TOP 10 GLOBAL TRENDS

Pandemic Update: What’s Changed, What Hasn’t & What Needs to Change

Rocky Mountain Land Use Institute | March 2021
P.U.M.A.’s Global Trends Report

- Initially created in 2007 to inform the Downtown Denver Area Plan
- IDA President’s Award for value to place management field
- 2020 was the fourth update, created in collaboration with IDA
**2007**

**DEMOGRAPHICS**
- Changing American Demographics
- Immigration Trends
- Changes within the “Creative Class”

**LIFESTYLES**
- Traffic Congestion & Value of Time
- Trends in Health Care/Wellness/Recreation
- Growth of Tourism
- America’s Growing Debt Burden

**COMPETITION**
- Emergence of a Planetary Middle Class
- Continued Advances in Technology, Environmentalism, Sustainability, Climate Change

---

**2011**

**DEMOGRAPHICS**
- Changing American Demographics
- Education, Talent & Jobs
- Emergence of Young Professional Women

**LIFESTYLES**
- Changing Consumer Behaviors
- Shifts in Transportation & Mobility
- Health, Wellness & Urban Form
- The Age of Austerity

---

**2014**

**DEMOGRAPHICS**
- Changing American Demographics
- Education, Talent & Jobs
- Influence of Women

**LIFESTYLES**
- Changing Consumer Behaviors
- Shifts in Transportation & Mobility
- Health & Wellness
- Rise of Regionalism

**COMPETITION**
- Emergence of a Planetary Middle Class
- Continued Advances in Technology
- Sustainability Mainstreamed

---

**2017**

**DEMOGRAPHICS**
- Changing American Demographics
- Education, Talent & Jobs
- Rise of the Mid-Tier City

**LIFESTYLES**
- Changing Consumer Behaviors
- Shifts in Transportation & Mobility
- Housing & Livability
- Regionalism

**COMPETITION**
- Shifts in Global Wealth
- Continued Advances in Technology
- Social Equity – The Neglected Pillar of Sustainability

---

**2020**

**DEMOGRAPHICS**
- Changing American Demographics
- Education, Talent & Jobs

**LIFESTYLES**
- Changing Consumer Behaviors
- Shifts in Transportation & Mobility
- Housing
- The Power of Place

**COMPETITION**
- Shifts in Global Wealth
- Continued Advances in Technology
- Climate Change
- Social Equity

---
CONCLUSION

For the past 15+ years, converging trends have been favorable for vibrant downtowns.
COVID-19

Pandemic is a colossal public health disruption, but more an *accelerator* than a game-changer
Protests for Racial Justice

Acceleration of trend to address social equity, both income inequality and racial justice

Drawing by Leah Folsom, Age 12
Economic Shock

Highest unemployment rate since the Great Depression, but will duration be relatively short?
DEMOGRAPHICS
Younger generations will return to pre-pandemic preferences quickly

- Experiencing less personal health risk
- Once health conditions stabilize, anticipate a surge in demand for entertainment, dining and services
- Racial justice protests solidify activism role of Millennials and Gen Z
Demographics

Older generations will be more cautious

- Most impacted by day-to-day health risks
- Boomers may search for new multi-generational housing options
- Pandemic may accelerate Gen X ascension to positions of influence
Accelerated Trend: Retail

Euthanasia for outdated formats

- Ecommerce less than 10% of sales, but expect modest acceleration
- Preferences for local, authentic & emotional connections to products will remain
- More community-focused retail with premium on social impact
- *Expect a surge in entrepreneurship that can be channeled to storefronts*
Accelerated Trend: Nature of Work

Will The Office Fundamentally Change?

- Expect more work/home flexibility, could soften demand for office
- **Conventional formats remain essential for creativity, teamwork and career advancement**
- Institutional support fields will remain in locations close to key anchors (i.e. government, education, health)
Accelerated Trend: Housing

Downtowns *Still* Become Neighborhoods

- Gen Z & Millennials continue to be drawn to downtown living
- **Affordability** *the* critical economic & social stabilizer
- Alternative ownership and rental types – cooperatives, group living options, live/work, conversion of hotels & office
- Advantages of smaller cities
Creating Unique Experiences

- “Contextualism” values history, culture and existing populations
- Fundamentals include safe, clean, walkable, human scale
- **Close streets, activate outdoor spaces – time to take risks!**
- Engage and support arts & culture to help reinvent public space
Other Accelerated Trends

