The Trends

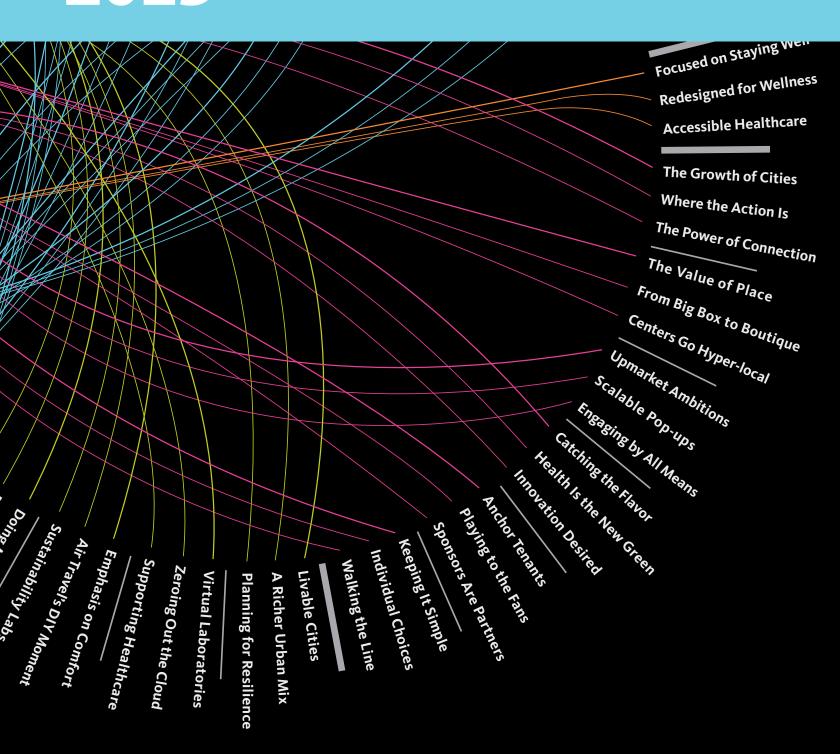
A look at the issues driving change in the coming year.

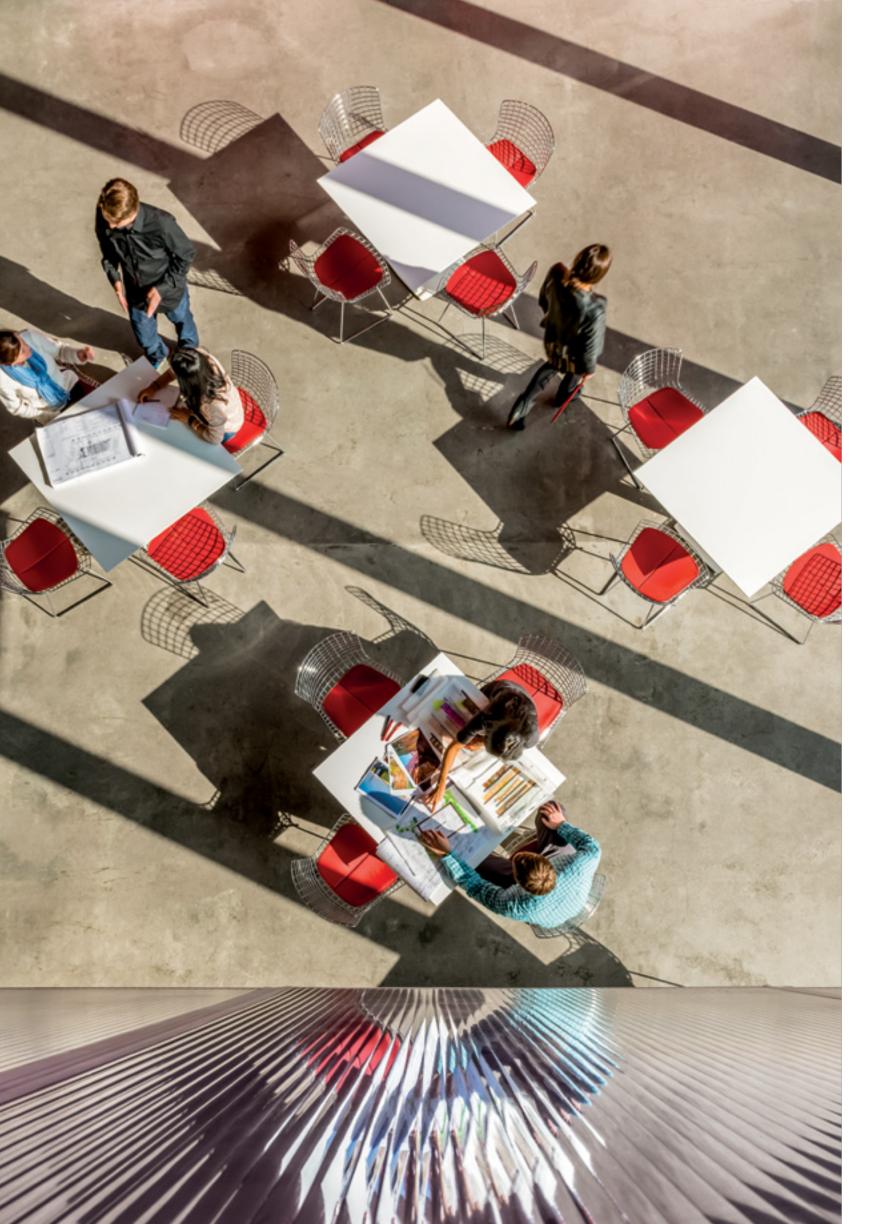
The Responses

How design will address 2013's market challenges.

The Specialists

Thought leadership from Gensler's 20 practices.







What's ahead for design in 2013?

Our newest publication, Gensler Design Forecast, taps the collective intelligence of our global team. Focused on the intersection of business and design, it provides a quick and comprehensive guide to what's ahead.

Unique among design firms, Gensler works with a cross section of the world economy. This exposes us to the issues driving change across our clients' markets. As designers, we address the opportunities that such change creates for our clients—engaging them in a dialogue about the future.

Gensler Design Forecast distills this into 60 trends. It draws on the insights we've gained with our clients, turning these trends to their competitive advantage. We are pleased to share it with you, believing that you will find it timely, interesting, and useful.



Diane Hoskins, FAIA Andy Cohen, FAIA, IIDA

Gensler Design Forecast 2013

The Future of Work

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Future-proofing Rethinking ROI

Catalyzing Connection

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Repositioning Steps Up

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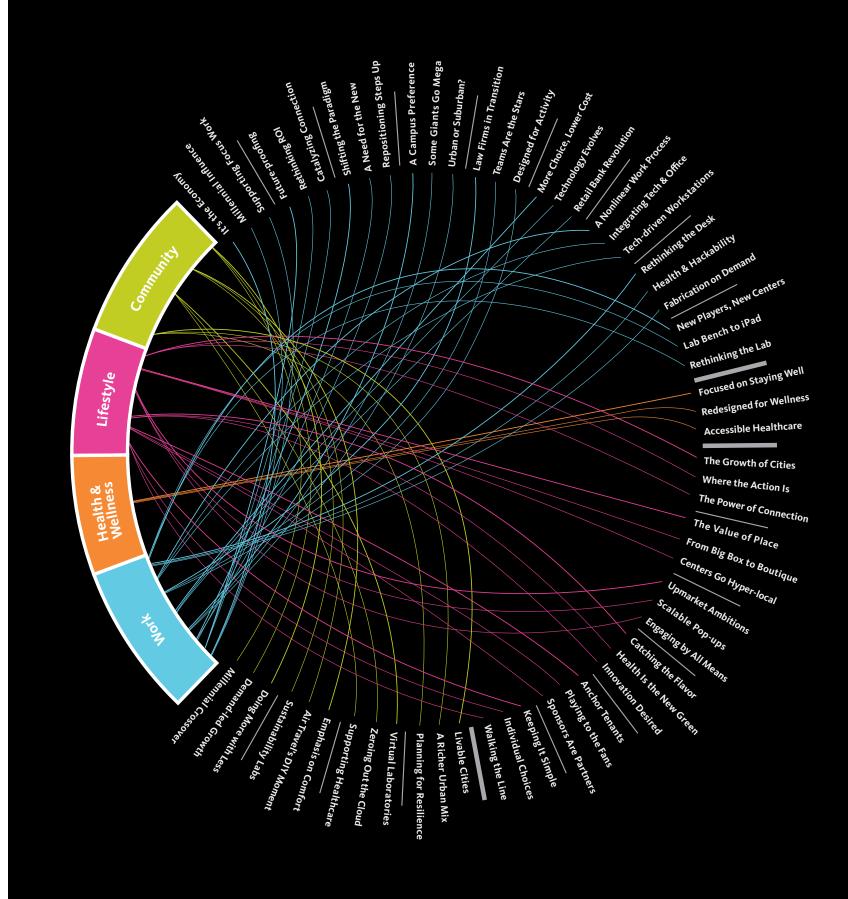
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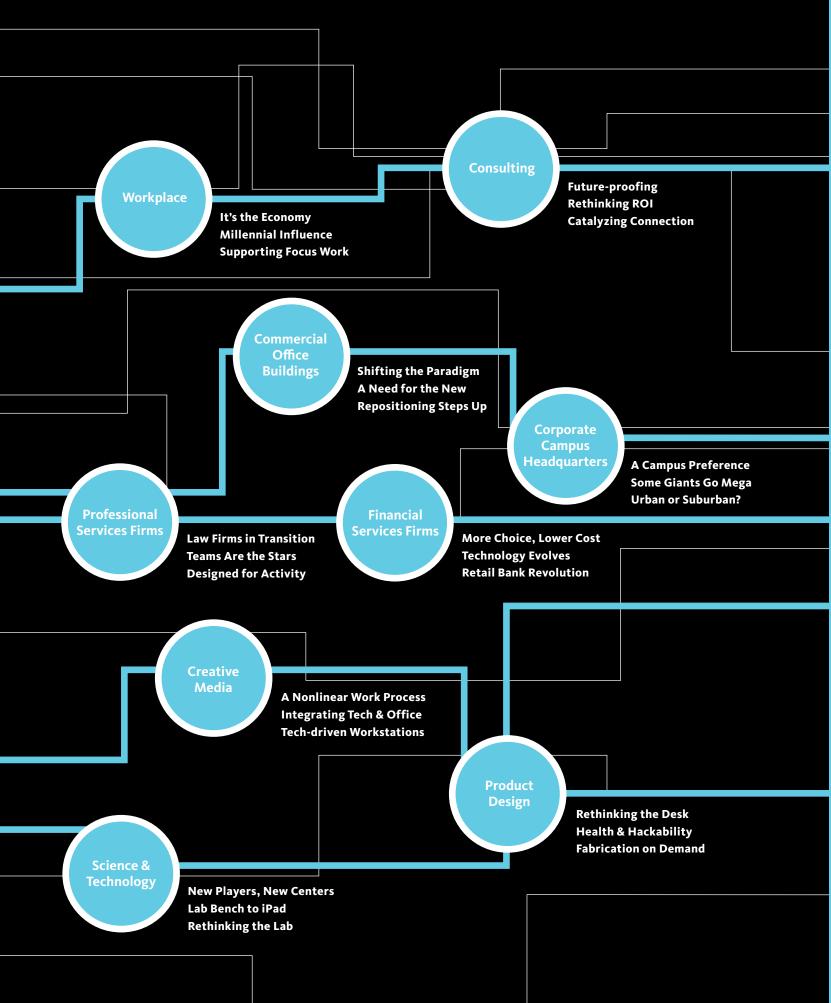
Throughout the publication, follow this link to connect to related videos, blog posts, publications, and research reports.



