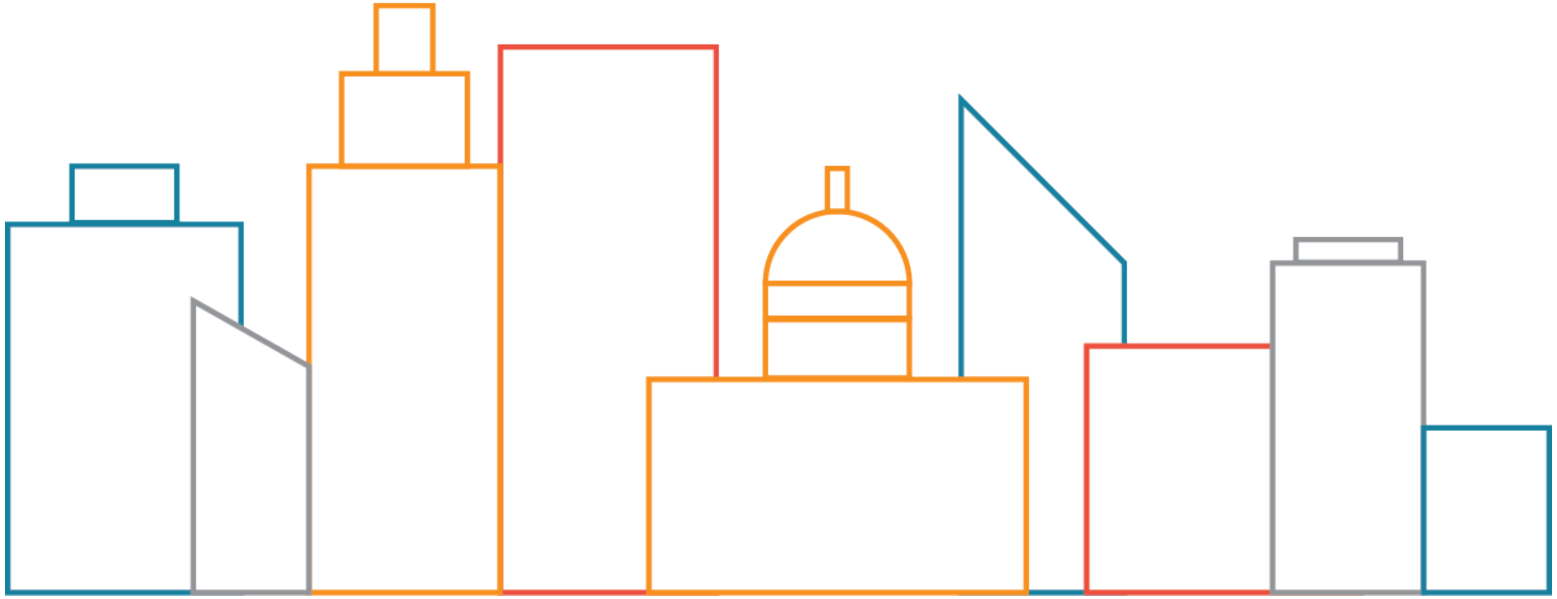


TOP 10 GLOBAL TRENDS

Affecting North American Downtowns and How to Respond at Home

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

Rocky Mountain Land Use Institute | March 2021

P.U.M.A.

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

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

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

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

2020

DEMOGRAPHICS
Changing American Demographics
Education, Talent & Jobs

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

DISRUPTION
Divisive Politics
Continued Advances in Technology
Climate Change
Social Equity

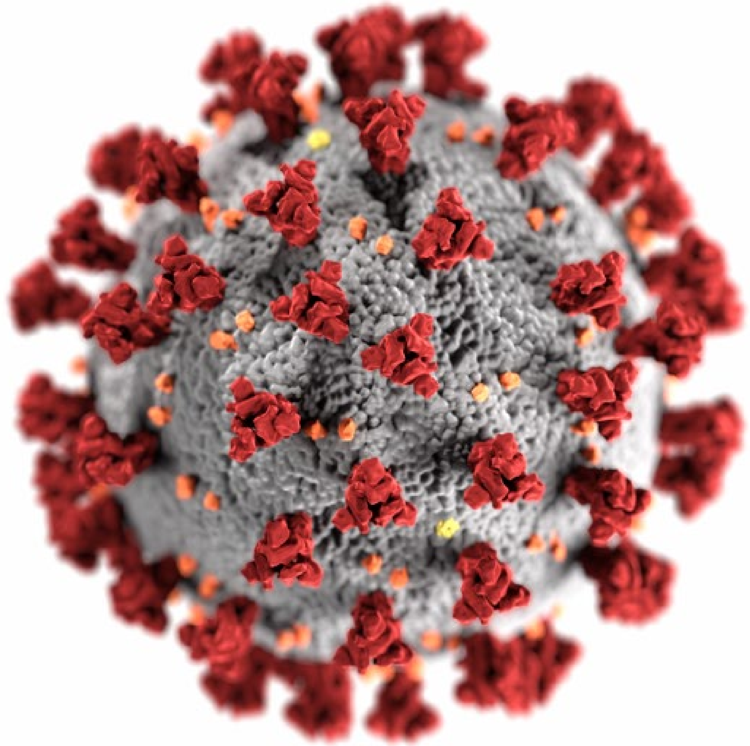
CONCLUSION

For the past 15+ years, converging trends have been favorable for vibrant downtowns

P.U.M.A.

COVID-19

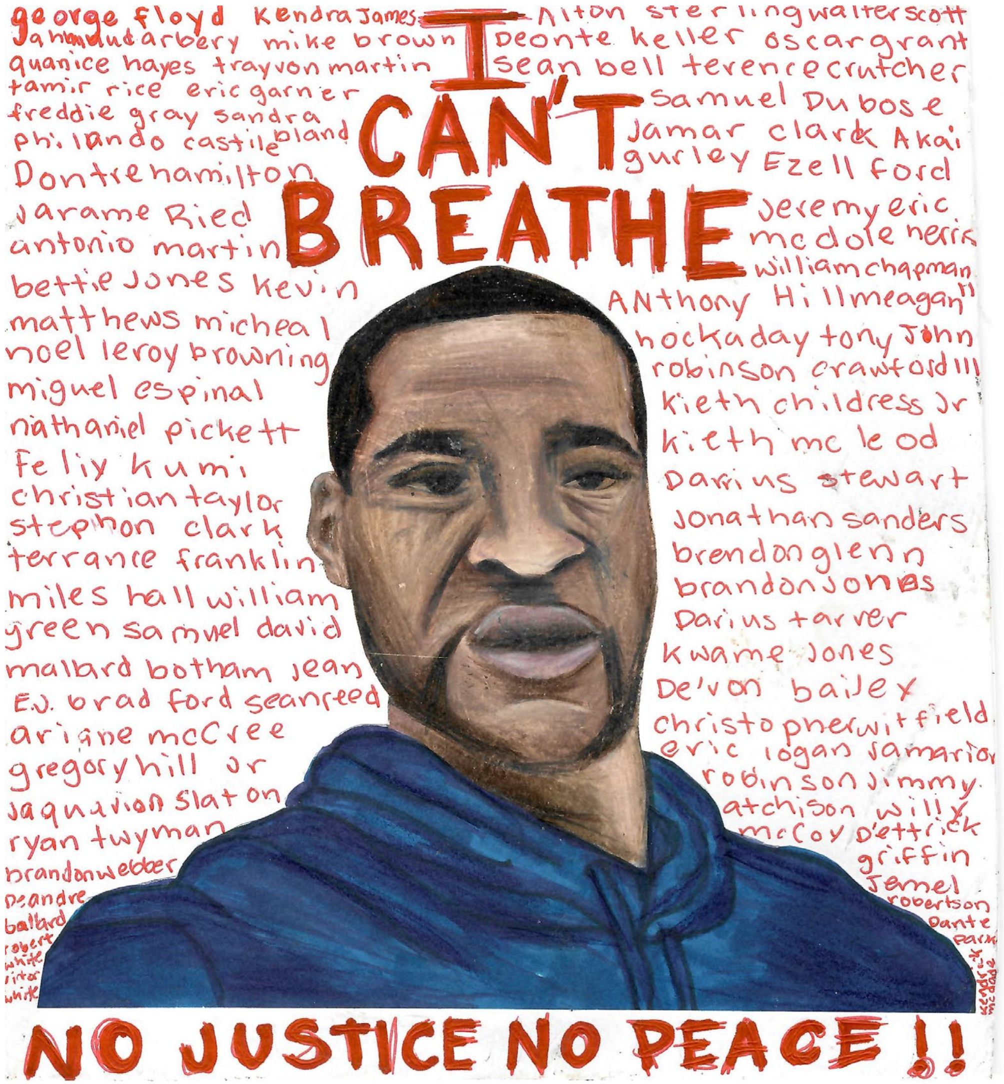
Pandemic is a colossal public health disruption, but more an ***accelerator*** *than a game-changer*



P.U.M.A.

Protests for Racial Justice

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

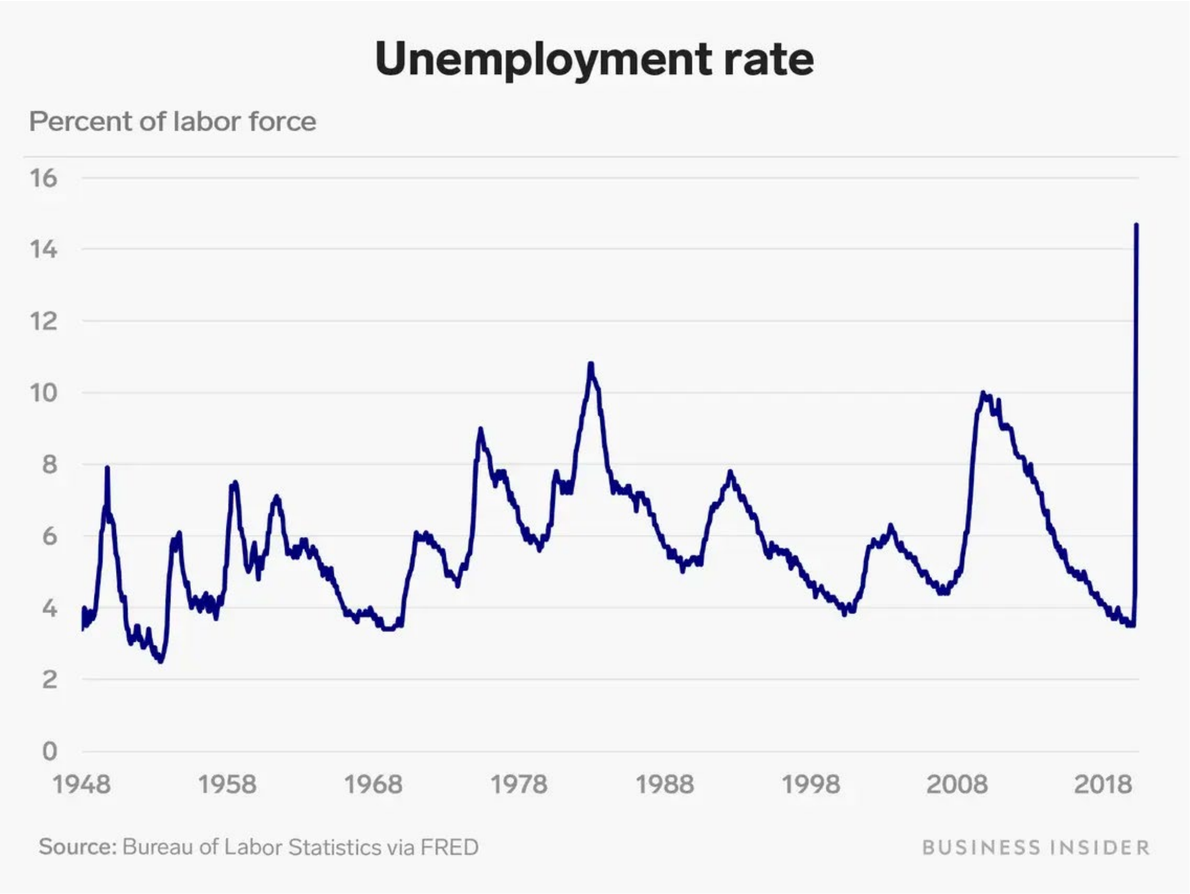


Drawing by Leah Folsom, Age 12

P.U.M.A.

Economic Shock

Highest unemployment rate since the Great Depression, but will duration be relatively short?



P.U.M.A.

DEMOGRAPHICS

P.U.M.A.

Big Assumption on 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

P.U.M.A.

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

P.U.M.A.

LIFESTYLES

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

P.U.M.A.

Accelerated Trend: Power of Place

Creating Unique Experiences

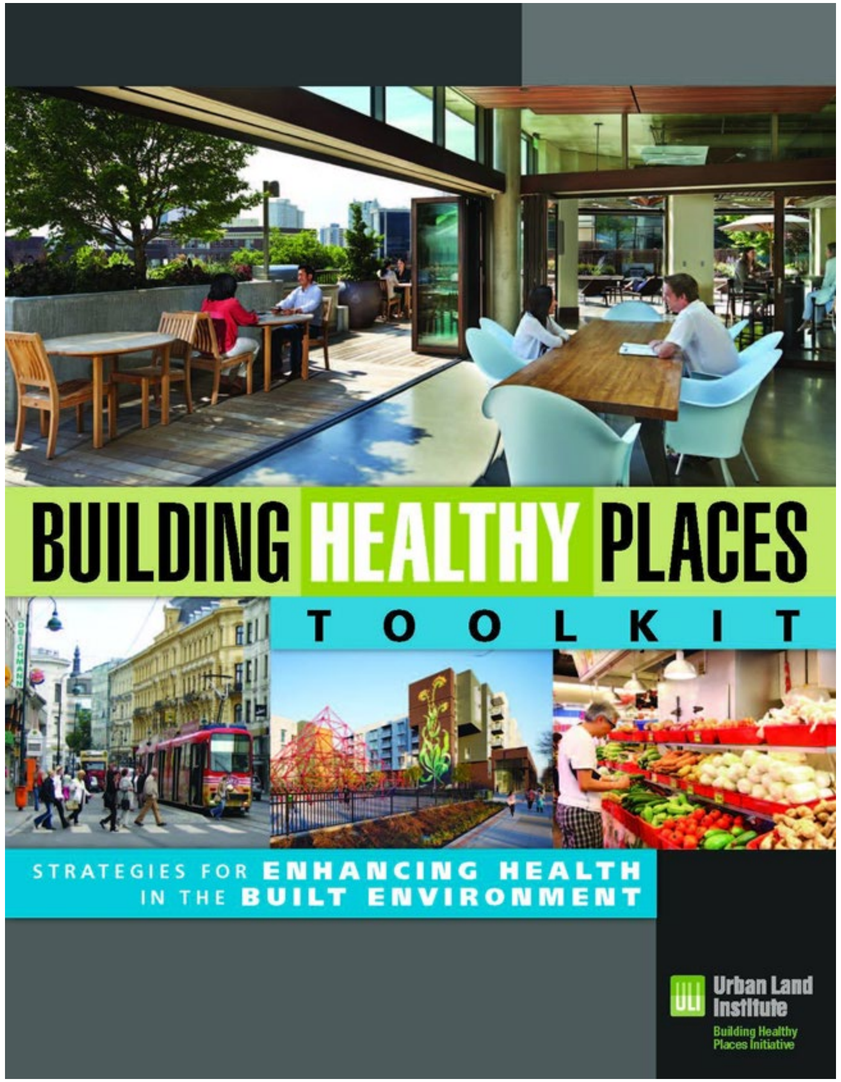
- "Contextualism" values history, culture and existing populations
- Fundamentals include safe, clean, walkable, human scale
- **Close streets, activate outdoor spaces – time to take risks!**
- Engage and support arts & culture to help reinvent public space

P.U.M.A.

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

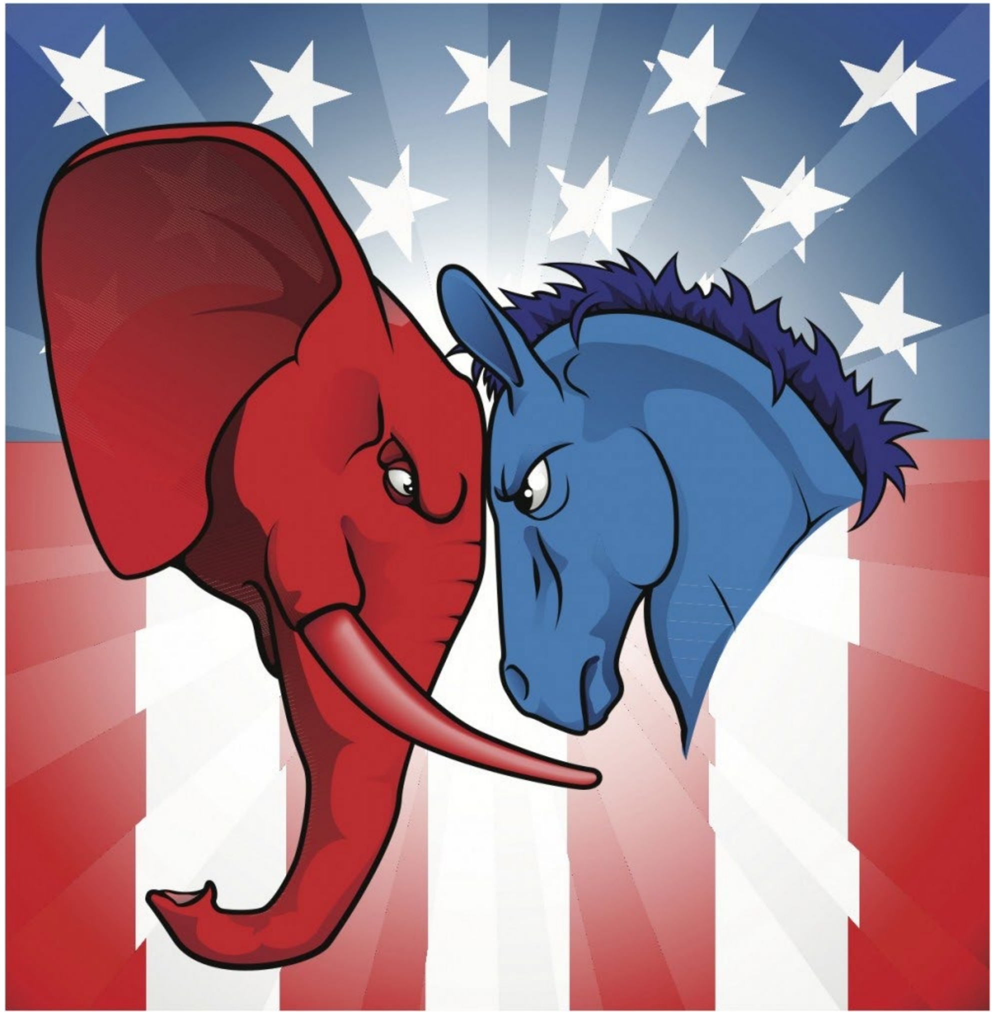
Cities on the Front Line

- 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.

