

**Gensler**

# DESIGN FORECAST<sup>®</sup> 2024



A PUBLICATION OF THE GENSLER RESEARCH INSTITUTE



**EVERYTHING WE DO IS  
GUIDED BY OUR MISSION:  
TO CREATE A BETTER  
WORLD THROUGH THE  
POWER OF DESIGN.**

Wuhan YOFC Headquarters, Wuhan, China  
On the cover: Capital One McLean Block A, McLean, Va.

# DESIGNING FOR IMPACT

As we enter 2024, we continue to ask how we can help our clients thrive in times of crisis and change. Economic pressures, geopolitical volatility, climate change, the workplace reset, inclusivity, and the continuing need to manage aging buildings and stranded assets remain top of mind for real estate and building industry leaders.

We believe design has an enormous role to play for our clients — and for the world today. As a discipline, it is unique in its ability to solve problems and create results. Using systems thinking and a compassionate understanding of people's needs and expectations, designers can make sense of complex challenges to create lasting solutions.

Design also represents hope and healing. As war, social injustice, climate change, and health crises grow more acute, people desperately want more connection and community. In places like Ukraine, where Gensler is working with the mayors of Mariupol and Irpin to rebuild their cities, people are looking to design to help them create a future that turns the page on a violent past and honors the people and places they loved before the invasion. This is the impact design can offer. It is a universal language that can build common ground and make a positive impact.

## Design for a Radically Changing World

As the world's most innovative design firm, we see first-hand the transformation that design can make on the human experience. Nowhere is this truer than in the world's cities in which we work. Today, more people are living in cities than anywhere else on the planet. Cities are complex, and the impacts of any single issue can affect tens of millions of people. We urgently need to redesign our cities, rethink how people connect, and address mobility problems, climate change, infrastructure, and housing.

The past few years have also taught us that the only way to make real impact happen is to inspire and take the lead to help people see a future that's more compelling and exciting than the past. This is why we wrote our book, *Design for a Radically Changing World*. We wanted to capture the idea that by uniting creativity, imagination, and innovation, we use design to drive positive change. *Design for a Radically Changing World* shows the impact of design on our everyday lives and offers innovative solutions for the most challenging issues we face.

## 8 Key Global Design Trends Driving Significant Change

While the topics covered in the book represent our vision for how design must change to meet generational challenges, this year's Design Forecast contains the advice, research, and ideas that our clients need to know right now, and in the year to come. The "8 Trends Shaping Design in 2024" are what we see as the most important signals and key opportunities in the building industry today.

Our 2024 *Design Forecast* also reflects the transformation we've been going through as a firm. We've added four new practice areas, bringing our total to 33, and three new offices, for a total of 53 in 16 countries. The new practice areas include Build to Suit & Headquarters, Entertainment, Industrial & Logistics, and Mobility & Transportation. Trends, project photography, and research for all four are included in this year's *Design Forecast*.

## Design Transformation

This transformation is a key part of why we've been able to meet challenges head on and remain a strong partner to our clients. Design is uniquely valuable in times of change because it can connect and unify diverse ideas, tools, and approaches. We have an enormous opportunity to address the crises we face — but only if we're willing to use our innate creativity and problem-solving abilities to think bigger and lead with bold new initiatives.

Generative AI has introduced new possibilities. Our designers are embracing the technology as a collaboration tool to accelerate new ideas and open the door to new talent and new opportunities. In addition, by committing to lowering the carbon impact of our projects, we're leading the industry with sustainable design strategies and initiatives. Our Gensler Cities Climate Challenge (GCC) roadmap is helping our clients and the industry take immediate steps and our Gensler Product Sustainability (GPS) Standards is helping to provide a bigger market to low-carbon interior materials. Finally, equitable design considerations are baked into all our projects to address the complex interconnection between the built environment, injustice, and inequality.

By diversifying our expertise, focusing on our clients' needs, and transforming the way we design, we've been able to weather economic shifts. This allows us to continue to grow leaders, move into new markets, and scale our impact.

## Leadership in Times of Change

Gensler's unique co-leadership model has also been vital to our success in recent years. With two individuals in leadership positions across the firm, we have seen innovation thrive. We believe creativity ignites when people with diverse backgrounds come together to lead collaboratively. This approach has propelled our growth, and it has elevated our ability to take on complex design challenges in over 140 countries with 3,500 clients across the globe.

As the world and the design industry transform to meet the moment, so too must our leadership platform. The opportunities to connect design to climate action, ESG, attainable housing, immersive multidimensional experience design, the emergence of AI, and more are too great to ignore. To enable the firm's engagement with these new opportunities and challenges, we have decided to broaden our leadership structure.

After nearly 20 years of serving as Co-CEOs of Gensler, we are proud to announce our election by our Board of Directors as the first Global Co-Chairs of Gensler, effective January 1, 2024. In this new position for the firm, we will focus on expanding the firm's global reach, broadening our impact, adding new practice offerings and services, and enhancing key global client relationships.

We are equally proud to announce Jordan Goldstein and Julia Simet as the next Co-CEOs of Gensler. These two dynamic leaders have each been with the firm for nearly 30 years and, in anticipation of this transition, have served as Co-Firm Managing Principals since early 2021. With so much opportunity and important work before us, this is exactly the right time for this transition. Julia and Jordan will maintain responsibility for the day-to-day operations and hands-on oversight of the firm, including our regions and offices, practice areas, client relationships, and our brand and culture.

Our transformational approach to design is the reason that we emerge stronger from every downturn, from every economic dip, and from every crisis. Along the way, we've learned that what people want is experience. Whether a sports stadium, airport, hotel, or office of the future, the spirit of every project is the human experience. We're more equipped now than ever before to design for impact and help our clients navigate every challenge.



  
DIANE HOSKINS  
FAIA, IIDA | Co-CEO

  
ANDY COHEN  
FAIA | Co-CEO

# DESIGN FORECAST<sup>®</sup>

## THE 8 TRENDS SHAPING DESIGN IN 2024

01 EXPERIENCE  
MULTIPLIERS  
PAY PREMIUM  
DIVIDENDS.

02 CONVERSIONS  
RESURRECT  
STRANDED  
ASSETS.

03 SUSTAINABLE  
DESIGN  
BECOMES  
A NON-  
NEGOTIABLE.

04 *IN*: THE FUTURE OF  
THE WORKPLACE  
AS A COMPELLING  
DESTINATION.  
*OUT*: RETURN TO  
OFFICE METRICS.

05 MIXED-USE  
LIFESTYLE  
DISTRICTS  
BRING CITIES  
BACK TO LIFE.

06 DESIGNERS  
HARNESS AI  
TO ACCELERATE  
IDEAS AND  
INNOVATION.

07 FOCUS SHIFTS  
TO AGELESS  
COMMUNITIES  
AND DESIGN  
FOR A LIFETIME.

08 20-MINUTE  
CITIES BECOME  
ARCHETYPES  
OF EQUITY AND  
ACCESSIBILITY.

# EXPERIENCE MULTIPLIERS PAY PREMIUM DIVIDENDS.

01

Now more than ever before, people are craving phenomenal, visceral, and connected experiences in every part of their lives, whether that's in a workplace that feels like a clubhouse or a sports stadium that anchors a vibrant, 24/7 mixed-use entertainment district. In 2024, real estate leaders will find success reclaiming human connection with "experience multipliers": immersive designs that drive loyalty, boost sales, and improve vibrancy with a shared sense of inspiration and belonging.

"The only way to make real impact happen is to show people a future that's more compelling, more hopeful, and more exciting than the past. That's our charge as designers. We have the ability to make sense of complex challenges and create lasting, positive change."

Diane Hoskins and Andy Cohen, Gensler Co-CEOs



Fifth + Broadway, Nashville  
Brookfield Properties (OliverMcMillan)  
Vibrant and walkable mixed-use district

02

Office-to-residential conversions and other creative repositioning will represent a new value proposition for the building industry: transforming under-performing office buildings into housing and addressing a vital need for new residential options in cities. As organizations seek out fully amenitized, recently built projects, this “flight to quality” is stranding under-capitalized and unoccupied B and C buildings in urban cores around the world. In 2024, expect more government municipalities to incentivize adaptive reuse strategies and conversions whose renovations breathe new life into cities and offer vital infrastructure enhancements – and do it in an environmentally responsible way.

# CONVERSIONS RESURRECT STRANDED ASSETS.



100 New Bridge Street, London  
A project in Central London targets 95% reuse, recovery, and recycling of construction waste. The conversion seeks to redefine 100 New Bridge Street as a contemporary, Grade A office building. With a strong commitment to material reuse, the repositioning maximizes the building’s sustainability, wellness, and ESG credentials.



Under Armour Global Headquarters, Baltimore  
Net zero energy

# SUSTAINABLE DESIGN BECOMES A NON-NEGOTIABLE.

03

As intense weather and climate change assail the built environment, sustainable design shifts from an option to an obligation. By 2024, the building and real estate industries around the world will recognize the value of environmentally conscious design and its ability to mitigate risk. Higher standards for products and materials, the adaptive reuse of existing buildings, net zero energy strategies, and regenerative design principles will define our sustainable future.

# IN: THE FUTURE OF THE WORKPLACE AS A COMPELLING DESTINATION.



167 N Green Street, Chicago  
Shapack Partners & Focus  
New construction office development  
with a vast tenant amenity package

## 04

As more organizations understand that the workplace landscape has permanently changed, the focus will shift less on how many people come into the office and more on what the future of work looks like to support their people's needs. In 2024, organizations will continue to plan for in-person experiences in spaces that are agile and flexible enough to evolve with the changing demands of the workforce and useful enough to earn people's commutes.

# OUT: RETURN TO OFFICE METRICS.

# MIXED-USE LIFESTYLE DISTRICTS BRING CITIES BACK TO LIFE.

## 05

Monolithic, office-focused downtowns have become a thing of the past, replaced by vibrant, experience-driven social districts that are focused on a mixed-use collection of retail, entertainment, sports, housing, and other lifestyle-anchored developments. By prioritizing safety and mobility in these new multimodal districts, cities can attract residents and tourists and bring COVID-impacted neighborhoods back to life.



Milwaukee Bucks Entertainment District, Milwaukee  
CAA Sports

# DESIGNERS HARNESS AI TO ACCELERATE IDEAS AND INNOVATION.

06

In 2024, AI will open the door to new ideas, new talent, and new creative opportunities. Far from replacing designers, AI will become a collaboration tool that will help designers redefine the design and innovation process with new insights, rapid iterations, and more immediate response times. Buildings and spaces designed with the help of AI will be more sustainable, better performing, and more responsive to individual needs and preferences.



AI depiction of futuristic city



Confidential Mixed-Use Master Plan

# FOCUS SHIFTS TO AGELESS COMMUNITIES AND DESIGN FOR A LIFETIME.

07

Over the past 50 years, the average life expectancy for people around the world has expanded by more than 10 years, a figure that will only grow in the coming decades. With the global trend toward increased longevity, 2024 will mark a shift toward designing age-inclusive communities. Demand for flexible and multigenerational communities that foster accessibility and affordability will have universal appeal.



# 20-MINUTE CITIES BECOME ARCHETYPES OF EQUITY AND ACCESSIBILITY.

08

As city leaders seek out design strategies to help them enhance their central business districts to be more lifestyle-oriented, the idea of the 20-minute city remains increasingly attractive. These vibrant, walkable neighborhoods, where all essentials lie within a 20-minute reach – including restaurants, retail spaces, medical facilities, educational places, and much-needed residential alternatives – are redefining city living. This trend underscores the importance of creating accessible, inclusive urban spaces that promote equity, connectivity, and community.



Lower Hill District Mixed-Use Redevelopment, Pittsburgh  
Urban revitalization and mixed-use master plan

“Design is a valuable resource during challenging times because it results in creative, long-term solutions that can be scaled for a global impact while still resonating at a local level. It’s also a problem solver. We believe that it can play a critical role in tackling complex challenges, from social injustice to climate change, war, and health crises. With systems thinking and people-first compassion, design can make sense of complex and intangible inputs to form outcomes with enduring impact.”

*From Design for a Radically  
Changing World by  
Diane Hoskins and Andy Cohen*



PG. 22-69

OFFICE BUILDING  
DEVELOPERS

BUILDING  
TRANSFORMATION

BUILD TO SUIT  
& HEADQUARTERS

FINANCIAL  
SERVICES FIRMS

PROFESSIONAL  
SERVICES FIRMS

CONSUMER GOODS  
COMPANIES

TECHNOLOGY COMPANIES

ENERGY COMPANIES

FOUNDATIONS,  
ASSOCIATIONS  
& ORGANIZATIONS

PRODUCT DEVELOPMENT

GOVERNMENT &  
DEFENSE AGENCIES

MEDIA COMPANIES

STRATEGY SERVICES

# WORK

PG. 70-101

CITIES & URBAN DESIGN

AVIATION

EDUCATION

CRITICAL FACILITIES

CLIMATE ACTION  
& SUSTAINABILITY  
SERVICES

MOBILITY  
& TRANSPORTATION

INDUSTRIAL & LOGISTICS

# CITIES

PG. 102-139

RESIDENTIAL

MIXED USE  
& RETAIL CENTERS

HOSPITALITY

RETAIL & CONSUMER  
EXPERIENCE

SPORTS

ENTERTAINMENT

CULTURE & MUSEUMS

BRAND DESIGN

DIGITAL  
EXPERIENCE DESIGN

# LIFE- STYLE

PG. 140-159

SCIENCES

HEALTHCARE

SENIOR LIVING

WELLNESS SERVICES

# HEALTH

# WORK

---

## PG. 22 - 69

---

OFFICE BUILDING  
DEVELOPERS

BUILDING  
TRANSFORMATION

BUILD TO SUIT  
& HEADQUARTERS

FINANCIAL  
SERVICES FIRMS

PROFESSIONAL  
SERVICES FIRMS

CONSUMER GOODS  
COMPANIES

TECHNOLOGY COMPANIES

ENERGY COMPANIES

FOUNDATIONS,  
ASSOCIATIONS  
& ORGANIZATIONS

PRODUCT DEVELOPMENT

GOVERNMENT  
& DEFENSE AGENCIES

MEDIA COMPANIES

STRATEGY SERVICES

## Designing the Future Workplace

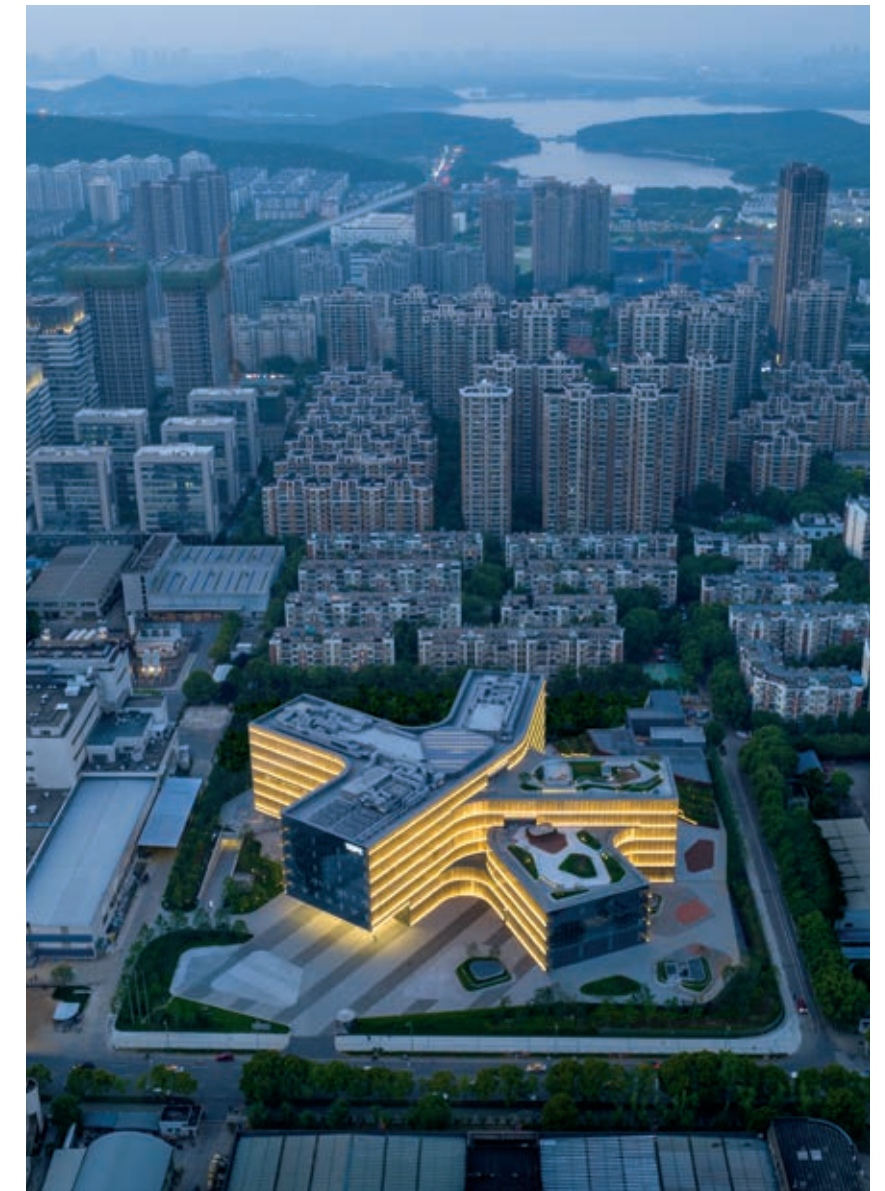
While there are distinct differences across the globe in how people work, one thing is clear: the workplace is changing. The most successful office workplaces must be compelling destinations that offer a variety of inclusive workspaces where workers can focus, connect, and collaborate. Workplaces and office buildings that optimize sustainability and create meaningful and unique experiences that foster a sense of community, connection, and well-being will have a competitive advantage over those that don't. We must design spaces that are agile enough to endure future challenges and flexible enough to rapidly evolve with the changing demands of the workforce.

# Office Building Developers



Burlingame Point, Burlingame, Calif.

Office building developers are currently grappling with the same issue facing many of their tenants: how to adapt buildings and spaces to accommodate changing work patterns, while making them more sustainable and climate resilient in the long term. Developers are now focused on creating an enhanced workplace experience for a wide variety of job types and work arrangements while also providing buildings that use design elements such as operable windows and shallower floorplates, which will give them the flexibility to adapt and change uses over time.



Wuhan YOFC Headquarters, Wuhan, China

## Trends

**Tenants will continue to migrate to high-quality workplaces in vibrant urban communities.**

To attract and retain workplace tenants, developers are adding distinctiveness and personality to their buildings through a mix of new uses, high-quality amenities, and positioning within the city or neighborhood. Expectations have risen and office buildings need to inspire joy and genuine delight to make it compelling for people to invest in their workplace journey.

**Long-term sustainability remains a priority for tenants and investors alike.**

Regulations are tightening in many cities, requiring more sustainable building practices. For companies aiming for ambitious ESG goals or net zero targets, a high-performing building is all but required. And for investors, a resilient building makes for a sounder investment amidst the uncertainty of a changing climate. Together, these factors present an opportunity for developers of net zero buildings to differentiate themselves and attract high-value tenants.