Trends often cross several market sectors. They take various forms and invoke different design responses, but there's enough common ground to suggest the meta-trends that drive change in a larger sense: the state of the global economy, climate change, the constant innovation of science and technology. We've organized our forecast by sectors and practices, but "place" is less easily categorized. Its richness and resilience require synergy from our designers—an open-ended embrace of the future that spurs creativity and takes inspiration from all quarters.



The Future of Work



A new workplace revolution has begun. The millennial generation is reshaping work in its own image. Choice is in the air, even if how it's exercised varies from sector to sector. "Everyone under one roof" sometimes trumps mobility. As business pushes into new markets, bridging the local/global divide is more crucial. That push also means that the flow of workplace innovation comes today from every part of the world.

Workplace

TREND 01

It's the Economy

Economic shifts continue to drive change in the workplace, but the implications are far from uniform. In some sectors, mobility is reducing and reallocating real estate to fit people's work styles. For others, getting everyone "under one roof" is more important. In every sector, both the financial metrics and the intangibles of human performance to meet a team's fast-changing are priorities as firms vie for talent needs. The artwork and amenities and strive for innovation.

TREND 02

Millennial Influence

The influence of millennial workers can be seen in the workspace at different scales. This reflects the cohort's interest in self-direction and self-expression. Coworking space gives young entrepreneurs an instant community that's used to rapid-fire collaboration. Hackable space can be reshaped on the fly are homegrown and temporary.

TREND 03

Supporting Focus Work

Gensler's WPI survey shows that individual focus work is the most significant factor in workplace effectiveness. WPI respondents rated it "most critical," perhaps because—as the WPI data shows —if you support it well, then collaboration, learning, and social interaction go up; if you don't, they go down. The challenge is how to support focus work in open, collaborative work settings.

PRACTICE AREA LEADERS

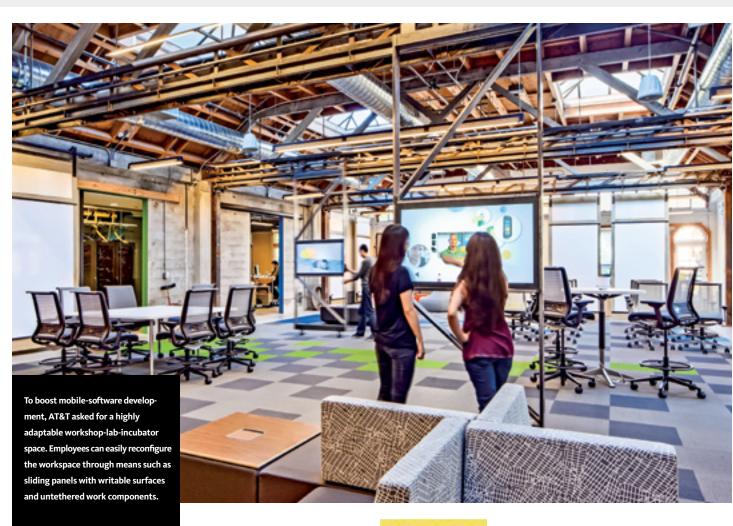


San Francisco





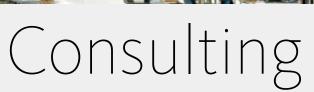
Washington, DC



above: AT&T Foundry, Palo Alto, CA opposite: Gensler, Los Angeles







TREND 04

Futureproofing

As they expand and contract, their interests converging and diverging with others as markets shift, organizations find it much harder to project future space needs accurately. So they have an increasing need for real estate that gives them "the right to be wrong," with a flexibility that's strategic rather than operational. Potentially, this could involve the way the space works and the way it's delivered and deployed.

TREND 05

Rethinking ROI

How design addresses value goes beyond the financial. Holistic measures of ROI provide greater transparency about how real estate assets perform at a human level—personal productivity, engagement, and wellness, for example—and at organizational, community, and regional levels. Making these broader performance goals explicit and measurable will spur innovation and provide new benchmarks.

TREND

06

Catalyzing Connection

Connection and engagement are emerging as common threads of real estate, including office space, across the economy. This has a technological aspect, mixing real and virtual in ways that are likely to reshape work and other settings. Connection can be at odds with people's need to focus, which Gensler research shows is fundamental. Bridging the virtual and real divide is also a challenge, despite steadily better technology.

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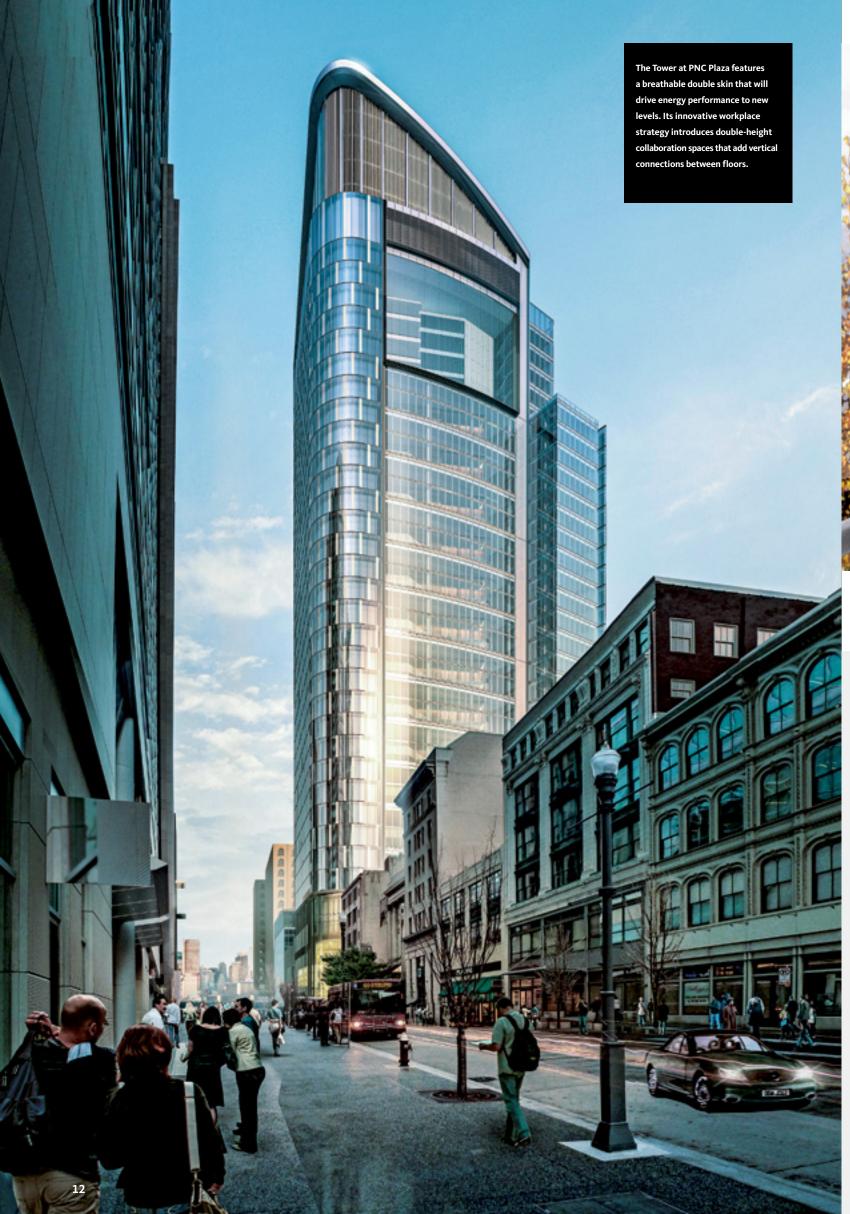
Andrew Garnar-Wortzel



Philip Tidd



Gervais Tompkin





View related content

opposite: The Tower at PNC Plaza,
Pittsburgh
above: C3, Culver City, CA

Commercial Office Buildings

TREND 07

Shifting the Paradigm

A convergence of workplace and demographic trends requires next-generation office towers with more adaptable tenant space, supporting greater density and interaction with a more loft-like spaciousness and better vertical connectivity. Higher ceilings, more generous lease spans, and ventilation strategies improving indoor environmental quality are among the likely responses to enduser interest in healthy, sustainable, and productive work settings.

TREND 08

A Need for the New

Office tenants are looking for new office building "products" offering build-to-suit flexibility. The office tower is being rethought to allow individual tenants to tailor their spaces to have a headquarters look and feel. Giving employees the ability to customize work settings and recapturing parts of the core as communal space are two ways office towers can support single-and half-floor tenants in a style that reinforces their brand and identity.

REND



Repositioning Steps Up

Building renewal is on the upswing, with a particular focus on Class B and C properties that startups and companies with millennial workers appreciate for their expansive floor plates and sense of authenticity. Retrofitting Class A office towers with higher-efficiency systems and improved cladding and glazing can add leasable space by recapturing obsolete mechanical floors. New lobbies and better daylight quality on office floors also enhance value.

PRACTICE AREA LEADERS



Leslie Jabs New York



Elva Rubio Chicago



Peter Weingarten San Francisco



Corporate Campus Headquarters

TREND



A Campus Preference

Despite the pull of urban centers, many companies still prefer campus headquarters. Silicon Valley is a famous example, but campuses are also showing up closer in as cities actively compete for the high-tech, biotech, energy, and other sectors. The latest campus headquarters are tailored to the company's culture and ways of working more closely than in the past, giving global and mobile teams a home base.

11

Some Giants Go Mega

In China and the US, some energy, financial, and technology giants are opting for megacampuses. The goals are to support their work processes, foster collaboration and social cohesion, and protect intellectual property. Their sheer size allows mega-campuses to provide the services, amenities, and "netpositive" infrastructure of selfcontained communities.

TREND

12

Urban or Suburban?

Some companies are opting for urban campuses because their young talent wants to live and work there. In some regions, this is emptying out suburban office campuses, making them a drag on the market. By shifting them to multi-tenant occupancy, for example, and mixing in nonoffice uses, the properties can often be repositioned, finding new life with other tenants.