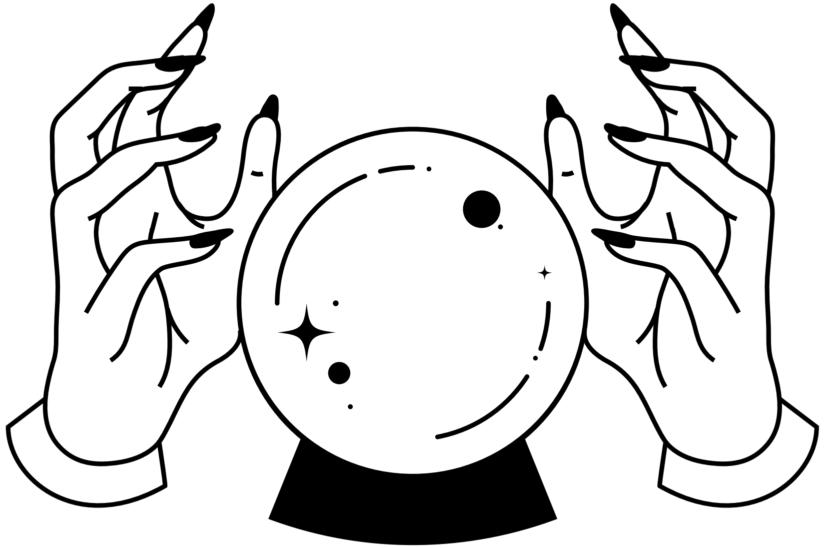
- Generational shifts between individual prosperity and the greater good
- FDR, Reagan, and beginning in 2020??
- Post election impact of insurrection & massive federal stimulus



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

P.U.M.A.

Making cities for people

Matthew Lister

Managing Director and Partner, **Gehl**

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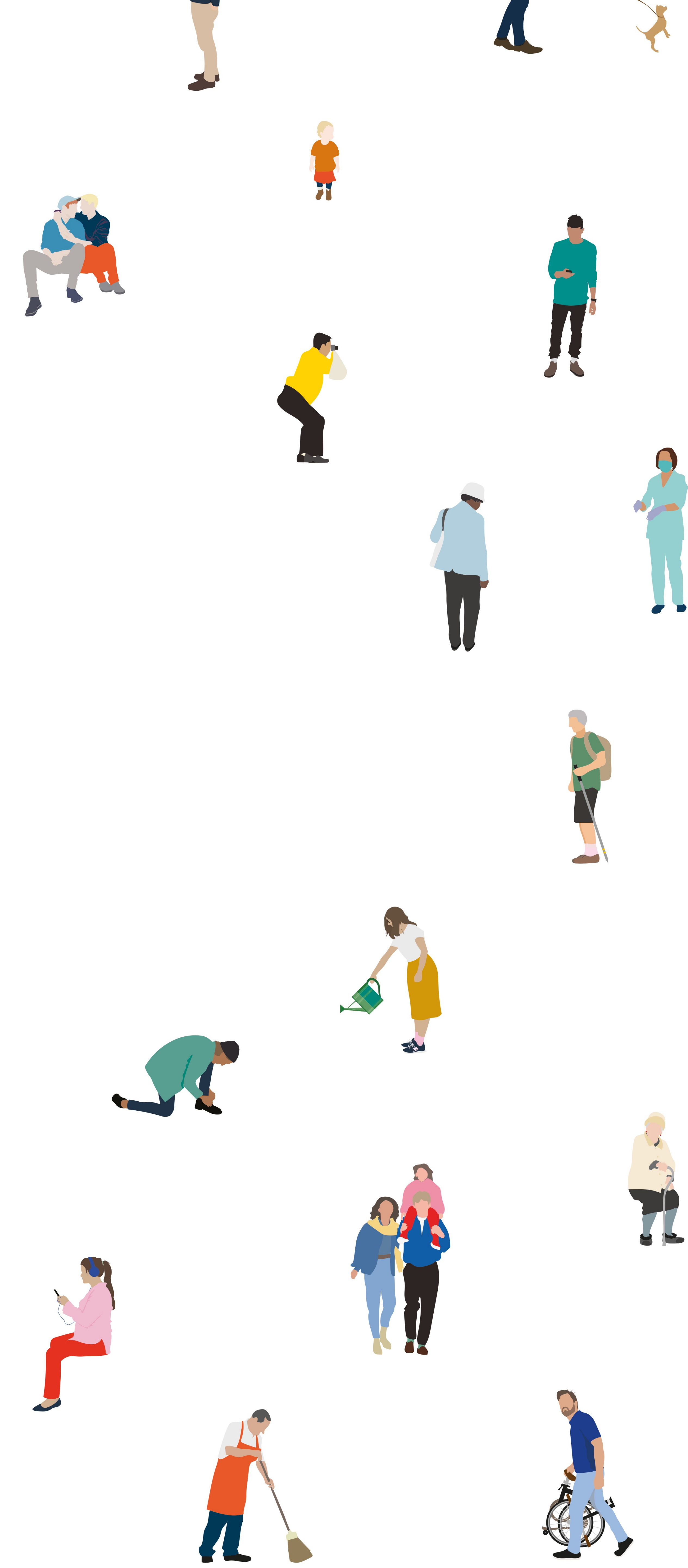
matthew@gehlpeople.com



Our challenge is to make places that foster and nurture human connection.


Before...

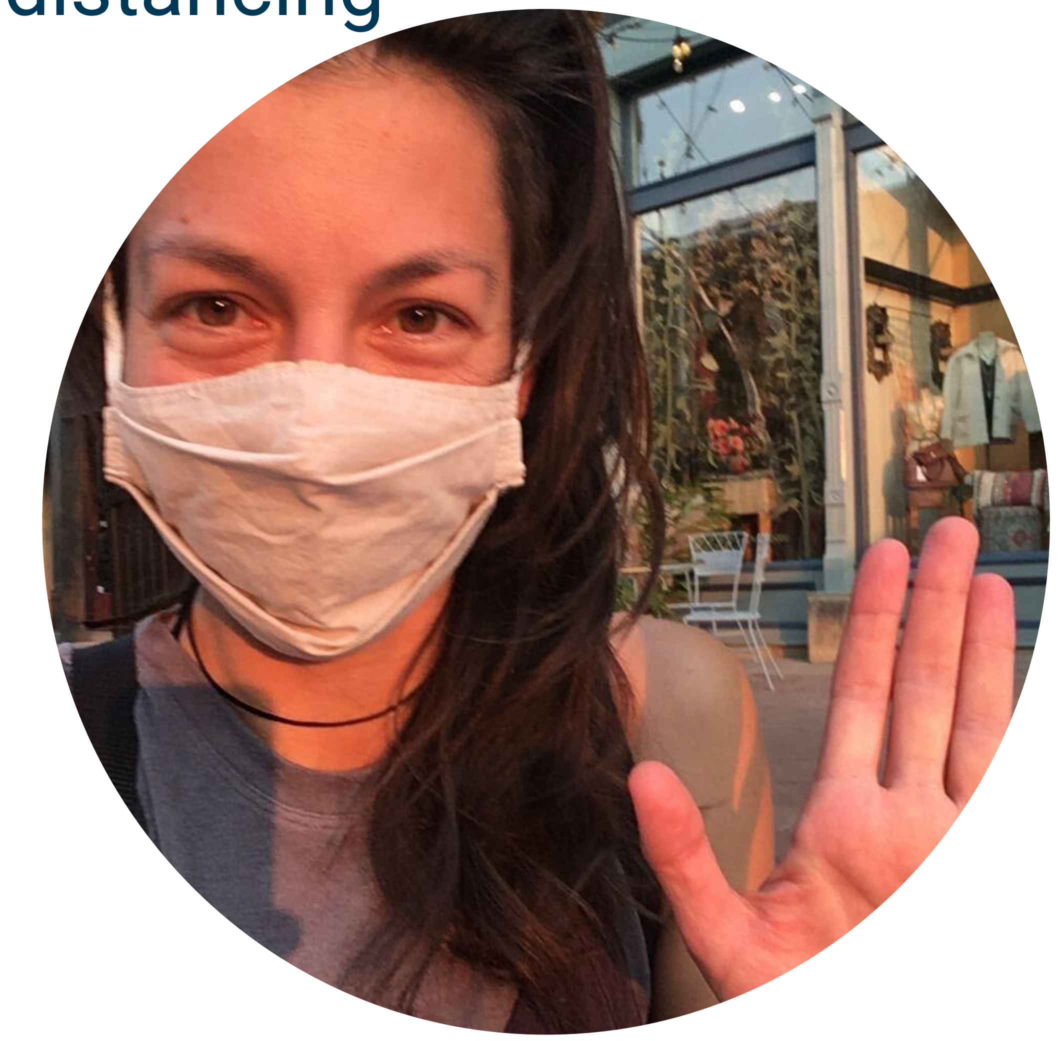

March 13, 2020
2 Avenue
Right..Okay...
Now what?

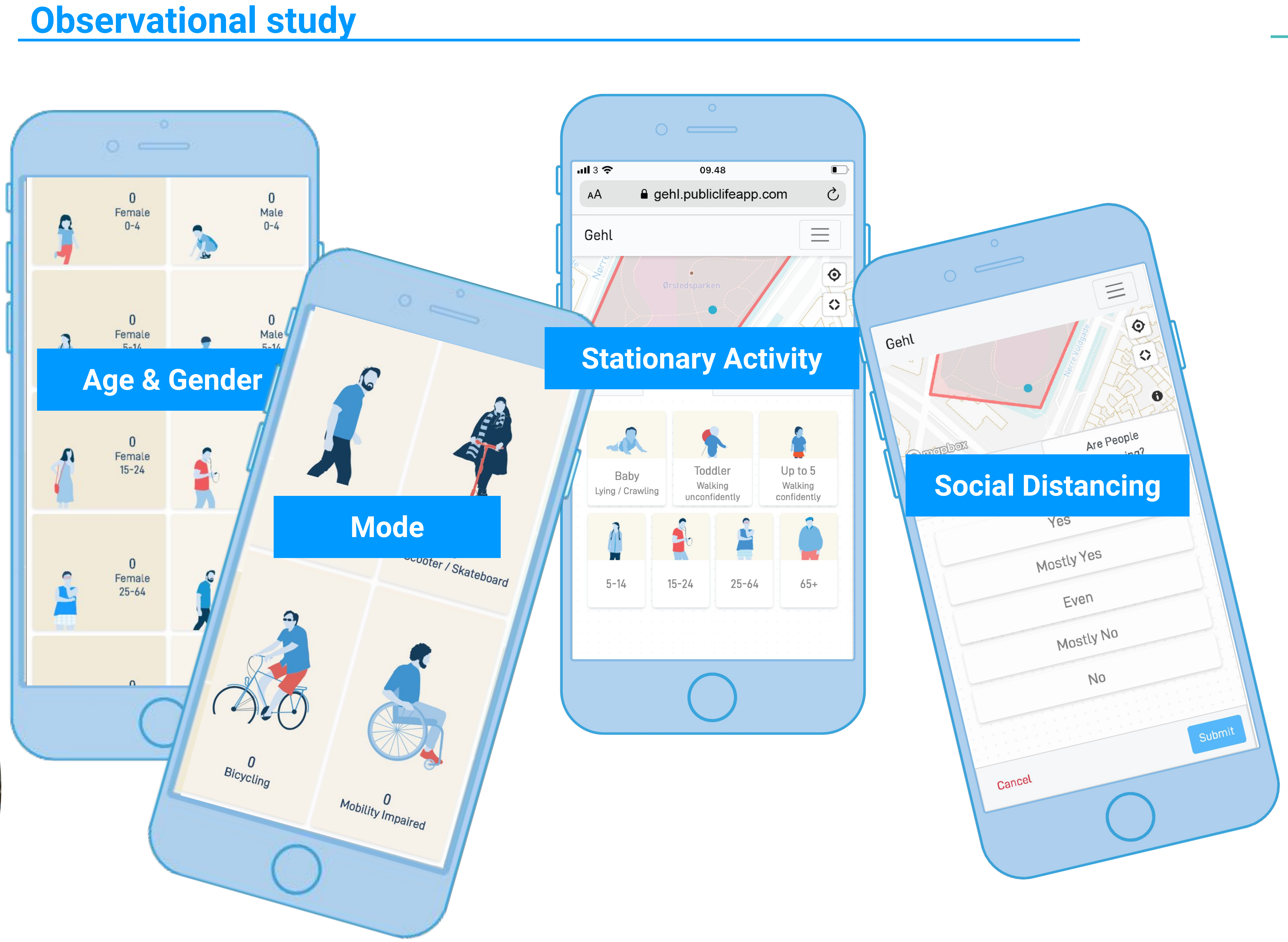

The best way to understand
the city is to watch people
using it.