- **Mobility as a service:** Integration of all modes, public & private – fixed route & point-to-point
- **Public health:** Considerations in the design of public and private space
  Add public health expertise to downtown organizations, city building
- **Higher education:** Alternatives to four-year colleges
DISRUPTION
Accelerated Trend: Social Equity

Diversified City = Diversified Economy

- U.S. income inequality extreme
- Rising tide of civic activism promoting equity in schools, wages, housing – racial justice protests will influence other realms
- Cities that offer greater opportunity and equality have higher aggregate growth
- Downtowns need to lead, find a meaningful role to advance solutions
Accelerated Trend: Climate Change

Cities on the Front Line

- Majority of Millennials and two-thirds of Gen Z see climate change crisis
- Pandemic offers glimpse of reduced carbon world
- Anticipate growing activism & investment in renewables, non-carbon vehicles
Accelerated Trend: Realignment?

Political Realignment in the U.S.

- Generational shifts between individual prosperity and the greater good
- FDR, Reagan, and beginning in 2020??
- Post election impact of insurrection & massive federal stimulus
CONCLUSIONS 2021 A.C. (After Covid)

*Trends remain favorable for vibrant downtowns*
- Demographic diversity and youth
- Capture Millennial & Gen Z talent
- Emergence of second tier cities
- Opportunity to diversify, curate storefronts
- Capitalize on public space innovations
- Local & regional investment remain critical
- Economic opportunity and racial justice are key
TOP 10 GLOBAL TRENDS
Affecting North American Downtowns and How to Respond at Home

www.pumaworldhq.com
@pumaworldhq
Making cities for people

Matthew Lister
Managing Director and Partner, Gehl

citiesforpeople
www.gehlpeople.com
matthew@gehlpeople.com
Our challenge is to make places that foster and nurture human connection.
Right..Okay...

Now what?
The best way to understand the city is to watch people using it.
Gehl Lens - Public Space & Public Life

Our Methods

Over two days of observational surveys + leave behind insurveys, we collected data on how people are moving through, spending time, and to what degree they are social distancing.
Living with COVID- public life data and projects

Take our survey! How has your use of public space changed during the pandemic?
Public Space, Public Life, and COVID 19
In the first phases of the reopening in Denmark

www.covid19.gehlpeople.com/
May 2020
2023 respondents
63 countries
MOTIVATIONS

Drivers of physical and mental health outstrip essential errands as the top reasons people use public space.
### Which spaces have you used?

<table>
<thead>
<tr>
<th>Space</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neighborhood Street / Sidewalk</td>
<td>87%</td>
</tr>
<tr>
<td>Places for Essential Errands</td>
<td>72%</td>
</tr>
<tr>
<td>Local Neighborhood Park</td>
<td>67%</td>
</tr>
<tr>
<td>Stoop, Yard, or Courtyard</td>
<td>59%</td>
</tr>
<tr>
<td>Wild or Natural Area</td>
<td>54%</td>
</tr>
<tr>
<td>Large City Park</td>
<td>42%</td>
</tr>
<tr>
<td>Main Street / Sidewalk</td>
<td>37%</td>
</tr>
<tr>
<td>Roof, Balcony, or Fire Escape</td>
<td>27%</td>
</tr>
<tr>
<td>Plaza or Other Paved Public Space</td>
<td>16%</td>
</tr>
<tr>
<td>Temporary Street Closure</td>
<td>10%</td>
</tr>
</tbody>
</table>

### Where have you felt crowded?

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Neighborhood Street / Sidewalk</td>
<td>59%</td>
</tr>
<tr>
<td>Places for Essential Errands</td>
<td>32%</td>
</tr>
<tr>
<td>Local Neighborhood Park</td>
<td>14%</td>
</tr>
<tr>
<td>Main Street / Sidewalk</td>
<td>25%</td>
</tr>
<tr>
<td>Roof, Balcony, or Fire Escape</td>
<td>26%</td>
</tr>
<tr>
<td>Plaza or Other Paved Public Space</td>
<td>7%</td>
</tr>
<tr>
<td>Temporary Street Closure</td>
<td>1%</td>
</tr>
</tbody>
</table>

n=1,389 respondents
SOCIAL LIFE

People aged 65+ seek out social activity at higher rates

% citing social interaction as a reason for using public space

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Social Interaction</th>
</tr>
</thead>
<tbody>
<tr>
<td>65 years or older</td>
<td>41%</td>
</tr>
<tr>
<td>Under 65 years</td>
<td>26%</td>
</tr>
</tbody>
</table>

“I’ve had distanced conversations with neighbors (10 feet or more) and once had an entire evening out — we on our driveway, they on theirs.”