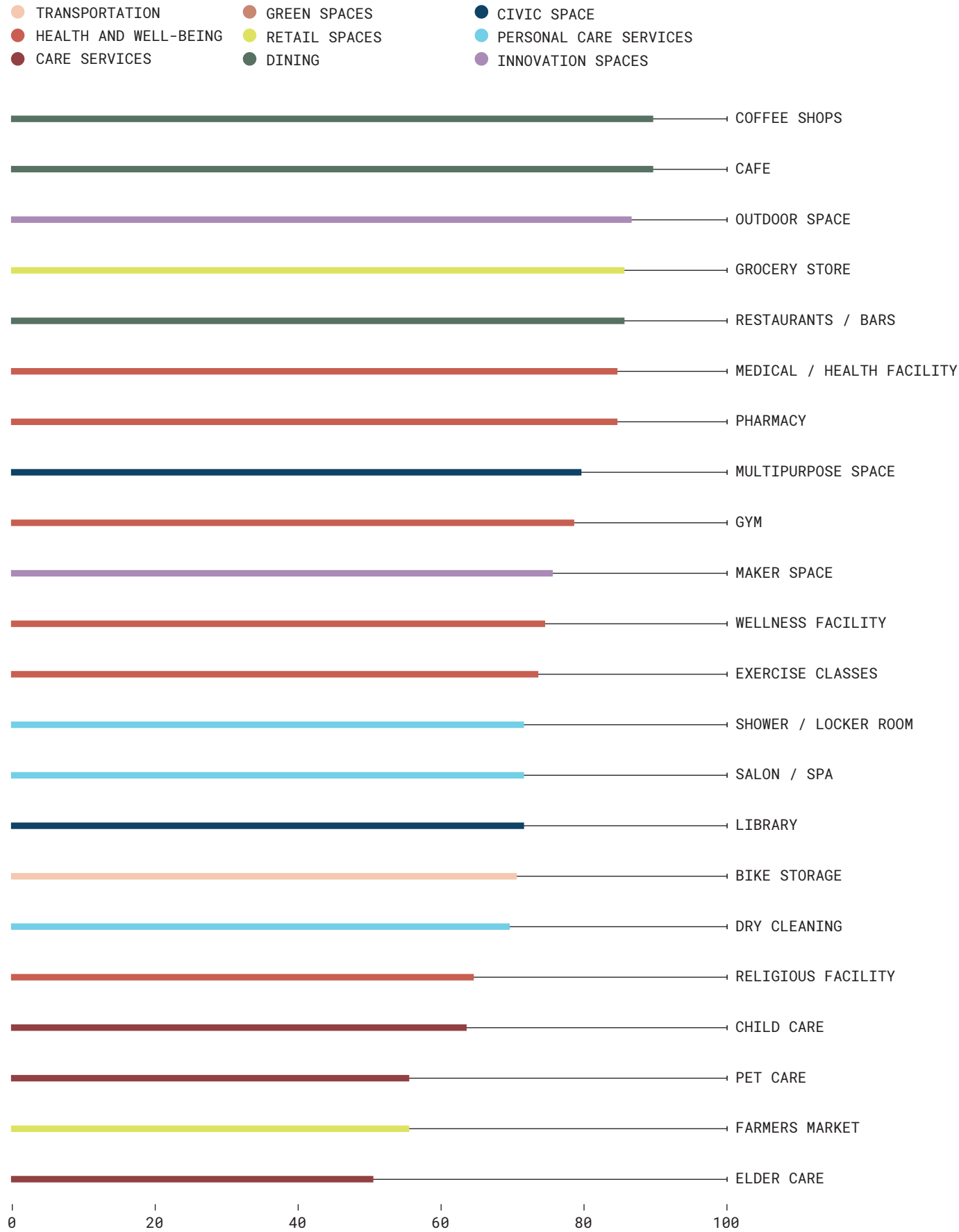
**Adaptability becomes a key design feature for both conversions and new construction.**

Office developers are converting class B and C buildings to new uses, which is driving a trend of built-in adaptability for new buildings. Recognizing that an office building may one day need to serve a different function, the choice of building systems becomes more important. Design elements such as floor-to-floor window systems vs. a curtain wall, for example, are desirable for current office tenants and are well-suited to other potential future uses.

**High-performing workplaces have greater choice of amenities and services in and around their workplace than the average workplace.**

Percentage of respondents in high-performing workplaces who have the listed amenities/services on-site or nearby their workplace/office building.

Source: Gensler Global Workplace Survey Comparison 2023



2151 Hawkins St, Charlotte, N.C.  
Portman Holdings | Mixed use, transit-oriented development



Springdale Green Campus, Austin  
Jay Paul Company

# Building Transformation

The market disruptions of the past few years have begun to stabilize, revealing which real estate assets hold long-term value and which are prime candidates for conversion to residential and other uses. In major cities, building codes and incentives are being developed to address the demand for a new mix of uses in central business districts. At the same time, corporate tenants are setting decarbonization goals while emerging policies at the state or national level aim to curb carbon emissions associated with new construction, ultimately creating strong demand for green building retrofits and adaptive reuse projects.

## Trends

**Cities continue to amend regulations to meet the demand for building conversions.**

As city and local governments recognize the opportunity to add more housing while also addressing stranded office building assets, they are amending local building codes and change-of-use regulations to support the demand for a more varied mix of uses in CBDs. The changes will also open the door to conversions for many types of spaces.

**Public-private partnerships and government incentives are driving building and neighborhood transformation.**

Cities have realized that single-function central business districts no longer serve them. To drive investment and encourage a new mix of uses, cities are creating public-private partnerships or offering other government incentives that can help ease the approvals process and tight margins on attainable housing projects.

**The demand for sustainable, high-performing retrofits intensifies.**

ESG goals, decarbonization targets, and emerging policies and regulations are increasing demand for adapted or retrofitted buildings that can be modified into high-performing assets at much lower carbon costs to comply with emerging policy requirements around lifecycle carbon analysis.

---

### SPOTLIGHT ON EUROPE

---

**Europe is leading the way in office conversions and circular approaches to building projects.**

In general, office-to-lab conversions have become more common in Europe, as opposed to North America, where the conversation is still centered around easing the housing crisis with office-to-residential conversions. Cities in Europe and California have already introduced policies requiring whole-lifecycle carbon assessments to be completed in order to obtain building permits and planning permission. We expect these types of policies to be broader in the U.S. over the next 5–10 years.

WE'VE STUDIED OVER

**1,000+**

BUILDINGS IN OVER  
120 CITIES

**32%**

OF THEM ARE VIABLE  
CONVERSIONS

**3,300,000,000 kg**

OF CARBON WOULD  
BE SAVED IF WE  
CONVERTED THEM ALL

Loffler Companies Headquarters,  
St. Louis Park, Minn.

Through thoughtful adaptive reuse, Loffler Companies enlisted Gensler to transform a former Sam's Club into a vibrant, flexible new headquarters that places a premium on health, wellness, and flexibility.







The Link Building Reposition,  
Phoenix  
DW Capital Partners

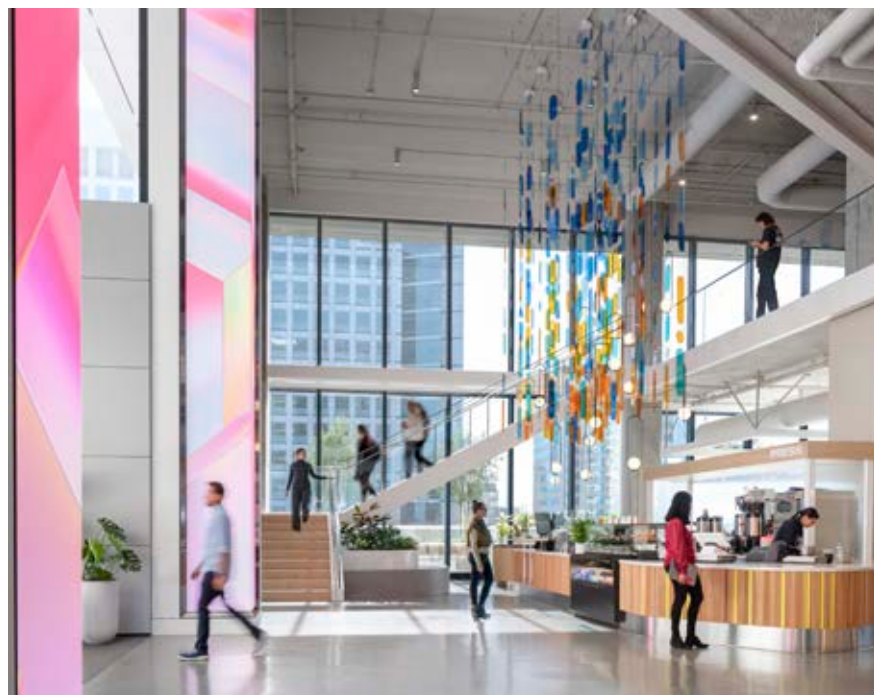
Gensler repositioned two existing buildings into a vibrant, class A creative office campus. The project engages the two buildings with a modern glass atrium connected to outdoor shaded amenity spaces.





# Build to Suit & Headquarters

Leading global organizations are realizing the impact that a purpose-built headquarters can have on employee experience and business outcomes. Creating — or recreating — a headquarters is a powerful way for an organization to connect its ethos and vision to its physical presence and organizational aspirations — with tangible outcomes. By taking a holistic approach to the physical design and visitor experience, a built-to-suit headquarters can be a vital tool for expressing brand identity and culture to engage employees and promote shared purpose to customers, shareholders, and the community at large.



Adobe Founders Tower, San Jose, Calif.

“There’s no greater investment return potential than in the foundations of your company, which are the people and the places where they come together to do great things.”

Shelly Mrstik, Build to Suit & Headquarters leader

# Trends

## Purpose-built headquarters will attract and inspire people to achieve their full potential.

Purpose-built headquarters will become the most desired places that attract and retain top talent. They fully embrace a company's brand, values, and culture by designing a compelling and enhanced experience that fully engages and delights employees, customers, and the community in their pursuit of a common bond and shared objectives.

## Sustainability measures and long-term resilience planning become priorities.

Companies will continue to prioritize sustainability and decarbonization, creating opportunities to design high-performing headquarters where bespoke solutions allow for elegant responses with greater innovation, efficiency, and impact. These highly tuned workplaces, buildings, and campuses will outperform generic/speculative real estate and demonstrate a dedication to resilience across the company, to shareholders, and the market.

## Pilot projects will showcase a headquarters as an agile testing ground for the future of work.

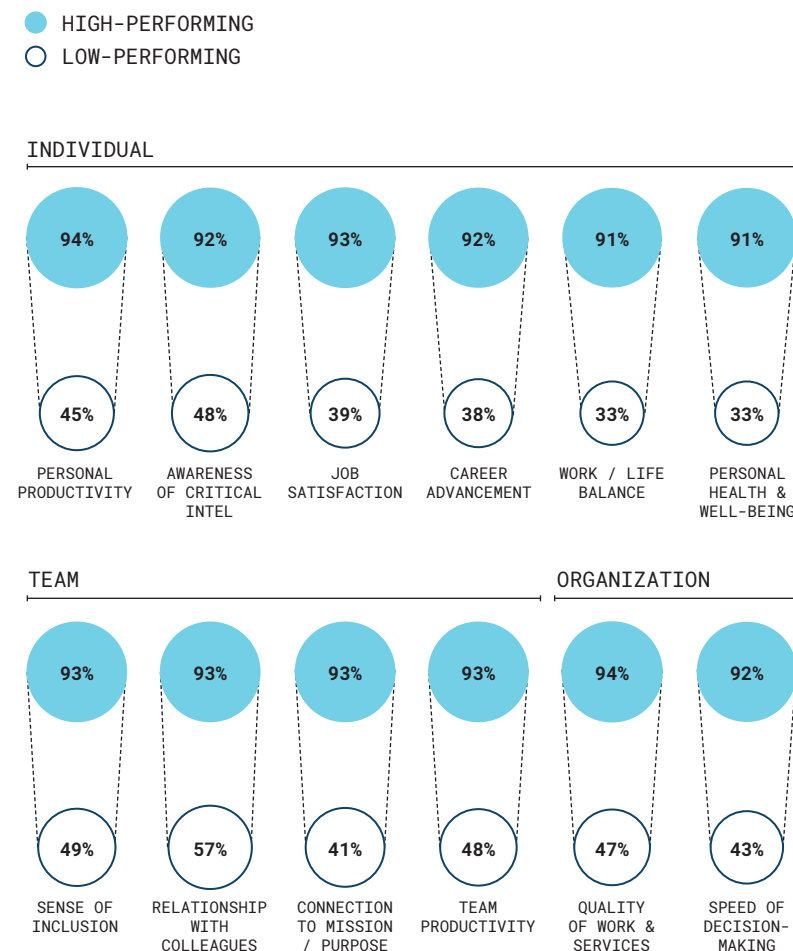
Companies with headquarters have an opportunity to reevaluate their space needs and experiment with new hybrid work arrangements with pilot projects in their existing spaces. Testing new concepts, adjusting floor plans and program elements, and conceiving new space types in a headquarters will help define workplaces for offices further afield and cultivate agility to meet future needs.

Capital One McLean Block A, McLean, Va.

At Block A, the future of Capital One is physically manifested in a space that embodies the company's key drivers of collaboration, approachability, and innovation, immersed in a dynamic neighborhood.

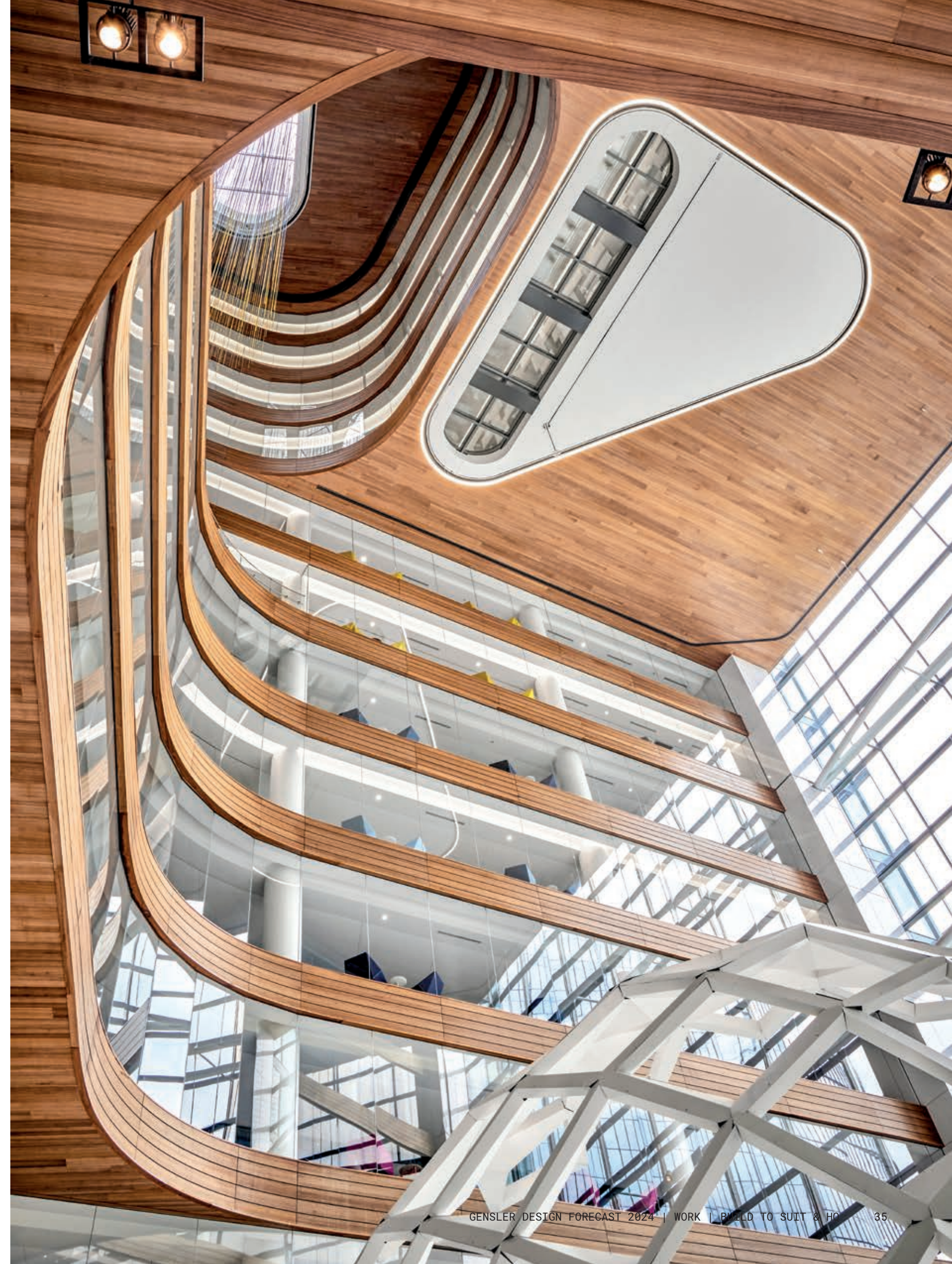
**High-performing workplaces have positive impacts on individual, team, and organizational outcomes.**  
 Percentage of respondents who said that working in the office positively or very positively impacts each of the following outcomes, comparing high-performing and low-performing workplaces.

Source: Gensler Global Workplace Survey Comparison Report 2023



“Build the headquarters that builds your company. Investment in a built-to-suit project gives you the power to fully curate your physical environment to nurture your culture, attract and inspire your employees, and drive growth and innovation for a sustained future.”

Peter Weingarten, Build to Suit & Headquarters leader



# Financial Services Firms



Confidential Client, London

Market volatility, innovations in technology, shifting customer demands, and new realities of hybrid working are driving significant changes in the financial services industry. In response, financial institutions are focusing on creating flexible and adaptable workspaces that could easily be transformed in the future, enhancing the client and employee experience through hospitality and personalization, and tailoring their strategies to target local markets. These changes signal a future where financial services organizations must continually evolve their business models, customer offerings, and workplace environments to remain competitive and cost effective.

## Trends

### Design for culture and employee personality becomes a priority.

In a competitive talent market, there is a need to create bespoke spaces that reflect a firm's culture and personality. Unique styling and hospitality elements will help office environments adopt more of the comforts of home, while seamless A/V and technology support offers something the home office cannot.

### Workplace design principles extend to local markets.

The importance of a unified physical and digital experience across the financial retail and workplace environments will drive the need for new standards and guidelines, placing additional emphasis on design strategy and branding. For large firms, developing strategies tailored to local markets — while still aligning with the overall brand — will be a key differentiator.

### New workplace realities require design for new training and development.

Firms that invest in change management and training to support the transition to new workspace designs, hybrid work arrangements, and evolving job roles will gain a talent advantage in the long term. Learning and development programs will need to adapt to hybrid work arrangements and amenity spaces will need to be more multifunctional.



Confidential Client, New York



# Professional Services Firms

Like many industries, law firms and professional services firms are seeking to reduce their environmental impact, foster diversity, and better support their people as they continue to adapt to new ways of working and collaborating. In order to stand out and attract new talent, firms must create workplaces that demonstrate these values through sustainable design and inspire a sense of purpose and belonging.