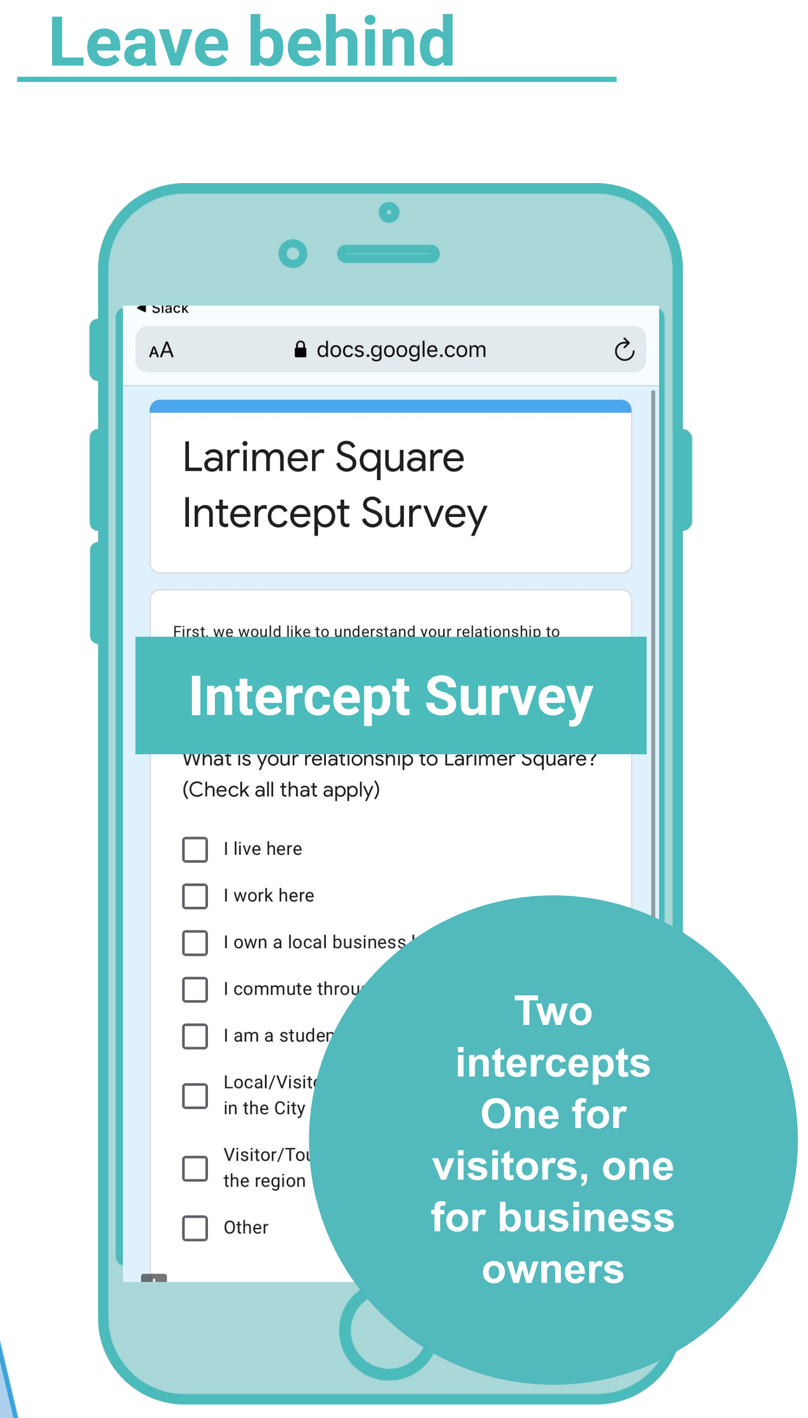
Gehl Lens - Public Space & Public Life

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







8

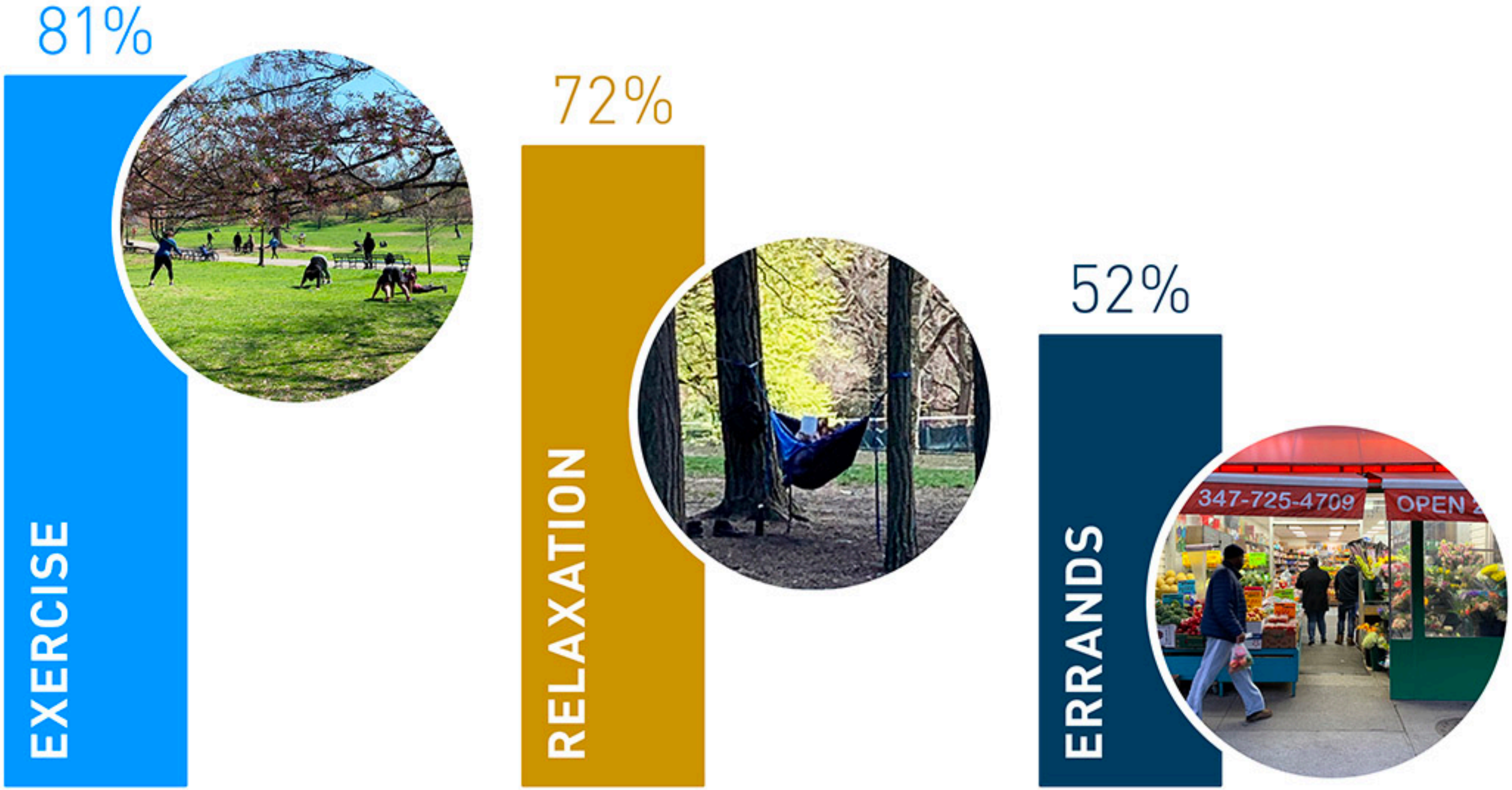
Living with COVID- public life data and projects

www.covid19.gehlpeople.com/

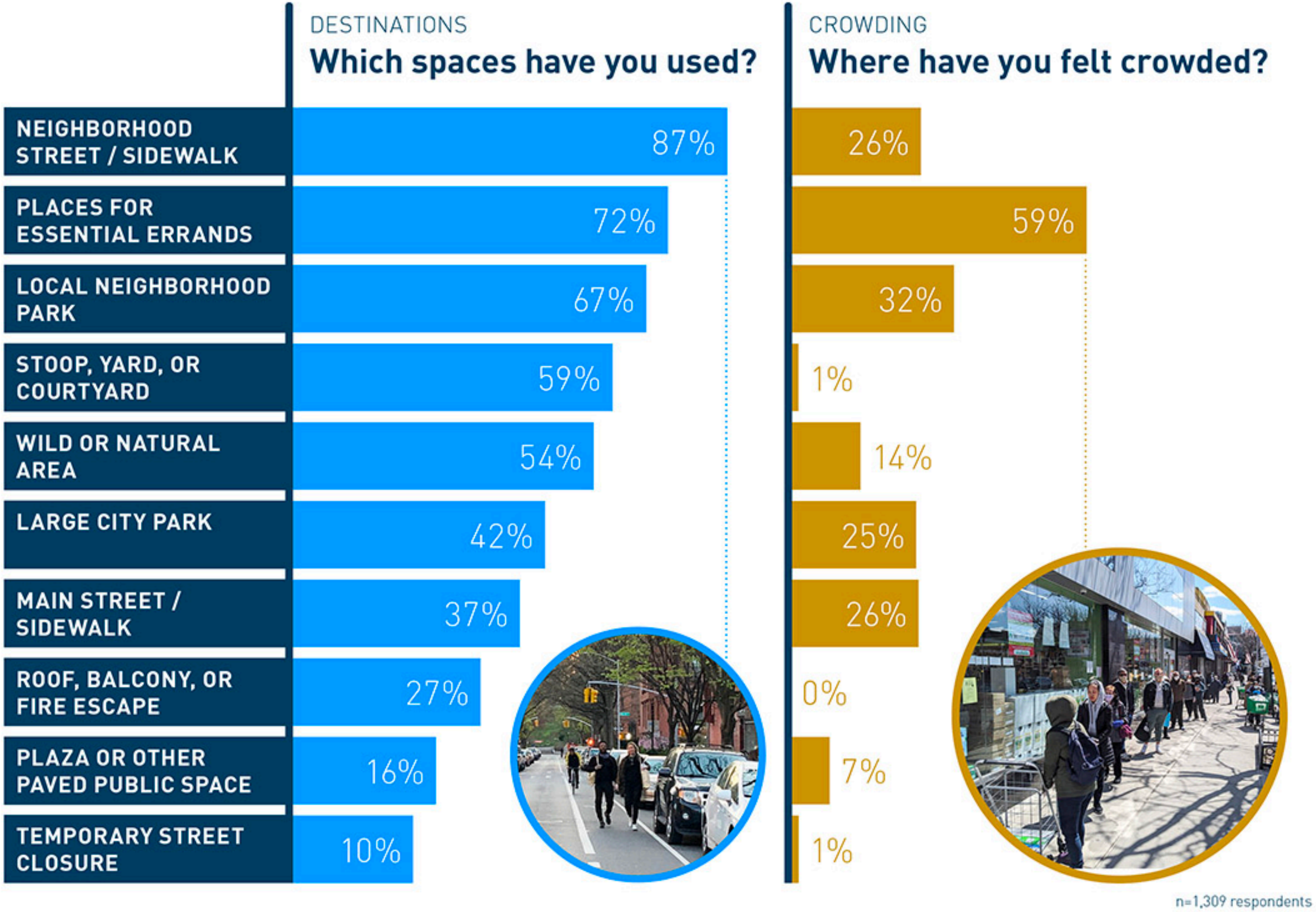
May 2020
2023 respondents
63 countries

MOTIVATIONS

Drivers of physical and mental health outstrip essential errands as the top reasons people use public space.



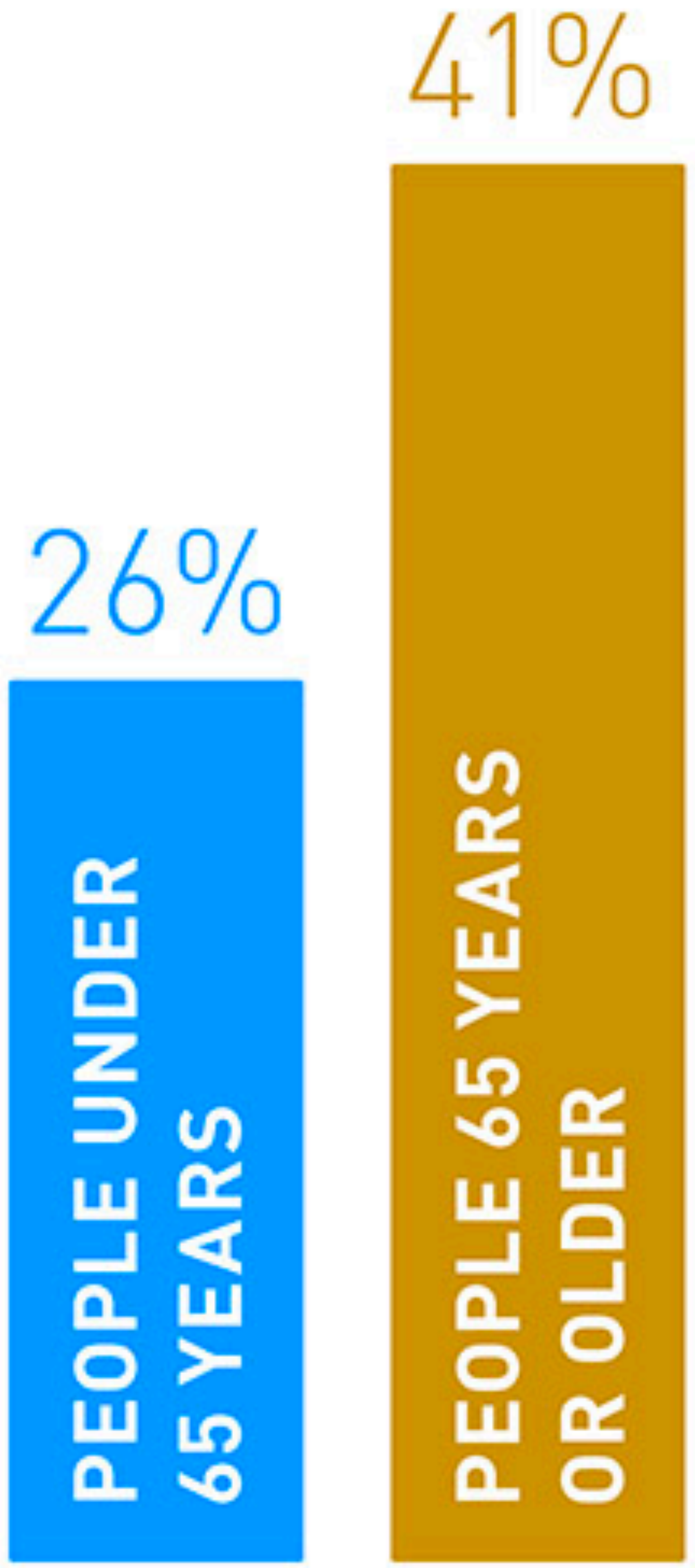
n=1,309 respondents


DESTINATIONS
Which spaces have you used?
CROWDING
Where have you felt crowded?
NEIGHBORHOOD STREET / SIDEWALK
87%
26%
PLACES FOR ESSENTIAL ERRANDS
72%
59%
LOCAL NEIGHBORHOOD PARK
67%
32%
STOOP, YARD, OR COURTYARD
59%
1%
WILD OR NATURAL AREA
54%
14%
LARGE CITY PARK
42%
25%
MAIN STREET / SIDEWALK
37%
26%
ROOF, BALCONY, OR FIRE ESCAPE
27%
0%
PLAZA OR OTHER PAVED PUBLIC SPACE
16%
7%
TEMPORARY STREET CLOSURE
10%
1%
n=1,309 respondents

SOCIAL LIFE

People aged 65+ seek out social activity at higher rates

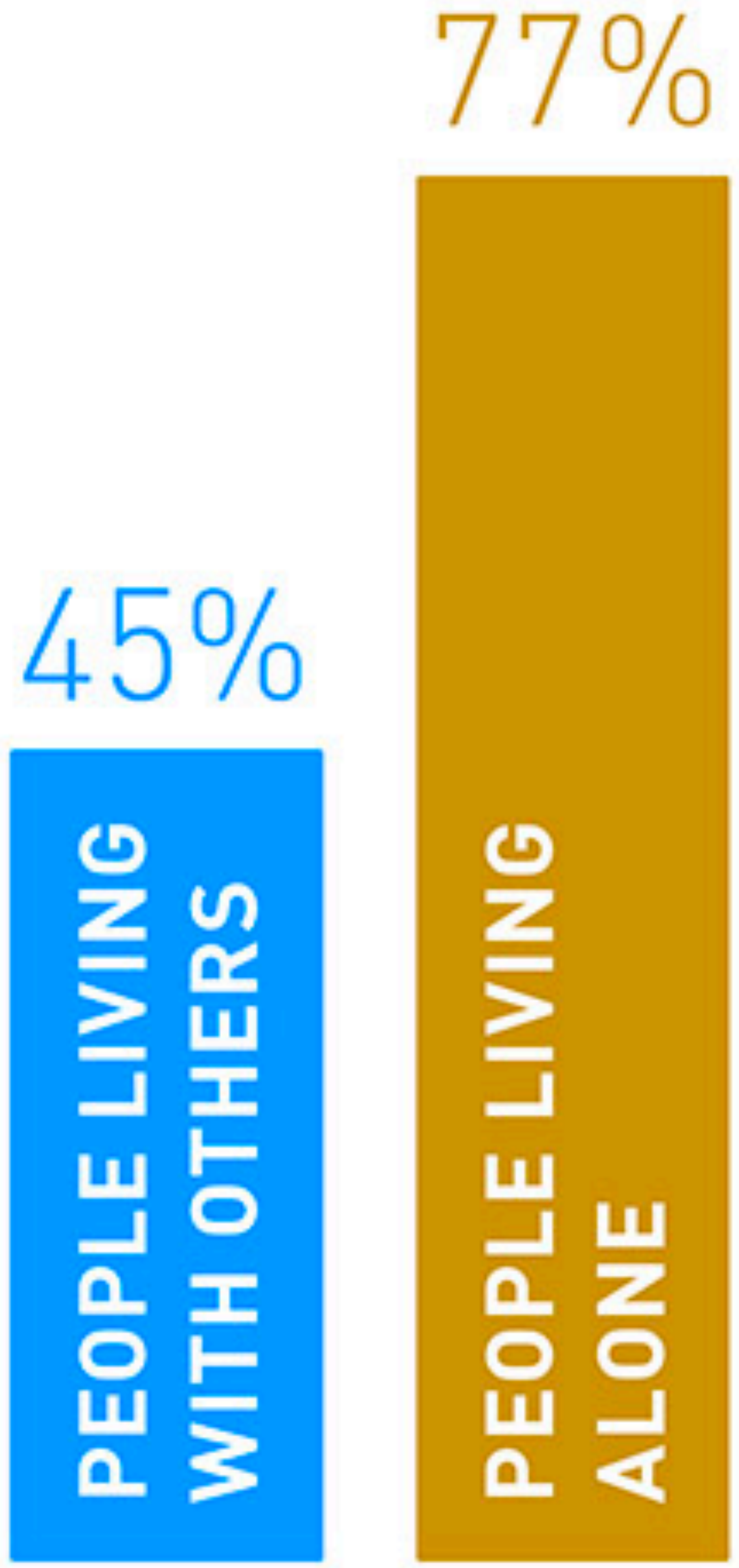
% citing social interaction as a reason for using public space



"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



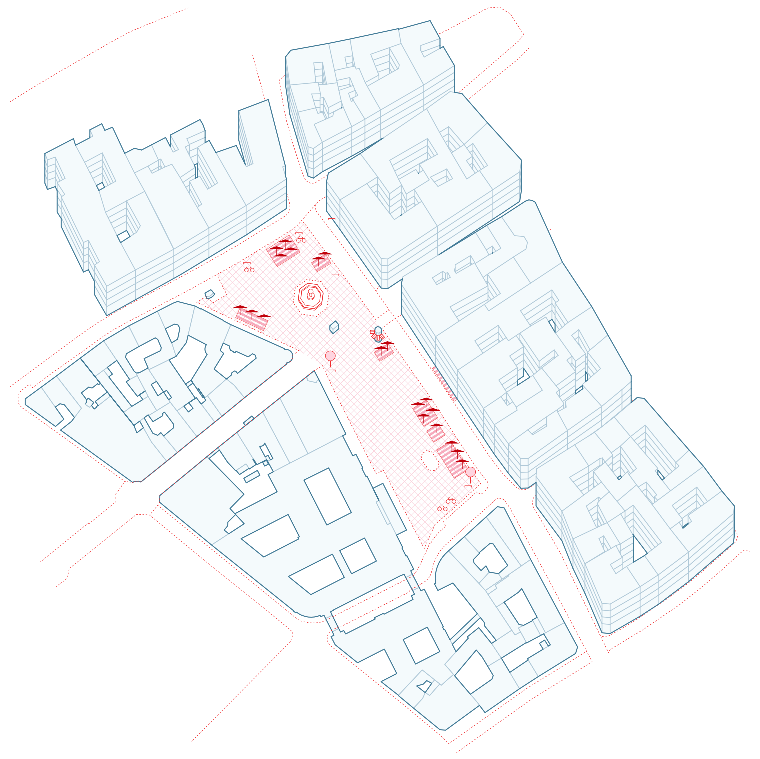
"I do feel like I am more comfortable **making eye contact and smiling** with strangers on the street — it's been **a nice way to feel connected**."