PRACTICE AREA LEADERS







Janet Pogue Washington, DC



Los Angeles





Professional Services Firms

TREND
13

Law Firms in Transition

The professional services sector is under pressure. Many law, accounting, and consulting firms continue to push into new markets, but law firms in particular are coming to grips with falling revenues and stagnant rates. As a result, there's a new openness to innovation in work process and how it is supported by the office workplace and by mobility strategies and technology.

TREND
14

Teams Are the Stars

Law firm teams are starting to eclipse individual legal stars, making support of teamwork a higher priority. Gensler's Legal WPI survey found that 71 percent of attorney collaboration happens in individual workspace, not in conference rooms. With remote participants involved, the right equipment is a must. In open plan offices, avoiding distraction is an issue.

TRENI

15Designed for Activity

Accounting and management consulting firms have long leveraged mobility. Now they're taking the next step, organizing the workspace by activity. A variety of settings can be booked on demand, placed and allocated to reflect prevailing work patterns. The goal is to support different work modes more effectively while maintaining or improving utilization of the space.

PRACTICE AREA LEADERS



Marilyn Archer Houston



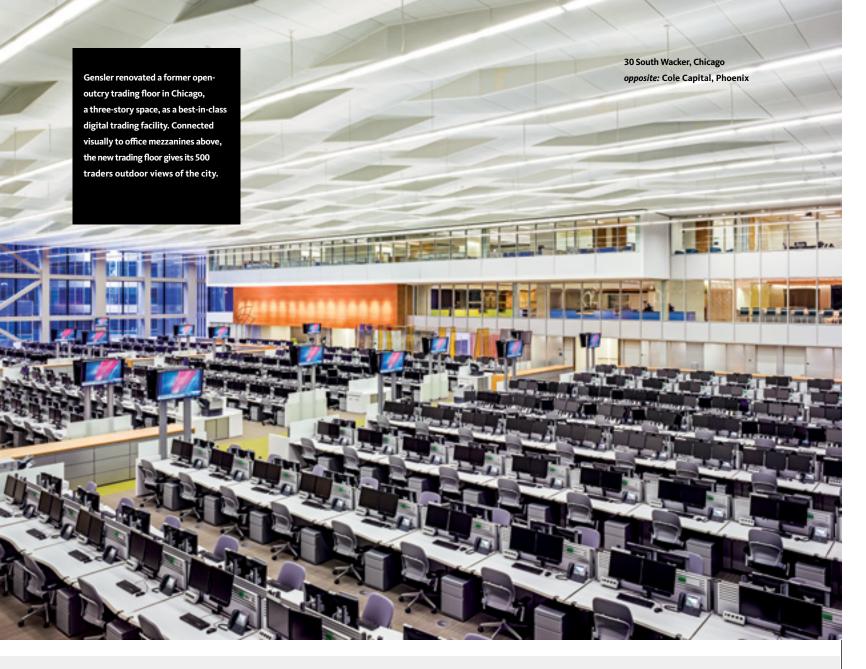
Barbara Dunn Los Angeles



View related conte

Steve Martin Washington, DC





Financial Services Firms

TREND **16**

More Choice, Lower Cost

While business conditions put even greater emphasis on real estate costs, financial services firms still have to attract and support their top performers. Emphasizing new work styles and workspace choices gives these firms added flexibility and efficiency, especially for global expansion, while delivering the sophistication and amenities their high producers expect today in their work settings.

TREND

Technology Evolves

Tech is the glue for financial services firms. Better tech integration and quieter, more energy-efficient cooling are improving the workspace—including trading floors—and lowering operating costs.

To speed software/systems development, leading financial hubs such as London's Canary Wharf are opening financial tech accelerator spaces close to their potential clients.

TREND

18

Retail Bank Revolution

As more and more people move to cashless payments and virtual banking, retail banking is focusing on the relationship itself as a first-person, place-centered experience. For both private banking and branch banking, a revolution is under way that looks beyond traditional models for new ideas on how to connect with customers on a personal—and highly personalized—level.

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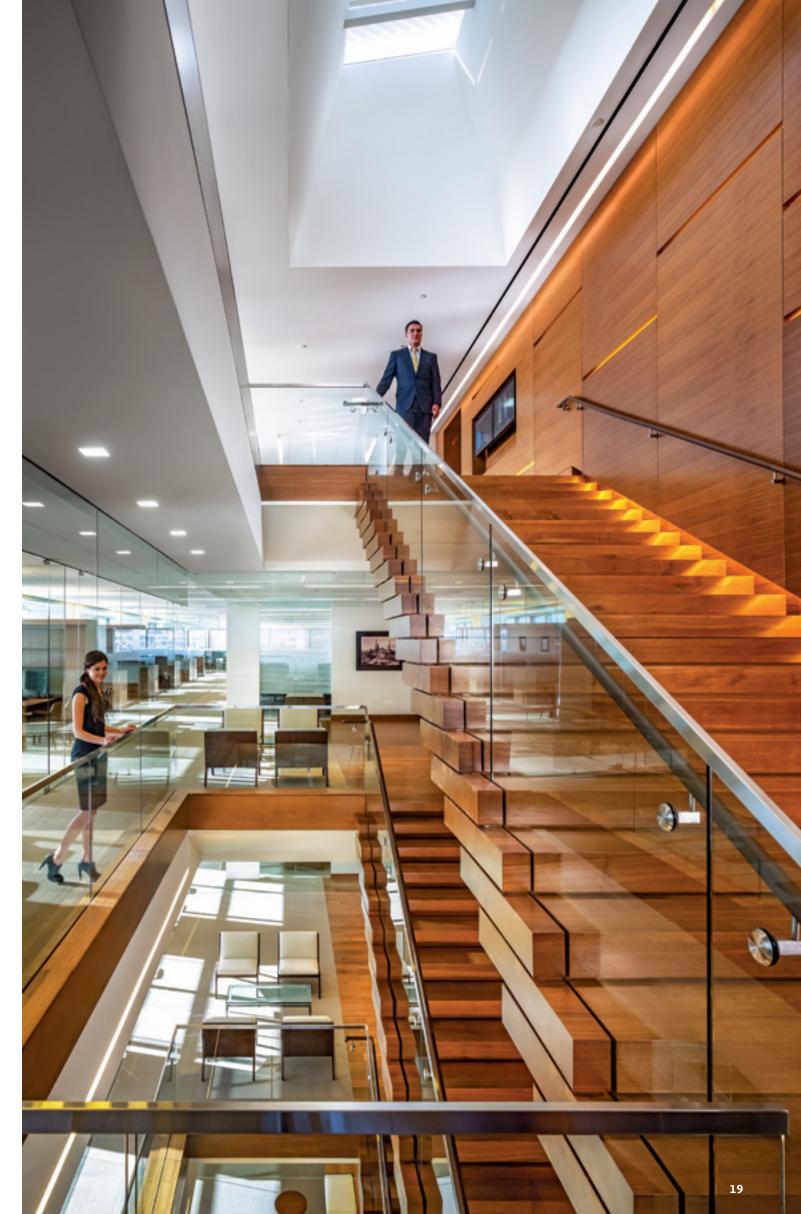
Cathy Bregenzer San Francisco



Rocco Giannetti New York



Krista Lindsay London



Creative Media

TREND

19

A Nonlinear Work Process

Converting content from physical and analog to digital changes the technology and eliminates the need for traditional workflow and adjacencies. The shift to server/ cloud-based computing frees up where and how media production can occur. As multidisciplinary teams replace departments, the media workspace is becoming more open, multi-functional, and collaborative.

TREND 20

Integrating Tech & Office

The separation of tech-intensive studios and conventional office space is over, replaced by one cohesive creative media work setting. Former "black box" functions like video production and graphics editing take place at the desktop—collocated in the workplace, not in enclosed editing rooms or studios—to provide fully integrated production facilities.

TREND 21

Tech-driven Workstations

The changing nature of the technology is transforming the traditional creative media workstation. It is being redesigned around the equipment as a support structure and framework. The latest workstations empower users to tailor, reconfigure, and move them around easily, depending on how they work, where they work, and the creative media task at hand.

PRACTICE AREA LEADERS





Michael White Los Angeles





this is new editing and production technology that lives on the desktop.

left: Time Warner Cable, El Segundo, CA above: KCET. Burbank. CA

21

Product Design

TREND

22

Rethinking the Desk

As smart devices proliferate, as mobility becomes the rule, what happens to the desk? Will it become "universal," changeable at will to suit the needs of any user? Is a desk even needed if smart devices have everything people require to work and connect? Or will smart surfaces and even smart eyewear change the game, transforming the workspace and making smartphones and tablets passé?

TREND

23

Health & Hackability

If sitting at your desk all day literally takes years off your life, the sedentary nature of office work is likely to change—with significant workplace product implications, since this could be as big a health issue as secondhand cigarette smoke was a generation ago. Letting people reshape work settings quickly to meet changing needs similarly opens the door to a range of new products.

TREND

24

Fabrication on Demand

Solid modeling programs, rapid prototyping, and instant fabrication are impacting product design. They let designers model and fabricate, but they could also "localize" some product manufacturing, eliminating inventories and shipping. In time, they could change the relationship between designers and end users, with fabrication technology serving as the "medium of exchange."

PRACTICE AREA LEADERS





Steve Meier



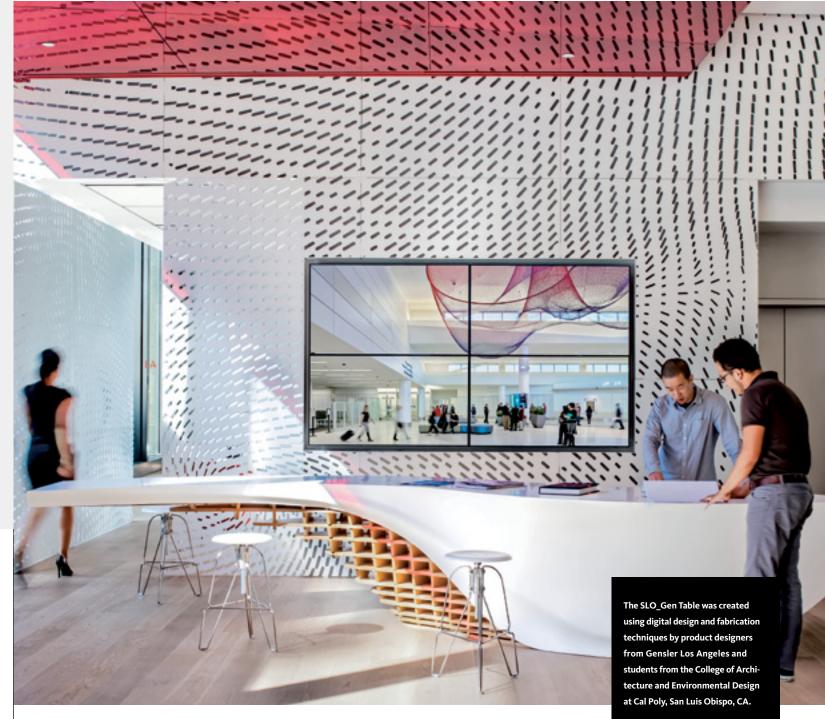
George Miller-Ramos London

Ehren Gaag PRACTICE AREA LEADER

How is product design evolving in the workplace?