Confidential Client, New York

Quorum by Convene, New York



# Trends

## Focus spaces and drop-in desks help define the hybrid law office.

Hybrid work arrangements mean firms are trading closed offices and assigned seating for focus spaces and drop-in desks — freeing up square footage for richer amenities and additional collaborative spaces with upgraded A/V technology that make the office a productive space for hybrid work and a cultural hub worth traveling for.

## Firms are putting their sustainability credentials on display.

Sustainability is a key differentiator for potential talent, clients, and investors. As firms try to lessen their environmental impact, many are demonstrating their commitment to environmental sustainability by reducing their carbon and physical footprint, pursuing LEED, BREEAM, and other certifications, and designing the workplace to enable resource efficiency.

## Design for culture and inclusion will stimulate workplace collaboration.

Culture is key to attracting and retaining talent. The physical workplace is essential in defining and sharing a firm's culture with employees and clients. Offices should enable interaction and support connection and mentoring, while creating a sense of belonging for all employees. Creating human-centric workplaces that inspire purpose and demonstrate organizational values will help firms stand out to potential talent and clients alike.

“The future of design for professional services firms will be defined by new technologies, the amenities and workspaces that attract and retain top talent, and how the workplace demonstrates social impact and sustainability bona fides.”

Timothy Bromiley, Professional Services Leader

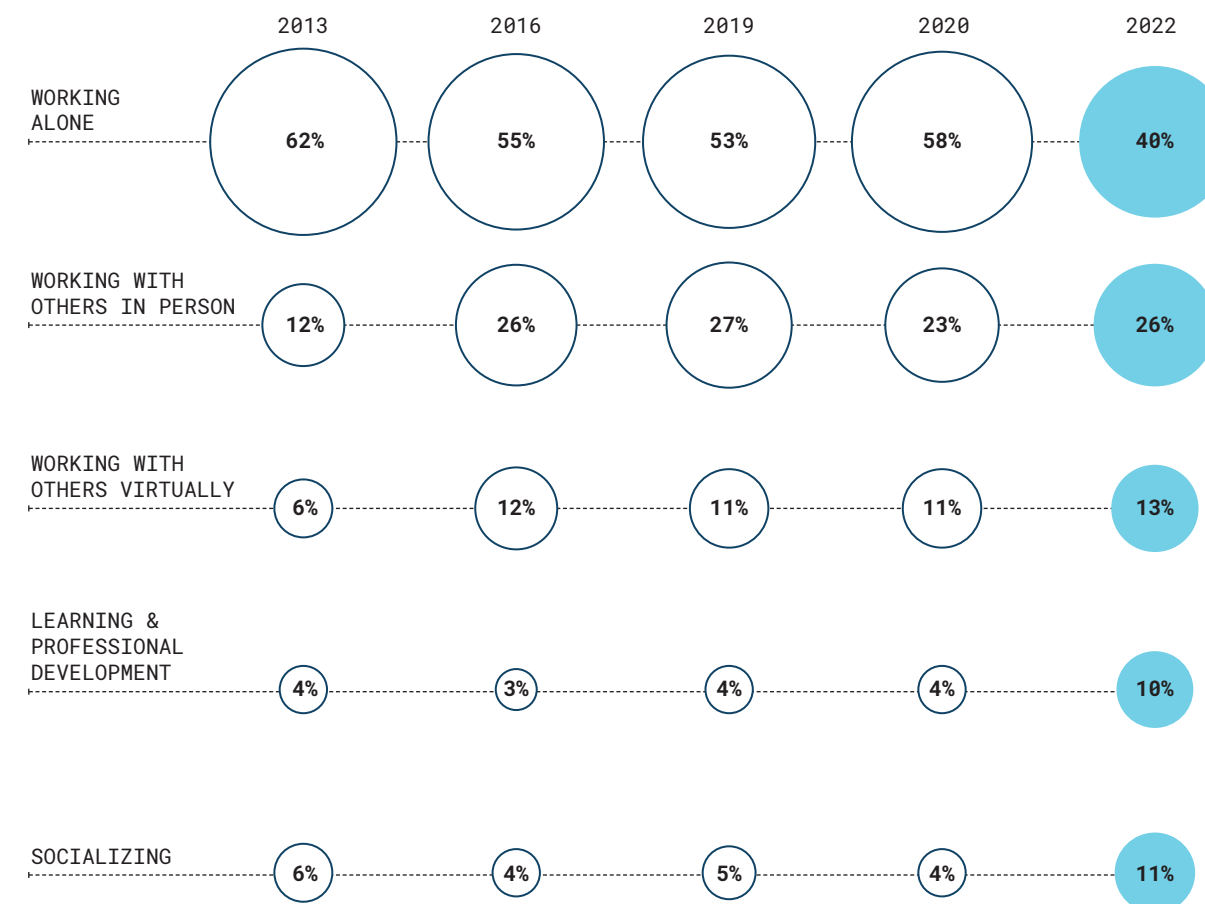


Confidential Client, Shanghai

## Law firm employees spend more time socializing, learning, and collaborating than before.

Percentage of time spent in each work mode during a typical week, among legal industry employees.

Source: U.S. Workplace Survey 2022 - Legal Briefing



“We are in an incredible moment of change and opportunity. We need a workplace experience that provides seamless technology; that better serves our communities; that is bold on resilience; and that is designed to enhance our humanity, health, and our whole selves.”

[L]  
Kevin Heinly  
Global Work Sector co-leader,  
San Diego

[R]  
Amanda Carroll  
Global Work Sector co-leader,  
New York

“Deep exploration of employees’ job functions and work styles has shed light on how much time employees need to spend in the office and what kinds of spaces and technology make them successful, allowing designers to categorize individuals according to how they work best, rather than by their business function, which yields a more successful workplace design.”



# Consumer Goods Companies



7-Eleven Bangalore Workplace Interiors, Bengaluru, India

The consumer goods industry is in constant evolution, requiring companies to innovate their products and operations — and their workplaces — at an ever-faster pace. Flexibility and agility are paramount. As such, companies from automotive to beauty to food & beverage brands are investing heavily in R&D centers, product testing labs, and co-creation spaces to quickly bring teams together to innovate, develop, and refine new offerings. An ongoing focus on sustainability continues to redefine the entire value chain, from manufacturing and supply chains to the workplace.

## Trends

**Investments in R&D and innovation will continue to define the consumer goods workplace.**

Consumer goods companies are investing in innovation hubs, product experience centers, and other multi-use spaces that bring diverse teams together to co-create, cross-pollinate, and develop new products. Some, like automotive companies, are converting workplace into R&D, showroom, and more specialized spaces to drive revenue and catalyze emerging areas of business, like electric vehicles.

**Distribution centers will become “super spaces” that showcase the brand and put products front and center.**

To engage with their workforce, consumers, and manufacturing partners, consumer goods companies are extending their brands into distribution centers and warehouses. By activating those spaces beyond purely functional uses, distribution centers can become “super spaces” that showcase the brand and products through observation floors and other educational, learning, and brand-building activities.

**Forward-thinking brands are demonstrating their ESG commitments through workplace design and construction practices.**

Many consumer goods companies are decarbonizing their supply chain and they're looking to do the same in their workplaces. Brands have an opportunity to connect their sustainability goals and accomplishments across their entire value chain and to their workplace strategy, such as integrating biophilic design, indoor air quality testing, and sustainable and transparent materials into their spaces.

“Clients are investing in strategies to foster creativity and innovation by building workspaces and curated blended experiences for diverse groups to test, learn, connect, and identify future consumer trends.”

Francesca Poma-Murialdo and Juana Vasquez,  
Consumer Goods leaders



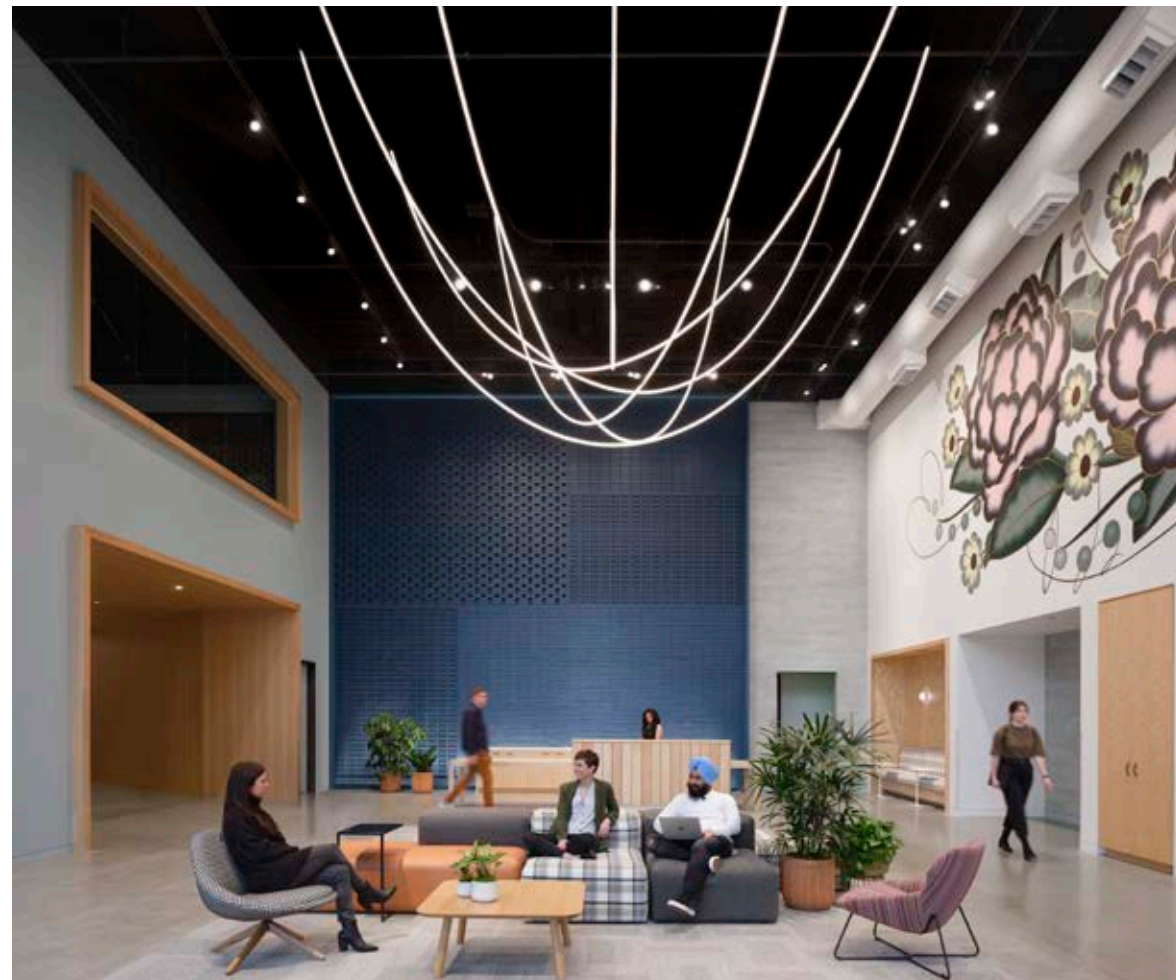
Neiman Marcus Group Hub,  
Dallas

Neiman Marcus's new Dallas hub will be an innovation center and a place where associates can gather, meet, and strategize. The hub fosters teamwork, innovation, and collaboration, and infuse technology to create a unifying space for everyone.



# Technology Companies

As the industry continues to navigate the realities of hybrid work, tech companies will iterate and experiment, invest in pilots, and explore new workplace strategies and purpose-driven amenities to help inform real estate decisions. Inspiring office experiences that increasingly consider sensory design, rotating office programming that can create a tech workplace that inspires. The industry will continue to expand its focus on inclusivity, deepening investment to consider the needs of all workers, including those in call centers and distribution centers.



Confidential Client,  
Santa Clara, Calif.



Confidential Client,  
Suzhou, China

## Trends

### Designing for buzz will attract tech workers back to the office.

In the tech workplace, employers will look to earn their employees' commutes by exploring buzz-boosting experiences that inspire attendance and productivity. These buzzy experiences will pair sensory-rich physical spaces with on-demand programming to energize the workplace, with a focus on arrival experiences, social spaces, and hospitality-infused team spaces.

### The idea of the "club workplace" could enliven urban neighborhoods and locate the office closer to where tech workers live.

Tech companies are looking for real estate in amenity-rich, multiuse live-work neighborhoods where large clusters of employees live. Enter the "club workplace," a new type of neighborhood workplace that bridges the gap between home and the hub office with the convenience of a reduced commute, and creates opportunities to engage the community in new ways.

### Tech employers are starting to design for mentorship.

Hybrid work has heightened the need for lateral awareness in the office — the impromptu ability to observe leadership behaviors or overhear conversations that inform project work or performance. Neighborhood layouts can enhance passive mentorship, but this must also be balanced with spaces with acoustic privacy to allow tech workers to get into a flow state.

Globally, office-based tech employees value the office to focus on their work, access to technology, and for professional development and coaching.

For which of the following reasons is it most important to come to the workplace?

Source: Gensler Global Workplace Comparison Report 2023



Pinterest Mexico, Mexico City

SAP Japan, Tokyo



# Energy Companies

As the energy sector faces pressures to transition to more sustainable and green sources of energy, there's a growing focus on ESG goals, carbon neutrality targets, and innovation in renewable energy technologies. With a tech influence, talent is moving into the energy field to develop and commercialize solutions, such as solar, wind, nuclear, and carbon capture. The office design trends in the sector reflect this transition, with a growing focus on sustainability, safety, well-being, inclusivity, flexibility to accommodate hybrid work, and community outreach.

## Trends

**Large energy campuses embrace modularity and flexibility to support hybrid and in-person synergies.**

Large energy campuses are evolving as companies embrace hybrid working, minimizing use of the private offices, or standardize smaller private offices. By creating standard/modular room sizes that can easily convert to another space, such as office-to-huddle rooms, clients can maximize the use of their space with ultra flexibility as work modes evolve.

**Employee experience and well-being rises to the top of the priority list alongside safety.**

For the energy industry, safety has always been a priority, but that focus is expanding to holistic employee well-being. These companies are offering a range of new spaces and amenities, from access to mental and physical health programs to better circulation, daylighting, indoor-outdoor spaces, and places to reflect and restore.

**Investments in new, carbon-free energy production will lead to new types of storage solutions.**

Across the globe, tax credits and incentives will enhance the growth of new, carbon-free energy such as nuclear, wind, solar, hydropower, and green hydrogen. At the same time, energy companies are funding, developing, and acquiring new, carbon-free energy assets to improve their carbon footprint. This heightened investment is spurring innovations in emissions-free energy production and storage.

Energy workers selected the ideal mix of experiences for their company's office environment.

1  
COFFEE SHOP

2  
BOUTIQUE HOTEL

3  
CORPORATE

4  
CLUBHOUSE

5  
RESIDENTIAL

6  
CONFERENCE CENTER

7  
LIBRARY

8  
CREATIVE LAB

Source: Gensler Global Workplace Comparison Survey 2023



Shell Office, Dubai

“ESG and carbon neutrality goals are growing in importance in the energy world. The energy sector is looking at what it means to take carbon out of the circular economy with carbon capture and sequestration.”

Vince Flickinger, Energy leader



Right to Dream Copenhagen, Farum, Denmark



Confidential Client Headquarters, Washington, D.C.

# Foundations, Associations & Organizations

Foundations, associations, and non-profit organizations are making positive progress toward meeting today's expectations around flexible workspaces, community engagement, and in-person connections. Organizations are seeking to right-size their portfolios through options like selling existing buildings and leasing new spaces that better facilitate collaboration, events, and public engagement. At the same time, partnerships between organizations, developers, and local communities are emerging to jointly address space needs while strengthening regional networks and impact.

## Trends

**Non-profits and developers discover mutual benefit by retrofitting underutilized buildings into community hubs.**

Rather than demolish vacant or underutilized buildings, developers are retrofitting and reusing these spaces into community hubs that bring together non-profits and other value-aligned tenants. By offering below-market rents to community partners who couldn't otherwise afford space, these hubs can forge strategic partnerships and drive further impact.

**Investments in workers' holistic well-being will pay dividends.**

In a sector facing staff shortages and high burnout rates, talent attraction and retention is key. To appeal to a changing workforce and drive their missions forward, non-profits can invest in spaces and programs that enhance holistic employee well-being, from wellness rooms to community service opportunities to flexible hybrid work arrangements.

**The need to reconnect will drive demand for ground floor places to convene membership.**

As organizations continue to reconnect with their members in person, there will be a heightened focus on meeting and event spaces, as well as community engagement opportunities. By pursuing public-facing ground floor spaces, organizations can increase their community presence, drive influence, and host revenue and membership-generating activities.

**“The office is no longer assumed to be the default place to work for most employees — today’s workplace must make its case for being the better and more effective place to work. Ultimately, the future workplace must be a compelling destination where people want to be. But most important, the workplace must be an effective place to work, where both individuals and teams do their best work.”**

[L]  
**Janet Pogue McLaurin**  
Global Work Sector co-leader,  
Washington, D.C.

[R]  
**Nayan Parekh**  
Global Work Sector co-leader,  
Singapore

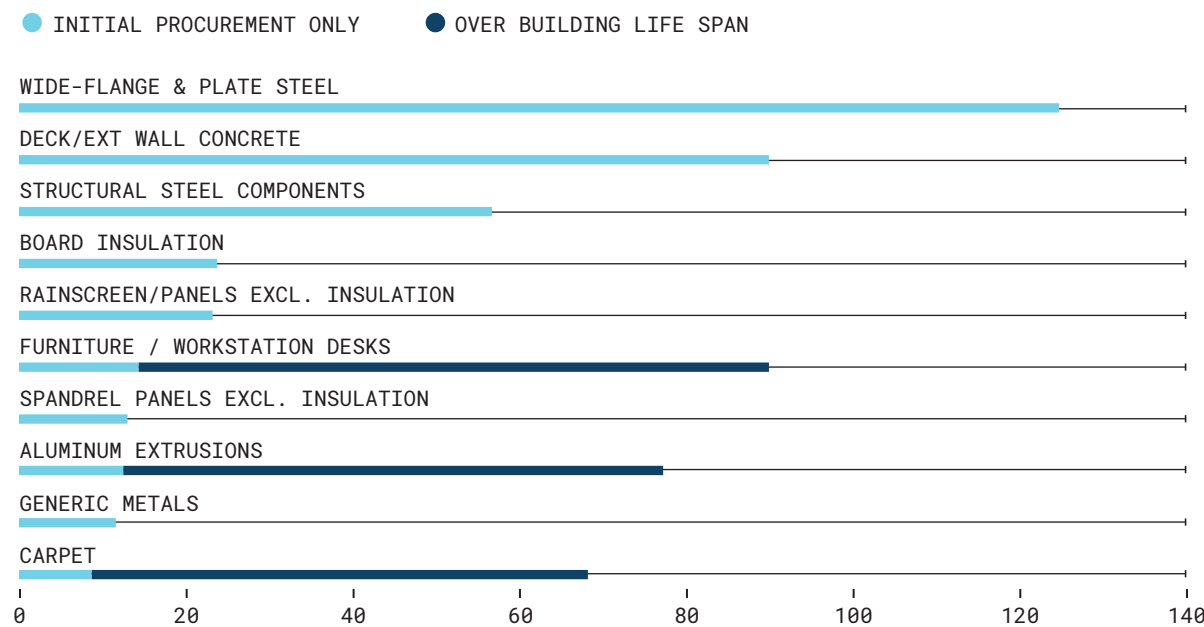
**“This is an extraordinary moment for companies to rethink their approach to the workplace and the new role it serves, in order to showcase the investments and decisions they are making to support meaningful progress towards diversity, equity, and inclusion in the workplace.”**



Union, A. Rudin

### Understanding the Impact of Materials

The following infographic shows the impact of commonly used building materials, both at initial procurement and over a building's estimated life span of 60 years. Structural materials have the biggest initial impact; over time, interior design elements and materials increase in total impact as replacements add up.