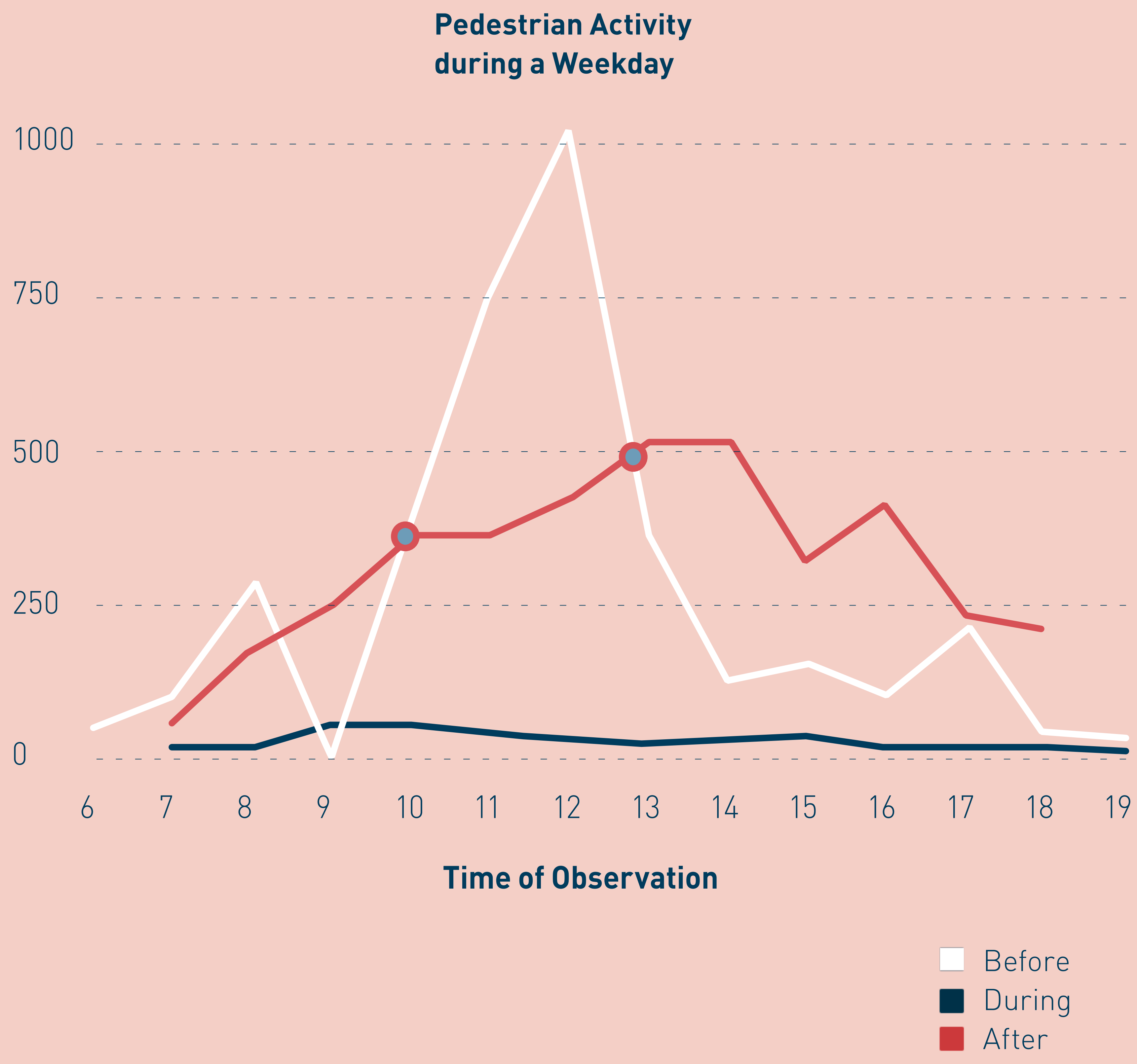
n=1,309 respondents

While Copenhagen on the other hand, managed to spread out the activity level over the day.

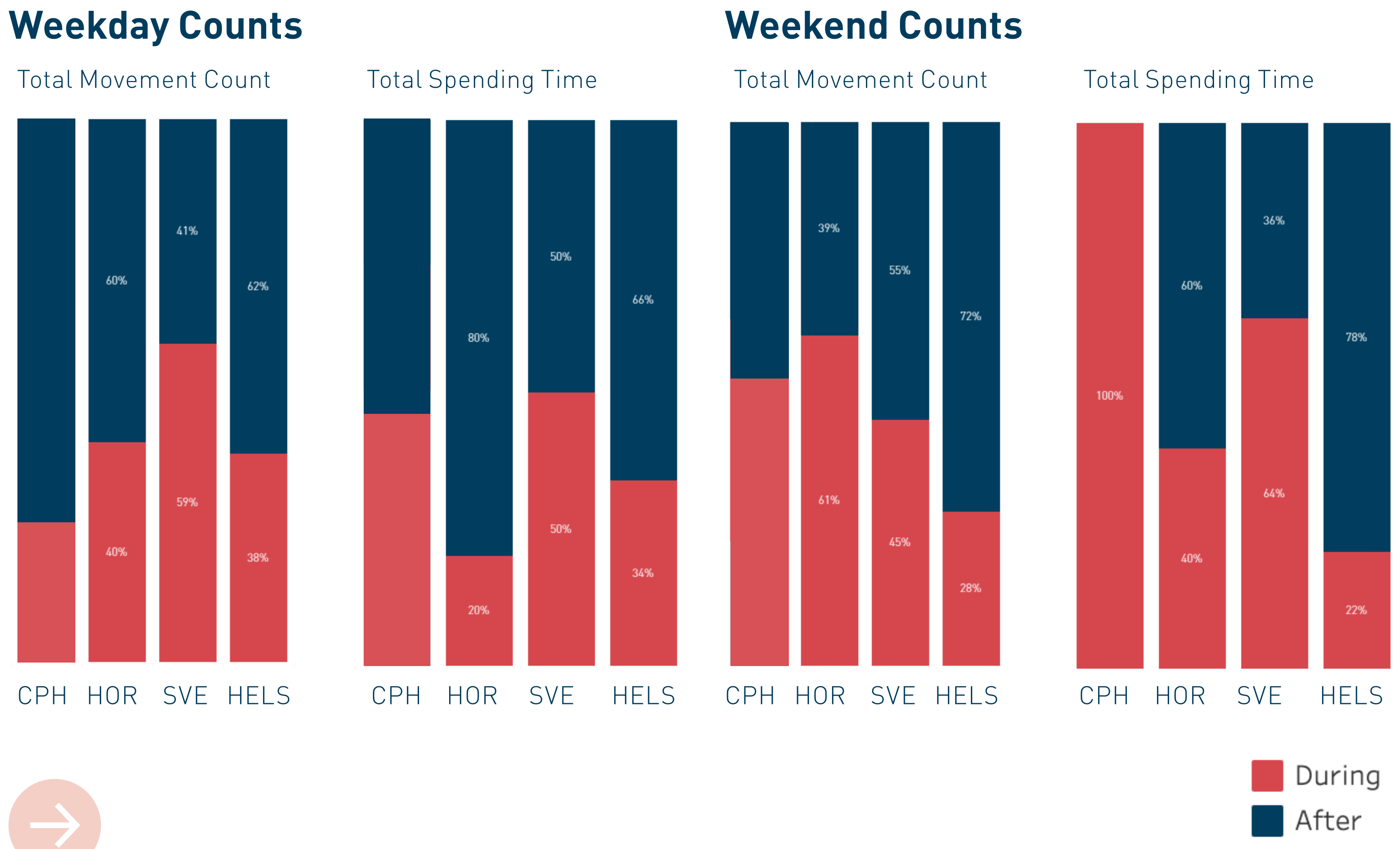
Pedestrian Activity
Data from Gammel Torv of before, during and after the COVID restrictions

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.

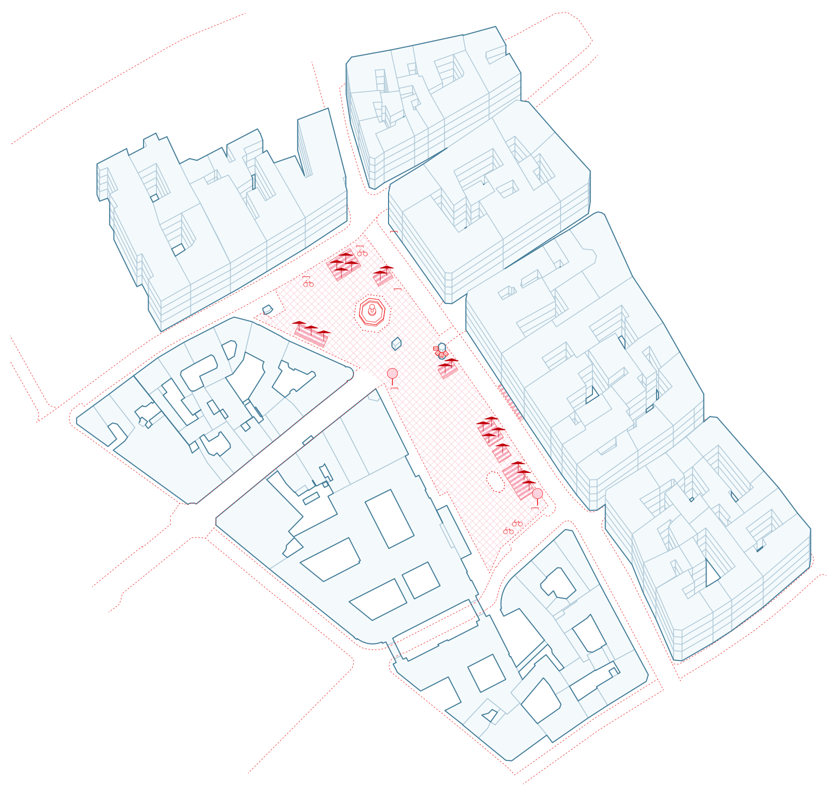


During Covid-19 lockdown, more people were spending time in selected spaces in the city center. In the reoprning, the people is more spread out, and more people are moving around. This is particularly true in Copenhagen and Svendborg.

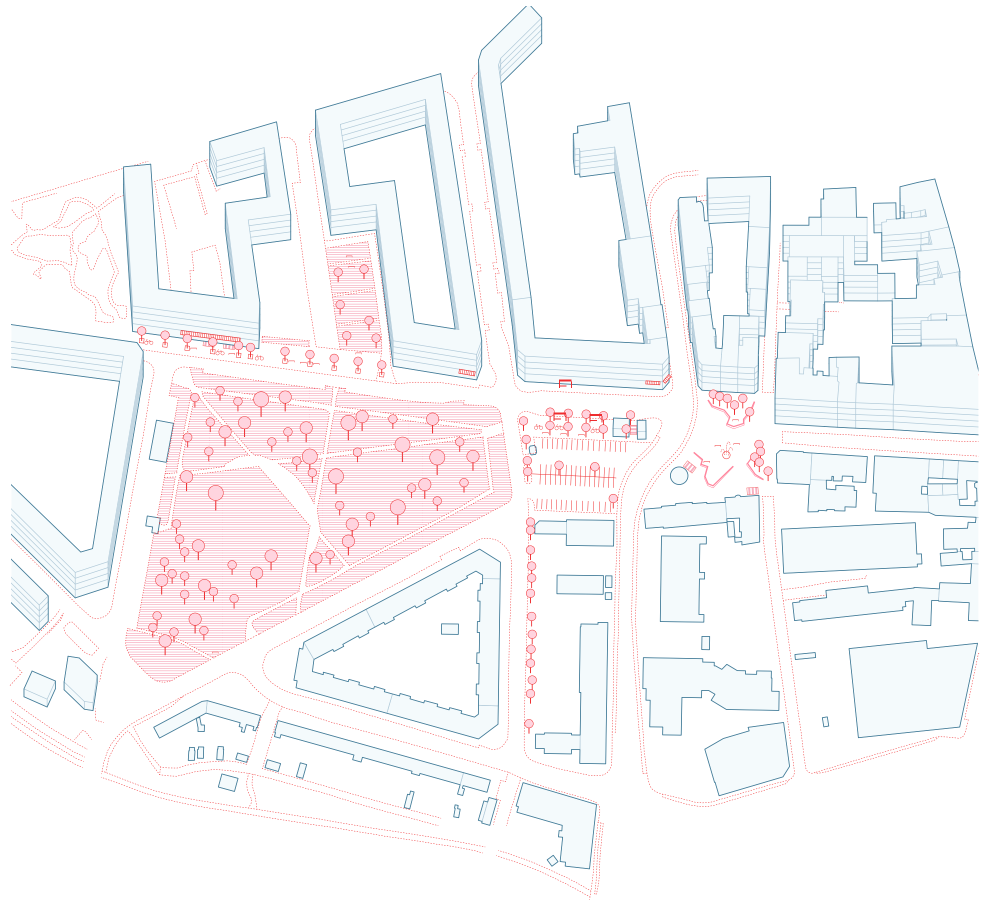
Strøget, Copenhagen, June 13th, 2020
Credit: Pedro Borges

During the reopening, all city centers have seen and increase in pedestrian activity

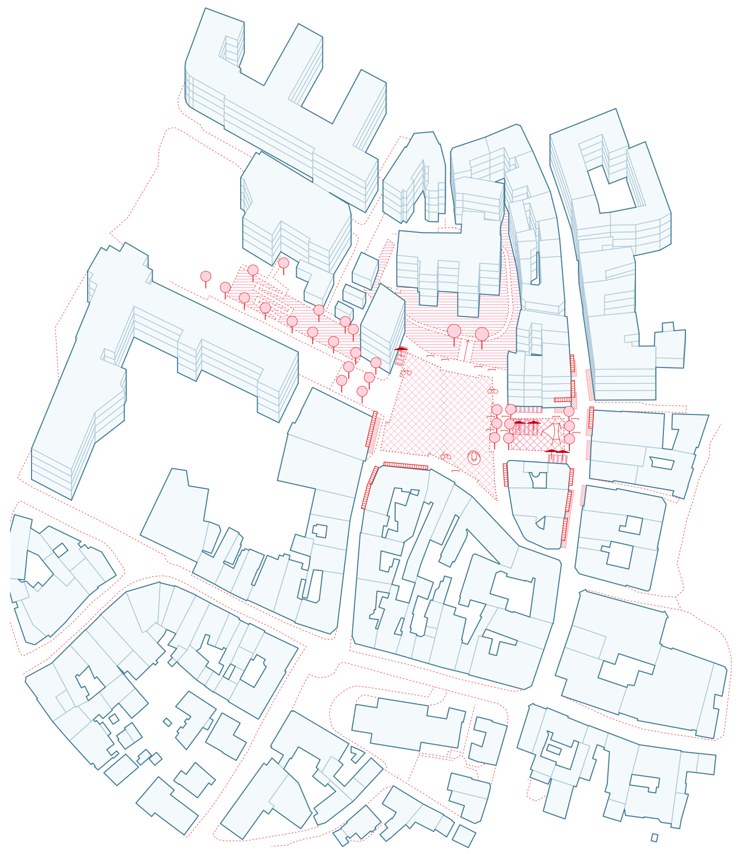
Copenhagen



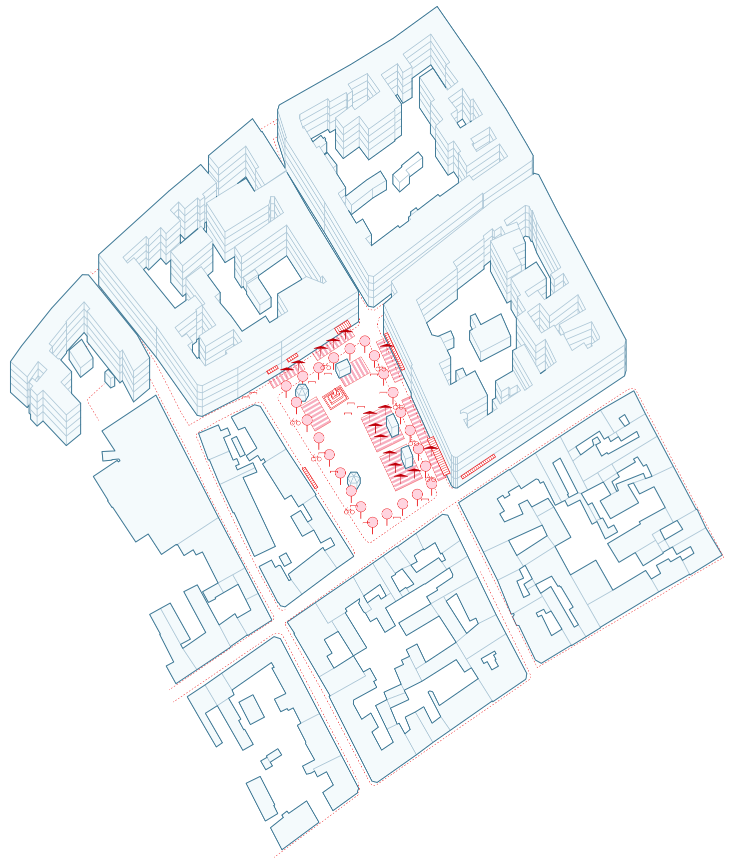
Horsens



Svendborg



Helsingor



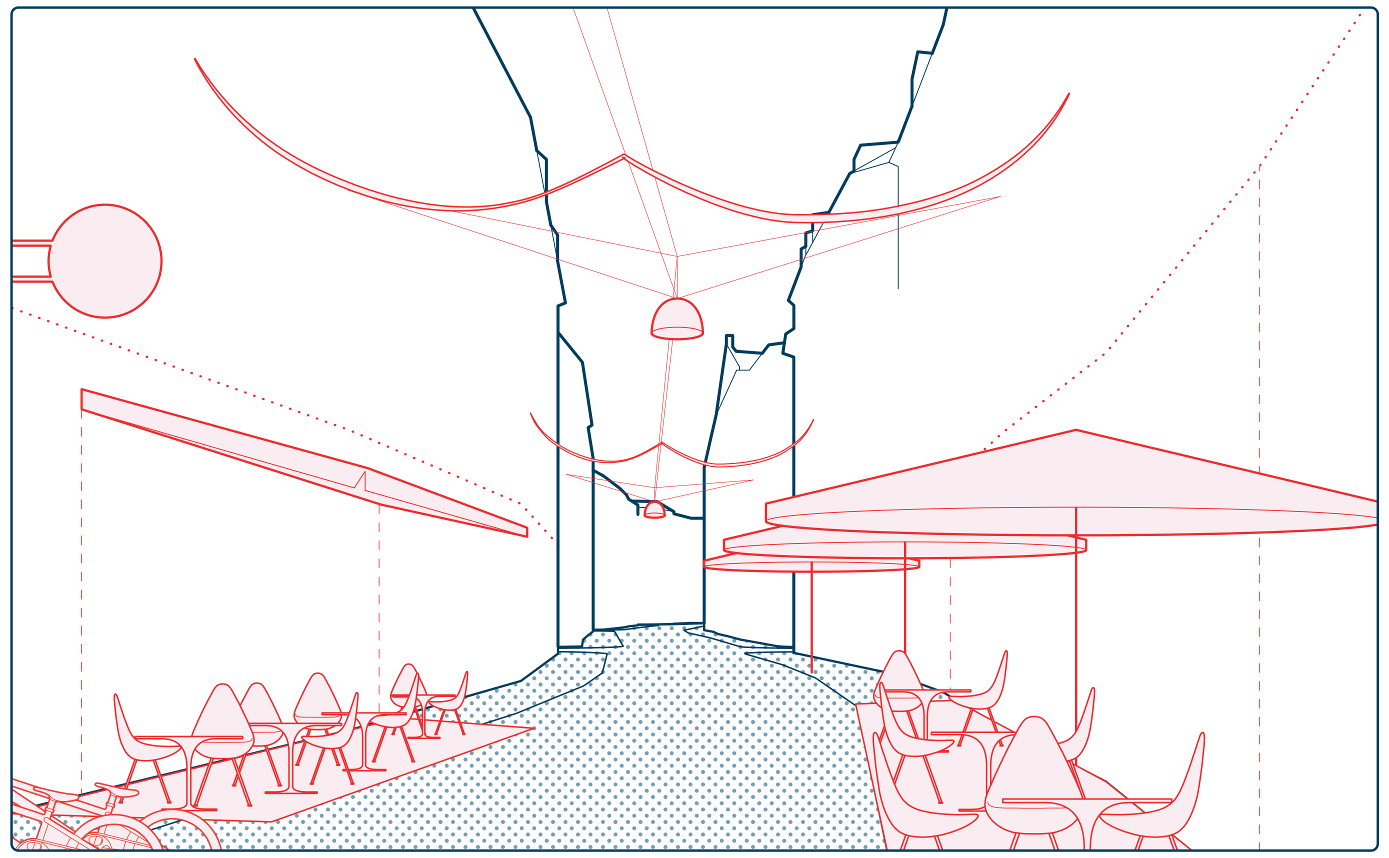
Percentage Change in Pedestrian Activity from lockdown to reopening:

	Copenhagen	Horsens	Svendborg	Helsingor
Pedestrians	+798%	+1564%	+142%	+217%
Cyclists	+66%	+101%	-34%	+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?



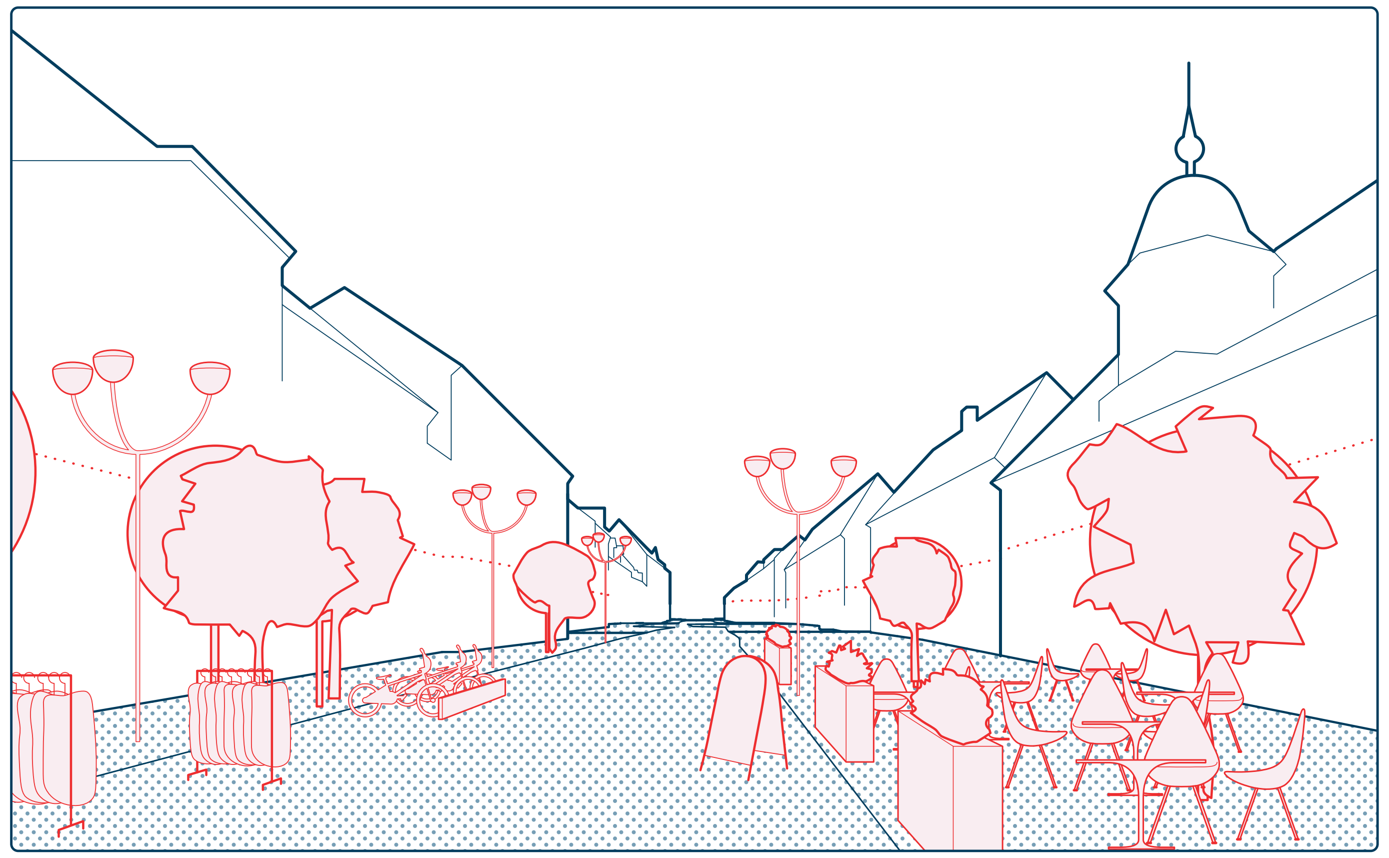
Copenhagen

There is a 780% increase in pedestrians compared to during lockdown, with peak time from 12:00 to 14:00.

% of city's population moving

1% → 3%

Lockdown Reopening



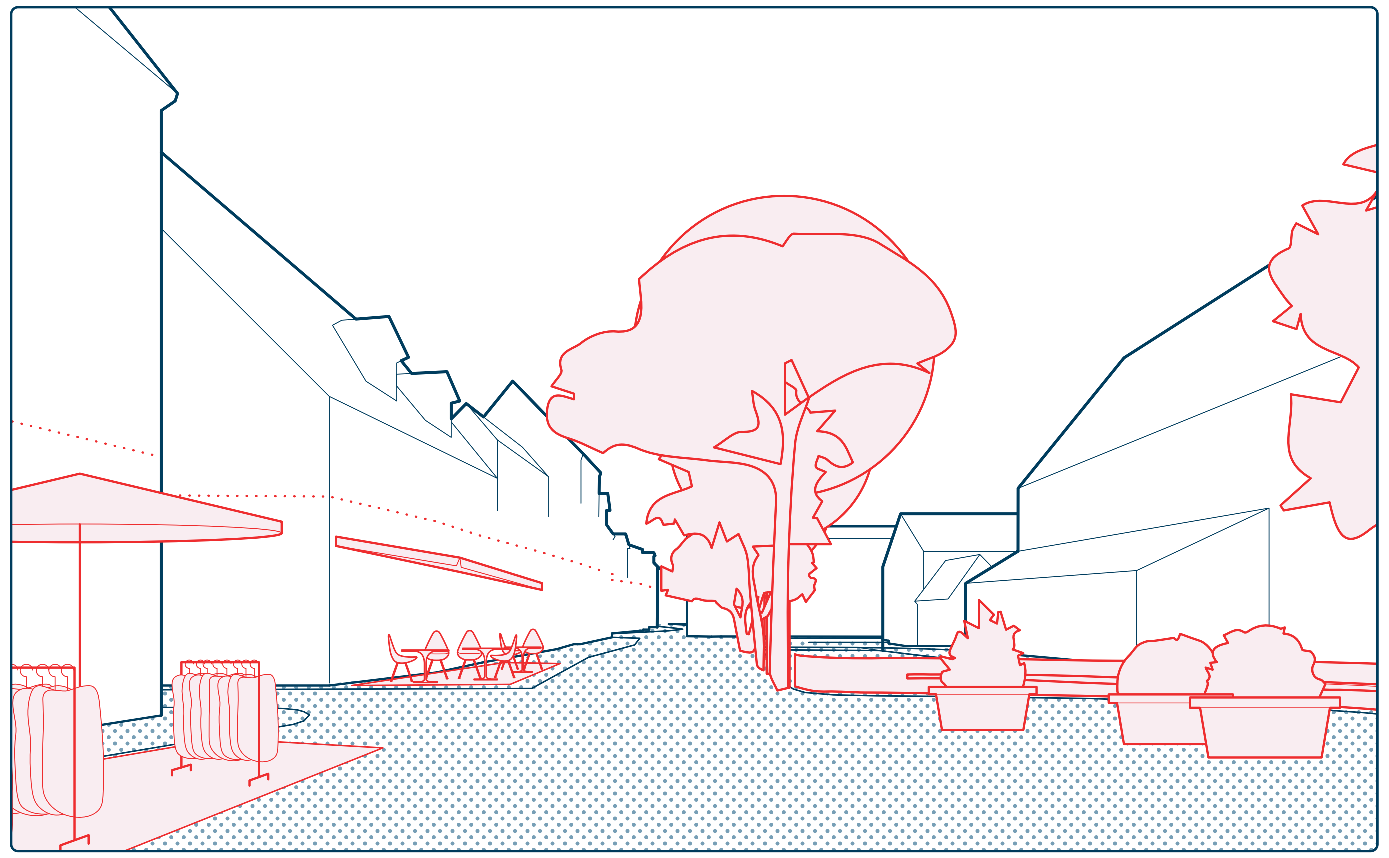
Horsens

There is a 4900% increase in pedestrians compared to during lockdown, with peak time from 14:00 to 16:00.

% of city's population moving

1% → 13%

Lockdown Reopening



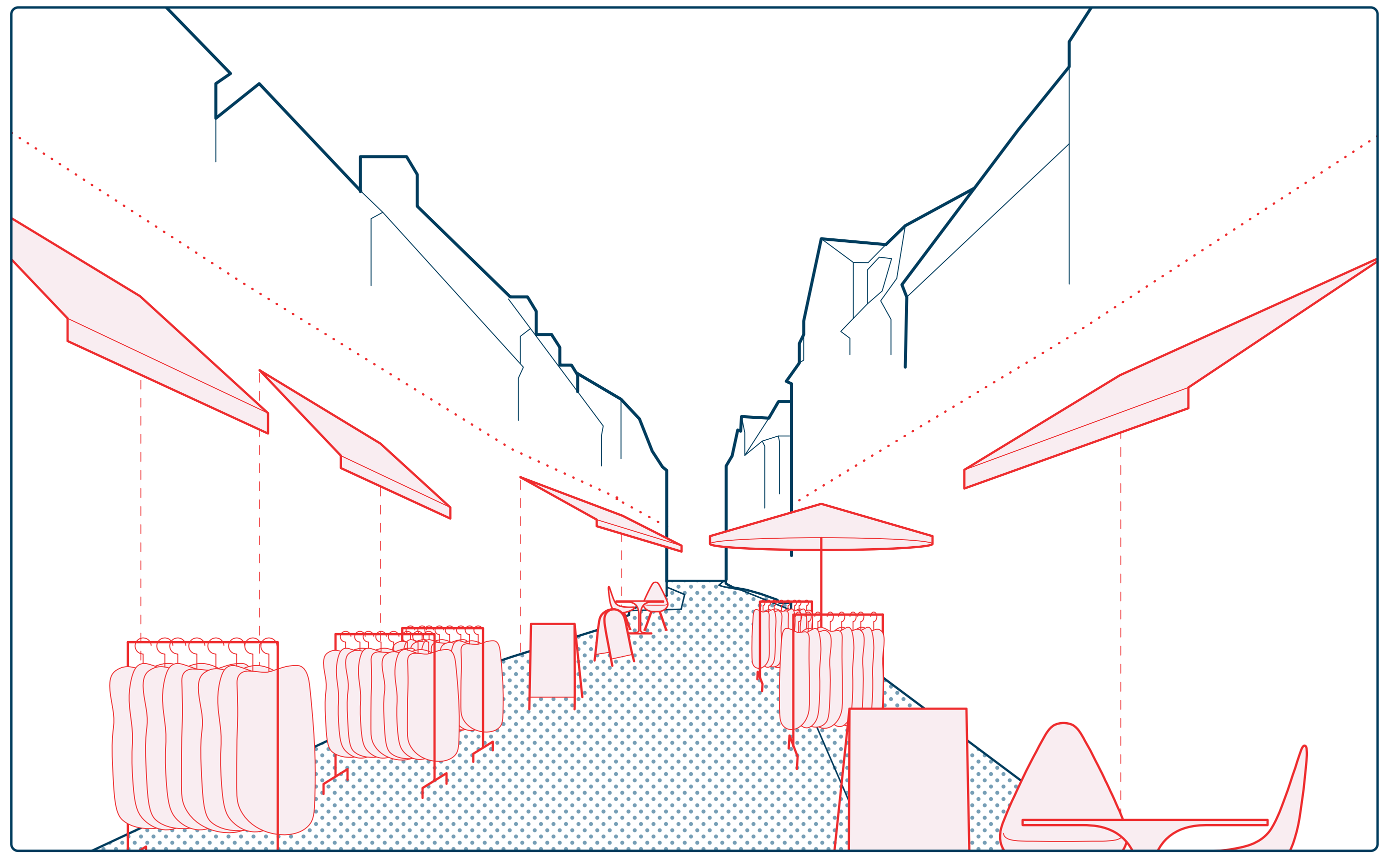
Svendborg

There is a 580% increase in pedestrians compared to during lockdown, with peak time from 15:00 to 17:00.

% of city's population moving

10% → 15%

Lockdown Reopening



Helsingor

There is a 460% increase in pedestrians compared to during lockdown, with peak time from 12:00 to 14:00.

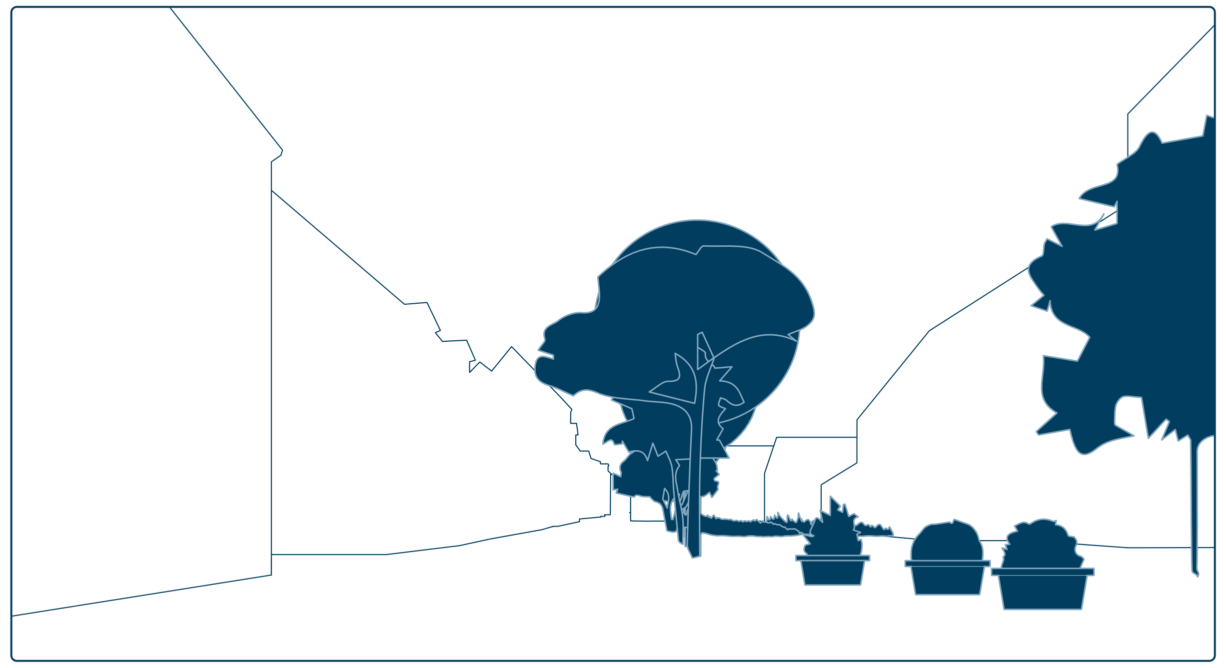
% of city's population moving

5% → 15%

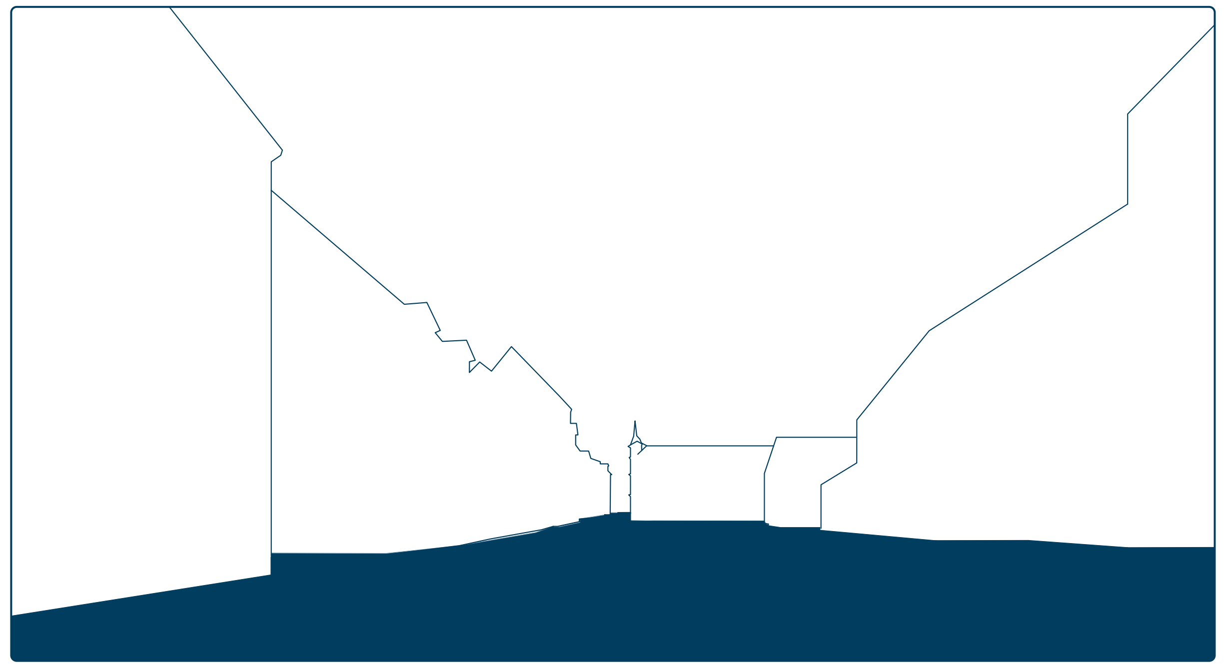
Lockdown Reopening

Q.