EG: A mobile and collaborative workforce requires new ways to team and connect. Our research shows that as much as 50 percent of the workplace should support collaboration and interaction. The conference room isn't where it's happening, so the potential for distraction is higher. With the shift from laptops to tablets, people are even more mobile. All this suggests opportunities for a new generation of products that facilitate the different modes of work that need to coexist in the workspace. The need for virtual teams will also drive new products. Wellness is likely to change work styles, with desks and chairs that let people choose to stand or sit while they work.







opposite, from left: HiFi Chair, Ninety Task Light above: SLO_Gen Table left: David Edward Royale Chair



Science & Technology

TREND

25

New Players, New Centers

China's growth as an exporter and market is making it a global R&D center for science and technology, spurring new academic programs. Something similar is happening in the US as it faces a shortage of qualified graduates. To cope with reduced funds, universities are engaging industry as an active research partner, often in jointly sponsored facilities.

TREND

26

Lab Bench to iPad

The lab bench isn't the center of the action any longer. Advances in technology are integrating labs with other workspace, and freeing researchers and technicians to work in the field or at the patient's bedside. This expedites lab work, reduces space needs, provides greater flexibility, and supports workforce mobility by allowing shared use of lab facilities.

TREND

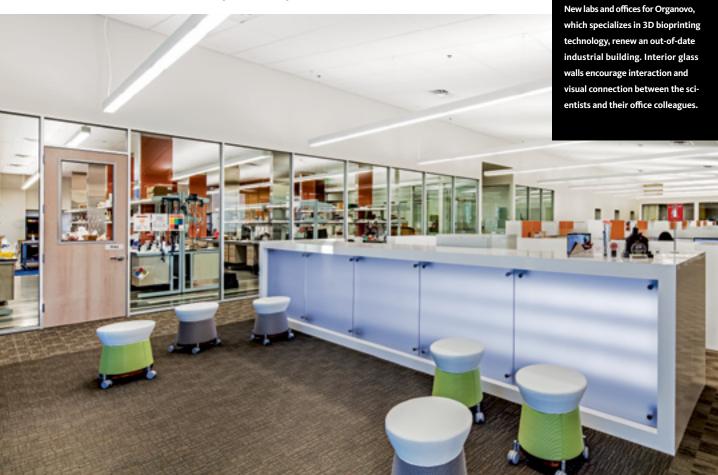
27Rethinking the Lab

Labs are becoming an accepted part of the office workplace. A shift to modularized labs adds planning flexibility and makes it easier and less expensive to update, replace, move, or remove them. Mobile labs make it possible to deploy fully equipped testing and research facilities wherever they are needed, including in remote or difficult locations.

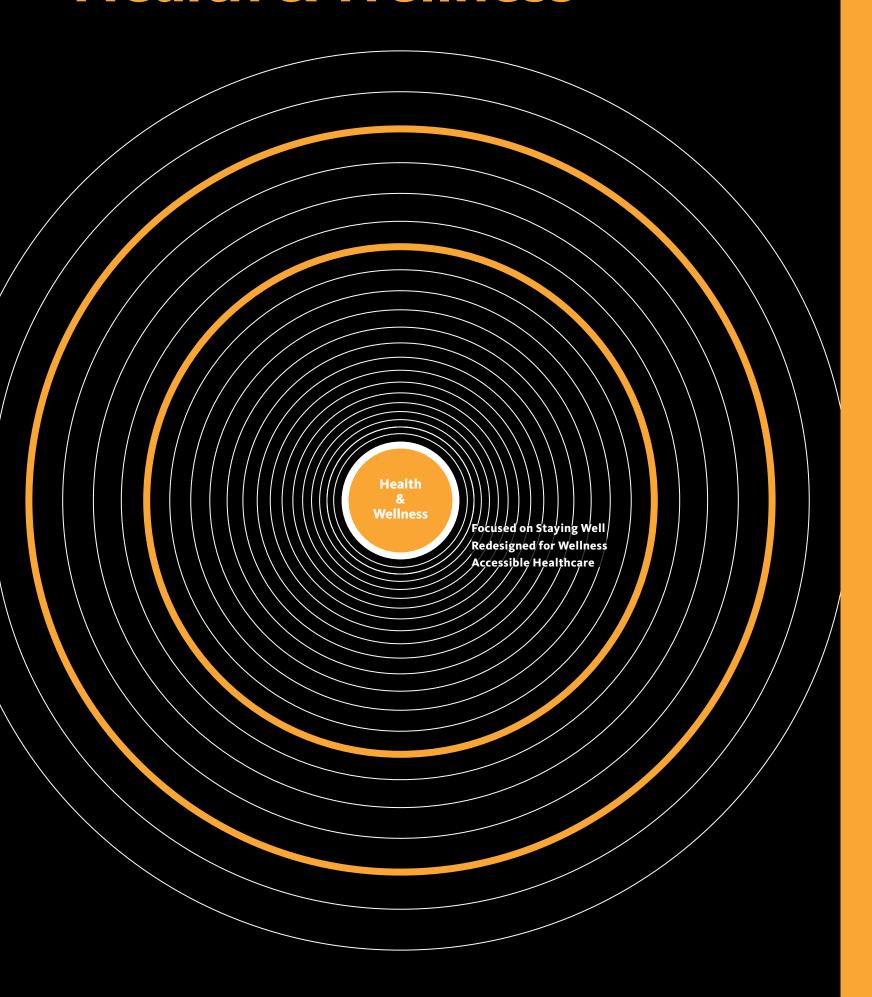
PRACTICE AREA LEADER



Barbara Bouza Los Angeles Thousand Oaks, CA below: Organovo, San Diego



The Future of Health & Wellness



As health consciousness grows, it is shifting the focus of healthcare from illness to wellness. Healthcare providers are rethinking their treatment models and facilities, both to reflect the more holistic view of health that wellness implies and to remain competitive in a fast-changing marketplace. Wellness speaks to the human dimensions of healthcare and broadens its range of settings. It opens the door to innovation.

Health & Wellness

TREND 28

Focused on Staying Well

Healthcare is being reinvented around the idea of wellness—proactively maintaining health, not just treating illness. Aging populations and the rising cost of care are leading to a holistic, self-managed approach to personal health that extends to all aspects of life. This has broad implications, not just for the healthcare sector—hospitals, insurers, and providers, for example—but also for communities and organizations.

TRENE

Redesigned for Wellness

As wellness is embraced by health-conscious consumers, everything from hospitals to work settings is being rethought and redesigned. Healthcare providers are focusing on the patient experience. Hotels are integrating fitness and stress reduction into guest rooms, while employers are making it easier for people to avoid sedentary habits. Communities are giving renewed value to recreational open space, and promoting walking and biking.

TREND

Accessible Healthcare

As healthcare has evolved, the human dimensions haven't always had the highest priority. Now consumers are pushing back. They want healthcare facilities to be located closer to where they live and work, and to use smartphones and tablets to schedule their appointments and get answers to routine questions. Technology today can take this further, letting specialists diagnose and even treat people remotely, working with local teams.

PRACTICE AREA LEADERS



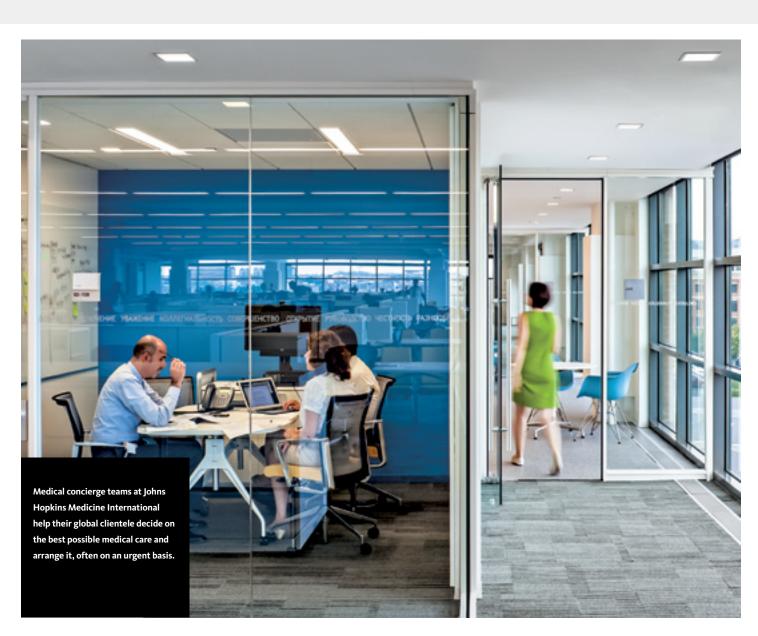
Sarah Bader Chicago

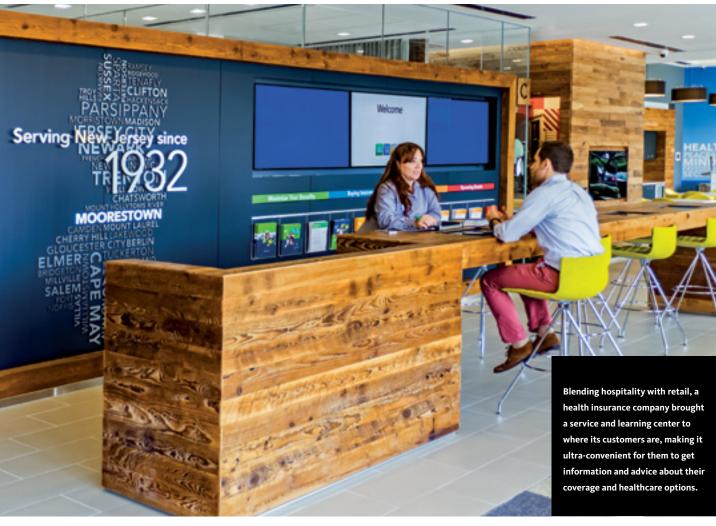


Barbara Bouza Los Angeles



Nila Leiserowitz Chicago







opposite: Johns Hopkins Medicine International, Baltimore top: Horizon Center, Moorestown, NJ above: An energy company's fitness center, Houston following page: Yishun Community
Hospital, Singapore