**GWP INTENSITY (KG CO2E/M2)**  
Global Warming Potential (GWP) Intensity within selected case studies, measured in kg CO2e/m2, and capturing product stage impacts including raw material supply, transport, and manufacturing (A1-A3 life cycle stages).

Source: Climate Action Through Design 2021

The future of product development will focus on experiential and cognitive design that enhances user enjoyment and performance through form, texture, and other sensory elements. There will also be a continued push for sustainable and circular product solutions through the use of recycled materials and designs that enable end-of-lifecycle reuse, remanufacturing, and recycling. Flexibility, reconfigurability, and inclusivity will remain key drivers as products aim to accommodate different modes of work and serve people of all abilities.

# Product Development

## Trends

**Flexibility, reconfigurability, and adaptability will be table stakes for successful product design.**

Workers are looking for offices that offer a mix of experiences, as well as products that support different work modes. Given this desire for choice and variety, and a measure of inherent unpredictability, the one common denominator that can help ensure a product's success is flexibility. Flexible, reconfigurable, and adaptable products will excel in the market.

**New product sustainability standards and "circular products" will be game changers for climate goals.**

Purchasers and end users are interested in products designed and manufactured with safe ingredients, recycled content, and low emissions. At the same time, manufacturers are seeking a common set of sustainability standards that provide clear, concise performance criteria. Together, these objectives will work to improve the sustainability profile of interiors products and drive down embodied carbon across the building industry.

**Products designed for equity and accessibility will have an edge.**

Inclusive product design not only creates a better experience; it can also help employers meet DEI goals, which work to ensure equity, accessibility, and productivity for the greatest number of people, regardless of their abilities or limitations. Products that address and ideally go beyond ADA standards without singling anyone out will earn a competitive edge.



The pandemic and increase in extreme climate events have heavily influenced the government and defense industries in recent years and are leading to significant efforts to adapt work environments and make facilities more flexible and resilient. Sustainable and resilient design, office consolidations, hybrid work, improved health facilities, and delivery of services online facilitate improved day-to-day operations and help prepare for future health or weather crises. Hybrid work models have become the norm as governments seek out design solutions that enhance the delivery of services, improve experiences, reduce costs, and adapt to changes in the way people live and work.

# Government & Defense Agencies



Hillsborough County Aviation Authority, SkyCenter, Tampa, Fla.

## Trends

### Government offices are aligning their real estate with flexible work models.

As government agencies shift toward hybrid models of work, they are reevaluating their space needs and redesigning the workplace to accommodate physical and virtual communication channels.

### Public funding will continue to focus on resilience and sustainable infrastructure.

An influx of public funding and increased emphasis on net or near-net zero goals are propelling the need to invest in resilient and sustainable public infrastructure that can reduce long-term costs and better withstand extreme weather events.

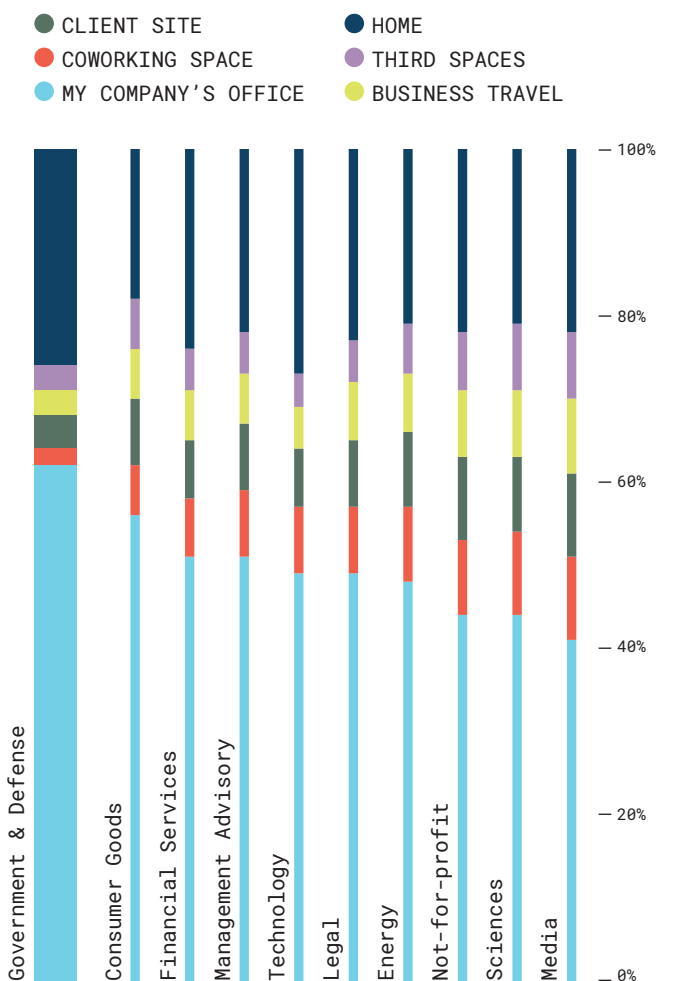
### Global health issues are also driving the need for better designed public facilities.

In the face of current and anticipated health and weather crises, government agencies are seeking design solutions that can enhance the delivery of public services and experiences. We will see more investments in public health labs as the government improves its readiness.

### Government employees have adopted hybrid and remote work styles.

The percentage of time spent across different locations in a typical workweek.

Source: Gensler Global Workplace Survey Comparison 2023



# Media Companies

The media industry continues to morph as social media and streaming move to center stage and media organizations continue to consolidate disparate distribution channels under one roof and one business model. The dynamic state of the industry requires a global, multidisciplinary approach to rapidly deliver flexible, integrated, and localized solutions and a workplace that is purpose built to adapt to change in the face of uncertainty.

---

## SPOTLIGHT ON AFRICA AND THE MIDDLE EAST

---

**Untapped markets beyond Hollywood emerge as the next frontier for creative content.**

While the demand for fresh content continues unabated, investment in soundstages is plateauing in the U.S., where capacity has caught up with demand. Other markets with more attractive tax incentives, such as Nigeria and the Middle East, are seeing growing demand for media production facilities. Nigeria's "Nollywood" has a burgeoning \$6.4 billion film industry, while the Middle East's entertainment market is expected to grow to over \$60 billion by 2028.

## Trends

**Media platforms are converging, creating more need for integration in the workplace.**

As revenue opportunities expand in social media and gaming, media companies will need to facilitate multichannel teams. This presents an opportunity in the media workplace to embrace greater physical connection and in-person moments of convergence.

**The physical and digital worlds become increasingly connected.**

New generations of media workers have higher technology expectations in the workplace because of the gaming and social media platforms they grew up with. To attract young workers, media environments will be more immersive and allow employees and visitors to engage with content on many layers, both analog and digital.

**Media organizations will partner with other lifestyle industries to create new experiences and venues.**

As consumers seek out new, in-person experiences for everything from live music and sports events to gaming and retail, media organizations will partner with other industries to develop venues that can extend the value of their content using digital and immersive strategies.



The Ranch Lot Studios, Burbank, Calif., Worth Real Estate Group



“Media employees report being in the office less than 40% of the time, which is low compared to other industries. These employees spend a significant portion of their time at other locations, including coworking spaces, client/partner locations, traveling, and spaces unique to media — such as offsite studios and production facilities.”

Johnathan Sandler, Media leader

# Strategy Services

As organizations of all sizes continue to find ways to draw more people to their buildings and places, many are experimenting with strategies that can create compelling destinations and serve the varied needs of different people and communities. Most agree that they must move away from homogenous, single-use spaces. By leveraging user research and pilot studies, organizations can provide new types of spaces, policy, programming, and technology to deliver vibrant experiences and places that bring people together in meaningful ways.

## Trends

**Strategic experimentation of new hybrid technologies in the workplace can create digital equity.**

As organizations look for ways to create parity between the remote and in-person work experience, they can evaluate their goals and user needs to determine the right collaboration tools and processes for their business. Implementing solutions that are simple, cost effective, and consistent will be important.

**Customer segmentation and analyses become key tools for creating purposeful work environments.**

In a bid to create future-forward work environments, employers are calibrating their research to understand the nuanced needs of different employee populations and business units. Organizations can adopt traditional segmentation tools and analysis and consider a “kit of parts” approach with flexible workplace concepts to tailor environments for different needs.

**Early-stage journey mapping will define meaningful places and experiences.**

As more organizations seek out unique meaningful places for diverse users, designers will embrace the earliest stages of journey mapping to bring experiences to life in new ways. Clarity at the start — using strategies such as qualitative and quantitative user research and community engagement sessions — can align developers, planners, and other stakeholders around what people really want.

“As we shape new experiences in a world of accelerating change, a strategic and holistic approach that considers the entire user journey will be key to creating places that truly meet people’s diverse and evolving needs.”

Claudine Frasch, Strategy leader

Below: A sample of various data visualizations collected from Gensler’s Strategy Services work with clients.

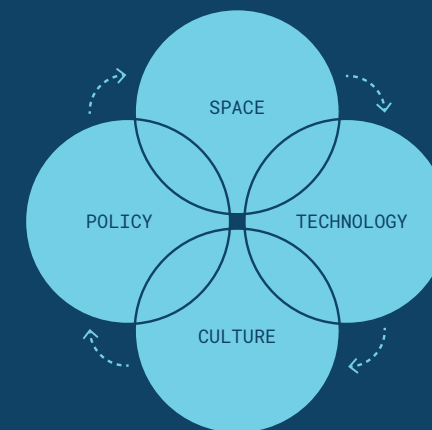
### VISIONING FRAMEWORK

Key Objectives:

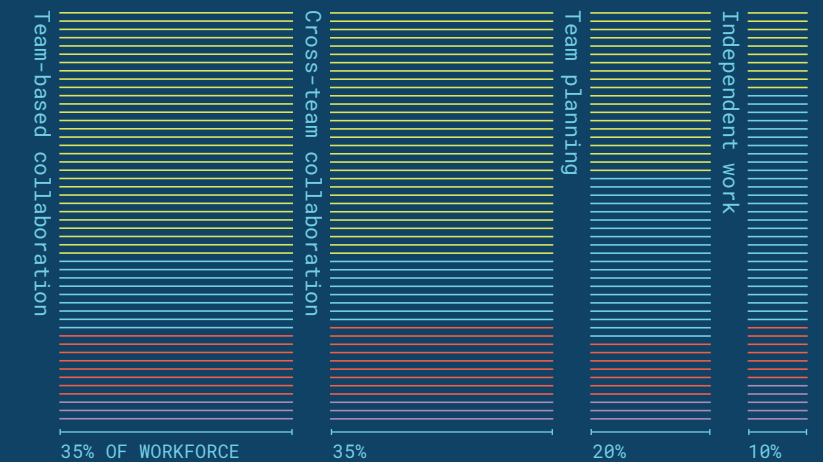
- Understand space needs
- Identify policy opportunities
- Understand cultural nuance
- Identify technology gaps

### EXPERIENCE DEMAND

These 4 workstyles will exist in different proportions in the office — mapping this in addition to what kinds of activities each workstyle spends time doing can inform the proportions of experiences we need to support.

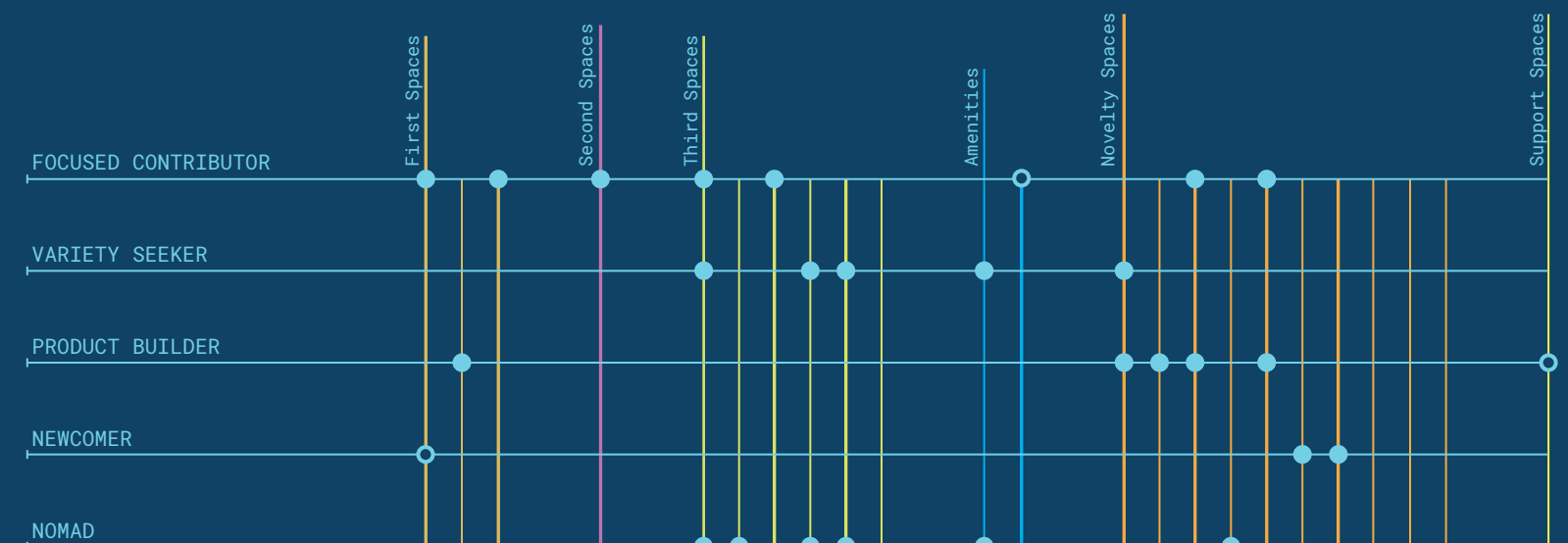


- GATHER & COLLABORATE
- FOCUS & COLLABORATE
- COLLIDE & CONNECT
- REFLECT & RESET



### TEAM JOURNEY MAP

- PREFERRED SPACE TYPE
- RECOMMENDED SPACE TYPE



# CITIES

PG. 70 - 101

CITIES & URBAN DESIGN

AVIATION

EDUCATION

CRITICAL FACILITIES

CLIMATE ACTION  
& SUSTAINABILITY  
SERVICES

MOBILITY  
& TRANSPORTATION

INDUSTRIAL & LOGISTICS

## Designing Vibrant 20-Minute Neighbor- hoods

Cities continue to undergo a period of massive transformation as they look for ways to reinvigorate downtowns and avoid disinvestment and flight. But these crises can also present an opportunity for cities to stimulate innovation, build sustainable infrastructure, and partner with the private, public, and civic sectors. The future of cities is being defined by their ability to create multifunctional 20-minute neighborhoods that successfully address the interconnected issues of thriving workplaces, attainable housing, and safe and accessible transportation.

Harborplace, Baltimore  
MCB Real Estate

This mixed-use development aims to reflect the generational change away from indoor malls to a more active, multiuse space for living, gathering, recreating, eating, and shopping.



The rise of flexible working, coupled with the increasing threats of a changing climate and ongoing volatility in the global economy, is challenging long-held tenets of city design and urban living. Planners are reimagining downtowns to respond to the evolving and varied needs of urbanites, while also addressing new public policy and regulatory planning restrictions. As such, reimagining the world's cities requires an interdisciplinary approach that can address multiple priorities and prioritize the equality, sustainability, and experience people want from their cities.

## Trends

**General master planning is rapidly evolving toward specialized city design that can meet blended work-life demands.**

Urban centers today require a unique and specialized approach to meet the demands of 21st Century living, marking the end of generalist master plans. Urban planners and designers should consider more mixed-use, flexible approaches that integrate living, working, and leisure into every district and development to cater to the varied needs of urban dwellers.

**Demand for affordable housing will be met through strategic partnerships with non-profit developers.**

To overcome the regulatory and economic barriers that often face affordable housing, urban designers can leverage partnerships with non-profit, mission-driven developers who can progress projects more quickly and at lower cost. As the focus turns to more social-based developments, harnessing the right partners including developers, housing authorities, and non-profits will be imperative.

**Investment in adaptation strategies will continue to increase the profitability and desirability of urban real estate.**

Adapting to the impacts of climate change through measures such as urban green cover, resilient public spaces, and equitable design can mitigate the impact of climate change in the built environment. Local governments and city planners have an opportunity to demonstrate the long-term return on investment and incentivize sustainable and resilient development through tax benefits.

# Cities & Urban Design



“The era of the generalist master planner is over. The challenges of the 21st Century city demand a new approach to urban planning and design that is flexible, adaptive, specialized, and focused on implementing real solutions.”

Andre Brumfield, Cities & Urban Design leader



Haizhu Innovation Bay Lijiao Core Area Urban Design, Guangzhou, China

SPOTLIGHT ON EUROPE

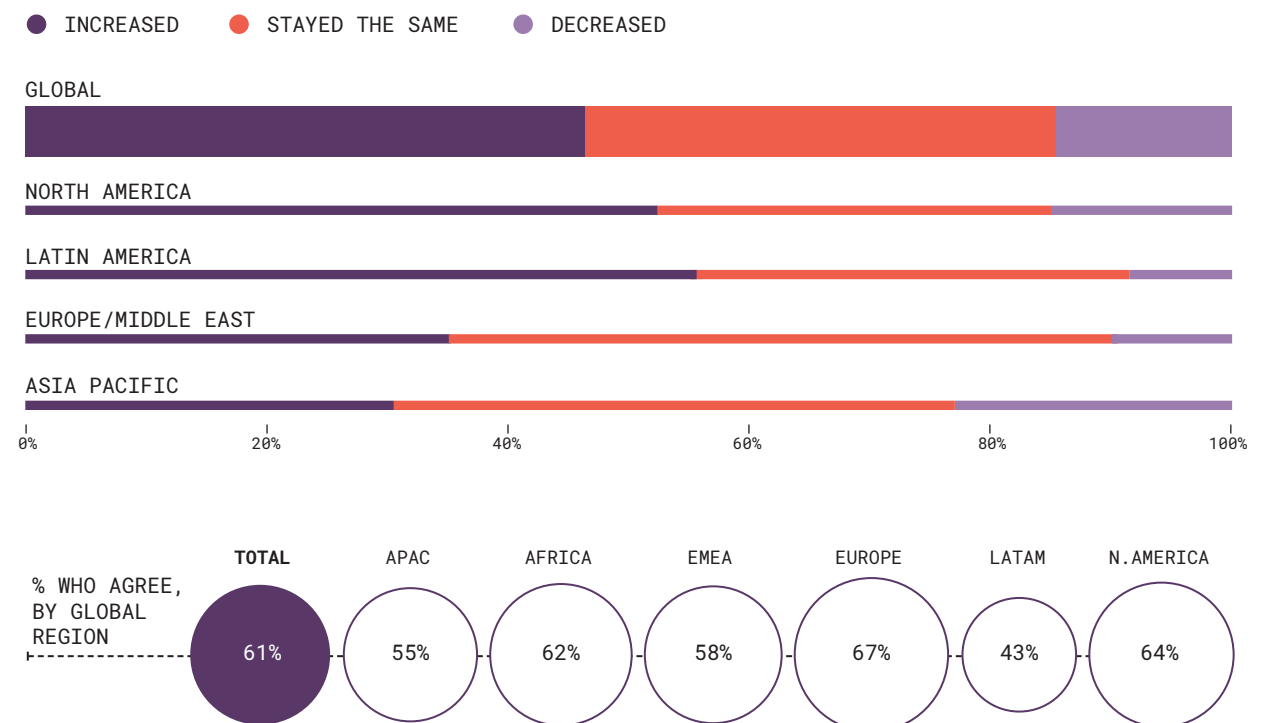
European cities – typically denser than those in the U.S. – will adapt faster to blended, mixed-use living.