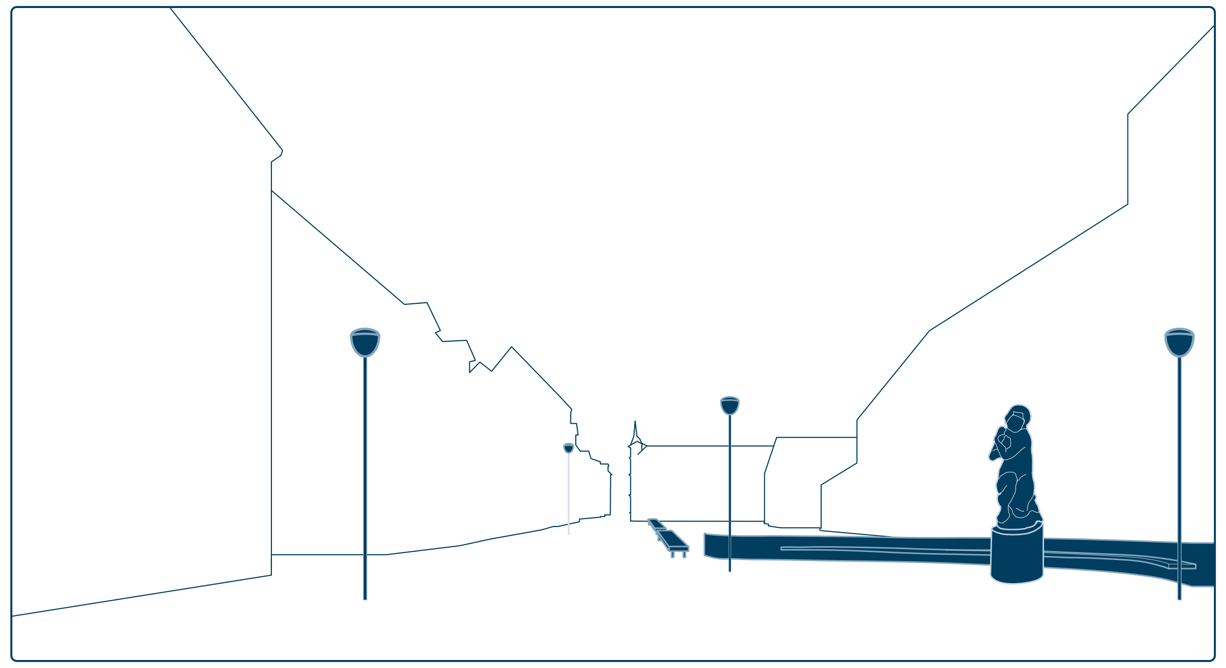
What combination of spatial and programmatic conditions is most conducive to inviting people to spend time during the lockdown and re-opening?



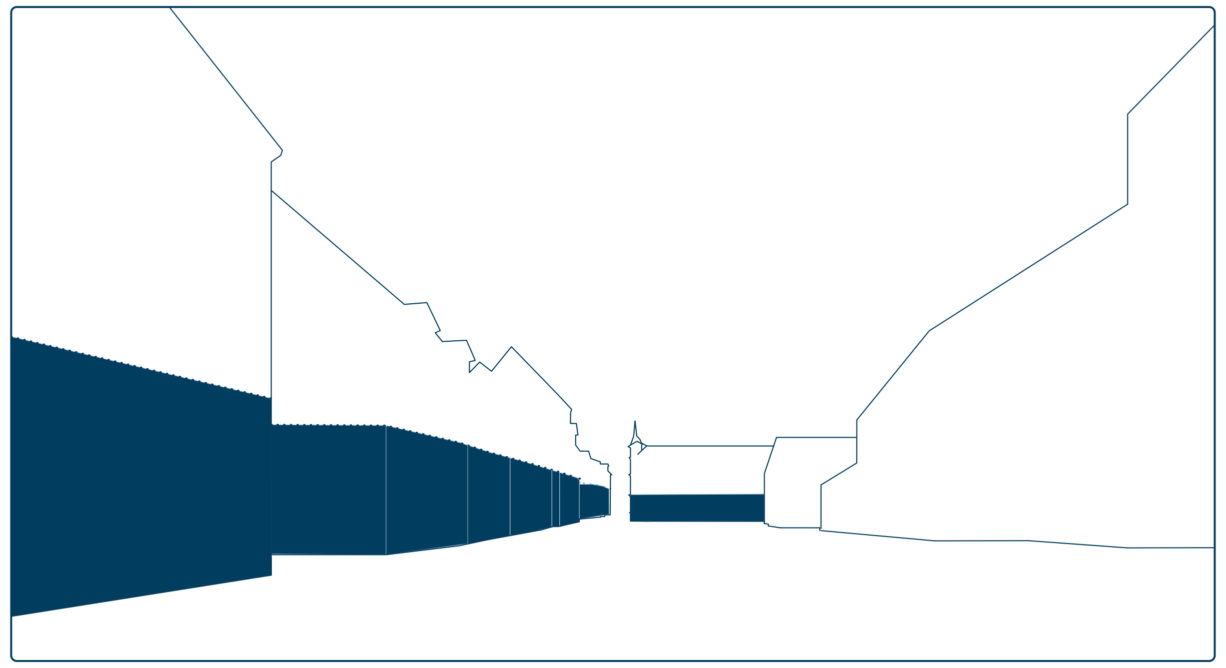
Nature - Vegetation and Street Trees



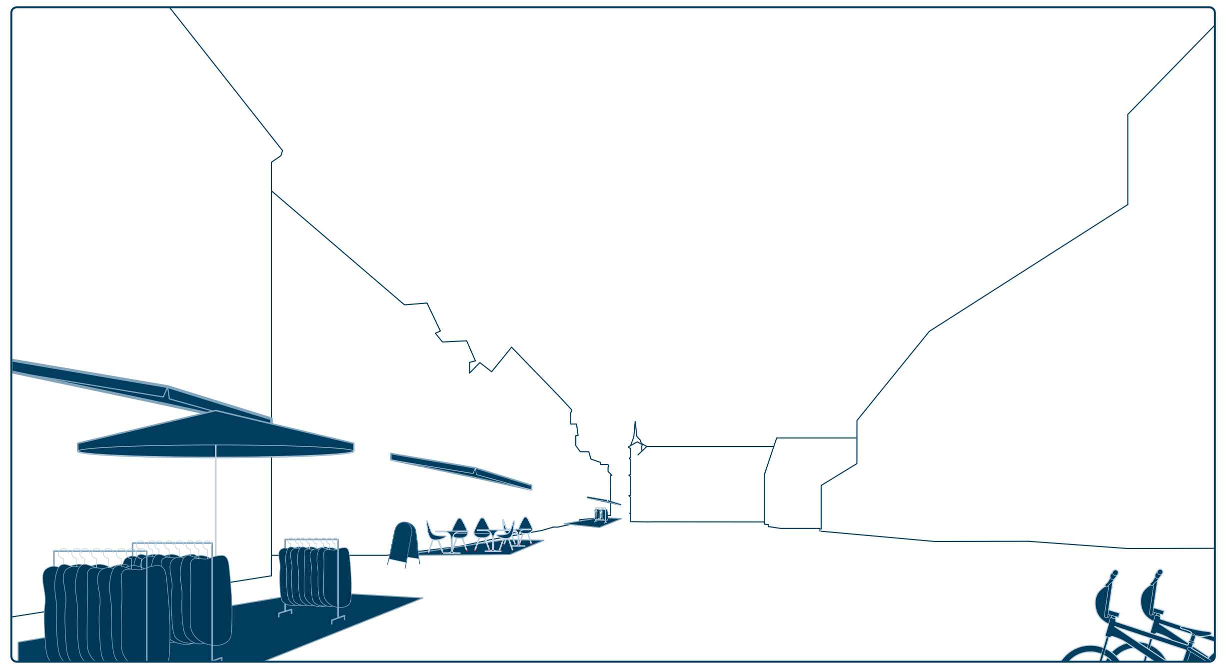
Shared Surface - Multiple widths



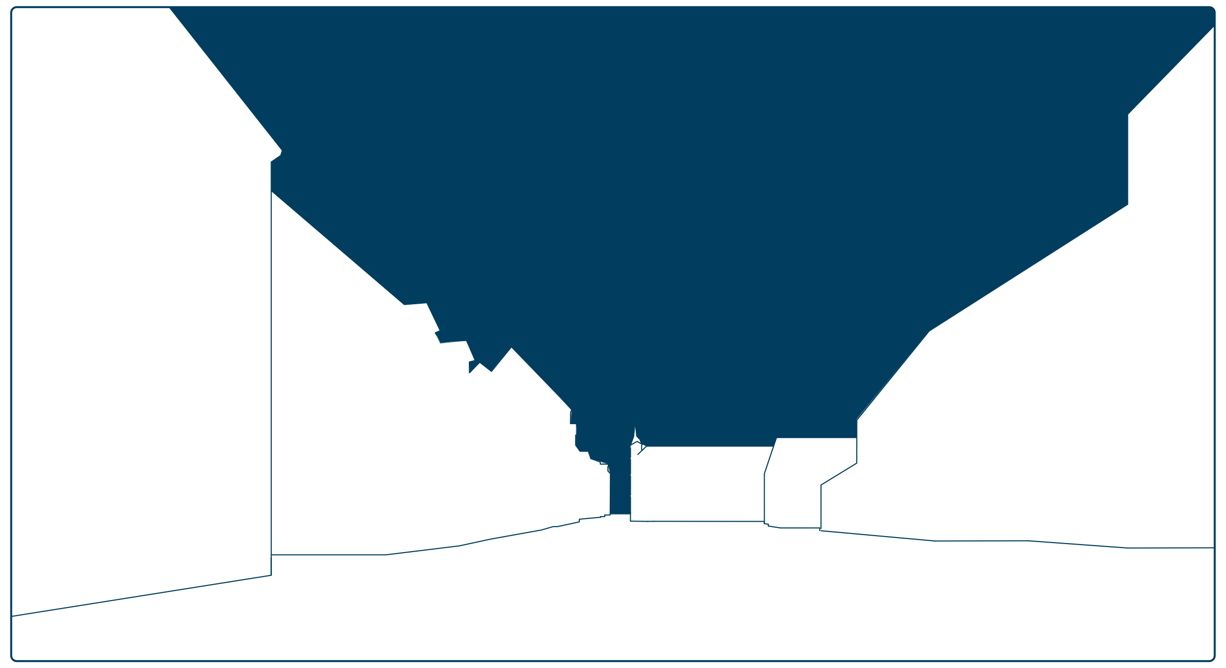
Urban Furniture - Benches, lighting, monuments



Groundfloor - Active, continuous, diverse.

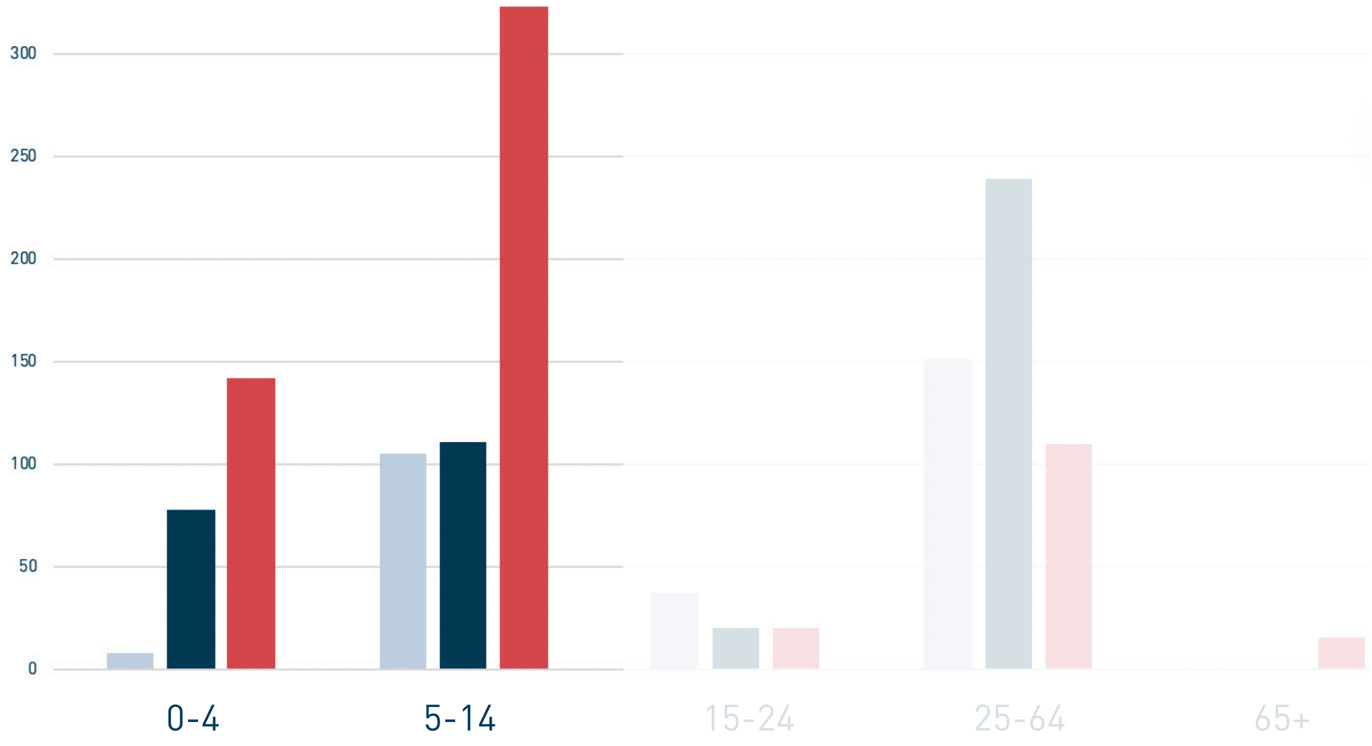


Urban Furniture - Benches, lighting, culture



Building Scale - 2 to 4 stories high.

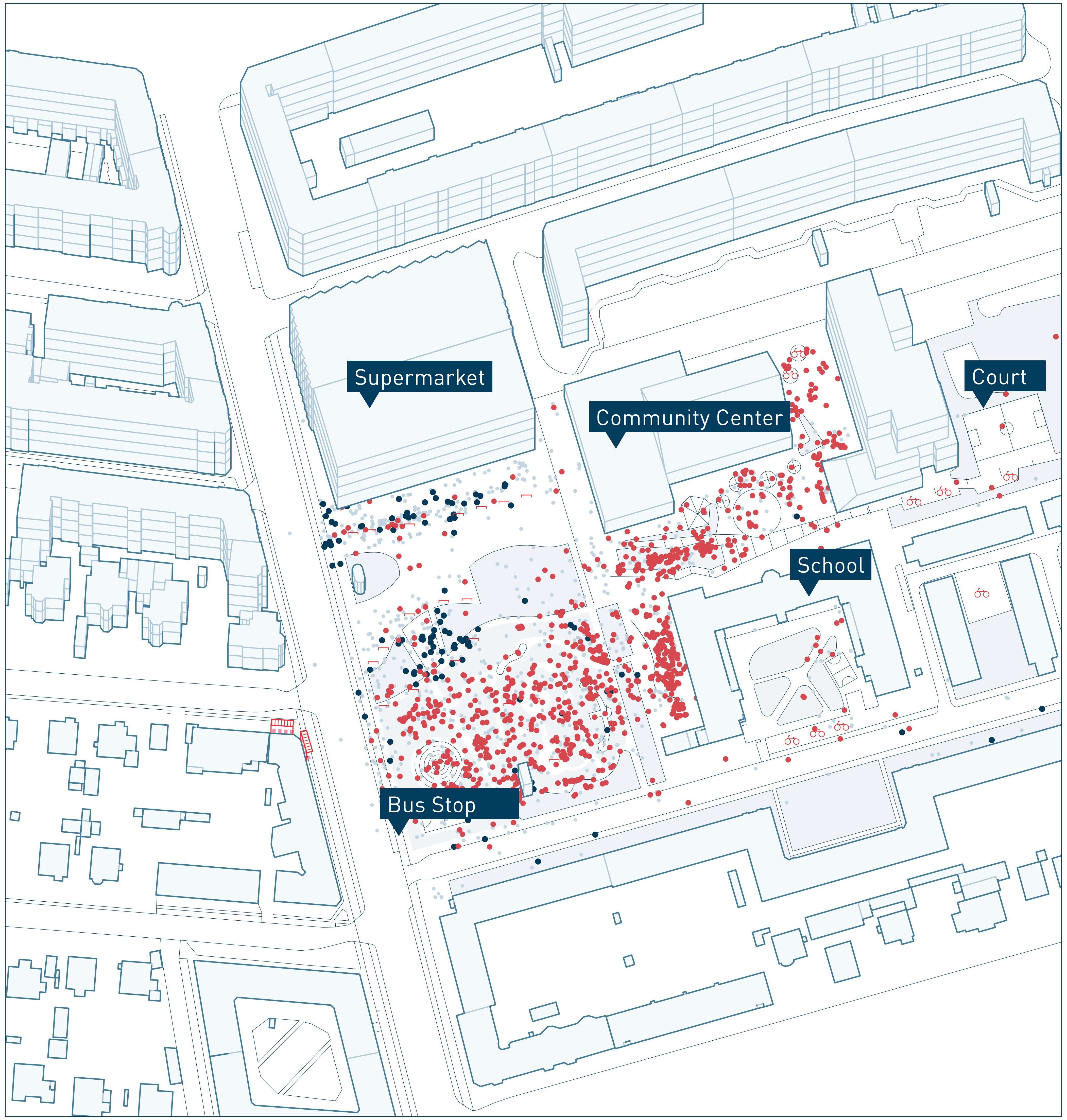
New and sustained user group: 3x as many kids and 17x as many infants in the public space.