Q&A

Sarah Bader
PRACTICE AREA LEADER

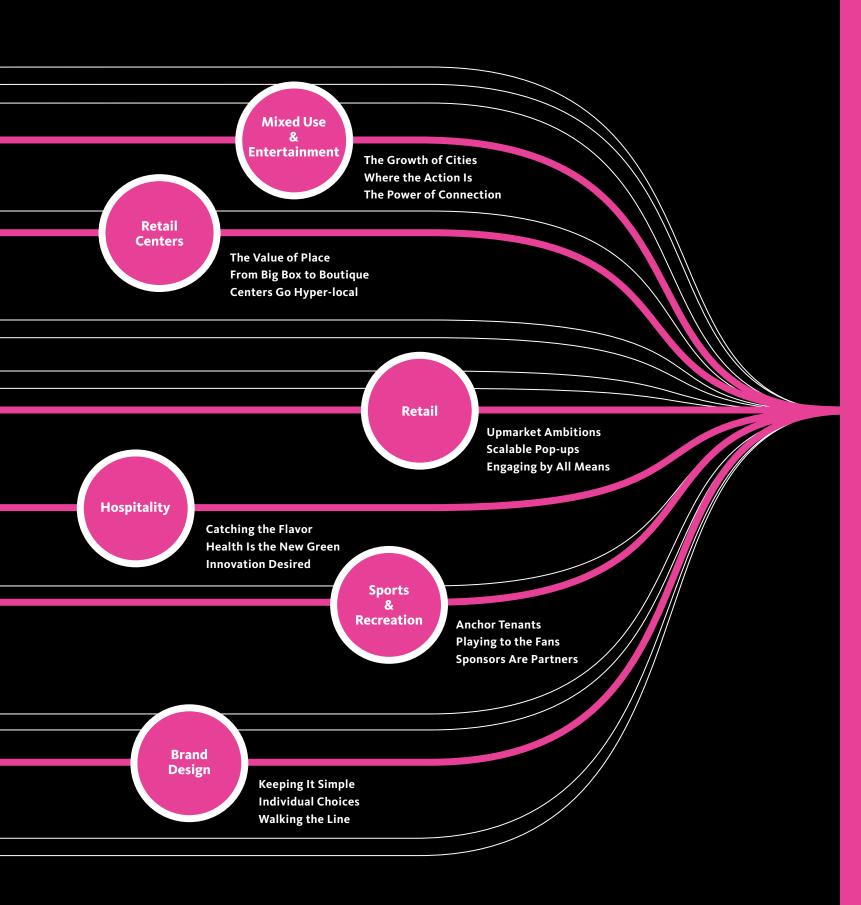
How is technology impacting design for health and wellness?

SB: For providers, success will depend on the ability to touch more people. Technology allows that through what we call information arbitrage—taking electronic medical records and managing the information in new ways. It will enable people to monitor their own care and to involve providers more fully. How we support this technology in the physical space is a developing area of expertise.

View related content



The Future of Lifestyle



We now live in many places at once. Smart devices connect us to work, play, shopping, entertainment—and to each other—in a convergence of tangible and virtual worlds. As urban experiences and pleasurable pursuits are increasingly filtered through digital media, people will seek to make personal connections between leisure's real and virtual contexts. Informed, connected individuals will drive the market.



Mixed Use & Entertainment

31

The Growth of Cities

The UN projects an 84 percent increase in urban population by 2050, when 69 percent of the earth's 9.3 billion people will live in cities. Urbanization drives growth and challenges cities to absorb it without being overwhelmed. This will require strategies that range from mixed-use "vertical cities" to fine-grained development that effectively addresses the cultural context.

32

Where the Action Is

The urban core is experiencing a rebirth. Its popularity reflects the fact that the typical city center comes with a modicum of infrastructure, services, and amenities, usually including mass transit. This makes the core a particularly attractive venue for redevelopment. As single-use districts lose favor, the urban core is pulling in a broader range of uses and mixing them in closer proximity.

33

The Power of Connection

Destinations trade on their ability to connect people. The best of them connect emotionally by providing immediate, authentic experiences that get people "out of the house" at night and on weekends. The activity their synergy produces gives them a vibrancy that can spark renewal in the areas around them and generate higher returns faster for property owners and developers.

PRACTICE AREA LEADERS



Marty Borko Los Angeles



Bea de Paz Washington, DC

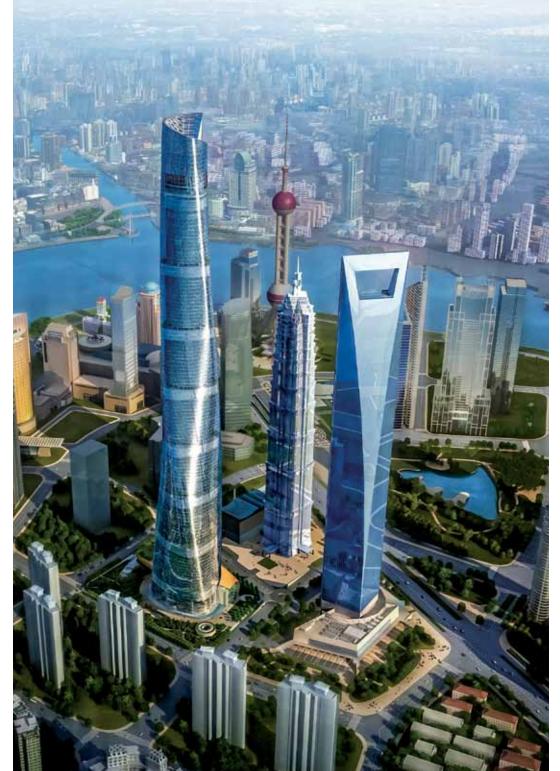


Peter Merwin Houston



Duncan Paterson Los Angeles





Bergamot Transit Village redevelops a vacant industrial site next to a new Metro station in Santa Monica, CA. Mixing creative workspace, multiunit housing, and vibrant streetfront retail, it fits with and activates the surrounding neighborhoods.

opposite: Nexus IRSA, Buenos Aires above: Bergamot Transit Village, Santa Monica, CA left: Shanghai Tower, Shanghai

A super-tall tower's vertical mix can draw a 24/7 crowd to activate its district. The Shanghai Tower's 121 stories combine offices with hospitality, housing, and retail—all linked by transit to the surrounding city.

35

Retail Centers

TREND 34

The Value of Place

To compete successfully with online shopping, retail centers offer what amounts to a curated experience. As "curated" implies, they are rethinking everything from the tenant mix to the details of the overall setting. Variation and customization are a big part of the curating process, expressed through events and store offerings and activities. So are the amenities that can turn a retail center into a real destination.

35

From Big Box to Boutique

Consolidation and contraction among retailers mean that US retail center owners and developers face big box and anchor vacancies. To stay relevant, revive and raise rents, and preserve and grow their tenant base, they are reinventing themselves. For new retail centers, this is shrinking the format as they and their tenants switch to a boutique-like experience to generate buzz and attract new customers.

TREND

36

Centers Go Hyper-local

Consumer interest in authenticity is pushing retail centers to focus on the local in their tenant mix and design choices, avoiding a one-size-fits-all approach. In keeping with retailers that are tailoring their look and offerings to the specific community served, retail centers are adding locally focused events and finding ways to leaven their tenant roster with local stores and locally derived and often artisanal—goods.

PRACTICE AREA LEADERS

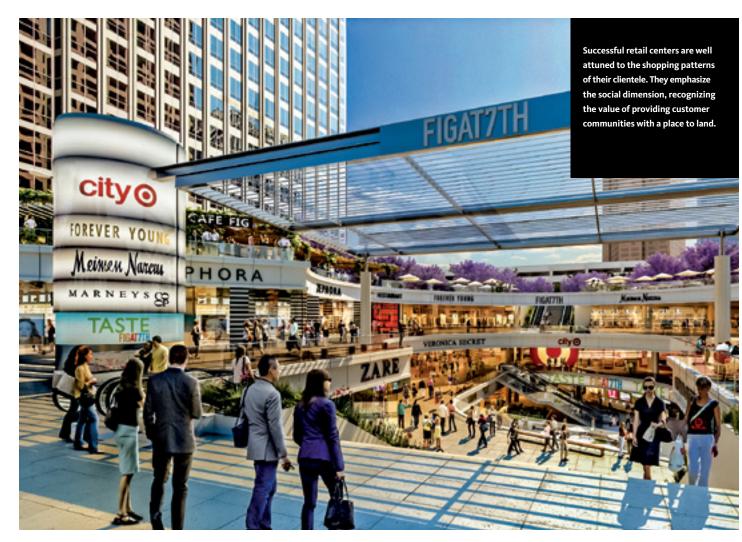


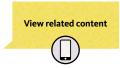
Maureen Boyer San Francisco



David Glover Los Angeles







above: FIGat7th, Los Angeles below: Coex, Seoul

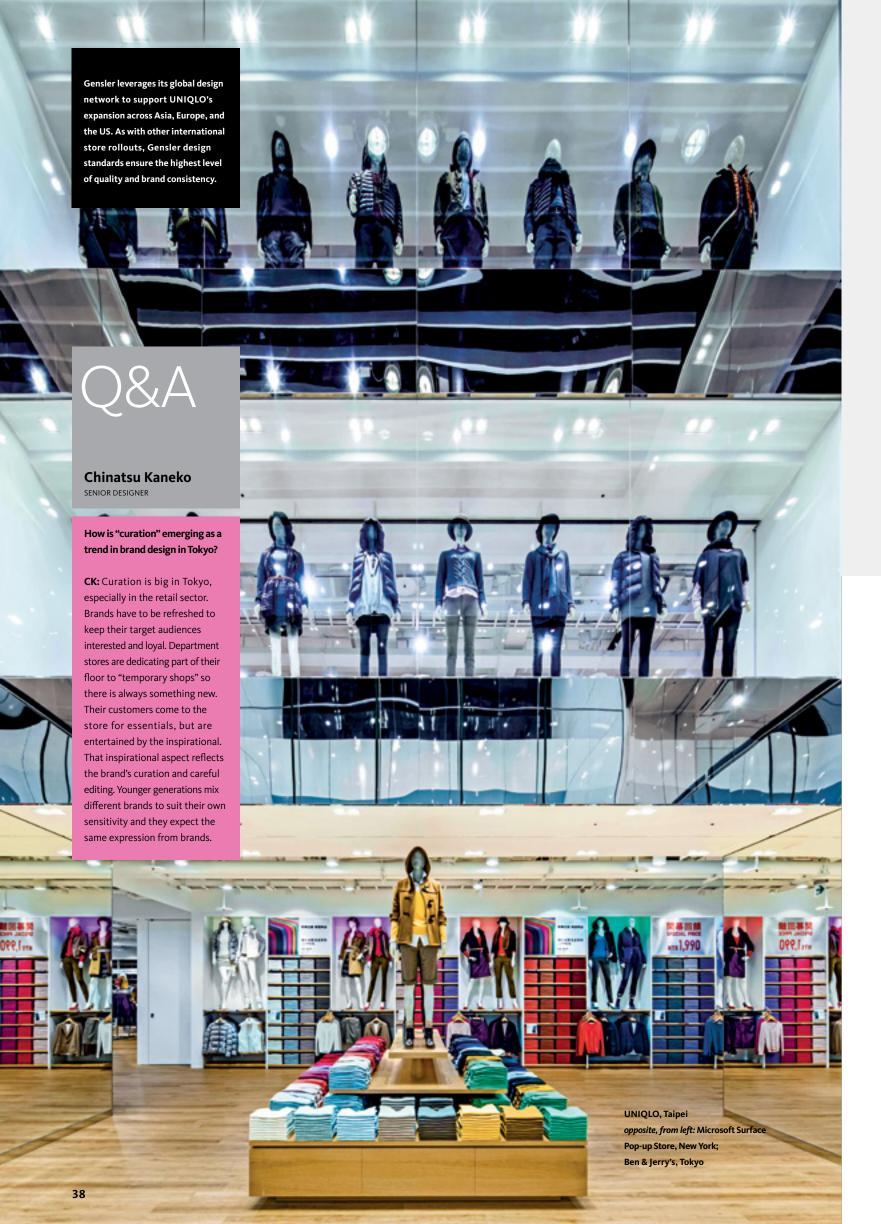
Maureen Boyer PRACTICE AREA LEADER

stay relevant and thrive?

