologies. These advancements have the potential to enhance people's lives, facilitate caregiving, and extend independent living and aging-in-place.

05

Wellness models for active adults are replacing one-size-fits-all care models.

Unlike one-size-fits all care models for older adults, wellness community models for active older adults allow residents to focus on their interests and needs. By focusing on the seven dimensions of wellness — intellectual, physical, social, spiritual, vocational, and emotional — this model offers a holistic, comprehensive approach.



E

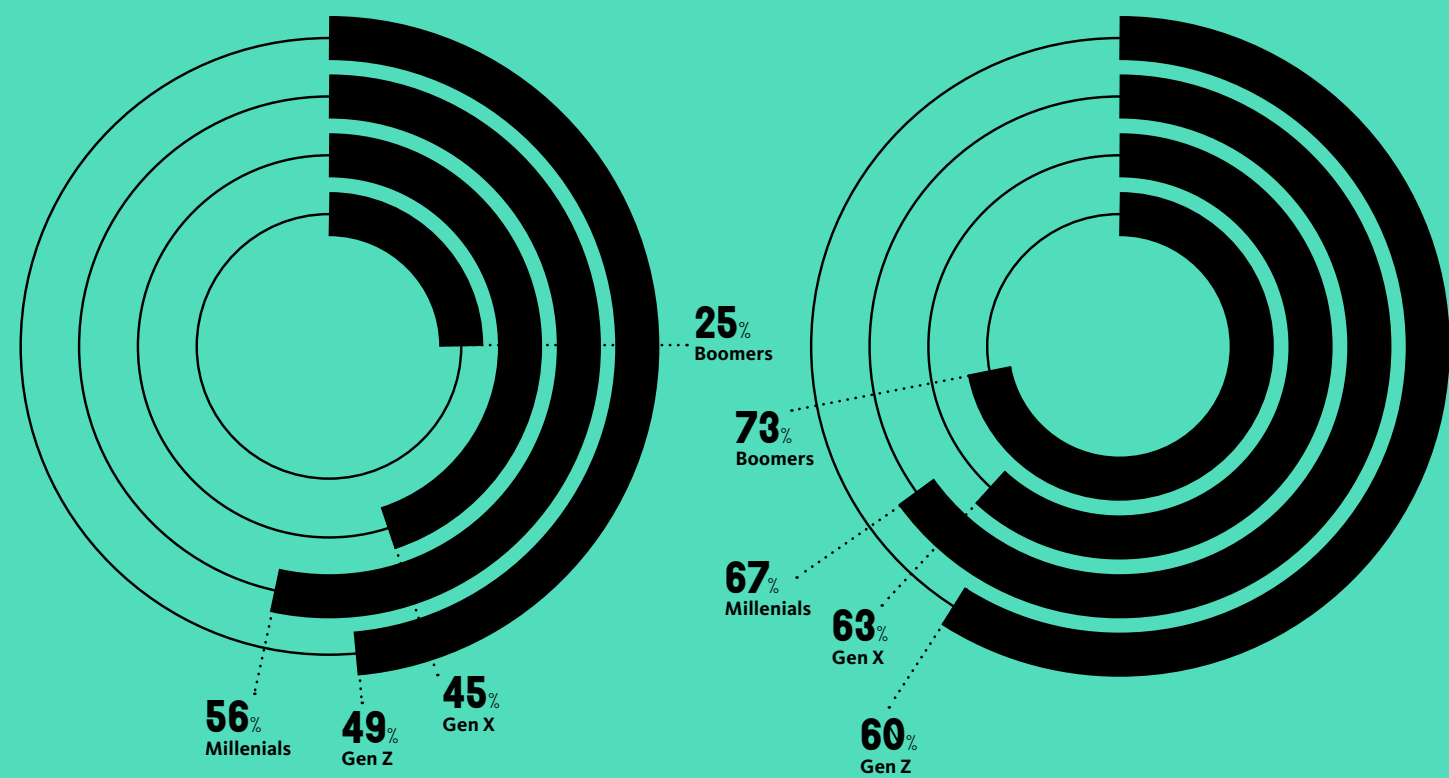
FEATURED PROJECT

E. Willow Valley
Mosaic, Lancaster, Pa.

Baby boomers are the generation that reports the highest level of satisfaction with their current living situation (73%), and the lowest interest in leaving the city where they live as a result of the ability to work remotely (25%).