Key:

- Before
- Lockdown
- Reopening

Stationary Activity recorded in Sundbyoster Plads. June 12th, 2020

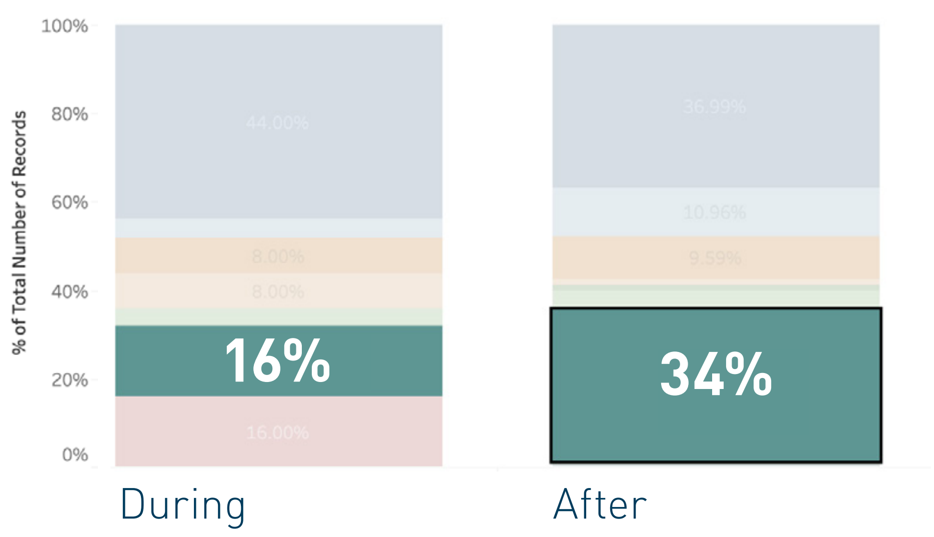


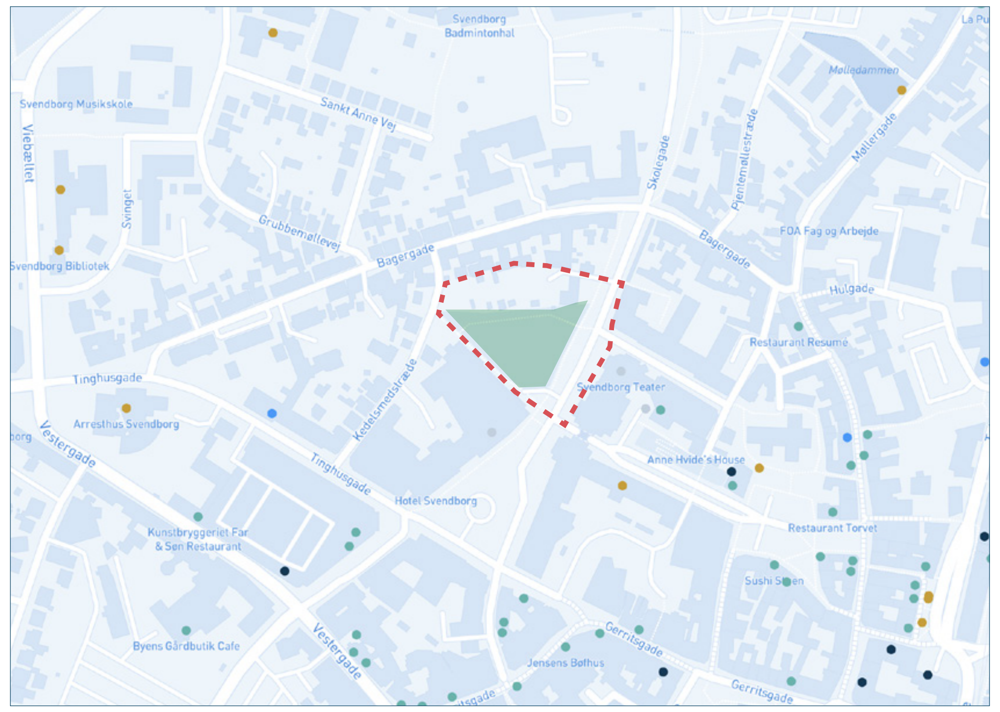
During lockdown and in the reopening phase, play has increased throughout all local meeting places

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

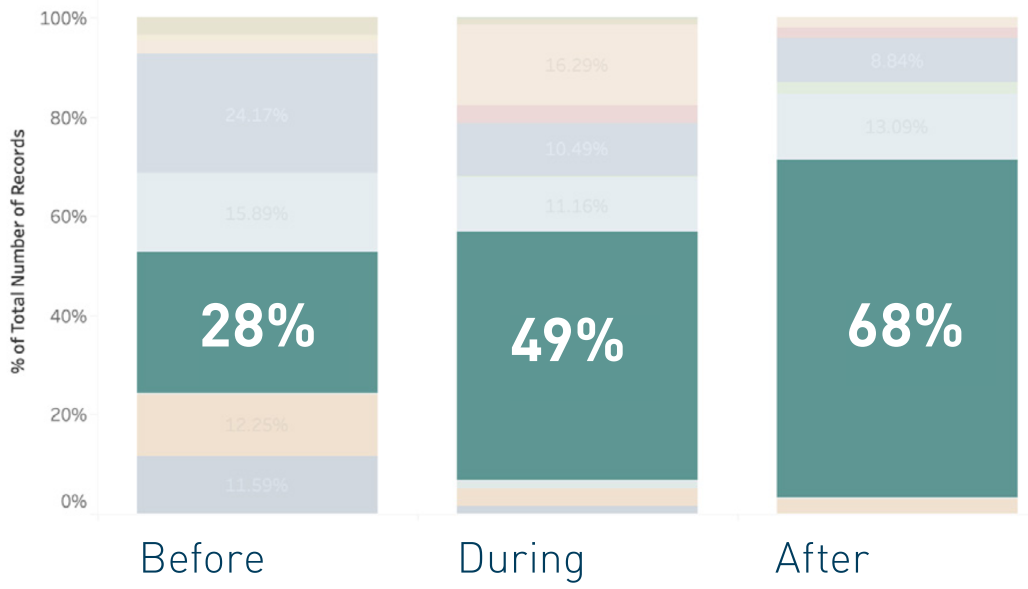
Graphs showing the percentage of redistribution of stationary activities in local meeting places.

Svendborg - Krøyers Have

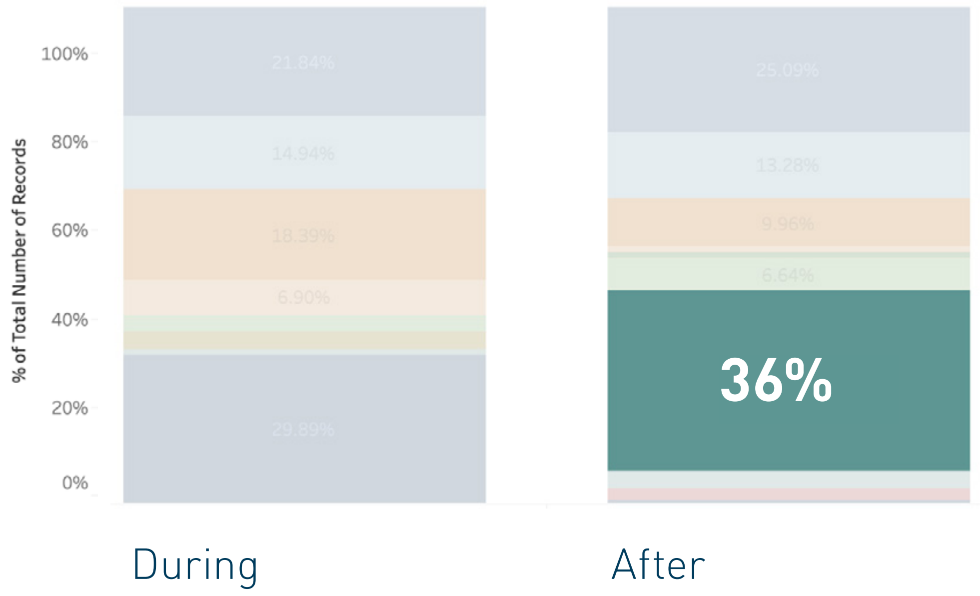




Copenhagen - Sundbyøsterplads



Horsens - Lunden




Pokeworks
CHECK OUT OUR FAMILY MEALS

November 25 2020

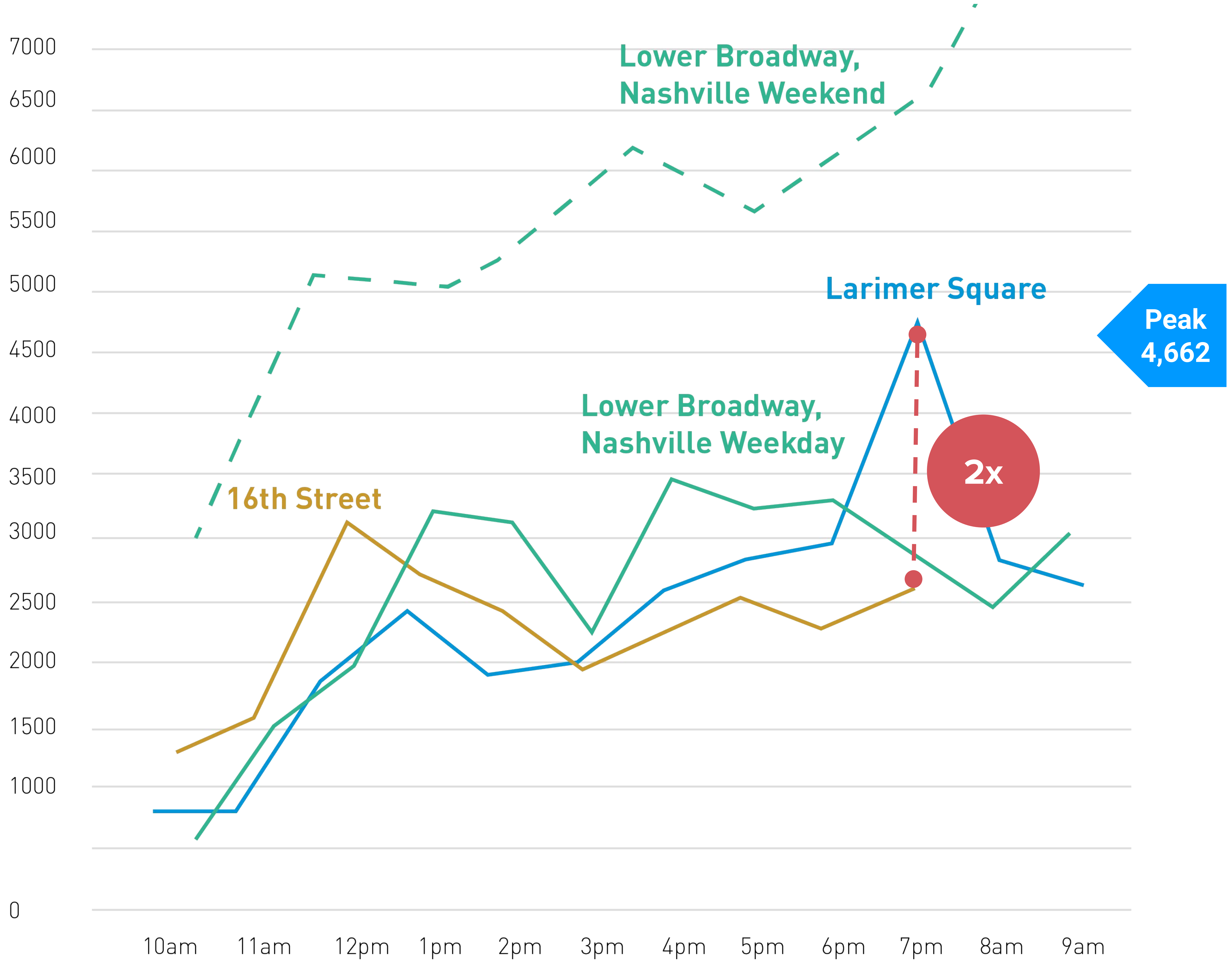
Larimer Square Public Life Data Findings

Gehl

People Moving

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.

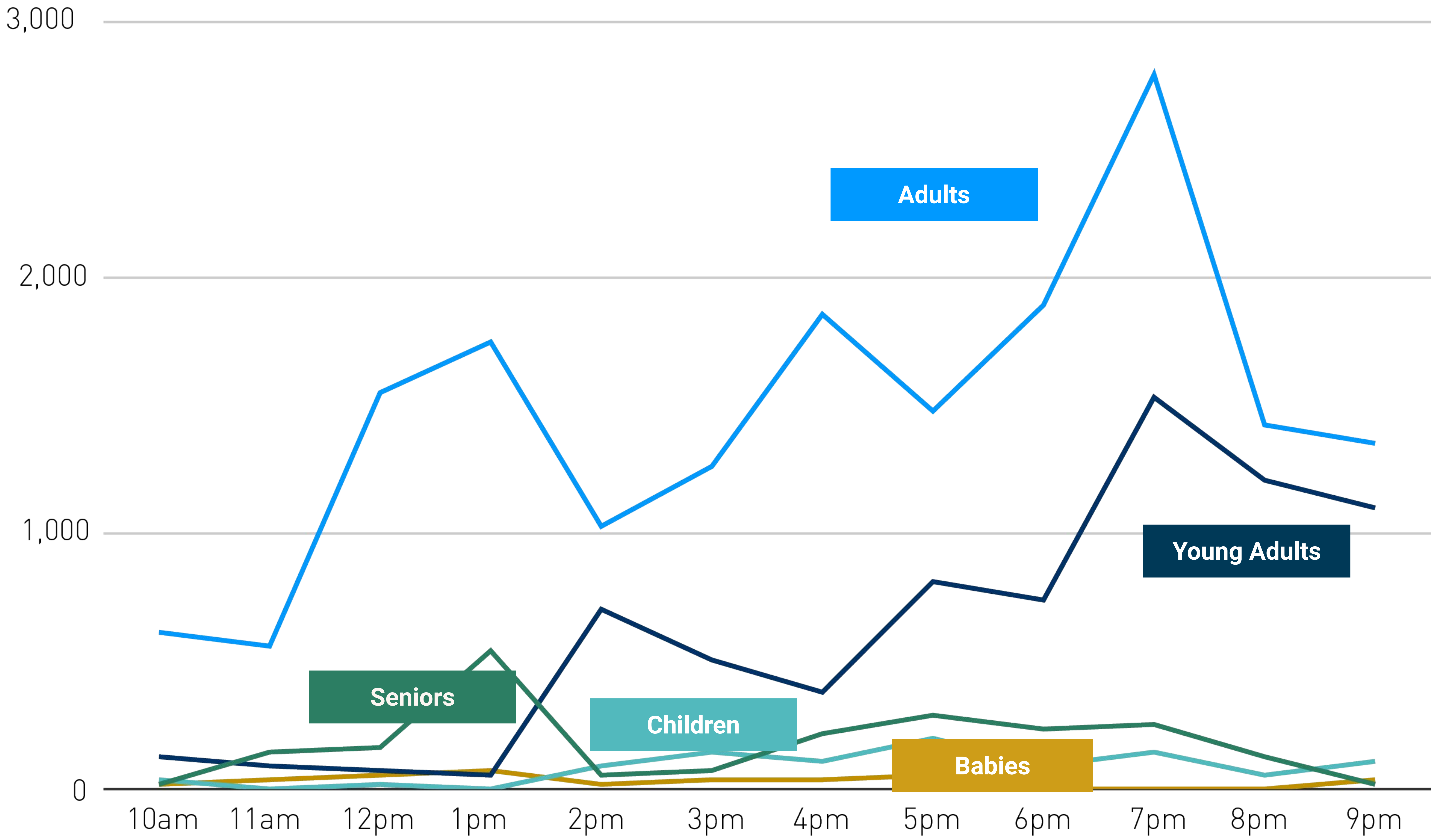
Almost 2x more people are walking on Larimer than 16th Street.



The age split leans heavily toward adults, with few seniors and fewer families passing through.