European cities are typically densely concentrated and highly interconnected through micromobility and public transport links. Urban designers can leverage the accessibility of these cities to change and adapt areas around the urban center to meet the blend of experiences people desire between their work, life, and leisure needs.

Globally, over half of urban residents believe the cost of housing has increased since the pandemic.

Compared to prepandemic times, housing costs have...

Source: Gensler City Pulse Survey Spring 2022



“Airports and aviation firms must rise to the sustainability challenge by electrifying their infrastructure, decarbonizing materials, and optimizing designs to minimize embedded carbon.”

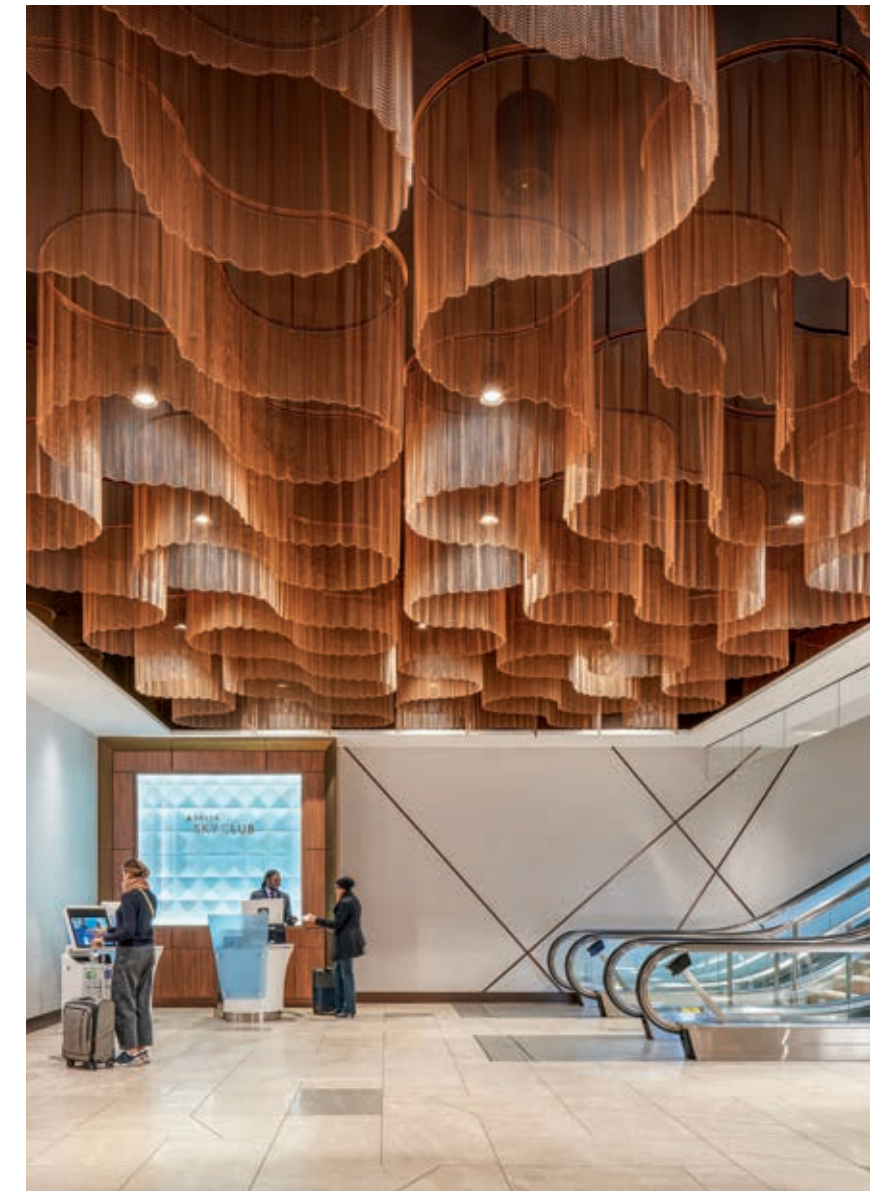
Tim Sullivan, Aviation leader

# Aviation



JFK New Terminal One, Queens, N.Y.

The aviation industry is showing positive signs of recovery with leisure and high-end business travel driving its revival after a difficult few years. Even so, the storm clouds haven't all gone away. Amid turbulent economic headwinds, new traveler expectations, and more stringent legislation on carbon output, the industry is set to pivot to meet future demands. Now, aviation firms are taking a proactive approach to invest in holistic sustainability solutions, pilot new technologies and innovations, and engage local communities and key stakeholders to build resilience against future disruptions.



Delta Sky Club, Los Angeles

## Trends

**Airports are looking to become fully electric to mitigate their environmental impact.**

As airports look for ways to reduce the use of fossil fuels, they can focus on minimizing their carbon impact by electrifying their operations. Complete electrification requires airports to work with tenants — particularly food vendors — to help them transition to electric options.

**Airport design will leverage local communities to become more diverse.**

The gradual but progressive awakening of diversity strategies in the airport industry moves beyond meeting hiring quotas toward a robust community-centered recruitment approach. Airport design and construction can leverage mentorship protégé programs and internships to support the community that surrounds the airport to develop and learn new skill sets, in turn creating spaces that are more inclusive and diverse.

**Prefab and modular design are on the cusp of becoming mainstream in airport design.**

Borrowing techniques from industries such as hospitality and residential, airports can use prefabrication to construct standard components in airports such as retail space, lounge areas, and bathroom facilities. Modular design techniques improve efficiency and quality control while reducing costs and carbon emissions.



SPOTLIGHT ON EUROPE

**Rail operators and airports in Europe will sync up for a more seamless travel experience.**

The gradual improvement of intermodality in Europe is paving the way for an integrated travel experience across multiple forms of transport. As airports and train operators become more in sync, policymakers, other surface access providers, and contractors have an opportunity to establish mutually beneficial policies.

**90%**

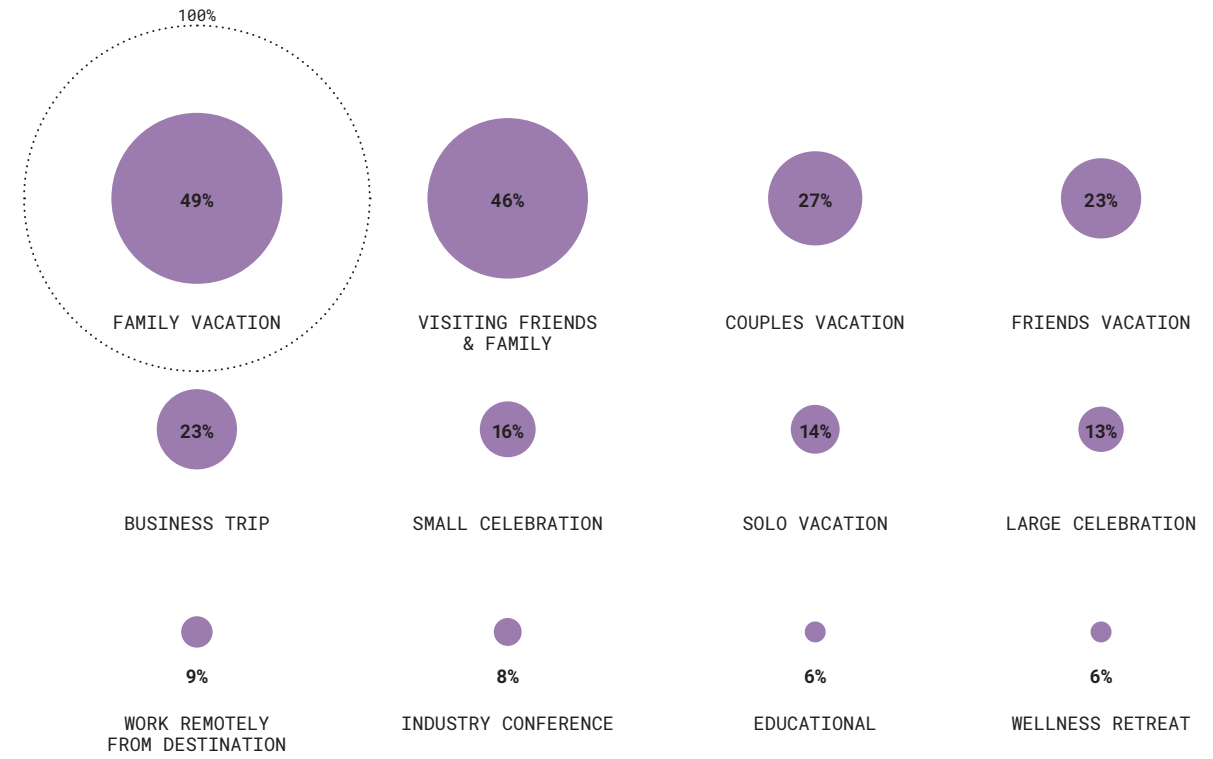
of U.S.- and Canada-based survey respondents intend to travel in the foreseeable future.

Source: Gensler Hospitality Experience Survey 2023

**Travel has bounced back significantly since 2021.**

Most travelers still prioritize air travel to see loved ones, but business trips now make up almost a quarter of all travel.

Source: Gensler Hospitality Experience Survey 2023



LaGuardia Airport, Delta Air Lines Terminal C, Queens, N.Y.



John Glenn Columbus International Airport, Columbus, Ohio

“Airports are more than transportation hubs; they are the gateways to our cities and the most important infrastructure elements of the global, connected future. Although they are often located outside city centers, they make a first impression, with immediate and lasting implications for how passengers view their journey and the city itself.”

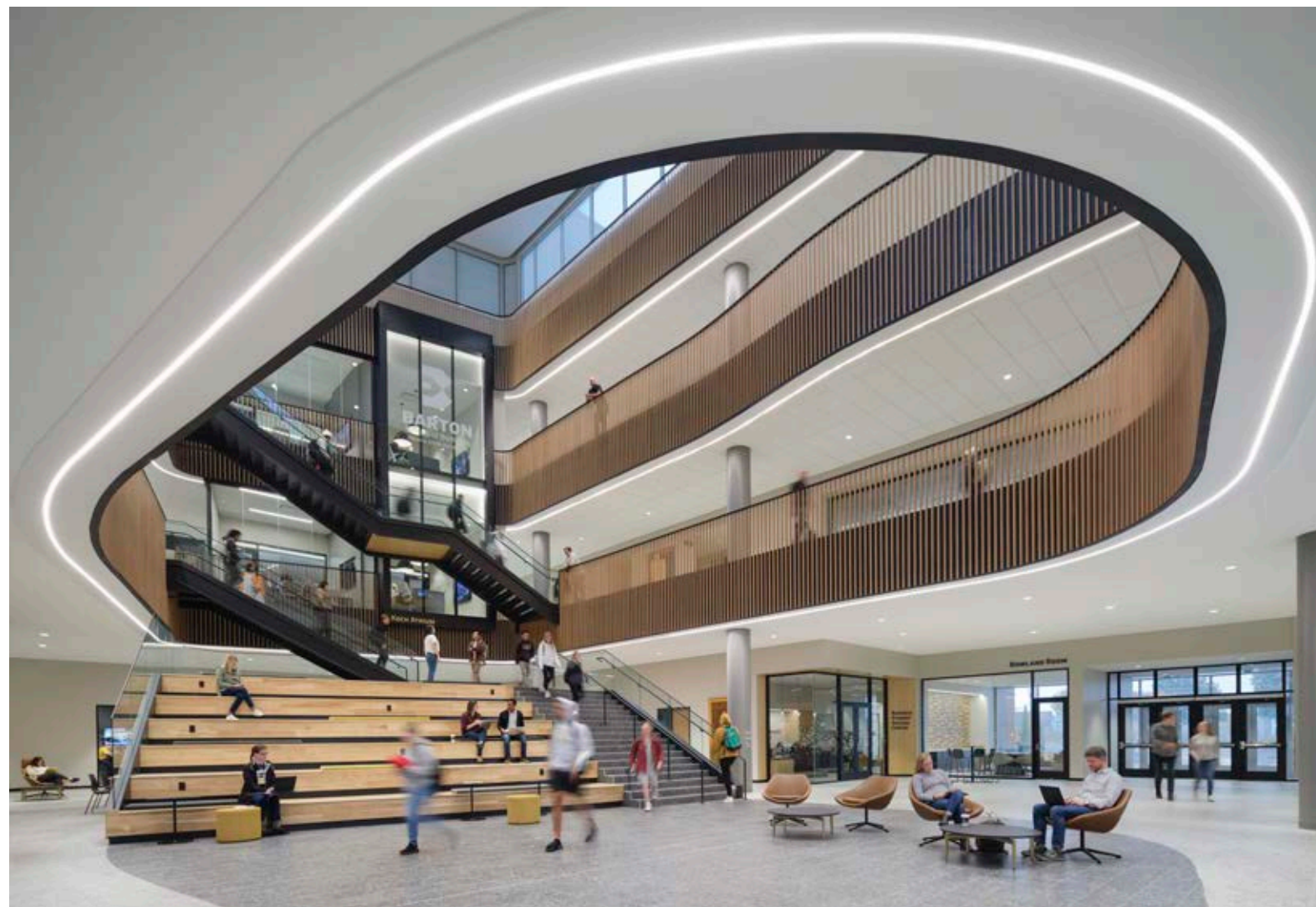
**Ty Osbaugh**  
Global Cities Sector co-leader,  
Washington, D.C.

# Education

Higher education is facing a reckoning: declining enrollment, rising costs, and questions about the value of a traditional four-year degree are causing institutions to reconsider the highest and best use of their campuses. Many colleges and universities are looking for cost-effective ways to improve the student experience and decrease their carbon footprint through adaptive reuse and renovations in lieu of new construction. With a focus on the student experience, institutions are prioritizing community and belonging, which includes diversity, equity, and inclusion. Hybrid learning is becoming a permanent fixture, but many institutions still face challenges developing the right learning models, technologies, and environments.

“In order to prepare students for the increasingly multidisciplinary nature of work, the physical campus is shifting from a collection of siloed buildings dedicated to individual majors into a collection of spaces that blend multiple disciplines, and we have to design accordingly.”

Mark Thaler, Education leader



Wichita State University Barton School of Business Woolsey Hall, Wichita, Kan.

## Trends

### Building renovations and reuse on campus have become a key development strategy.

As higher education institutions strive to stay relevant and reduce operating costs, they must focus on the highest and best use of their physical assets. Data-informed strategies can help colleges and universities right-size their infrastructure, lower embodied carbon, and optimize campus space use, such as converting aging classroom buildings into student collaboration space or student housing, rather than new construction.

### As hybrid learning becomes an expectation, institutions will find new ways to support different methods.

Hybrid learning is here to stay, and developing the right learning models, technologies, and physical environments will remain a priority. In 2024, we'll see educational institutions invest in the spaces, technologies, faculty, and staff to support different hybrid approaches — whether activity-based, schedule-based, or HyFlex (where students can choose to attend in-person, online, or both).

### The benefits of social connection and well-being demands new types of amenities.

From K-12 through higher education, it is crucial to design places on campus that facilitate community and promote physical, social, and emotional well-being. Student collaboration spaces and residence halls are vessels for cultivating a sense of belonging. Schools, colleges, and universities are supporting “the whole student” and often providing non-academic support services, from affordable meals and housing to mental health and other wraparound services.



West Virginia University Reynolds Hall, New School of Business, Morgantown, W.Va.



The Engine at MIT, Cambridge, Mass.



# Critical Facilities

The rise of technological advancements, such as the increased adoption of AI and cloud computing, is driving the demand for new, high-performance data center designs around the world. While data centers are critical infrastructure in a digital economy, designers are always looking for ways to make them more efficient since each data center carries steep environmental challenges related to energy consumption and carbon emissions. Interdisciplinary collaboration, stakeholder engagement, and sustainable expertise will increasingly differentiate future-forward critical facilities.



## Trends

### The AI goldrush will drive new growth in the market — and new designs.

The rapid growth of AI and other emerging technologies will have a huge impact on the market as data center operators look to build dedicated AI sites or adapt existing buildings to deploy AI. These advanced operations will force new designs to accommodate more computing power and new kinds of cooling solutions, from traditional air-cooled data halls to direct-to-chip, immersion, and liquid cooling.

### Sustainable design options drive more efficient operations.

Data center operators have a growing list of alternatives to lower their energy consumption and decrease their carbon footprint. On-site power generation, near-site green energy sources, waste heat recovery, and alternative material choices — like using timber over concrete — are some of the options available to make data center infrastructure more sustainable and resource efficient.

### Existing buildings will be ripe for data center retrofits.

In prime markets, like London or Northern Virginia, urbanization and the shortage of land for large-scale data center development are pushing data centers into brownfield sites, existing buildings, and vertical designs. Former corporate and research campuses on the periphery of urban centers offer attractive acreage and existing architecture for data center development.

# Climate Action & Sustainability Services

The urgency of the climate crisis has pressured governments across the world to implement increasingly stringent legislation around climate disclosure. Organizations are grappling with the complexity of reporting carbon output, while taking measures to drastically reduce their carbon footprint to meet stakeholder expectations. Action-oriented responses are expected to demonstrate sustainable credentials through real estate, material selection, and organizational processes. As a result, there is a growing demand for holistic sustainability approaches that consider how environmental, social, and governance (ESG) considerations can be integrated into design and construction from the outset.

## Trends

### Extreme weather events are driving demand for resilient design at scale.

The rapid acceleration of climate change is emphasizing the need for immediate design responses at the city and building scale to cope with extreme weather such as floods, storms, and heat waves. Architects, developers, and urban designers should embed resilient design at the outset of projects and pilot solutions that can be scaled over time.

### Companies will increasingly incorporate social sustainability into their business strategies.

Social sustainability is the goal of creating a more equitable and just society, including factors such as fair labor practices, human rights, and community engagement. Beyond the narrow focus on net zero carbon, companies can take a holistic action-based approach to sustainability that considers their environmental and social impact.

### Policy requirements and stakeholder expectations will place greater focus on transparent carbon reporting.

Investors, occupiers, and other stakeholders are demanding greater transparency from companies about their environmental impact. Coupled with tighter disclosure regulations from governments, carbon output reporting will no longer be voluntary. To create a robust carbon reporting strategy, organizations should define clear, output-driven sustainability goals and metrics tied to their business strategy.