How can US retail developers

MB: The best way to connect with your customers is to be relevant to them. This relates to how well you grasp the current conditions of your specific market and how well you can project them into the future. Teenagers continue to be a significant target market for US malls, but today's young adults shop differently than previous generations. If your retail center—like many others has young adults as its primary demographic, you have to pay close attention to their constantly changing habits. If you can continually show them that you know what they care about and your retail center reflects that, you're on the right track to staying relevant to them.





Retail

TREND **37**

Upmarket Ambitions

From quick-serve restaurants to makers of custom car wheels, everyone is moving upmarket. Chains with a "fast food" image are broadening their menus—emphasizing fresh, local, and healthy—and giving patrons attractive places to meet up and socialize. Other retailers are stretching the luxury category as they recognize the growing affluence of their customers.

TREND
38

Scalable Pop-ups

From its origins in high fashion, the pop-up store concept is spreading, taking cues from food trucks, in-store stores and experiential feature zones, and the over-the-top installations found in trade shows. Reflecting retail's time-bound need for space, pop-ups are "going mega" to introduce new products. They've also hit the sidewalk and parked curbside to generate brand buzz.

TREND
39

Engaging by All Means

Retailers, banks included, are pulling out the stops to connect with their customers. Many offer tailored content such as in-store navigation, social apps, interactive environments, and digital wallets to keep the focus on personal service and engagement. Others stress their brand elements ("This is us"), the local ties ("We're here too"), and one-to-one guidance ("How can we help?").

PRACTICE AREA LEADERS



Barry Bourbon San Francisco



Kyle Davis Chicago



Irwin Miller Los Angeles





View related content

Relevance and authenticity are key strategies in engaging customers. In Tokyo, the new Ben & Jerry's shop is redolent of the company's roots in New England dairy farms, an authentic look that appeals to young people in the city.

The sustainable, 185-room Fairme Pittsburgh shares the 23-story Three PNC Plaza with law firm Reed Smith's headquarters, ground-floor retail, and 28 condominiums. The mix helps activate a major plaza in the heart of the city's downtown.

above: Fairmont Hotel, Pittsburgh
left: Mr. C Beverly Hills, Los Angeles
opposite: Shore Hotel, Santa Monica, CA

Hotels are upping the ante on sustainability to attract guests and control life-cycle costs. The LEED-Gold Shore Hotel sets the bar high for green design, with natural ventilation, LED lighting, sandstone walls, and rooftop solar panels.

View related content

Hospitality

TREND 40

Catching the Flavor

Many hotels aim to stand out by celebrating their roots in the community. Providing a backstory is part of this, especially for established properties. New ones trade on their cachet, with amenities that draw locals as well as visitors. Knowledge of the terrain and a reflected sense of place are differentiators that add to the guest experience. Creativity and authenticity always win points. TREND 41

Health Is the New Green

Hospitality brands have made sustainable practices part of their brand and offering. Now health and wellness are in their sights. Wellness is more than access to a spa or fitness center. It can mean guest rooms that encourage yoga, exercise, and meditation, for example, and design choices, toiletry selections, room-service menus, and mini-bar snacks that reflect a health consciousness.

TREND 42

Innovation Desired

Hotel operators in the Middle East are especially keen on the new. With more competition in this sophisticated and rapidly maturing market, choice is up and prices are coming down. That's driving experimentation: new brands, new lifestyles, and new designs. At the high end, the focus is on creating something special and memorable—the kinds of settings that lead to return visits.

PRACTICE AREA LEADERS



Ed Grun Houston



Tom ItoLos Angeles



Nancy Nodler Houston



below: Rio 2016 Olympics Master Plan (with Coutinho, Diegues, Cordiero Architects, Miguel Pinto Guimarães Architects, and SWA), Rio de Janeiro right: Farmers Field, Los Angeles bottom right: Shengjing International Performing Arts Center, Shenbei, China







Sports & Recreation

43

Anchor Tenants

Sports and entertainment districts are now urban destinations, often developed in tandem with convention centers. The goal is to maximize each venue's revenue and its contribution to the whole. Arenas and stadiums now host several teams along with headline music and trade events. The crowds they attract stay on afterward, spending their money right there instead of heading home.

44

Playing to the Fans

Sports venues are designed to make fans feel like repeating the experience. The latest stadiums deliver cruise ship-worthy offerings at every price point. Technology is leveraged to enhance the game-watching experience and connect fans with venue sponsors and teams. The locations of choice now are downtown—with public transit replacing the sea of parking.

TREND 45

Sponsors Are Partners

The sponsors of sports venues are increasingly viewed as partners. To make their investment in naming rights pay off, sponsors are actively involved in shaping every aspect of the fan experience they touch. They measure their ROI in engagement: getting fans out to the games, interacting with them at the venue, and keeping the connection going between games and in the off-season.

PRACTICE AREA LEADERS



Ron Turner Los Angeles



Jonathan Emmett Los Angeles



Keith Fuchigami Los Angeles



Michael Wekesser Los Angeles

Jonathan Emmett PRACTICE AREA LEADER

How can technology enhance the fan experience?

JE: When we're watching a game at home, we're accustomed to a plethora of data—instant stats, commentary, interaction with other fans, and the opportunity to follow along with our own devices. Sports fans look for a similarly immersive experience at the game; and with thoughtful strategy and design, technology presents an opportunity. The goal is to engage and entertain—not overwhelm. If you miss the chance consumers are choosing for personal communications and transactions, it's likely your fans are going to stay home with those



THE WILL STORE

Brand Design

TREND 46

Keeping It Simple

Consumers face an overwhelming range of choices, so brands are simplifying their message and offerings. The paradox of choice means that brands have a potential advantage if their paring down is seen as a convenience. Pop-ups and other responses to changing tastes and short attention spans use time itself as a limiting device them. They also engage them in to introduce a new product and deliver a message.

TREND 47

Individual Choices

People connect based on shared values and aspirations, so tapping into both is a brand imperative. In this sense, brands have something in common with family or friends—social bonds that bridge between the personal and the communal. So smart brands give people many reasons to choose many different ways so they stay interested—and loyal.

TREND 48

Walking the Line

Consumers once felt that they lacked control, but social media, smartphones, and peer-to-peer connections are shifting the balance. Consumers set the pace and terms of brand engagement. Yet they also expect that the brand's intelligence, sense of authenticity, and willingness to surprise them in pleasing ways will be there. Smart brands walk that line with alacrity.

PRACTICE AREA LEADERS



John Bricker



Dian Duvall San Francisco



Deanna Francl Washington, DC







helped create brand awareness for DoubleTree's Cookie CAREavan, a 50-city food truck tour featuring the hospitality brand's signature chocolate-chip cookies.

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The Future of Community **Livable Cities** A Richer Urban Mix Urban Virtual Laboratories **Planning for Resilience Zeroing Out the Cloud Supporting Healthcare** Critical Transportatio **Emphasis on Comfort** Air Travel's DIY Moment Sustainability Labs **Education** Culture Doing More with Less **Demand-led Growth** Millennial Crossover

Thriving communities grow from a strong base. Behind their growth is a supporting armature—flexible, resilient, and able to meet the future in many different ways. To thrive is to work well. Thriving communities attract talent and investment, move people and goods efficiently, and house, educate, entertain, and sustain the young and the old. New or renewed, thriving communities build a better world.



Planning & Urban Design

TREND 49

Livable Cities

"Walkable" cities, dense and transit-linked, are the new standard. One-third of the US population lives in central cities, the most since 1950. The worldwide migration of businesses and people into cities creates new challenges for providing adequate housing and services. To cope, some metropolitan regions are developing high-density new communities at their edges. Most are transit-served and the best are highly sustainable.

50

A Richer Urban Mix

New work patterns are reshaping cities the same way they're reshaping the workplace. As creative and knowledge workers unplug from traditional office space, they are creating significant shifts in real estate demand. They are already transforming the urban cores of some established cities, turning dense transit corridors into catalysts of redevelopment that allow for a richer, more accessible mix of uses than in the past.

51

Planning for Resilience

Designing with nature for resilience is a planning strategy that takes sustainability to the next level. Resilience moves the focus from individual buildings to larger areas and urban/regional systems. Accurate risk assessment is part of it. For example, climate data from the last 50 years may be an inadequate basis for ensuring the safety of communities over the next 50 years, given the higher incidence of extreme weather events.

PRACTICE AREA LEADERS



Alan Colyer



Carlos Cubillos Washington, DC



Peter Sheard London

The proposed floating airport in the UK's Thames Estuary would achieve resilience by addressing sea-level rise. It would replace London Heathrow, which could then be redeveloped as a transitserved new community. **Gensler** Design Forecast 2013

Mission Critical

TREND 52

Virtual Laboratories

Data centers are the new university research labs. These institutions rely increasingly on computing power to support scientific, engineering, medical, demographic, and even legal research. While business continuity is all-important to business users, research institutions value speed, capacity, and—in particular—the ability to add and upgrade equipment quickly and cost effectively to meet changing program needs tied to research funding.

TREND 53

Zeroing Out the Cloud

The exponential growth of digitized data puts the spotlight on the energy and carbon footprint implications of data centers. Several of the biggest users are taking the lead by being more transparent about these implications and pushing for new solutions. Making processing and cooling more efficient is an important first step, but the end goal is net zero energy performance—without compromising speed and redundancy.

TREND 54

Supporting Healthcare

Hospitals' need for data centers has grown beyond traditional records storage to embrace the clinical side as well. Paperless records and digital patient care—including surgery, medical research, and other healthcare related activities—contribute to the data storm that healthcare providers are facing. A future growth that centers will support is the need for specialists to treat patients remotely, working with medical and paramedical teams in the field.

PRACTICE AREA LEADERS



Jan Gross New York



Greg LaCour Houston



Grant Uhlir Chicago









left: Cloud Computing Center, Upstate
New York
top: Cleveland Clinic Data Center,
Brecksville, OH
above: High Performance Computing
Research Center, Princeton University, NJ

Q&A

Jan Gross
PRACTICE AREA LEADER

What is the industry doing to keep data centers from overwhelming the grid?