People living alone socialize in public space at higher rates

% socializing in public space with people other than those they’re isolating with

<table>
<thead>
<tr>
<th>Socializing With</th>
<th>Socializing With Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living Alone</td>
<td>77%</td>
</tr>
<tr>
<td>Living With Others</td>
<td>45%</td>
</tr>
</tbody>
</table>

“I do feel like I am more comfortable making eye contact and smiling with strangers on the street — it’s been a nice way to feel connected.”

n=1,389 respondents
While Copenhagen on the other hand, managed to spread out the activity level over the day. You don’t see the hoards of people in Copenhagen’s city centre during the lunchtime peak anymore. The city centre seems like it is back to normal, and has managed to flatten its own curve. The flattening of pedestrian activity means there has been a distribution and consistent amount of activity throughout the day.
Compared to lockdown there is a general increase in people moving through the city center, whereas people spending time has changed more irregularly.

During Covid-19 lockdown, more people were spending time in selected spaces in the city center. In the reopening, the people are more spread out, and more people are moving around. This is particularly true in Copenhagen and Svendborg.
During the reopening, all city centers have seen an increase in pedestrian activity.

Percentage Change in Pedestrian Activity from lockdown to reopening:

- Copenhagen: +798%
- Horsens: +1564%
- Svendborg: +142%
- Helsingor: +217%

- Copenhagen: +66%
- Horsens: +101%
- Svendborg: -34%
- Helsingor: +39%
The physical surroundings seem to have been crucial when coming to inviting people back in the reopening.

Commercial streets have different aesthetics, and the design of the buildings varies.

What is the connection between how the streets are designed and what activity we see during lockdown and in the reopening?
What combination of spatial and programmatic conditions is most conducive to inviting people to spend time during the lockdown and re-opening?

**Nature** - Vegetation and Street Trees

**Shared Surface** - Multiple widths

**Urban Furniture** - Benches, lighting, monuments

**Groundfloor** - Active, continuous, diverse.

**Urban Furniture** - Benches, lighting, culture

**Building Scale** - 2 to 4 stories high.
New and sustained user group: 3x as many kids and 17x as many infants in the public space.
During lockdown and in the reopening phase, play has increased throughout all local meeting places.

2x more play in Svendborg
2.5x more play in Copenhagen
36% more play in Horsens

Graphs showing the percentage of redistribution of stationary activities in local meeting places.
Larimer Square
Public Life Data
Findings

Gehl
At 7pm Peak, it’s outpacing 16th Street. And it splits the weekend and weekday difference of Lower Broadway in Nashville — one of the country’s most active streets.

Almost 2x more people are walking on Larimer than 16th Street.
The age split leans heavily toward adults, with few seniors and fewer families passing through.

There is a college student uptick at 7pm

Invitations are working for adults and to a lesser degree young adults. More vulnerable age groups and young families are conspicuously absent.
Larimer draws a consistent crowd of locals

Since the street closure, most survey respondents visit regularly or frequently – This is a local destination.

How often do you visit the pedestrianized Larimer Street?

- Frequently (once every other week): 43.8%
- Regularly (daily or almost daily): 28.1%
- Occasionally: 25.0%
- This is my first time here: 4.0%

In a small survey with businesses, the perception is there has been a strong uptick in local presence during the street closure.
On the weekend it’s a packed but organized dining hall. People are social distancing effectively.

On the weekday it becomes a looser public space. Fewer people and more room to maneuver, but social distancing slacks.
Larimer’s social distancing dynamics

Proper social distancing calls for 6-ft radius per person. We understand on Larimer that many people are coming in groups so the radius must be adjusted. Using Saturday at 7pm as a peak example - the average group size at this time is approximately 4 people.

The radius has been adjusted to be 8ft, allowing 2 feet in between people in the group.

97% agree Larimer Square is easy to navigate while maintaining the 6 ft physical distance.

People Staying
Social distancing is a balance of capacity and behavior. During peak hours, some of these circles get over-taxed and see laxer distancing. While other areas remain empty.