“Buildings in the future will be living, breathing things — they will be continuously changing. Buildings will be even more energy-efficient, even smarter, and easier to engage.”

Jensen Huang, founder, president & CEO, NVIDIA



NVIDIA Headquarters - Voyager, Santa Clara, Calif.



SPOTLIGHT ON EUROPE

**Geopolitical turbulence is accelerating investment in renewable energy in Europe.**

The war in Ukraine has highlighted the importance of energy security across Europe, and has led to a growing demand for renewable energy to become energy independent. Companies can invest in renewable energy projects as they seek to reduce their reliance on imported fossil fuels and meet sustainability goals.

**Europe is leading the world in regenerative design and nature-based solutions.**

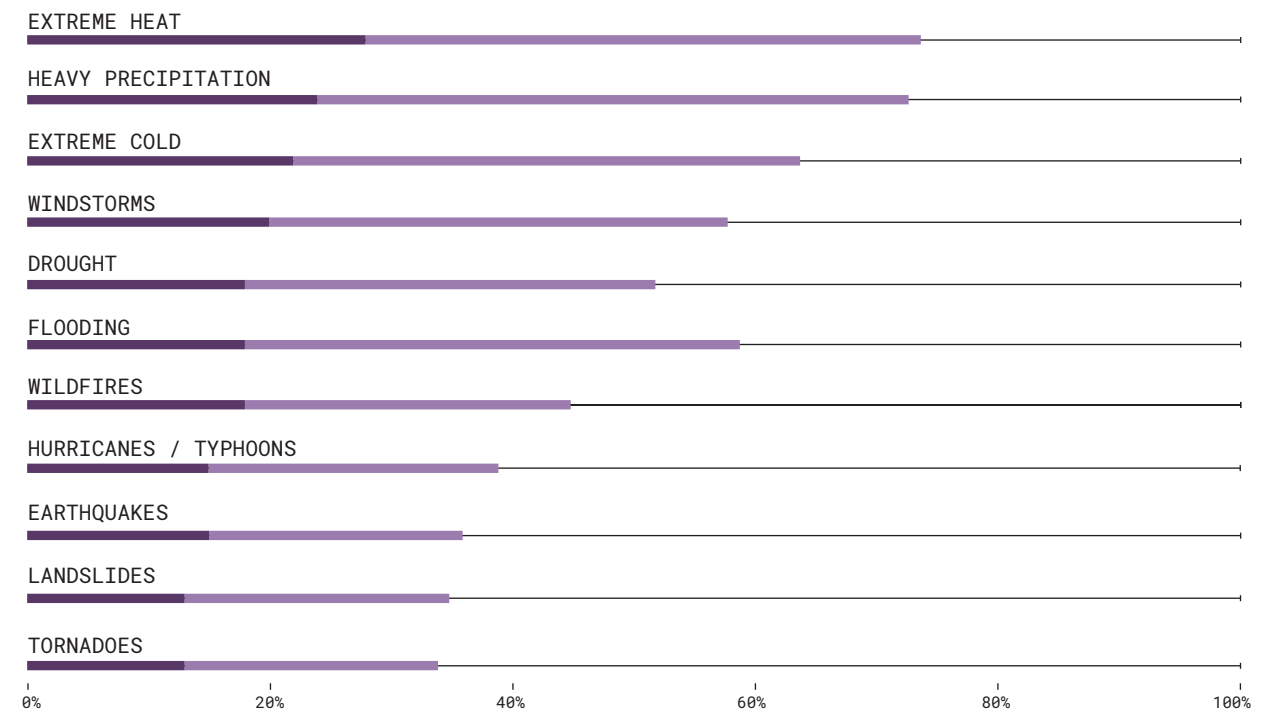
European regulations and reporting requirements are becoming more stringent and complex, especially around nature-based and biodiversity metrics, and EU Taxonomy. As requirements for circular economy statements and plans are in place in the U.K., other regions across the world will absorb learnings for global best practice.

**Globally, extreme temperatures and heavy precipitation are the most common environmental stressors.**

Have you recently been personally impacted by the following extreme weather events?

Source: Gensler Global Climate Action Survey 2023

● SEVERELY IMPACTED ● IMPACTED





**The Lighthouse,**  
South San Francisco, Calif.  
Alexandria Real Estate Equities, Inc.

The Lighthouse, owned and developed by Alexandria Real Estate Equities, Inc., is a shared amenity space for a community of biotech companies, with every detail designed at the forefront of sustainability. Targeting Designated Net Zero Energy ready, all of the building's energy demands are generated with on-site renewable resources.



# Mobility & Transportation

Mobility and public transit systems are experiencing significant disruptive changes, offering unique opportunities for innovation. Electrification, the rise of autonomous vehicles, urban air mobility, and more are combining to challenge traditional mobility patterns in our cities. Meanwhile, legacy roadway and public transit systems are struggling with ongoing traffic congestion and anemic ridership, both of which stress the viability of our urban cores. The solution is a multimodal future that blends new technologies with optimized legacy infrastructure with the goal of improving access to, from, and within our cities.

## Trends

### **Mobility goes electric and the recharging experience becomes multimodal and mixed use.**

Infrastructure and buildings need to be designed to keep pace with the tremendous growth in demand for electric vehicles, from cars to scooters to electric Vertical Takeoff and Landing (eVTOL) aircraft. Electric vehicles require a longer charging period, so the recharging process opens new opportunities to co-locate live, work, and play programming facilities at charging hubs in urban areas.

### **Rail finds a rebirth in the U.S. with new investments in public transit and high-speed lines.**

With billions of dollars in federal aid earmarked for rail improvements around the U.S. combined with an ongoing push by local officials to double-down on public rail transit, opportunities abound for designing the next generation of stations and station adjacent development (TOD).

### **Mobility continues to be the backbone of a 20-minute city.**

Successful cities are made up of a collection of multiuse and vibrant neighborhoods in which everything you need — live, work, and play — is within your grasp. But this only works with effective mobility infrastructure: wide sidewalks, secure bike lanes, micromobility options, and a functioning transit system.



West Edge, Los Angeles  
Hines, Philena Properties, LLP  
Transit-oriented development

“Technology has a big impact on how city and mobility systems respond to the way people consume experiences. Many people ‘mix-and-match’ digital and physical experiences throughout the day — our systems have to be responsive to meet these demands.”

Dylan Jones, Mobility & Transportation leader

“Reusing existing buildings can help preserve the historical and architectural character of a community, as well as its sense of place, all of which are valuable in enhancing our personal sense of health and well-being. Additionally, this approach minimizes the use of new material resources and further reduces embodied carbon.”

“Designers must find ways to connect legacy modes of transit, such as rail, bus, and car infrastructure, with new and emerging modes, such as shared bikes and scooters, and electric vertical takeoff and landing aircrafts, known as eVTOLs. In doing so, design has the ability to define seamless connections while shaping the look, experience, and integration of new building typologies in our urban realm.”

[L]  
**Kirsten Ritchie**  
Global Cities Sector co-leader,  
San Francisco

[R]  
**Dylan Jones**  
Global Cities Sector co-leader,  
Los Angeles

# Industrial & Logistics

The demands of global economics and trade continue to evolve in the wake of rapid digital transformation. There is an urgent need to build more resilient supply chains and infrastructure as global political and economic disruptions impact local economies. The “just-in-time” model based on efficiency, speed, and cost is shifting to a “just-in-case” model built on visibility, flexibility, and security — and that’s resulting in manufacturing and distribution infrastructures shifting closer to the population they serve. Site selection for these spaces will become increasingly competitive and require an innovative approach that involves multiple disciplines in urban planning, human experience design, and digital strategies.

“The future of the industrial and logistics sector will be shaped by facilities designed as integrated physical and virtual worlds.”

Jon Siani, Industrial & Logistics Leader

## Trends

### Automation, robotics, and machine learning drive new virtual and physical designs.

Technological advancements are accelerating the rise of smart facilities that require designers to consider both virtual and physical environments from the inception of a project. As digital transformation advances, more connected, predictive, flexible, and responsive processes and facilities will emerge, fueled by machine learning.

### Shifting worker expectations spur user experience-based factory design.

As machines and automation occupy dangerous and monotonous tasks, factory workers’ skill sets are changing to focus on creative problem-solving. Combined with a focus on employee health and well-being and increased pressure to retain and attract talent, workers require healthy spaces that consider access to light, nature, better air quality, and comfortable ergonomics, as well as added programmatic amenities like break rooms, catering and kitchen services, and fitness centers.

### Cost-effective sustainable solutions will require a new set of tools and processes.

Governments, consumers, and investors are demanding more sustainable solutions while remaining cost competitive. Implementing innovative sustainable practices such as on-site power generation, electrified fleet vehicles, low-carbon materials, and smart building controls can significantly reduce the carbon impact of industrial and logistics facilities in their communities. Sustainability goals can be baked into projects at the conception if the right partnerships and expertise are formed from the outset.



Ericsson USA 5G Smart Factory, Lewisville, Texas

Maruwa Seto Factory,  
Aichi, Japan

This factory for a global ceramics manufacturer not only serves as a state-of-the-art facility, but also brings a new standard to the Seto business community, provides a testament to Maruwa's innovation and growth, and serves as an inspirational reference point for the community.



# LIFESTYLE

PG. 102 - 139

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

## Designing Experience- Driven Districts and Places

To evolve from single-use, monolithic downtowns, multiuse lifestyle districts will replace single-use central business districts to create a more vibrant, connected, and dynamic ecosystem with a mix of uses — from entertainment to retail, restaurants, hospitality, sports, and cultural attractions. And as people continue to crave shared in-person connections, venues of all types will continue to place a premium on communal, social spaces and engaging, multisensory experiences. Open 24/7, this blend of lifestyle services and amenities can bring people back to cities and cities back to life.



Landmark Two Residential Tower, Los Angeles  
Douglas Emmett

The global shortage of affordable and attainable housing continues to be the number one challenge facing the housing industry and the world's cities. Rising housing costs consume a growing portion of people's incomes, resulting in an untenable housing cost burden. To create more housing that is attainable for the vast majority of people, we have to adopt new approaches such as communities with both accessible rental and purchase options, "built to rent," "housing as a product," and other standardized design and manufacturing processes. These new efforts should also focus on building healthy communities that are multigenerational, mixed-use, and close to shopping, entertainment, healthcare, and the workplace.

"We need to look at what it means to have a multigenerational workforce and a multigenerational community, and ensure we're designing and operating places that allow them to come to life."

Kelly Farrell, Residential leader



GrowHome, Los Angeles

Designed to meet the pent-up need for attainable starter homes, GrowHome is a flexible concept designed to accommodate households as they expand.

SPOTLIGHT ON EUROPE

**Build-to-rent models are booming in Europe to address affordability.**

Europe is experiencing a surge of investment in build-to-rent (BTR), a housing class designed and built specifically for the rental market. In highly competitive markets like the U.K., which are experiencing a rental housing crisis, lifestyle changes and a lack of affordable housing have spurred growing interest in BTR as a flexible solution to accelerate supply. These professionally managed, service-driven, and highly amenitized properties offer a high-quality communal living experience that serves a range of housing needs and budgets.

**Housing decisions are primarily driven by affordability, quality, and space.**  
The percentage of respondents who selected each option within their top five reasons for moving into their current home or unit.

Source: Gensler Residential Experience Index 2021



**Trends**

**The housing crisis will demand innovative approaches to materials and techniques to make costs more attainable.**

Across the globe, housing burden is on the rise, and innovation is crucial to help solve the attainable housing shortage. Standardized, modular, and prefabricated construction methods can reduce costs and increase production. Low-cost, repeatable technologies such as thin shell concrete and scalable, durable materials such as mass timber could boost housing affordability.

**Multigenerational, university, and corporate housing are driving the need for more agile, flexible housing stock.**

Cities with multigenerational, mixed-use communities have a competitive edge, and they must have the right mix of housing to meet diverse needs, from short-term student or corporate housing to longer-term market-rate housing to active adult communities. Flexible, reconfigurable units and agile housing management technologies can make housing stock more resilient.

**Physical and mental well-being will become a critical outcome for housing design.**

As lifestyles and workstyles blur, housing design should enhance residents' mental and physical well-being. By incorporating wellness-focused principles such as access to nature, indoor air quality, and restorative spaces, homes can become platforms for well-being that can improve people's health and increase their longevity.

# Mixed Use & Retail Centers

Mixed-use, live-work neighborhoods are the key to reviving urban centers, and the faster that city planners can reprogram single-use districts into multiuse places, the sooner troubled cities can effectively address their economic hardships. To do this, developers must find ways to bring people together through a multitude of experiences. Flexible public spaces that can be used for many different types of events will be in high demand, as will the right mix of housing, entertainment, and retail spaces. To address ongoing economic uncertainty and climate risks, planners must position these developments for long-term resilience by adopting master planning and real estate strategies that can adapt and pivot over time.

## Trends

**Demand will continue for mixed-use developments that are anchored by sports and entertainment venues.**

As people crave opportunities for in-person social interaction, entertainment-anchored developments with a diverse mix of spaces and amenities will be highly valued. To attract more users beyond traditional office and retail, retail centers and mixed-use developments are incorporating amenities like live music, sports, and festivals to foster shared, communal experiences.

**Public spaces that can be programmed as community catalysts will be market differentiators.**

Developers are recognizing the importance of well-programmed public spaces that can be used and activated by residents and tenants, and act as catalysts for the surrounding community. With flexible programming and thoughtful placemaking, these developments can transform a single-use development into a valuable, multipurpose community asset.

**By aggregating diverse assets under one roof, mixed-use developments can help offset climate risk.**

As climate disasters and extreme weather events put pressure on property portfolios, this is driving the need for developments designed to reduce risks and control costs, such as rising insurance rates. By aggregating diverse assets under one roof, mixed-use developments may benefit developers looking to future-proof their investments.

“There’s a big reckoning for cities and for developers about providing the ‘why.’ We can work remotely, but creativity, innovation, and the exchange of ideas happen in person. That’s the why.”

J.F. Finn, Mixed Use & Retail Centers leader

Bally's, Chicago









The travel industry looks to have another banner year in 2024, where the hospitality industry will sharpen its response to changing guest priorities. Guests still want convenience, but they're increasingly seeking out unique, multisensory experiences and places that enrich and enhance their lifestyles — and that includes eco-friendly practices. More hotels will introduce entertainment experiences while also sharpening programming around health and wellness. Technology will continue to play a bigger role as hotels look to personalization, mobile services, and automation to improve the experience of both the guest and the hotel team member.

# Hospitality

Diversified Empire, Rancho Cucamonga, Calif.



## Trends

### Interest in “sustainable travel” is driving new hotel offerings.

In response to consumers and governments, sustainable travel is increasing. Guests are demanding sustainable options, such as locally sourced food and electric vehicle charging stations. Meanwhile, governments — such as in France, where short-haul domestic air travel was banned, or in Bhutan, which charges tourists a daily fee to offset overtourism — are implementing regulations to curb emissions.

### Consumer demand is leading hotels to offer on-site health and wellness experiences.

In response to changing consumer preferences, hotels and resorts have an opportunity to embrace health and wellness within their developments, becoming destinations that host and facilitate varied experiences, from nature retreats to yoga programs.

### Hotels and resorts will blend entertainment, sports, and residential spaces into a single integrated experience.

Hotel operators are focusing more on immersive experiences and integrated resorts that merge live music, sports, entertainment, casinos, and residential components. These cross-industry synergies are driving hotel and resort stays as guests seek meaningful social connections and enriching experiences — whether on-site or outside the property.

## SPOTLIGHT ON LATIN AMERICA AND ASIA PACIFIC

### The Latin American and Asia Pacific markets are seeing an uptick in demand for branded residences.

With the growing blend of business and leisure (or “bleisure”) travel, opportunities to live and work in different parts of the world are emerging. Markets such as Latin America and Asia Pacific are seeing a surge in branded residences with new investment opportunities that offer potential for higher returns, especially when operated under an established brand. New resorts are including a residential element, while existing developments are adding residences to their current inventory.

Almost half of employed respondents did at least some work during recent leisure trips.

Source: Gensler Hospitality Experience Survey 2023

8% I WORKED MOST DAYS AND DID LEISURE ACTIVITIES AFTER NORMAL WORKING HOURS.

12% I WORKED MOST DAYS BUT STILL DID LEISURE ACTIVITIES DURING THE DAY.

37% I CHECKED INTO WORK OCCASIONALLY.

51% I AM COMPLETELY DISCONNECTED FROM WORK.



Nekajui Ritz Carlton Reserve, Guanacaste, Costa Rica

“Accommodations that are integrated into the community fabric — while delivering the convenience, value, and amenities that travelers want — are uniquely positioned to surpass guest expectations.”

Ana Ardon, Hospitality leader

# Retail & Consumer Experience



Jackie Robinson Foundation  
Workplace + Museum, New York

As we move through the trend cycles of retail and consumer experience, brands are finding their sweet spot by understanding what consumers need, when and where they need it. An understanding of how to cater to a variety of consumer missions and mindsets while carefully choreographing the physical, digital, and human aspects of an experience together provides a greater range of choices for consumers and gives brands more ways to reach their audiences. As relationships become more reciprocal, brands must keep in constant communication with their consumers, learning from insights about how to continuously improve the consumer experience.

## Trends

**Blending, not bifurcation, is the formula for consumer engagement.**

Experiences are no longer either/or; they are AND. Through the years, we've seen the full spectrum — from convenience to engagement, from transaction to experience. Today, brands must strike a balance and find the right blend to meet consumer needs and create relevance for physical space, also recognizing where other channels can fill gaps.

**Physical-human-digital (PHD) is the baseline of consumer engagement.**

As physical and digital experiences continue to blur, the intersection is increasingly important to map. Brands are investing in digital experiences that are additive in a meaningful way — introducing ease, streamlining processes, or creating connection. In many cases, a consumer's own device is the best way to generate engagement, providing the choice to have a digitally augmented — or totally analog — experience.

**Hypercuration elevates the role of physical space.**

To differentiate physical space from online engagement and connect with consumers on a local and personal level, brands and retailers will edit in-store assortments to be more meaningful and relevant. Curating products based on context, location, or even personal preferences will also simplify the decision-making process, freeing up space for a greater focus on the brand and additional experiences.

### SPOTLIGHT ON EUROPE AND ASIA

**In Europe, demand will continue for “click-and-collect” convenience-driven shopping.**

Curbside pickup or “click-and-collect” shopping continues to be popular in Europe. In the U.K., it accounts for 40% of sales for retailers who offer the service, according to Barclays. Ikea allows customers to pick up online orders at Tesco supermarkets. Zara's click-and-try-on service allows customers to book a fitting room and have merchandise ready to try on when they arrive in store.

**In Asia, immersive retail and “live shopping” blends shopping and entertainment.**

“Live shopping” — in which hosts livestream products that people can buy in real time — is highly developed in places like China and Korea because of WeChat-savvy, mobile-oriented consumers and a growing influencer economy. Retailers can capitalize on this trend by offering seamless physical-digital experiences that blend shopping and entertainment, such as dedicated in-store spaces for livestreaming events that drive sales, while also creating community and brand building.