JG: We are looking at new ways to cool these buildings, which are the heartbeat of our culture. We need to look for more sustainable, more renewable energy sources to power them. We're also urging manufacturers to warranty higher operating temperatures for their equipment, which will allow operators to run the equipment at a higher temperature and won't require so much cooling power.



Aviation & Transportation

TRENI

Emphasis on Comfort

The introduction of new aircraft like the A-380 and B-787 puts a new emphasis on passenger comfort and efficiency. While airlines are making a big point of it as they bring the planes on line, airports are still catching up. On the horizon is the emergence of more personally adaptable spaces in terminals, with clubs as the testbed of the concept. Leading airports are already taking lessons in comfort from hospitality.

56

Air Travel's DIY Moment

Airports and airlines are letting air travelers do it themselves. As people go paperless, their mobile phones will supplant ticket counters and kiosks. As a result, much less space and staff will be needed on the landside for departing passengers—a change that could reshape terminals, making them more compact. Phones as well as signage will guide people to their gates, pointing out amenities along the way.

TREND

Sustainability Labs

Airports increasingly see themselves as sustainability proving grounds. They are large enough to tackle sitewide innovations like cogeneration and geothermal climate control that are equally applicable to urban districts. Terminals, too, have a scale and visibility that make sustainable measures valuable both from a building performance standpoint and as "teaching moments" for the traveling public.

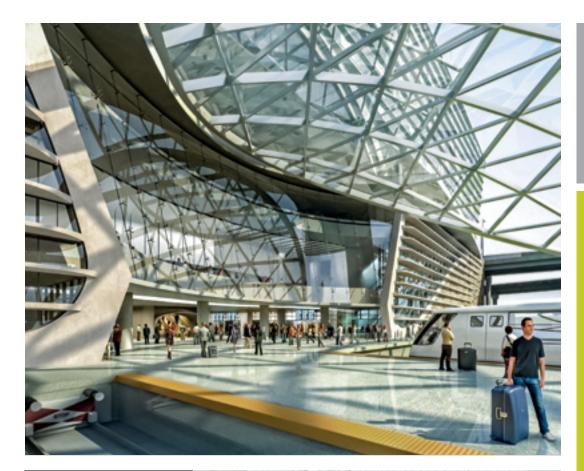
PRACTICE AREA LEADERS



Bill Hooper Washington, DC



Keith Thompson Los Angeles





A&C

Jennifer Johnson
MANAGING DIRECTOR

How are airports becoming destinations?

JJ: Bringing an airport into the urban fold, and vice versa, can have a huge impact on revenue. Take Denver International Airport (DIA): some 53 million travelers pass through DIA every year, but far too many of them never get into the city. DIA's South Terminal Redevelopment Program will help change that. The catalyst is a new rail line extending 15 miles from downtown Denver to connect with DIA. The airport will meet it with a new train station, a large hotel and conference center, and a public plaza that's big enough for festivals and cultural events. Once they're in place, DIA will not only be a gateway to Denver for arriving passengers, but a key destination in the region. For the city and for its airport, that's one trailblazing revenue generator!

opposite: Incheon International Airport
Terminal 2, South Korea
above left: Denver International
Airport South Terminal Redevelopment
Program
left: San Francisco International Airport

Terminal 2 renovation



Education & Culture

TREND 58

Doing More with Less

Financial exigencies are leading many education and cultural institutions to find new partners and new markets, integrate technology into programs and facilities, and rethink how they serve their communities—without diminishing the quality of the experience. Strategies include having buildings serve multiple uses, leveraging programs by offering online courses, and spurring growth by developing centers or campuses in locations with greater demand.

TREND

Demand-led Growth

In some fast-growing economies, the demand for education and culture still outstrips the supply. This is fueling a wave of expansion. In education, the first goal is to train the next generation, but the longer-term goal is to achieve parity with, if not actually surpass, international institutions. In the petroleum-rich Middle East, culture is a source of national prestige, so museums and other cultural projects are potential ingredients in new development.

TREND

Millennial Crossover

There are similarities between the millennial generation at work and the younger cohort still in school. Both value self-expression and calling their own shots. While the workplace is changing to accommodate them, education lags behind. Teaching models and settings are out of sync with students who value collaboration (but need to focus) and are ready to scrap survey courses for small-group seminars, hands-on prototyping with peers, and self-paced online learning.

PRACTICE AREA LEADERS



Dave Br Chicago

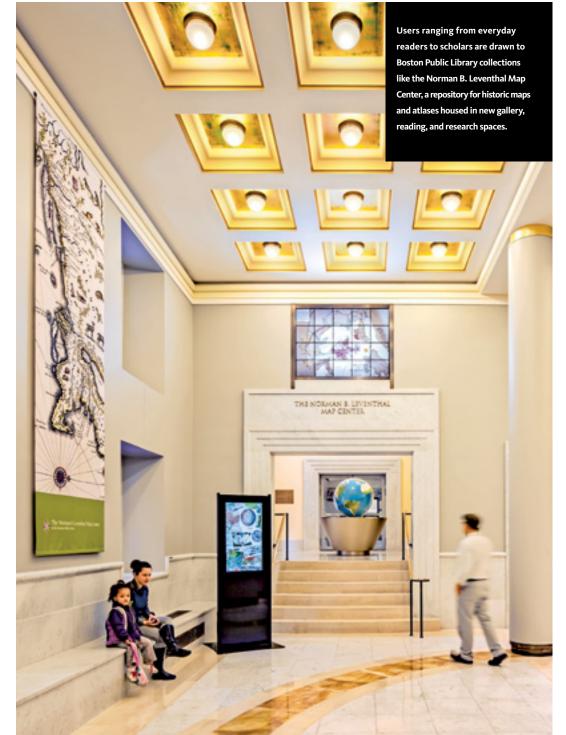


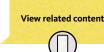
Maddy Burke-Vigeland New York



Kimberly Hickson







opposite: Moorpark College Academic Center, Moorpark, CA left: Norman B. Leventhal Map Center, Boston Public Library, Boston below: MIT-SUTD International Design Center, Cambridge, MA following page: Myriad Botanical Gardens, Oklahoma City, OK

A new international partnership with Singapore University of Technology and Design prompted MIT to build a collaboration hub—a multipurpose international design center that can be reconfigured as peeds change.





Gensler Annual Report Gensler is led collaboratively across its 43 offices and 20 practices by an exceptional team of designers. Every client benefits from the range of their experience, the breadth of their market coverage, and the depth and diversity of their knowledge and expertise. The Gensler difference begins with them.



from left: Andy Cohen, Diane Hoskins, David Gensler, Dan Winey, Ray Shick, Robin Klehr Avia, Joe Brancato, Ken Sanders, Julia Simet, Chris Johnson

WE GROW WHEREVER OUR CLIENTS TAKE US.

Our Global Presence Keeps Expanding.

Gensler has extended its reach to 43 locations. including the most recent additions in Bangalore, Bangkok, Miami, Pittsburgh, Raleigh-Durham, São Paulo, Seoul, and Toronto.



Firm Launches New Practice Areas.

To meet client needs, we continue to extend the breadth of our services. including three new practice areas in Health & Wellness, Education & Culture, and Creative Media.

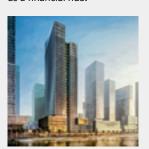


Research Program Keeps **Building Knowledge.**

Gensler continues to fund research projects across offices and practice areas to investigate the connection of design to strategy and business performance. This body of knowledge includes 100,000+ Workplace Performance Index survey responses and 1 million+ observational data points, as well as insights gained from direct client and user outreach. Ongoing efforts include a survey exploring evolving workstyles.

Big Win in the Middle East. The National Bank of Abu

Dhabi named Gensler as the lead designer for NBAD Headquarters in the Abu Dhabi Central Business District on Al Maryah Island, strengthening the city's role as a financial hub.



WE RECEIVE

ACCLAIM.

INTERNATIONAL

New Benchmark for Shanghai Tower.

Slated to be the tallest building in China when completed in 2015, the Shanghai Tower crossed the 400-meter threshhold in December 2012.



We Cultivate Innovation

by Hiring Diverse Talent.

2,200+ internships in four

decades and continues

to offer scholarships to

and designers.

promising young architects

Gensler has hosted

Firm Tapped as Interior Design Giant.

VMSD Ranks Gensler

For the second year running

Gensler earned VMSD's

the firm's \$65 million in

2011 retail revenue.

Top Retail Firm.

Gensler claimed the #1 spot in Interior Design's 2012 Top 100 Giants and was named the "Most Admired Firm." The firm also was named #2 among the magazine's 2012 Hospitality Giants.

HyundaiCard Air Lounge Wins National AIA Award.

The American Institute of Architects conferred the 2012 Institute Honor Award for Interior Architecture to the HyundaiCard Air Lounge in South Korea.



Gensler Is Top-Ranked International Design Firm.

Gensler received the top architectural firm (nonengineering) ranking in ENR's Top 500 International Design Firms.

OUR PEOPLE LEAD THE PROFESSION.

Architectural Record Designer Xia Spotlighted Names Gensler #1. as "Brave Thinker."

Gensler claimed the Gensler's Jun Xia joined a #1 spot in Architectural slate of influential leaders as Record's 2012 Top 250 one of The Atlantic's Brave Thinkers 2012 for his work Architecture Firms, an on the Shanghai Tower. achievement driven largely by the diversity of our Perhaps more impressive practice areas, talent, and than the tower's soaring geographic markets. height, said the magazine, are its sustainable features.

realize greater potential through design excellence.

Hartman Named an

named a Fellow of the

American Institute of

Principal Bill Hartman was

Architects, recognizing his

leadership with clients to

IIDA Inducts Williamson.

Design Association inducted

principal Jim Williamson as

President. Williamson plans

international presence and

2012-2013 International

to help grow the IIDA's

enhance its mission.

The International Interior

AIA Fellow.



#1 retail design firm ranking. The standing acknowledges

Henry's Contributions Recognized with Legion of Honor Induction.

The Retail Design Institute inducted principal Jeff Henry into the Retail Design Legion of Honor, recognizing his lifetime contributions that have shaped retailing, store design, and design culture.



Birney Honored Among

Director Aaron Birney to its

Designer Dozen list of the

best and brightest young

designers in retail design.

Top Young Designers.

VMSD named Design

on Retail Design DDI named principal John

Bricker a "Top Retail Design Influencer," recognizing his role as a retail practice founding member and his interdisciplinary approach.

Bricker Cited for Impact



BD+C Calls Gensler the Best Place to Work.

Industry magazine Building Design + Construction named Gensler a "Best AEC Firm to Work For," recognizing the firm's diverse talent pool and commitment to professional development.



58 **Gensler** Annual Report 59

BROAD EXPERTISE WITH LOCAL RELEVANCE.

Gensler Predicts London's Future as Global Leader.