Social distancing is a balance between capacity and behavior. When over capacity, people adhered to social distance more than when it was under capacity.
Food and Beverage is taking full advantage of the street closure

Greenery

Protection from inclimate weather

Clear offering

Clear circulation

Determined social distancing

People Staying
Retail on the other hand is trying the same approach, but with less impact.

The character of Larimer comes from the storefronts. Avoid blocking them from view.
New York City is dead forever

By James Altucher
August 17, 2020 | 4:16pm | Updated
Outdoor Dining in N.Y.C. Will Become Permanent, Even in Winter !!!

The program has become a vital lifeline and allowed more than 10,000 restaurants and bars to take over sidewalks, streets and other public spaces.

Dining outside in Winter??!

That’s Impossible!!!
With the right ingredients... Not impossible!!

Space Heater + Warm Blanket + Hot Toddy =
World War I and the 1918 flu pandemic was quickly followed by a manic flight into sociability. The Roaring Twenties saw a flowering of parties and concerts. The 1918 virus killed more people than the deadliest war humanity had hitherto experienced, but it did not reduce humanity’s determination to socialize.
Our challenge is to make places that foster and nurture human connection.

Damn right it is!!
A society can be so stone-hard
That it fuses into a block
A people can be so bone hard
That life goes into a shock

And the heart is all in shadow
And the heart has almost stopped
Till some begin to build
A city as soft as a body

_Inger Christensen - 1969_
PANDEMONIUM OR
POSITIVE CHANGE:
OUR POST-PANDEMIC
DOWNTOWNS

JON GAMBRILL  Managing Director, Gensler
Rocky Mountain Land Use Institute | 03.26.21
5 KEY CONSIDERATIONS FOR OUR POST-COVID RETURN:

1. The desire for people to reconnect is driving the recovery and emphasizing the true impact of real estate and place.

2. Now more than ever, we have the opportunity to reimagine the future of cities.

3. Our focus on health must include climate action.

4. Design solutions that prioritize human experience offer the best opportunities to emerge stronger from the crisis.

5. We must define the next generation of places and spaces in a post-COVID world.
People’s relationships with their cities are shifting due to health concerns over public transportation and density.

71% New York
67% London
64% Singapore, San Francisco

—GENSLER CITY PULSE SURVEY
NEARLY HALF OF RESPONDENTS STILL WANT TO LIVE IN AN URBAN SETTING

<table>
<thead>
<tr>
<th>City</th>
<th>Larger City</th>
<th>Comparable City</th>
<th>Smaller City</th>
<th>Suburbs</th>
<th>Rural Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York Metro</td>
<td>13%</td>
<td>7%</td>
<td>25%</td>
<td>32%</td>
<td>23%</td>
</tr>
<tr>
<td>San Francisco Metro</td>
<td>13%</td>
<td>11%</td>
<td>26%</td>
<td>31%</td>
<td>19%</td>
</tr>
<tr>
<td>Greater London</td>
<td>10%</td>
<td>3%</td>
<td>26%</td>
<td>18%</td>
<td>43%</td>
</tr>
<tr>
<td>Singapore</td>
<td>13%</td>
<td>10%</td>
<td>37%</td>
<td>22%</td>
<td>18%</td>
</tr>
</tbody>
</table>
The pandemic helped us remember what’s truly important: life with other people.

—GENSLER CITY PULSE SURVEY
### Key Finding #1: Expectation That Work Will Return But Change

**Flexible Workday Replaces M-F, 9-5**

Hybrid model where office (and central business district) is more for convening.

### How Many Days Would You Prefer to Work From the Office vs. From Home?

<table>
<thead>
<tr>
<th></th>
<th>Full Time in Office</th>
<th>1 or 2 Days at Home</th>
<th>3 or 4 Days at Home</th>
<th>Full Time at Home</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>29%</strong></td>
<td></td>
<td></td>
<td></td>
<td><strong>19%</strong></td>
</tr>
<tr>
<td><strong>52%</strong> OF U.S. WORKERS WOULD PREFER A HYBRID WORK MODEL.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Key Finding #2:
**A Desire and Willingness to Returning to Work, School, and Shopping**