More than any other generation, baby boomers want to stay in the cities where they live.

Source: Gensler City Pulse Survey Fall 2021

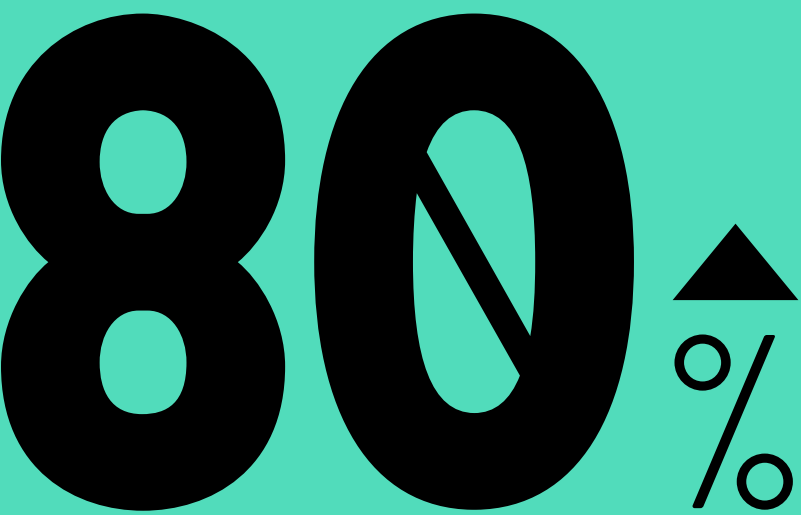


Percentage of respondents who say the ability to work remotely has made them think about moving, by generation

Percentage of respondents who are satisfied with their current living situation, by generation