Eataly, London

“Retail’s new purpose is wider, deeper, and more enduring than just transactions between buyers and sellers. It’s about establishing a place, both physical and virtual, where customers feel valued and understood as part of a community. Brands are thinking about quality engagement across every outpost where they connect with their end users, including online, in store, through social media, or with a pop-up location.”

Aaron Birney  
Global Lifestyle Sector co-leader,  
Los Angeles

The sports industry is currently undergoing significant changes. At the professional level, there's an increased focus on revenue generation through television rights, sponsorships, and ticket sales. Meanwhile, colleges and amateur sports are looking for new means to boost revenue streams and better develop their athletes with public-private partnerships and dedicated training facilities. Across all levels, sports venue design is breaking down barriers between arenas and cities by integrating into surrounding communities through mixed-use districts. Ultimately, the industry is focused on enhancing the fan experience while exploring new revenue opportunities.

## Trends

**The barriers between arenas and cities will become more porous and multiuse as sports districts redefine city living.**

As sports venues become integrated into urban cores, the perimeters separating arenas, stadiums, and cities will dissipate. By activating real estate and experiences surrounding the venue, owners, partners, and developers can create 24/7, walkable districts that increase foot traffic, decrease the need for parking, and enhance value for their overall franchise.

**Public-private partnerships will bring new funding — and new sports developments — to colleges and universities.**

For universities and colleges facing a shrinking donor pool, public-private partnerships (P3s) offer an alternative financing source for new sports developments or renovations. Whether to fund capital improvements or address deferred maintenance on aging assets, these partnerships can benefit schools and drive revenue for developers.

**Dedicated facilities for women's sports will continue to gain traction around the world.**

With the rising success of programs like the Women's World Cup and the WNBA, development for dedicated facilities and programs for women's sports is accelerating. In addition to dedicated stadiums and arenas, training and performance facilities that cater to the specific needs of female athletes, from training regimens to rehabilitation, will be highly sought after.

# Sports

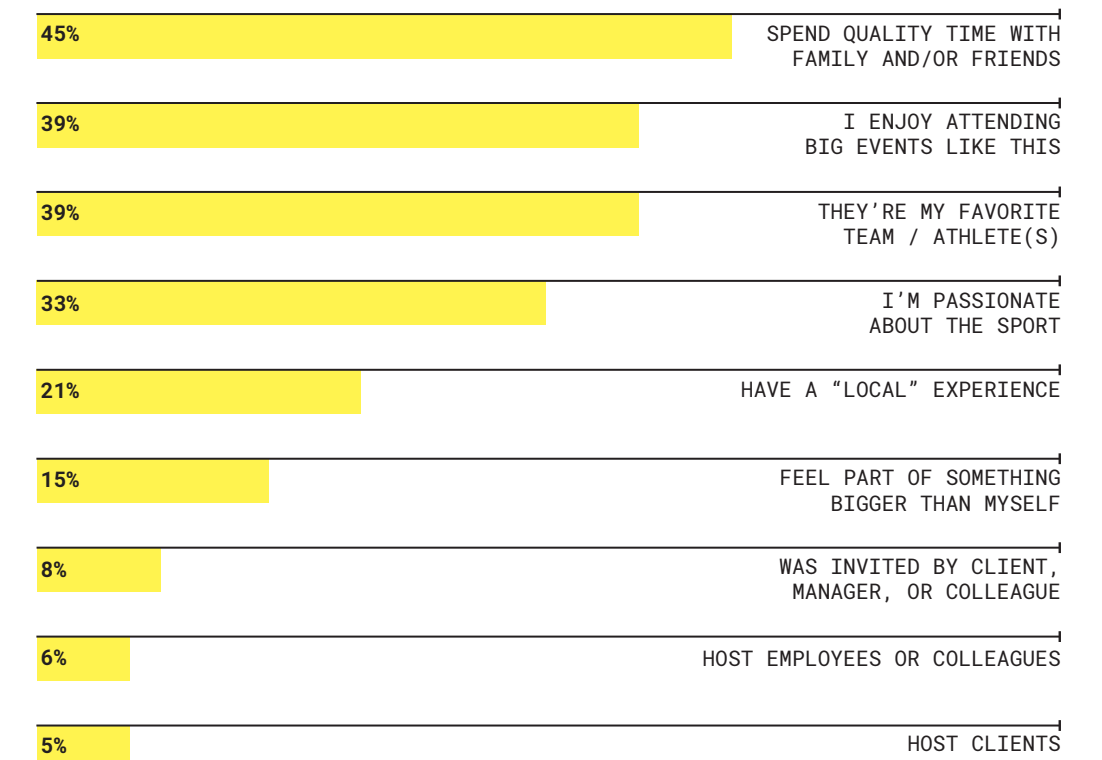


University of Cincinnati Indoor Practice Facility and Performance Center, Cincinnati

**The social and community aspects of live sports experiences continue to drive attendance.**

Among respondents who had attended a professional or college-level sporting event since January 2022, the chart indicates the percentage who selected each response to the question: "What were your primary motivations for attending this most recent in-person sporting event?" Respondents could select multiple responses.

Source: Gensler Sports Experience Survey 2022





FOREVER GREEN

Real Betis Stadium Estadio Benito Villamarín, Seville, Spain  
Co-design architects: Gensler with Raphael De La Hoz

# Entertainment

The entertainment industry is currently in a state of transition, with both developers and consumers scrutinizing the cost of admission. At the same time, people continue to turn to entertainment for connection and life enrichment. In 2024, the industry will forge new partnerships founded on creative synergies, with opportunities to revitalize commercial real estate with vibrant and compelling experiences, invest in quality concepts that create value, and differentiate themselves in a competitive marketplace with authenticity. Immersive, emotionally engaging experiences will become integral components of future mixed-use districts.

## Trends

### **New partnerships will bring together content creators and visionary developers.**

The 2023 entertainment labor strikes revealed that the industry is changing from the ground up. New types of partnerships will emerge between content creators and developers and owners, which would bring together funding, ideas, and unique storytelling to create new location-based entertainment experiences based on great storytelling and immersive design.

### **Repurposing underutilized real estate will create moments for joy and connection.**

Entertainment has a unique role to play in creating community vibrancy by reimagining commercial real estate. By crafting experiences that invite communities to gather and connect, feel joy, and find meaning, entertainment will revitalize underutilized properties such as empty malls and big box retail into multifaceted experiential spaces with participatory community engagement.

### **Amid financial uncertainty, the entertainment industry can earn the price of admission with transcendent immersive experiences.**

In times of financial crisis, opportunities for belonging and life enrichment are paramount to psychological well-being. When leisure spending is heavily scrutinized, entertainment must earn the ticket price. To stay relevant and thrive, immersive experiences must transcend the expected to delight, transport, and connect people to deliver shared joy at value.

“If we can create experiences in places, it will imprint on people a sense of connection that can be very powerful. This is what successful experiences can become.”

Bob Weis, Entertainment leader

“What if you could create something that’s so dynamic that whether you go into the hotel, casino, arena, or retail district, you go through this moment in the heart of the campus and you could change it based on the night, the event, or the opportunity?”

Tim Leiweke  
President and CEO of Oak View Group



University of Texas at Austin Moody Center, Austin  
Oak View Group



“As our physical and digital behaviors continue to converge, design for the built environment will require not just advanced technology, but an entirely new digital mindset. Digitization has not only accelerated; it has become far more integrated into every facet of our lives.”

[L]  
Hans Neubert  
Global Lifestyle Sector co-leader,  
New York

[R]  
Duncan Paterson  
Global Lifestyle Sector co-leader,  
Los Angeles

“Experiential design involves designing for the entire range of human experience. Our greatest challenge as designers is to create lasting experiences that are informed by changing users, tastes, and sensibilities. Experiences change constantly, but our goal should always be to capture the audience. It’s not about designing from the inside out or outside in, but designing in the tangential, making sure people experience a place with a story to tell.”

# Culture & Museums

“Today’s libraries are evolving into modern-day community centers — multiuse destinations that allow users to reclaim new and unique experiences beyond just checking out books.”

Brian Nicodemus, Culture & Museums leader



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

Museums, libraries, performing arts centers, and other cultural institutions have faced numerous challenges in how to sustain themselves, how to support and reflect their communities, and ultimately, how to evolve and stay relevant for the long term. Today, these cultural institutions have an opportunity to play a vital role as community hubs and connectors that bring people together with unique in-person experiences. To do that, these mission-driven organizations will need to design spaces and experiences with highly specific programs and needs that are relevant to the communities they’re in.

## Trends

**Cultural destinations will continue to be essential community infrastructure.**

Libraries and museums are adapting to new roles, partnering with like-minded organizations, and providing fundamental community functions rather than serving as ancillary spaces. Community asset mapping and strategic planning will help these institutions integrate within their communities to become more accessible, equitable community hubs.

**Creating more equitable and accessible experiences will become table stakes for both staff and visitors.**

For mission-driven institutions, creating more equitable and accessible experiences for people with different interests, backgrounds, and abilities is paramount. Institutions should focus on visitors, as well as staff, by providing a range of choices, more transparency between front and back of house, and breaking down hierarchies to create more equitable environments.

**A diverse mix of analog and immersive experiences will help reach new audiences.**

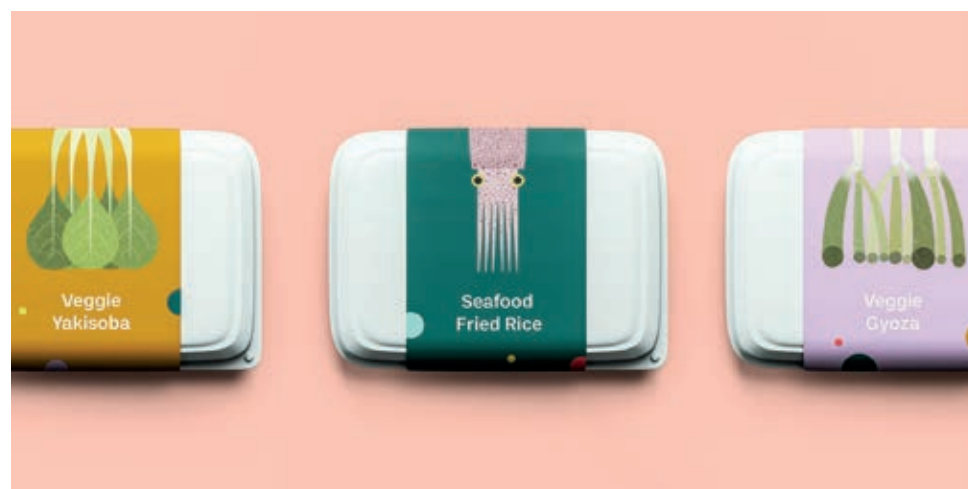
To grow new audiences, cultural institutions should provide a range of experiences in their spaces — from analog to ambient immersive experiences using hands-free technologies and one-of-a-kind designs — rather than pushing visitors to hardware such as VR headsets. This offers diverse audiences more choices and different entry points and levels of engagement.



Brooklyn Public Library, Brooklyn, N.Y.

# Brand Design

In a time of continued uncertainty, brands are looking for practical solutions to immediate problems that will help drive new interest and engagement, gain repeat customers, and build business. Brand design must deliver measurable impact through design that demonstrates a commitment to people and communities, from sustainability and DEI efforts to complex wayfinding and placemaking at scale. Investment in brand strategy is becoming a valuable tool to position assets to stand out amid the competition — whether for an office building, residential or retail space, or hotel.



Uwajimaya Signage, Seattle



Uber, Chicago

## Trends

### Brands will fully embrace the “joyconomy” to engage consumers.

During challenging times, there's a heightened level of need for brands that build connection by making people feel confident and optimistic. Brands have an opportunity to tap into this mindset by communicating joyfulness and positivity in their communications, and fostering moments of entertainment, escapism, and play within social spaces and experiences.

### The ongoing desire for shared experiences demands clear navigation, placemaking, and amenity strategies.

Venues are continuing to see an uptick in spaces that bring people together to create shared experiences. By providing communal spaces and experiences, brands can position themselves as good citizens and community members. This requires brand strategies at multiple scales — from thoughtful placemaking and wayfinding for a mixed-use district to branded amenities for a hotel or office lobby.

### Brands that act on their social responsibility commitments will continue to win market share.

Successful brands recognize that profit and social responsibility are intertwined, backed by a growing consumer base that values responsible brands. Brands that take a stand and demonstrate their CSR commitments — through measured progress and action, supported by clear visual communication and compelling stories about equity, inclusivity, and sustainability — will differentiate themselves.

“Today’s consumers are asking brands to have a meaningful point of view around social issues, like equity, health, and climate. And employees are expecting the same from their employers.”

Janice Cavaliere, Brand Design Leader

Georgetown Day School, Washington, D.C.

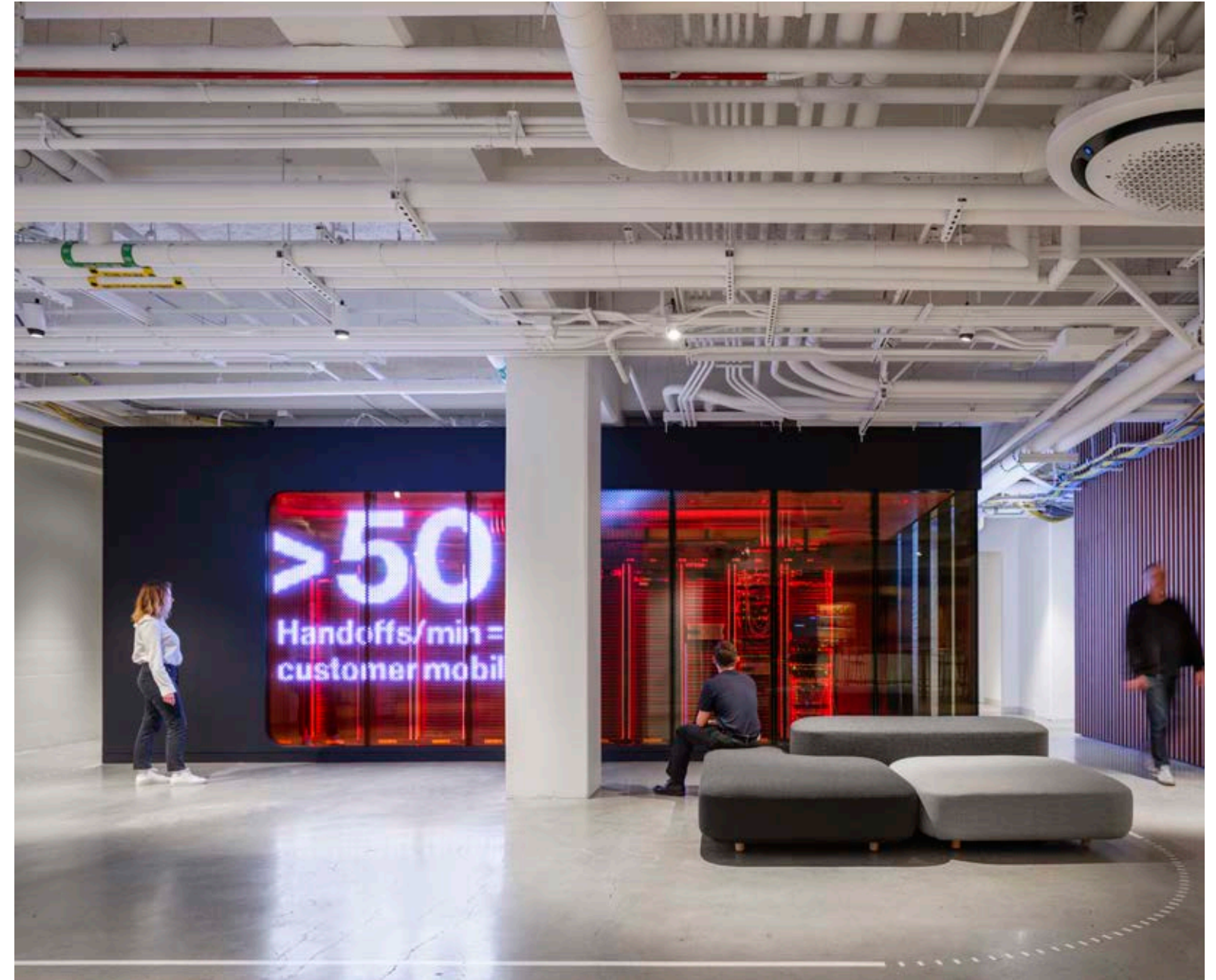


# Digital Experience Design

As the nature of how people interact with space rapidly evolves, understanding how we experience technology, use new applications, and adjust behaviors to adapt to change is critical. With a focus on people and their multisensory needs, greater physical and digital fluidity will enable high-impact, immersive, and seamless experiences that inspire, educate, and inform. Emerging technologies like AI and XR should be additive and purposefully integrated into the built environment to enhance the quality of human interactions. Data analytics and personalization are key to developing experiences that can continuously improve and provide value over time.



LG Display Transparent Future, Seoul, South Korea



Confidential Client, San Francisco

## Trends

**Data intelligence and AI will drive increased personalization and efficiency.**

The increased cognitive ability of AI and technology will allow designers and brands to radically improve customer experience, human interactions, and new forms of immersive entertainment. For example, intelligent personalization can create bespoke retail experiences and drive more efficient transactions. In the future, new forms of immersive and ambient technologies will focus on improving livability and the quality of the human condition.

**Physical-digital ecosystems will create custom experiences in a hybrid future.**

As nearly every experience becomes hybrid, the design of physical-digital ecosystems is more critical than ever. Our new hybrid lifestyles will require spaces for digital interactions to work. The seamless blending of technology and architecture is paramount to bringing new experience standards and consistent user experiences to office spaces, retail, performance venues, transit centers, and public spaces.

**The push for urban renewal will drive smart, adaptive environments on a city scale.**

An urgent focus on urban renewal is driving the need for more digitally enabled environments at a city and district scale. Interacting with it will be seamless to eliminate distraction and amplify attention. As technologies become cheaper and more powerful, dynamic placemaking and master planning will allow cities to design smarter, adaptive, and more inclusive mixed-use neighborhoods that deliver meaningful experiences.



---

SPOTLIGHT ON THE MIDDLE EAST

---

**The Middle East will continue to prioritize futuristic and immersive technologies in hospitality settings.**

As the region transitions from an oil-rich, resource-based economy to a more diversified service-oriented one, governments and the private sector in the Middle East, particularly Saudi Arabia, are prioritizing investment in new, immersive technologies. Across the region, where extreme heat drives people to spend more time indoors and novelty is premium, there's a strong desire for hyper-personalized, dynamic, content-rich experiences – from sports and entertainment, to hospitality, healthcare, and transportation.

“The seamless blending of technology and architecture is paramount to bringing new experience standards and consistent user experiences to office spaces, retail, performance venues, transit centers, and public spaces.”

Hans Neubert, Digital Experience Design leader

# HEALTH

PG. 140 - 159

SCIENCES  
HEALTHCARE  
SENIOR LIVING  
WELLNESS SERVICES

## Designing the Future of Health and Wellness

The health sector is grappling with compounding crises, from the lingering effects of the pandemic to a rapidly aging global population, climate change-related threats, and a renewed demand for health equity. People are seeking a holistic, integrated approach to health — one that prioritizes their personal safety and wellness and is embedded into their local communities. From healthcare and senior living to sciences, organizations across disciplines are seeking out new solutions for a range of healthcare challenges, from how we deliver and receive care to new residential approaches to aging in place.