<table>
<thead>
<tr>
<th>Rank</th>
<th>New York Metro Area</th>
<th>San Francisco Metro Area</th>
<th>Greater London</th>
<th>Singapore</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grocery shopping</td>
<td>Grocery shopping</td>
<td>Grocery shopping</td>
<td>Grocery shopping</td>
</tr>
<tr>
<td>2</td>
<td>Returning to work/school</td>
<td>Returning to work/school</td>
<td>Returning to work/school</td>
<td>Returning to work/school</td>
</tr>
<tr>
<td>3</td>
<td>Shopping in stores/malls</td>
<td>Shopping in stores/malls</td>
<td>Staying in hotels or vacation rentals</td>
<td>Shopping in stores/malls</td>
</tr>
<tr>
<td>4</td>
<td>Using shared bikes and scooters</td>
<td>Using shared bikes and scooters</td>
<td>Dining out</td>
<td>Using rideshare services</td>
</tr>
<tr>
<td>5</td>
<td>Dining out</td>
<td>Staying in hotels or vacation rentals</td>
<td>Shopping in stores/malls</td>
<td>Using mass transit</td>
</tr>
<tr>
<td>6</td>
<td>Staying in hotels or vacation rentals</td>
<td>Dining out</td>
<td>Using shared bikes and scooters</td>
<td>Dining out</td>
</tr>
<tr>
<td>7</td>
<td>Using rideshare services</td>
<td>Using rideshare services</td>
<td>Using rideshare services</td>
<td>Using shared bikes and scooters</td>
</tr>
<tr>
<td>8</td>
<td>Going to the gym/pool</td>
<td>Going to the gym/pool</td>
<td>Using mass transit</td>
<td>Staying in hotels or vacation rentals</td>
</tr>
<tr>
<td>9</td>
<td>Flying on an airplane</td>
<td>Flying on an airplane</td>
<td>Going to the gym/pool</td>
<td>Going to the gym/pool</td>
</tr>
<tr>
<td>10</td>
<td>Using mass transit</td>
<td>Attending large gatherings</td>
<td>Flying on an airplane</td>
<td>Flying on an airplane</td>
</tr>
<tr>
<td>11</td>
<td>Attending large gatherings</td>
<td>Using mass transit</td>
<td>Attending large gatherings</td>
<td>Attending large gatherings</td>
</tr>
</tbody>
</table>

The CBD is not an endangered species; opportunities for new, more mixed uses.
### KEY FINDING #3:
**CONTINUED APPREHENSION ABOUT TRANSIT, FLYING AND GATHERING**

<table>
<thead>
<tr>
<th>Rank</th>
<th>New York Metro Area</th>
<th>San Francisco Metro Area</th>
<th>Greater London</th>
<th>Singapore</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Grocery shopping</td>
<td>Grocery shopping</td>
<td>Grocery shopping</td>
<td>Grocery shopping</td>
</tr>
<tr>
<td>2</td>
<td>Returning to work/school</td>
<td>Returning to work/school</td>
<td>Returning to work/school</td>
<td>Returning to work/school</td>
</tr>
<tr>
<td>3</td>
<td>Shopping in stores/malls</td>
<td>Shopping in stores/malls</td>
<td>Staying in hotels or vacation rentals</td>
<td>Shopping in stores/malls</td>
</tr>
<tr>
<td>4</td>
<td>Using shared bikes and scooters</td>
<td>Using shared bikes and scooters</td>
<td>Dining out</td>
<td>Using rideshare services</td>
</tr>
<tr>
<td>5</td>
<td>Dining out</td>
<td>Staying in hotels or vacation rentals</td>
<td>Shopping in stores/malls</td>
<td>Using mass transit</td>
</tr>
<tr>
<td>6</td>
<td>Staying in hotels or vacation rentals</td>
<td>Dining out</td>
<td>Using shared bikes and scooters</td>
<td>Dining out</td>
</tr>
<tr>
<td>7</td>
<td>Using rideshare services</td>
<td>Using rideshare services</td>
<td>Using rideshare services</td>
<td>Using shared bikes and scooters</td>
</tr>
<tr>
<td>8</td>
<td>Going to the gym/pool</td>
<td>Going to the gym/pool</td>
<td>Using mass transit</td>
<td>Staying in hotels or vacation rentals</td>
</tr>
<tr>
<td>9</td>
<td>Flying on an airplane</td>
<td>Flying on an airplane</td>
<td>Going to the gym/pool</td>
<td>Flying to the gym/pool</td>
</tr>
<tr>
<td>10</td>
<td>Using mass transit</td>
<td>Attending large gatherings</td>
<td>Flying on an airplane</td>
<td>Flying on an airplane</td>
</tr>
<tr>
<td>11</td>
<td>Attending large gatherings</td>
<td>Using mass transit</td>
<td>Attending large gatherings</td>
<td>Attending large gatherings</td>
</tr>
</tbody>
</table>

Local, walkable destinations take on new importance.