The firm shared a vision of the City of London in 2050 at the Developing City Exhibition. In this future, the Square Mile becomes a new global free-trade zone, built on a new infrastructure and rich with cultural and technological innovation.



Winey Says Future Cities Are On the Way Up.

Principal Dan Winey highlighted the Shanghai Tower in a TEDx Talk about designing cities using the vertical space created by sustainable tall buildings.



Art Gensler on Airports: "Let's Flip the Terminal." In March 2012, Art Gensler delivered the keynote, "Let's Flip the Terminal," for the AAAE/ACC Airport Planning, Design & Construction Symposium. Gensler Denver

held an open house following

the leading industry event.



60

Barsuk Sheds Light on Learning Styles.

Studio director Peter Barsuk delivered a TEDx Talk about how the built environment can enhance learning, and how the newest education spaces encourage four learning modes: socializing, creating, focusing, and collaborating.

Gensler Sponsors CTBUH 2012 World Congress.

In September, Gensler sponsored the 2012 World Congress of the Council on Tall Buildings and Urban Habitat. The Shanghai meeting showcased highrise projects and examined issues such as climate change and urban density.



Duo Outlines Consumer Trends in Global Retail. Retail practice leaders Irwin

Miller and Barry Bourbon presented "Shopping the Globe" to National Retail Federation members in a groundbreaking live webinar, describing trends in emerging markets and offering four must-do strategies for companies that want to expand internationally.



Gensler Highlights "A **Building That Breathes.**" Principal Doug Gensler

spoke at CoreNet's East Coast regional symposium about The Tower at PNC Plaza, offering insights on the headquarters' innovative breathable skin and natural ventilation system.

Tompkin Takes Aim at **Technology Conundrum.** Principal Gervais Tompkin

spoke at TEDx about business's dependence on virtual relationships and how we succeed—or fail at adapting to the changes they require.

Gensler's "Redefining the Town Square" initiative engages the 43 cities where we're located, drawing on our energy and expertise

to initiate improvements to

Making a Global Impact.



Knight Stresses Need for Resilience at Greenbuild.

In a presentation at Greenbuild 2012, Lewis Knight, regional director of Gensler's Planning & Urban Design practice, outlined how the San Francisco Bay Area is taking a long-term focus to prepare for climate change and natural disasters by planning for resilience.

DESIGNERS MAKETHE DIFFERENCE.

Team Targets Housing for World's Rural Poor.

Driven to address the lack of affordable housing in the developing world, Gensler's Smita Gupta and Diwakar Chintala partnered with WorldHaus to create lowcost, eco-friendly modular houses and apartments. Starting at a cost under \$2,000, the prototypes use innovative materials such as interlocking compressedearth bricks and a modular microtruss and polystyrene roof panel system.



A Chic New Image for Rebranded Goodwill.

Clever details and a colorbased theme infused new energy into a rebranded Goodwill pop-up shop in Washington, DC, created with donated time by a Gensler design team.



gathering place for villagers.

Nagashizu: One Year Later.

A local Gensler team built

a fishing hut in Nagashizu,

Japan, a town destroyed

by the 2011 earthquake

and tsunami. The structure

helps revive a key aspect

of the town's livelihood.

while creating a communal

New Lease on Life for Blighted Neighborhood.

A team of Gensler planners and designers revitalized the MLK Medical Center Campus and surrounding area in South Los Angeles, transforming an underserved neighborhood into a health and wellness community.



Firm Exports Design

Thinking to Thailand. With students from four US and Thailand universities, principal Jordan Goldstein led an experiential design and research program in Bangkok to create scalable options for low-income housing and community centers.

SUSTAINABILITY IS EMBEDDED IN OUR WORK.

Relief in Sandy's Wake.

Following Superstorm Sandy, which hit the East Coast of the US, Gensler staff reached out to support Gensler employees in need of assistance. The firm has committed a matching donation of up to \$10,000 to support American Red Cross Disaster Relief.

Team Expands Role of Animal Shelters.

In June 2012, the Don Sanders Adoption Center opened as a "No Kill" animal shelter in Texas, Gensler helped Friends For Life reinvent the shelter's role in the community, with a sustainably designed space that sets a new standard for animal care, animal rescue, and client education.



IMPACT NY Highlights Design That Matters.

founded and co-chaired IMPACT NY, an IIDA event inviting New York design firms to submit pro bono work with community impact. Proceeds benefited desigNYC, a platform that connects civic-minded designers with nonprofits.

BASF Notches Double Platinum Rating.

The BASF North American Headquarters, in Florham Park, NJ, became the fifth project in the US to achieve LEED double Platinum certification. Gensler's design helped BASF attain the USGBC's highest rating.



Gensler Sets Benchmarks in Green Airport Design.

A host of new airport terminals reflect the firm's commitment to environmental stewardship, including the LEED Gold certified Portland International Jetport and San Francisco International Airport's Terminal 2, as well as the Chennai International Airport in India.



Angeles achieved LEED

Platinum status.

Gensler's Amanda Carroll

LA Office Nets LEED Platinum Rating. With radiant cooling systems, operable skylights, and advanced controls, Gensler's new office in downtown Los

Gensler maintained its

Sustainable Building.

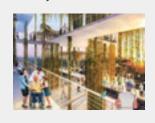
New Milestones in

leadership in sustainability with projects such as PNC Bank's first net-zero energy bank branch in Fort Lauderdale, FL, and The Tower at PNC Plaza in Pittsburgh. Set to be one of the greenest highrises in the US, the tower received Eco-Structure's 2012 "On the Boards" Evergreen Award.



Hospital Honored for Helping the Environment.

Gensler received a 2012 Healthcare Environment Award for Conceptual Design of the Community Hospital at Yishun, Singapore. The hospital's design enables 80 percent natural ventilation and a fully integrated natural water cycle.



Leading the Pack in Green Design.

Gensler captured the #2 spot on ENR's Top 100 Green Design Firms, and ranked #1 in Commercial Offices, #1 in Sports, Entertainment & Civic, and #1 in Retail The firm also captured the #1 spot in BD+C's Most Green Accredited Staff in Architecture and Engineering firms. Gensler has more than 450 LEED certified projects.

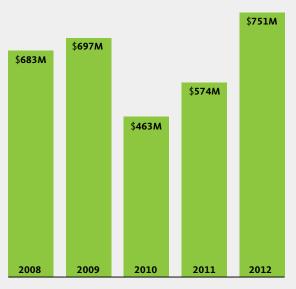
A Sustainability Pioneer. The USGBC awarded Art

Gensler the 2012 President's Award, recognizing his pioneering vision for the green building industry. Below: PNC Bank's net-zero energy retail branch



FINANCIAL RESULTS

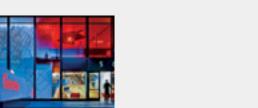
Revenues in our most recent fiscal year hit an all-time high, reflecting the breadth of our practice and service offerings, our global reach, and the continuing trust of our clients across our four market sectors.



Contributions to US and international retirement plans (US\$)

Gensler is fully employee owned through direct shares and our ESOP

The value of Gensler ESOP and retirement plans (US\$, on 9.23.12)



Gensler Annual Report 61 **Gensler Leadership** Simply put, Gensler is its people. A first-person quality pervades our one-firm firm. Clients are the first to know it, because they can quickly put faces to names. They recognize teamwork when they see it, too, but most important, they recognize commitment—a collaborative, can-do attitude that takes every challenge seriously and can draw on design research and a deep bench of talent and expertise to get the job done. Our people are the heart of the Gensler difference.

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Our clients reflect a dynamic world that is simultaneously global and local. If there's a trait they all share—whatever their size, locations, or focus it's the desire to excel. Design serves that ambition very well. And while "excel" takes place in the present, it aims for the future—a vision of what lies ahead that sees challenges as sources of opportunity and innovation. We design with that future in mind. Our clients' enduring success is how we measure our own.

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2,145

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NetApp NetSpi Neuberger Berman LLC Neudesic Neumann Monson Architects Neuro Focus Neutrogena Corporation New Boston Fund Inc. New Carrollton JV, LLC New Community Jewish High School New England Conservatory of Music New Giza New Museum of Contemporary Art New York Athletic Club New York Life Insurance Co. New York Marriott Eastside

New York Post

New York Public Library

The New York Times

New York School of Interior Design

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Merage Investment Group

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New York University Newport Orthopedic Institute **NewQuest Properties** News America Marketing Properties LLC **News Corporation** Next Century Associates, LLC **Nexus Development Corporation** NHN Japan Corp. Niagara Bottling, LLC Nick's Riverside Café The Nielsen Company Japan Nikken Sekkei Ltd. Ningbo Wantou Development Co., Ltd. Nintendo of America Inc. Nippon Life Insurance Company Nissan Motor Co., Ltd. Nissan North America, Inc. NM Project Company, LLC Noble Drilling Services Inc. Nokia Nokia Siemens Networks Nollenberger Capital Partners, Inc. Nomura Securities International, Inc. Nordman Cormany Hair & Compton LLP Noritex **Normandy Real Estate Partners** The North Face Northern Arizona University Northwestern Memorial Hospital Northwestern Memorial Physicians Group Northwood Investors Nossaman LLP Nova Corp, Inc. Novartis AG **NOVO Construction** NP International

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of the top 10 companies in Latin America are Gensler clients.

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of the 12 largest US technology companies are Gensler clients.

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Raycome Real Estate

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Development Co., Ltd

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America

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San Francisco Association of **RFALTORS®** San Francisco Travel Association San Jacinto Community College District SanDisk Corporation Sanguine Microelectronics (Shanghai) Co., Ltd. sanofi-aventis U.S. LLC Santa Ana Park S.A. Santa Monica College Santa Monica Malibu Unified School District Santa Monica Wellness Group Sapient Sapinda UK Limited Satcon Technology Corporation Satori Capital, LLC Saudi Binladin Group SAVO Group Scanga Architectural Woodworking Schiff Hardin LLP Schlumberger The School of the Art Institute of Chicago Schroders Investment Management Limited

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of the 12 largest US pharmaceutical firms are Gensler clients.

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Shellist, Lazarz & Slobin, LLP

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Co., Ltd.

Shenyang Oceanwide Real Estate

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Estate Co. Ltd **Sherwood Equities**

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Tianjin NEOCHINA Huacheng

Real Estate Co., Ltd.

Tudor Investment Corporation Tulsa Cancer Institute **TUOHY** Turcotte Development Group, LLC **Turnberry Associates Turner Construction Company** Tuxedo Park Library TWG Holdings, Inc. Twin Cities Habitat for Humanity Twin Cities Law Firm Twins Ballpark, LLC **Twitter** Two Sigma Investments, LLC Twofour54 FZ LLC

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W

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X

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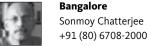
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Mission Critical
Mixed Use & Entertainment

Planning & Urban Design
Product Design
Professional Services Firms
Retail
Retail Centers
Science & Technology
Sports & Recreation
Workplace

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