The Economic Impact of Age Discrimination

Source: AARP

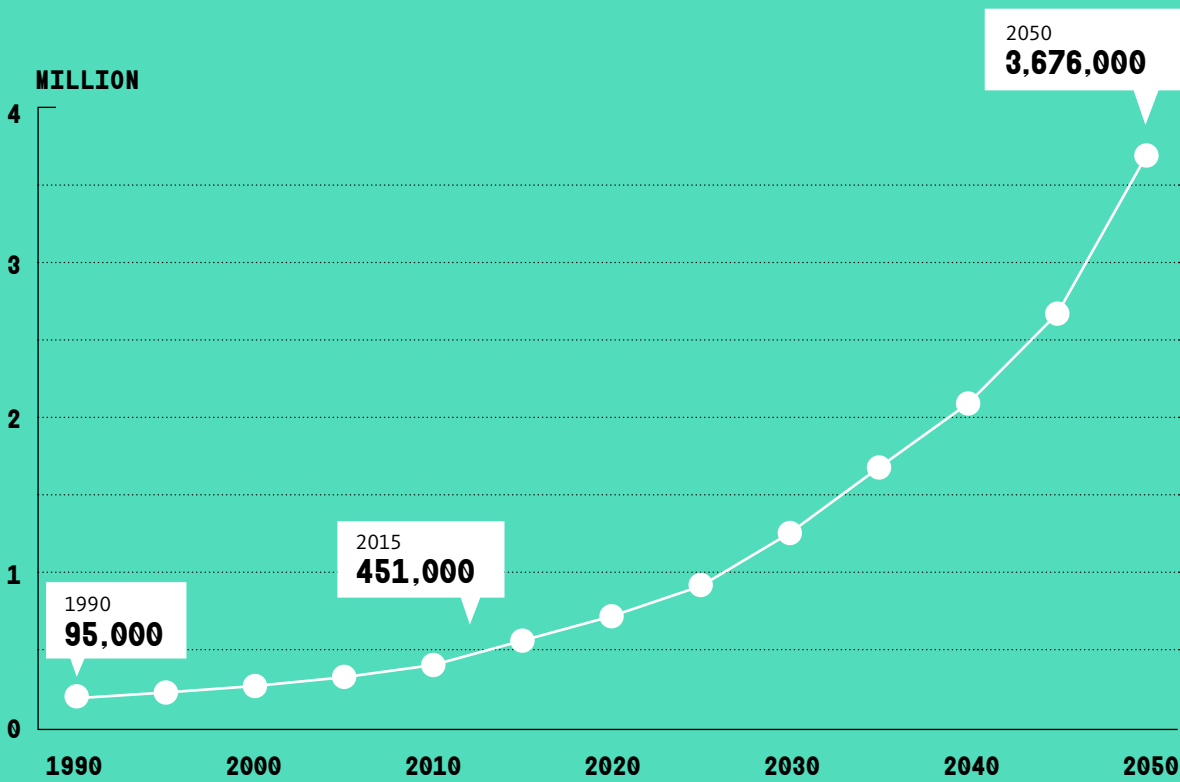


“The number of workers age 50-plus has increased by 80% over the past 20 years, more than four times faster than overall workforce growth.”

Moreover, “Among those age 65-plus who are currently employed, over 40% intend to work for at least five more years.”

The world’s centenarian population is projected to grow rapidly.

Source: United Nations/Pew Research Center



The United Nations estimates that there were about 95,000 centenarians in 1990 and more than 450,000 in 2015. At the current rate of increase, by 2100, there will be 25 million.

WELLNESS

OVERVIEW

The combined impacts of climate change, the pandemic, economic instability, and increased mental health issues have caused a seismic shift in how employers understand wellness. Far from being an optional amenity, wellness is now a cultural necessity — and therefore, one of the fastest growing industries across the globe. The conversation is no longer about whether wellness is good for business. We know it is. Now is the time to put wellness-based design strategies into action.

TRENDS

01

Successful organizations will foster a deeper sense of wellness through belonging.

Hybrid work modes threaten to undermine our ability to connect and create relationships, and a company's ability to build culture. In the near future, companies will look to grow culture virtually, while finding new ways to support their people's professional and personal growth, and to provide them with a healthy sense of belonging.

02

Designing for the edges takes center stage.

The variety of identities, affiliations, characteristics, and abilities that used to be pushed to the edges is now becoming part of the mainstream. This is driving more inclusionary design. Central building entries, for example, will create more seamless experiences for people of all physical abilities; new designs for neurodiversity will lean heavily on recent scientific findings. Where gaps and shortcomings exist in local code requirements, it will be incumbent upon designers and their clients to go beyond the minimum.

03

Finding individual agency: owning your personal wellness.

The ongoing health impacts of COVID have prompted many to take control over their own wellness. It's important to recognize that 'wellness' is a personal definition also based on circumstances. In the coming years, it will be up to organizations to find new ways to support their employees, whether that's through new types of amenities at the office or by giving people the space and time they need to rest, spend time with their families, eat healthily, or exercise.



04

Businesses are shifting to a mixed-use model.

Hyper-amenities are the new baseline. Wellness has evolved beyond the juice bar and the yoga mat. People require variety. That means providing choice, opportunity, scale, and variety in programming.

“The cost of poor health to employers is greater than the combined revenues of Apple, Amazon, Microsoft, Netflix, eBay, and Adobe.”

— Thomas Parry, Integrated Benefits Institute senior advisor

FEATURED PROJECTS

A. LinkedIn, Chicago

B. 545wyn, Miami

C. OhioHealth Neuroscience Wellness Center, Columbus, Ohio

“For many, wellness in the workplace now includes sustainable and healthy buildings, as well as environments that promote diversity, equity, and inclusion. One way landlords and employers are taking action on these priorities is by investing in ESG goals.”

Source: Dialogue Blog by Cindy Coleman and Stacey Olson, “An 8-Step Model for ESG and Wellness in the Workplace”

Demand for healthy buildings is at an all-time high — and will continue to grow.

Source: 2021 Fitwel report, “A New Investor Consensus: The Rising Demand for Healthy Buildings”

\$ INVESTING IN HEALTHY BUILDINGS

89.5%

of respondents plan to enhance their company's health and wellness strategy in the coming year.

Wellness Gap Analysis

Source: Gensler

DESIGNING FOR WELLNESS STARTS WITH AN ANALYSIS OF A SPACE TO SEE HOW IT STACKS UP AGAINST 8 KEY CHARACTERISTICS OF WELLNESS.





The Manor, McCann Worldgroup, London

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