**LEAST COMFORTABLE**

**MOST COMFORTABLE**
OVER HALF OF U.S. WORKERS WANT THE FLEXIBILITY OF A HYBRID WORK MODEL.

WORKERS ARE ASKING FOR MORE ACCESS TO PRIVACY IN THE WORKPLACE.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
WHERE ARE YOU CURRENTLY WORKING?

- Full time in office: 29%
- Hybrid work model:
  - 1 or 2 days at home: 8%
  - 3 or 4 days at home: 11%

WHERE WOULD YOU IDEALLY WORK?

- Full time in office: 29%
- 1 or 2 days at home: 28%
- 3 or 4 days at home: 24%
- Full time at home: 19%

Over half (52%) of U.S. workers would prefer a hybrid work model, working some time at home and some time in the office.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
46% of all U.S. workers would prefer an open work environment; currently 69% are in some form of open office.

47% of all U.S. workers would prefer a private work environment; currently only 21% are in a mostly or totally private workplace.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
### The Top Reason Employees Want to Come to the Office: The People

Employees see the office as most important for what’s hardest to do at home: Mentorship, Problem-Solving and Connecting.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled meetings with colleagues</td>
<td>54%</td>
</tr>
<tr>
<td>Socializing with colleagues</td>
<td>54%</td>
</tr>
<tr>
<td>Impromptu face-to-face time</td>
<td>54%</td>
</tr>
<tr>
<td>To be part of the community</td>
<td>45%</td>
</tr>
<tr>
<td>Access to technology</td>
<td>44%</td>
</tr>
<tr>
<td>To focus on my work</td>
<td>40%</td>
</tr>
<tr>
<td>Scheduled meetings with clients</td>
<td>40%</td>
</tr>
<tr>
<td>Professional development/coaching</td>
<td>33%</td>
</tr>
<tr>
<td>Access to amenities</td>
<td>29%</td>
</tr>
</tbody>
</table>

Source: Gensler U.S. Work From Home Survey 2020
U.S. WORKERS DRAMATICALLY PREFER ASSIGNED SEATING—AND DESPITE A DESIRE FOR FLEXIBILITY, TWO-THIRDS ARE WILLING TO TRADE FLEXIBILITY FOR AN ASSIGNED SEAT.

- **10%** Unassigned desk shared with others.
- **90%** Assigned desk used only by me.
- **39%** Yes, I would share with others for more opportunity to work remotely.
- **61%** No, I would prefer not to share even with more expectation to come to the workplace.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
### COMPARISON BY INDUSTRY

How many days would you prefer to work from the office vs. from home?

<table>
<thead>
<tr>
<th>Industry</th>
<th>Full Time In Office</th>
<th>1 or 2 Days at Home</th>
<th>3 or 4 Days at Home</th>
<th>Full Time at Home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Consumer Goods</td>
<td>54%</td>
<td>18%</td>
<td>12%</td>
<td>16%</td>
</tr>
<tr>
<td>Sciences</td>
<td>48%</td>
<td>23%</td>
<td>15%</td>
<td>14%</td>
</tr>
<tr>
<td>Government/Defense</td>
<td>38%</td>
<td>24%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>Legal</td>
<td>27%</td>
<td>28%</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Not-for-profit</td>
<td>26%</td>
<td>34%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>Energy</td>
<td>24%</td>
<td>31%</td>
<td>29%</td>
<td>16%</td>
</tr>
<tr>
<td>Media</td>
<td>20%</td>
<td>31%</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>Finance</td>
<td>19%</td>
<td>28%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>Management/Advisory</td>
<td>18%</td>
<td>33%</td>
<td>26%</td>
<td>23%</td>
</tr>
<tr>
<td>Technology</td>
<td>17%</td>
<td>28%</td>
<td>29%</td>
<td>26%</td>
</tr>
</tbody>
</table>
OVER HALF OF U.S. WORKERS WANT THE FLEXIBILITY OF A HYBRID WORK MODEL.

THE FUTURE WORKPLACE MUST DEAL WITH THE COMPETING PRESSURES OF INCREASING FLEXIBILITY WHILE ALSO INCREASING PRIVACY.