As the world looks to scientists to solve the world’s most urgent problems, organizations are looking for new ways to improve the reproducibility of scientific outcomes and accelerate the adoption of impactful technologies. New modalities such as automation and cloud labs are helping, as are new types of interdisciplinary and collaborative partnerships. To enhance these efforts, the industry is looking to locate pilot manufacturing and testing facilities closer to researchers. At the same time, design that can help science organizations meet their sustainability goals in their facilities is top of mind.

## Trends

### Advances in AI, robotics, and other technologies require new collaboration spaces.

Technology such as AI, robotics, cloud labs, and quantum computing are helping scientists iterate faster, reproduce science more accurately, and rapidly process data. Collaborative-based work environments will become more valuable as the increasing complexity and volume of data require broader expertise and new ways of visualizing and processing data.

### Scientific innovations will depend on multidisciplinary research.

As computing power increases through quantum technology, AI is required to help analyze and translate exponentially larger volume of data across scientific disciplines such as biology, chemistry, and engineering. Multidisciplinary approaches to scientific problems demand flexible spaces that support focus work, collaboration, and interaction among diverse disciplines.

### Specialized, small-scale manufacturing can accelerate scientific innovation.

There is an increasing demand to locate pilot plant and bench-scale manufacturing closer to researchers to facilitate more effective collaboration. Instead of large warehouses focused on mass production, smaller-scale localized labs can target specific problems, which can rapidly iterate and prototype solutions, physically allowing scientists to troubleshoot and engage in-person with the target audience.

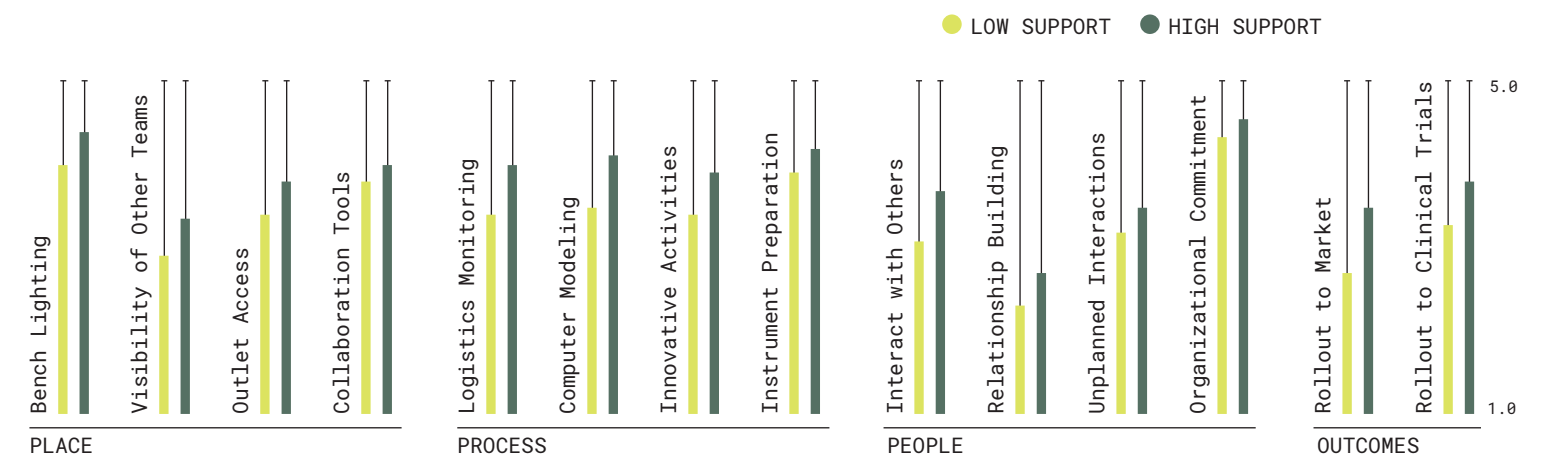


eleven50 by Alexandria, Seattle  
Alexandria Real Estate Equities, Inc.

**Multifunctional benches have a positive impact on design, process, people, and business outcomes.**

The effectiveness rating of each of the below variables as reported by wet laboratory-based scientists indicating that their bench highly or poorly supports dry laboratory-based activities.

Source: Gensler U.S. Laboratory Research Scientist Survey 2023





1229 W Concord Place,  
Chicago  
Sterling Bay

Sterling Bay is developing 55 acres of land into an a new neighborhood called Lincoln Yards. At the heart of this new development, Gensler designed 1229 W. Concord as a pioneering life science building that combines sciences and hospitality.

“To keep up with the accelerating pace of scientific discovery, we must foster environments where innovators from all disciplines can seamlessly collaborate to rapidly test ideas and move solutions to those in need.”

Erik Lustgarten, Sciences Leader





# Healthcare

The healthcare industry is ripe for opportunity as it recovers from a challenging economic climate post-pandemic. With the rising cost of clinical care, healthcare providers are investing in new digital technologies to help reduce costs through streamlining processes. A focus on community engagement and mixed-use healthcare districts will curb feelings of distrust with local communities while equitably including everyone from residents to caregivers, visitors, and leaders. As the industry looks to rebuild its reputation, new healthcare models are urgently required to mitigate costs and maximize equitable healthcare.



Mass General Brigham Integrated Care, Salem, N.H.

## Trends

**Mixed-use healthcare districts are on the rise as rural hospital closures accelerate.**

Economic pressures are pushing rural and critical access hospitals out of business at an accelerated rate. Healthcare providers can deliver clinical services within rural and underserved communities through mixed-use healthcare districts — partnering with non-conventional services such as internet providers, grocery stores, and residential developers to deliver more accessible healthcare to communities.

**Healthcare providers will work more closely with vulnerable communities to build trust.**

Rising clinical care costs are eroding trust between vulnerable communities and healthcare systems. To heal divisions, healthcare providers can engage communities in their healthcare offering. The combinational process of community input and the expertise of healthcare providers results in a system that is built for mutual benefit.

**Healthcare operators will adopt AI to manage administrative tasks and lower the cost of care.**

Shortages of healthcare professionals are impacting the industry at large. Nurses spend a significant amount of their time conducting administrative tasks. Healthcare providers can adopt AI to perform repetitive tasks and record keeping, lowering the costs of care, and allowing nurses to spend more time with their patients.



Acibadem Atasehir Hospital, Istanbul



“Healthcare occupies an interesting place in most communities and is uniquely positioned to help heal some of the wounds and bridge divides. If we thoughtfully reimagine our approach to community engagement, clinical services distribution, and partnership models, we have an opportunity to not only reshape outcomes but also rebuild trust.”

James Crispino, Healthcare leader

# Senior Living

## Trends

### Demand for residential and dementia care booms as boomers age.

The “2030 Problem,” when all baby boomers will be over 65 and account for 20% of the population, requires thoughtful and affordable solutions for this growing need for access to healthcare services and facilities that support care with dignity. Be it the “Green House” model (small, self-contained residences serving multiple residents) or in-home care, opportunities to innovate the design of assisted living and dementia will grow in 2024.

### Older adults want to age in place in their communities.

People are living in more urban settings, and they want to age in place. To attract older adults to their developments, providers have an opportunity to create diverse, adaptable, multifunctional spaces that offer a range of experiences. These places need to be in the communities in which they already live, which requires smaller, more urban development within 20-minute neighborhoods.

### Snowbirds, sunbirds, and strayers: Experience is driving lifestyle choices.

With a possible 40-year lifespan of “retirement,” some active adults are choosing to live in more than one community. Whether moving to sunny climates, pursuing new activities, or seeking out other familiar global communities, they’re making choices driven by their lifestyles, and lifestyle-based environments with a diversity of experiences will be highly sought after.

“In a rapidly aging society, demand for living facilities and communities supporting older adults is higher than ever. It’s time to make critical investments in residential developments to meet the aspirations of the older adult population.”

Tama Duffy Day, Senior Living leader

According to the United Nations, the number of older adults will double in the next 30 years. As retirement ages and lifespans extend, the conversation around what it means to be an older person in society is changing — as is the market for new and experimental business models for senior living developments. Older adults are looking for options in the places and ways they age — from traditional life care communities and active adult communities to intergenerational communities and aging in place. With the number of people living with dementia projected to reach 78 million by 2030, the need to design innovative solutions in our cities, communities, and residences is also critical.

Confidential Senior Living Community





---

SPOTLIGHT ON CHINA

---

**With China's rapidly aging population, demand for integrated senior living is booming.**

By 2040, China is expected to have 400 million people aged 60 years or older. The country is also facing a shortage of care workers and smaller families that are unequipped to support aging parents and grandparents. As a result, a market is emerging for quality facilities that are integrated into the surrounding community with amenities for residents and non-residents. Demand is also growing for age-friendly spaces and technologies that support aging in place.

“As patients begin to attain a more complete understanding of their health, they progressively expect their provider to recognize their needs, their history, and the way they prefer to engage. The average healthcare consumer is increasingly tech savvy, price conscious, and considers themselves an equal partner in their care.”

“We now stand at the precipice of the next science workplace — a workplace that amplifies how the science and tech sectors come together to capitalize on their power, not as singulars but as a convergence of forces. The sciences have always embraced the rigors of discovery; now it is our time to embark on remixing all of these diverse attributes to discover the next evolution of a science workplace.”

[L]  
**James Crispino**  
Global Health Sector co-leader,  
New York

[R]  
**Chad Yoshinobu**  
Global Health Sector co-leader,  
Seattle



# Wellness Services

Across industries, organizations are recognizing that wellness needs to be integrated into everyday life and across every type of space and environment to be most effective. There's a heightened focus on designing solutions and accessible spaces that support mental health, psychological safety, and inclusion. In addition, health and well-being should be part of an ecosystem that prioritizes prevention. Solutions that tie together design, policy, and strategy will be the most effective at supporting holistic health and well-being.

## Trends

### Psychological safety and inclusion will become essential to meet workers' needs.

Today's workers are seeking "psychological safety" where they can be their authentic selves. By giving people choice in where to work within the workplace ecosystem and embedding inclusivity and wellness throughout — from equitable access to enhanced daylight and air quality — organizations can create a culture that supports growth, promotes learning, and amplifies innovation and creativity.

### Businesses must design for wellness for a multigenerational workforce.

Businesses must learn to flex between hierarchical and adaptive work modes to support the dynamic needs and expectations of multigenerational workforces. Organizations that embed variety and flexibility throughout corporate policies can forge intergenerational connections, creating cultures and spaces that support people's needs throughout their lifespans and will win the competition for talent.

### A new market will emerge around wellness performance.

The shift toward more proactive engagement with wellness is spurring the development of a new market built around data-driven, highly personalized performance. Everything from wearables to training facilities can be designed to help individuals better understand and optimize their health.



“As more people are displaced through political and climate migrancy, cities and businesses must reimagine how to create wellness at a community scale while also designing for a continuum of care.”

Stacey Olson, Wellness Leader



# PRACTICE AREA LEADERS

## CITIES SECTOR Cities Sector Leaders

Dylan Jones  
Ty Osbaugh  
Kirsten Ritchie

**Aviation**  
Tim Hudson  
Tim Sullivan

**Cities & Urban Design**  
Andre Brumfield  
Ian Mulcahey  
Christopher Rzomp

**Climate Action  
& Sustainability Services**  
Anthony Brower  
Juliette Morgan  
Kirsten Ritchie

**Critical Facilities**  
Joost Lansbergen  
Jackson Metcalf

**Education**  
Deborah Shepley  
Mark Thaler

**Industrial & Logistics**  
Rick Ferrara  
Madeleine Hilton  
Jon Siani

**Mobility & Transportation**  
Carmen Cham  
Dylan Jones

## WORK SECTOR Work Sector Leaders

Amanda Carroll  
Kevin Heinly  
Janet Pogue McLaurin  
Nayan Parekh

**Build to Suit  
& Headquarters**  
Kelly Dubisar  
Shelly Mrstik  
Peter Weingarten

**Building Transformation**  
Matthew Holt  
Steven Paynter  
Sheryl Schulze

**Consumer Goods Companies**  
Francesca Poma-Murialdo  
Juana Vasquez

**Energy Companies**  
Catherine Black  
Vince Flickinger

**Financial Services Firms**  
Marisol DeRosa  
Tina Hakkaki

**Foundations, Associations  
& Organizations**  
Bevin Savage-Yamazaki  
Sean Wayne

**Government &  
Defense Agencies**  
Peter Barsuk  
Bob Peck

**Media Companies**  
Sumita Arora  
Johnathan Sandler

**Office Building Developers**  
Darrel Fullbright  
Duncan Lyons

**Product Development**  
Brandon Larcom  
Scott Star

**Professional  
Services Firms**  
Tim Bromiley  
Carlos Posada

**Strategy Services**  
Claudine Frasch  
Kevin Rosenstein

**Technology Companies**  
Erin Greer  
Brian Stromquist

## LIFESTYLE SECTOR Lifestyle Sector Leaders

Aaron Birney  
Hans Neubert  
Duncan Paterson

**Brand Design**  
Amy Bixler  
Janice Cavaliere

**Culture & Museums**  
Michael Volk

**Digital Experience Design**  
David Kramer  
Hans Neubert

**Entertainment**  
Lexi Barry  
Bob Weis

**Hospitality**  
Ana Ardon  
Tom Ito

**Mixed Use  
& Retail Centers**  
Bea De Paz  
J.F. Finn

**Residential**  
Kelly Farrell  
Brooks Howell

**Retail  
& Consumer Experience**  
Lara Marrero  
Jonathan Tyler

**Sports**  
Steve Chung  
Jonathan Emmett  
Ryan Sickman

**HEALTH SECTOR  
Health Sector Leaders**  
James Crispino  
Chad Yoshinobu

**Healthcare**  
James Crispino

**Sciences**  
Justin Cratty  
Erik Lustgarten

**Senior Living**  
Tama Duffy Day

**Wellness Services**  
Stacey Olson  
Michael Schur

The entire Design Forecast team would like to give a special thank you to the many clients, Practice Area leaders, and the Gensler Research Institute for their contribution in developing the trends and content featured in this publication.

## OVERSIGHT

Andy Cohen  
Diane Hoskins  
Leslie Taylor

## LEADERS

Nick Bryan  
Janice Cavaliere  
Sam Martin

## TEAM

Stephanie Benkert  
Sarah Chan  
Cindy Coleman  
Andrew Dalton  
Stella Donovan  
David Jimenez  
Clay Kessack  
Miki Koga  
Sara Martinez McAuliffe  
Kendra Mayfield  
Kasia Maynard  
Madison Metivier  
Erin Mobilio  
Jonathan Skolnick  
Hayley Verdeyen  
Zoe Zellers

## PRINTED BY

Hemlock Printers

## FONTS

Sharp Grotesk  
Roboto Mono  
Kievit

## IMAGE CREDITS

Garrett Rowland: Cover

Robert Benson: page 148  
Zack Benson: page 7  
CreatAR: page 42  
©Gensler, photo by Robert Deitchler: page 82  
Richard Ebberts: page 11  
James Ewing: page 84  
Scott Frances: page 130  
Rafael Gamo, courtesy of Deutsche Bank: page 37  
Gareth Gardner: page 36  
©Gensler / SCB / Site Design Group: page 109  
©Gensler, photo by Ryan Gobuty: pages 31, 77, 99, 104, 125  
Chris Goldstraw: page 55  
Kenta Hasegawa pages 100-101  
Scott Herder: pages 134-135  
Hufton + Crow, Courtesy of Eatly: page 117  
Orhan Kolukisa: page 149  
Cade Martin: page 3  
Todd Mason: page 56 bottom  
Kendal McCaugherty: pages 144, 145, 158-159  
Chad Mellon: page 27 top  
Justin Miers: page 90  
Gensler with Moody Nolan: page 83  
In partnership with MSA Sport: page 120  
John Muggenborg: page 41  
Nacása & Partners: page 53 bottom  
Jaime Navarro: page 53 top  
Jason O'Rear: pages 18-19, 24, 32, 48, 49, 50, 89, 92-93, 94, 137, 164  
©Jason O'Rear | Designed by Gensler in collaboration with GastingWalker&: page 82  
Shamanth Patil: page 46  
Jason Roehner | Roehner+Ryan: page 30  
Garrett Rowland: pages 10, 35, 38-39, 40, 116, 138  
Edward Shi: page 51  
James Steinkamp: page 86  
Brandon Stengel: page 29  
RAWVISION Studio: pages 1, 25  
Rendering Courtesy of Sunset Pier 94 Studios: page 66-67  
Tomorrow AB: pages 27 bottom, 76  
Connie Zhou: pages 62-63, 85, 131, 133, 146-147

## ENVIRONMENTAL IMPACT

By using paper made with post-consumer recycled content, the following resources have been saved.

TREES	WATER
<b>376</b> Fully grown	<b>30,000</b> Gallons
ENERGY	SOLID WASTE
<b>158</b> Million BTU	<b>1,300</b> Pounds
GREENHOUSE GASES	
<b>163,000</b> Pounds	

Environmental impact estimates were made using the Environmental Paper Network Paper Calculator Version 4.0. For more information visit [www.papercalculator.org](http://www.papercalculator.org)

FSC® is not responsible for any calculations on saving resources by choosing this paper.





#### EXPERTISE

##### WORK

Build to Suit  
& Headquarters  
Building  
Transformation  
Consumer Goods  
Companies  
Energy Companies  
Financial  
Services Firms  
Foundations,  
Associations  
& Organizations  
Government  
& Defense Agencies  
Media Companies  
Office Building  
Developers  
Product Development  
Professional  
Services Firms  
Strategy Services  
Technology Companies

##### CITIES

Aviation  
Cities & Urban Design  
Climate Action  
& Sustainability  
Services  
Critical Facilities  
Education  
Industrial & Logistics  
Mobility  
& Transportation

##### LIFESTYLE

Brand Design  
Culture & Museums  
Digital  
Experience Design  
Entertainment  
Hospitality  
Mixed Use  
& Retail Centers  
Residential  
Retail & Consumer  
Experience  
Sports

##### HEALTH

Healthcare  
Sciences  
Senior Living  
Wellness Services

# DESIGN FORECAST 2024



**OFFICE LOCATIONS**

- |            |             |                |                  |
|------------|-------------|----------------|------------------|
| Abu Dhabi  | Detroit     | New York       | Shanghai         |
| Atlanta    | Dubai       | Newport Beach  | Singapore        |
| Austin     | Hong Kong   | Oakland        | Sydney           |
| Baltimore  | Houston     | Paris          | Tampa            |
| Bangalore  | La Crosse   | Philadelphia   | Tokyo            |
| Bangkok    | Las Vegas   | Phoenix        | Toronto          |
| Beijing    | London      | Portland       | Vancouver        |
| Berlin     | Los Angeles | Raleigh-Durham | Washington, D.C. |
| Birmingham | Mexico City | Riyadh         |                  |
| Bogotá     | Miami       | San Antonio    |                  |
| Boston     | Minneapolis | San Diego      |                  |
| Charlotte  | Morristown  | San Francisco  |                  |
| Chicago    | Mumbai      | San Jose       |                  |
| Dallas     | Munich      | San José, CR   |                  |
| Denver     | Nashville   | Seattle        |                  |

**Gensler**

[WWW.GENSLER.COM](http://WWW.GENSLER.COM)