WORKERS ARE ASKING FOR MORE ACCESS TO PRIVACY IN THE WORKPLACE.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
FOR WORKERS ALREADY IN A HYBRID WORK MODEL, THE BENEFITS OF WORKING THIS WAY ARE BECOMING CLEARER.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
PEOPLE CURRENTLY WORKING FULL-TIME FROM THE OFFICE SPEND NEARLY 2X AS MUCH TIME COLLABORATING COMPARED TO THOSE FULL-TIME AT HOME.

<table>
<thead>
<tr>
<th></th>
<th>Currently full time in office</th>
<th>Currently 1 or 2 days at home</th>
<th>Currently 3 or 4 days at home</th>
<th>Currently full time at home</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focusing</td>
<td>39%</td>
<td>44%</td>
<td>53%</td>
<td>62%</td>
</tr>
<tr>
<td>Collaborating in person</td>
<td>43%</td>
<td>23%</td>
<td>14%</td>
<td>27%</td>
</tr>
<tr>
<td>Collaborating virtually</td>
<td>9%</td>
<td>21%</td>
<td>21%</td>
<td>6%</td>
</tr>
<tr>
<td>Learning</td>
<td>3%</td>
<td>6%</td>
<td>7%</td>
<td>6%</td>
</tr>
<tr>
<td>Socializing</td>
<td>6%</td>
<td>6%</td>
<td>5%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
PEOPLE CURRENTLY WORKING FULL-TIME FROM THE OFFICE SPEND NEARLY 2X AS MUCH TIME COLLABORATING COMPARED TO THOSE FULL-TIME AT HOME.

- **Focusing**
  - Currently full-time in office: 39%
  - Currently 1 or 2 days at home: 44%
  - Currently 3 or 4 days at home: 53%
  - Currently full-time at home: 62%
  - Pre-pandemic (December 2019 data): 47%

- **Collaborating in person**
  - Currently full-time in office: 43%
  - Currently 1 or 2 days at home: 23%
  - Currently 3 or 4 days at home: 14%
  - Currently full-time at home: 27%
  - Pre-pandemic (December 2019 data): 29%

- **Collaborating virtually**
  - Currently full-time in office: 9%
  - Currently 1 or 2 days at home: 21%
  - Currently 3 or 4 days at home: 21%
  - Currently full-time at home: 27%
  - Pre-pandemic (December 2019 data): 14%

- **Learning**
  - Currently full-time in office: 3%
  - Currently 1 or 2 days at home: 6%
  - Currently 3 or 4 days at home: 7%
  - Currently full-time at home: 6%
  - Pre-pandemic (December 2019 data): 5%

- **Socializing**
  - Currently full-time in office: 6%
  - Currently 1 or 2 days at home: 6%
  - Currently 3 or 4 days at home: 5%
  - Currently full-time at home: 5%
  - Pre-pandemic (December 2019 data): 5%

Compared to working before COVID, people currently full-time at home spend dramatically more time working alone, less time collaborating.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
ACROSS ALL DEMOGRAPHIC GROUPS, THE AMENITIES DESIRED BY MOST WORKERS ARE HIGHLY PRAGMATIC—WITH PARKING AT THE TOP OF THE LIST.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
AS WORKERS LOOK TO THE FUTURE, THE MOST DESIRED AMENITIES ARE HIGHLY PRAGMATIC—AND WORKERS ARE FOCUSED ON PARKING.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Amenity</th>
<th>Boomer %</th>
<th>Baby Boomer %</th>
<th>Gen X &amp; Millennial %</th>
<th>Gen Z &amp; Gen Tech %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Parking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Technology help desk</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Coffee/tea service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Gym/exercise room</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Outdoor space</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Sit-down eating/dining</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>To-go/carry-out food service</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Medical/health services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Well-being/preventative care services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Child care services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comparatively, parking is most important to Boomer workers. Younger workers place the most importance on gym/exercise spaces. Gen Z and Millennial respondents are 4X more likely than Boomers to rank child care as important.

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020
HUMAN-EXPERIENCE
DESIGN IS A
POWERFUL
OPPORTUNITY

1. Pandemic has caused massive shift in global work patterns.
2. We’ve adopted new behaviors, technologies, ways of working.
3. Working together is more important than ever.
4. Physical office will play a more central role in creating more connected, equitable experiences for people, organizations and communities.
Gensler

THANK YOU!

JON GAMBRILL  Managing Director, Gensler
Rocky Mountain Land Use Institute  | 03.26.21