There is a college student uptick at 7pm

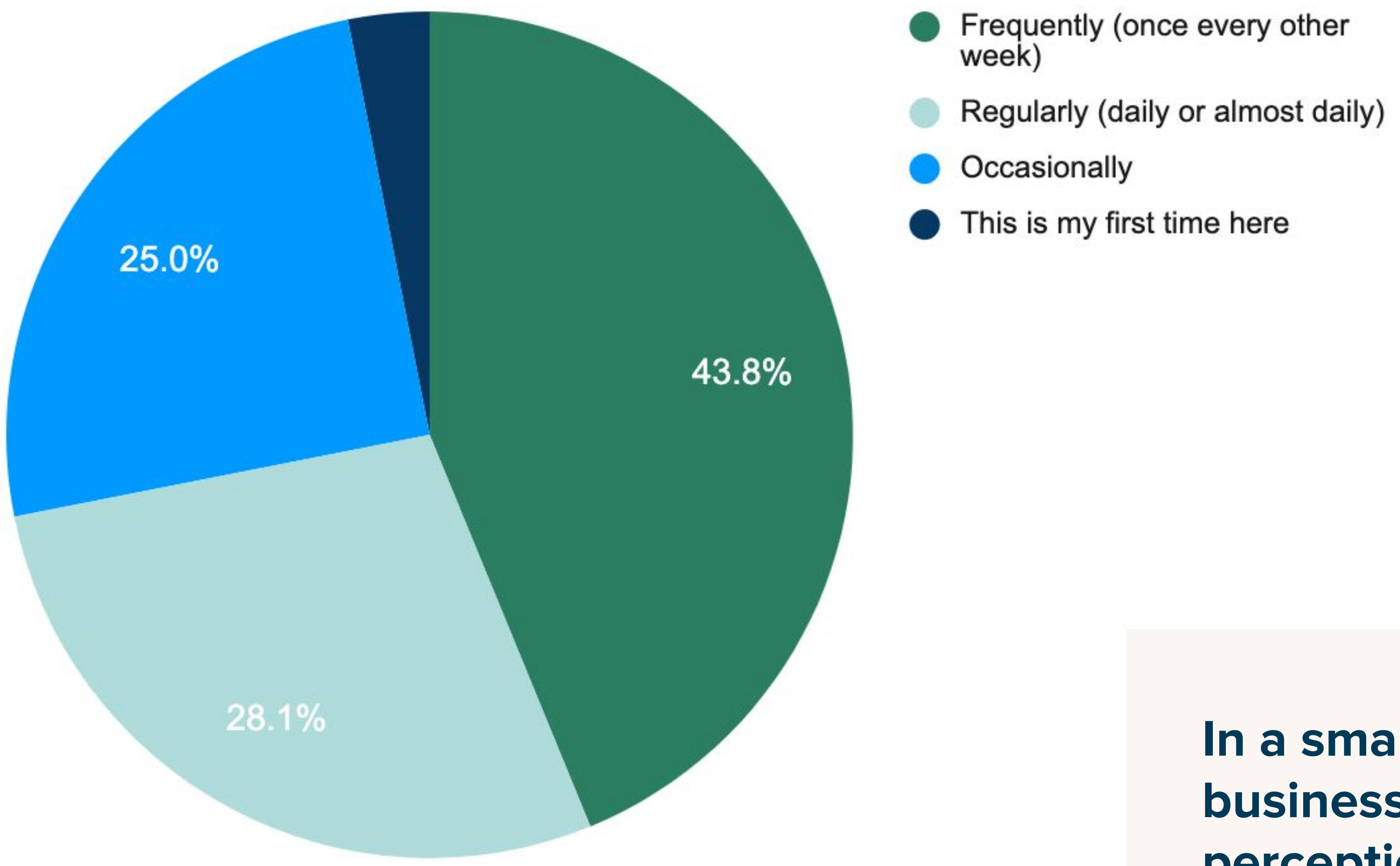
Invitations are working for adults and to a lesser degree young adults. More vulnerable age groups and young families are conspicuously absent.



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?

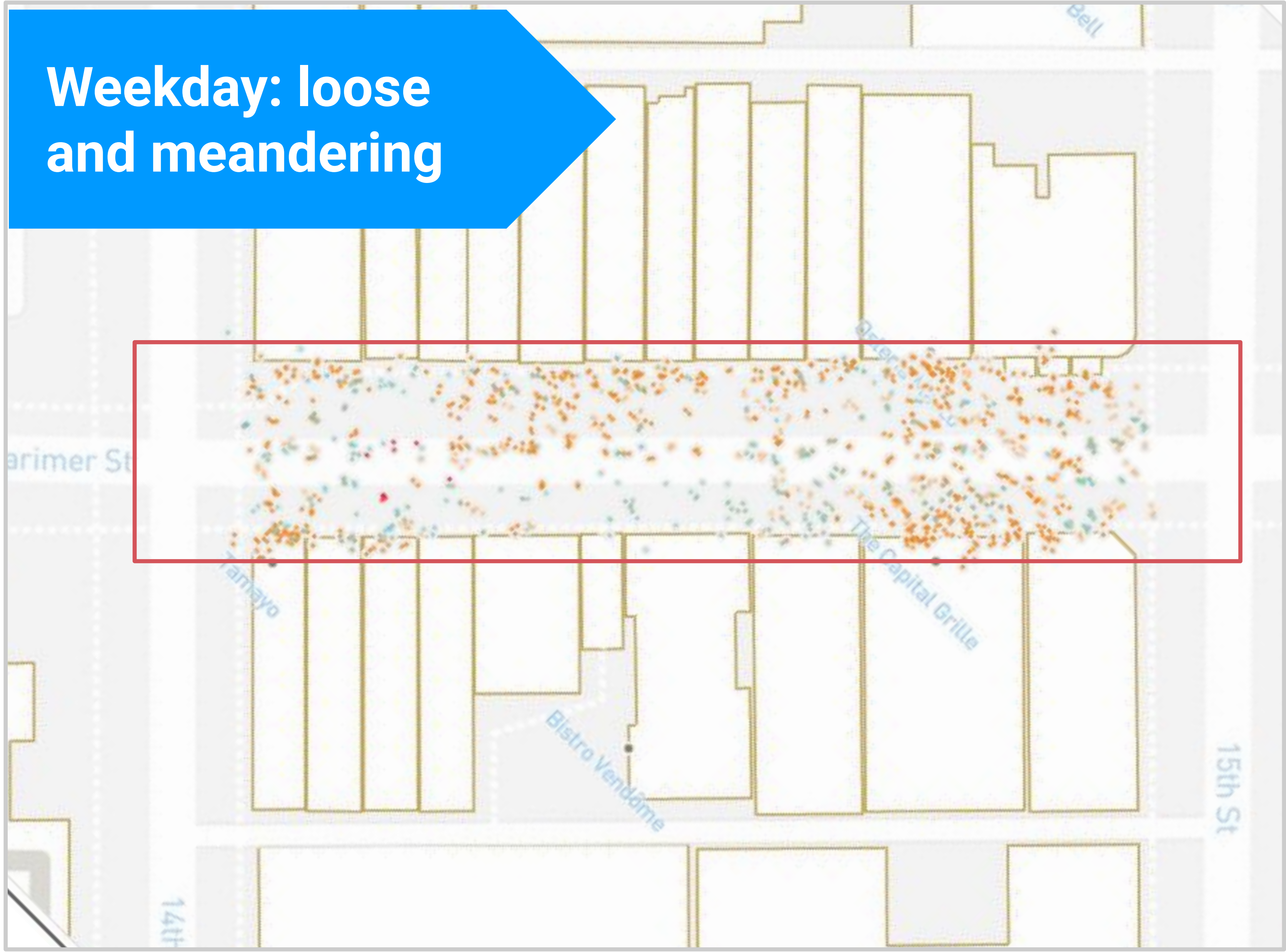


In a small survey with businesses, the perception is there has been a strong uptick in local presence during the street closure

People Staying

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.



People Staying

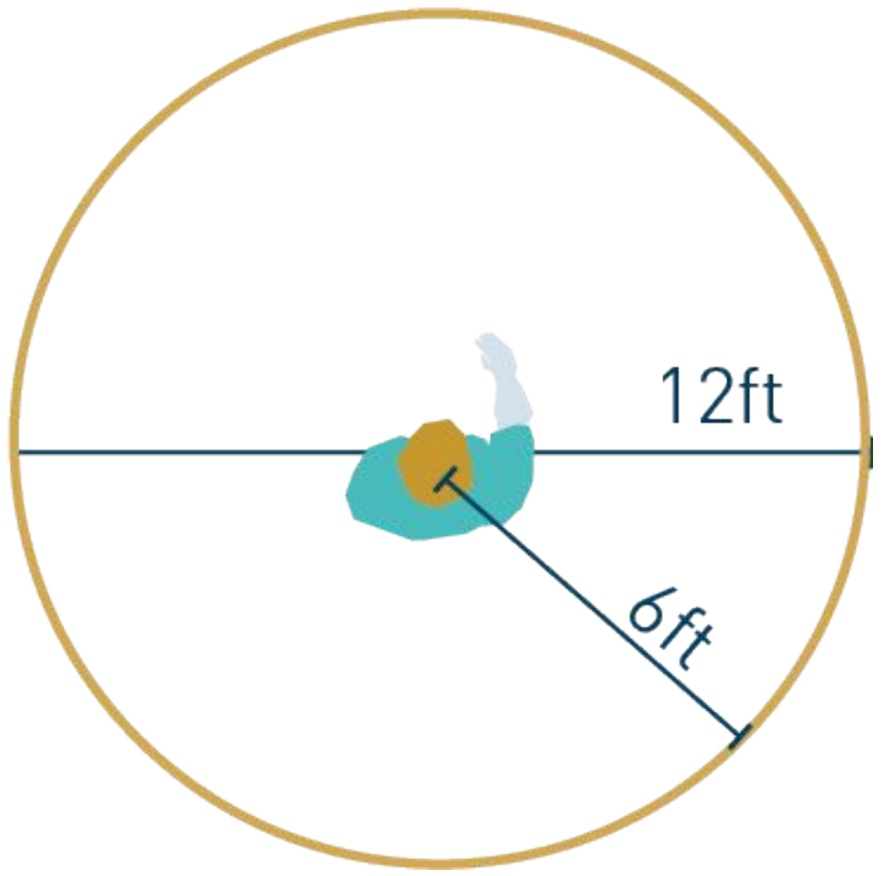
Larimer's social distancing dynamics

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.

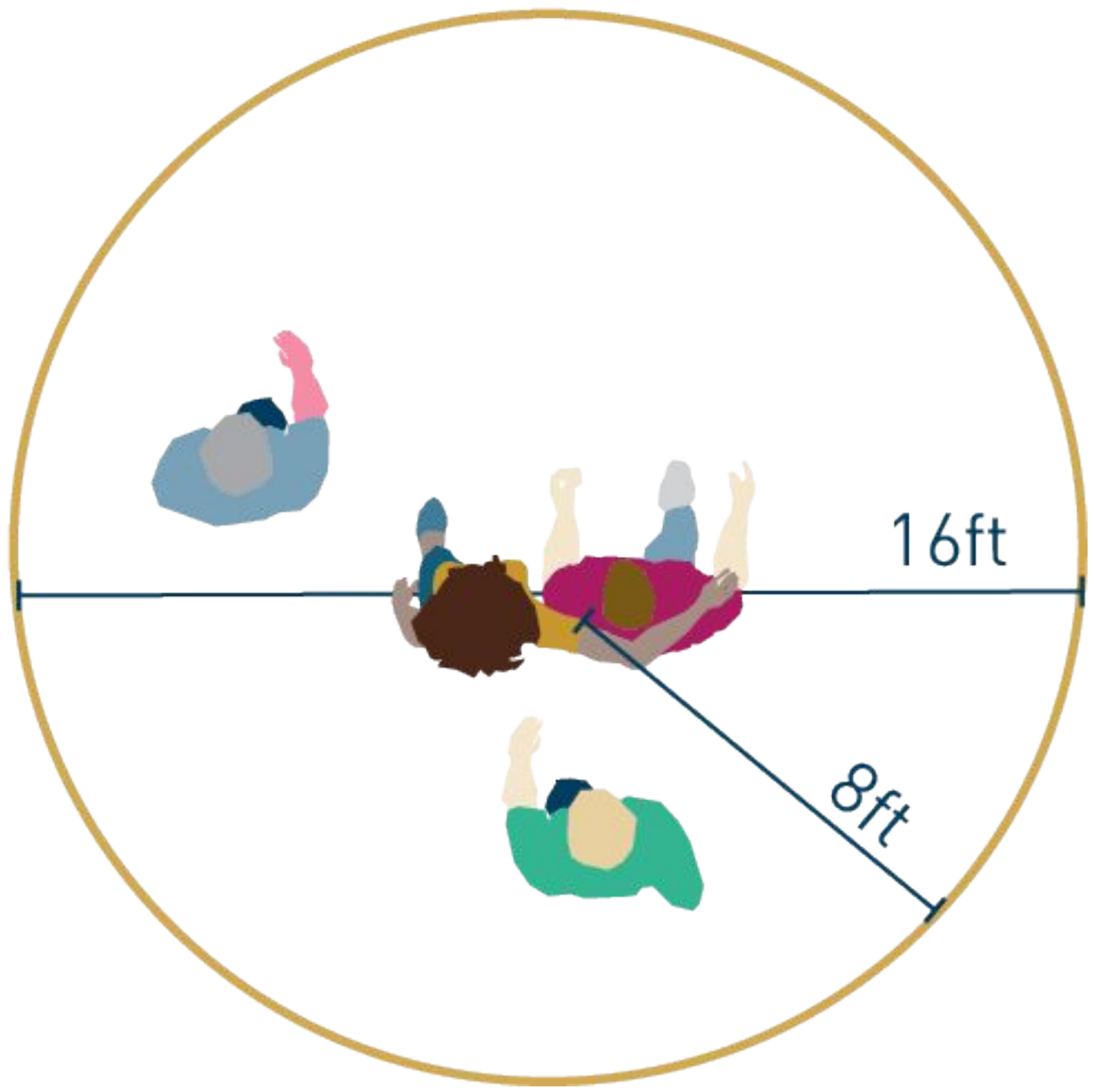
The radius has been adjusted to be 8ft, allowing 2 feet in between people in the group

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

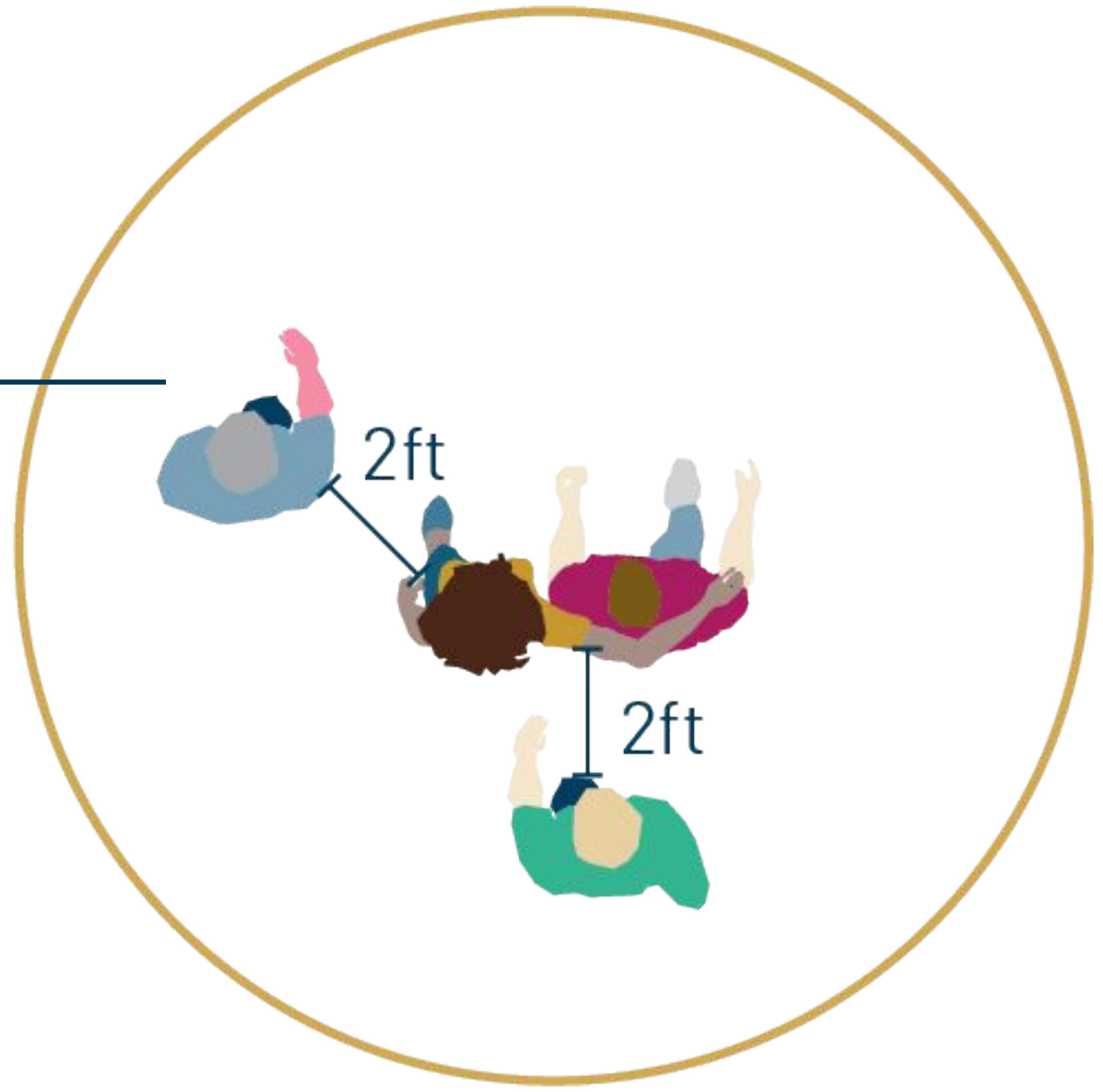
Average social distance circle



Group social distance circle



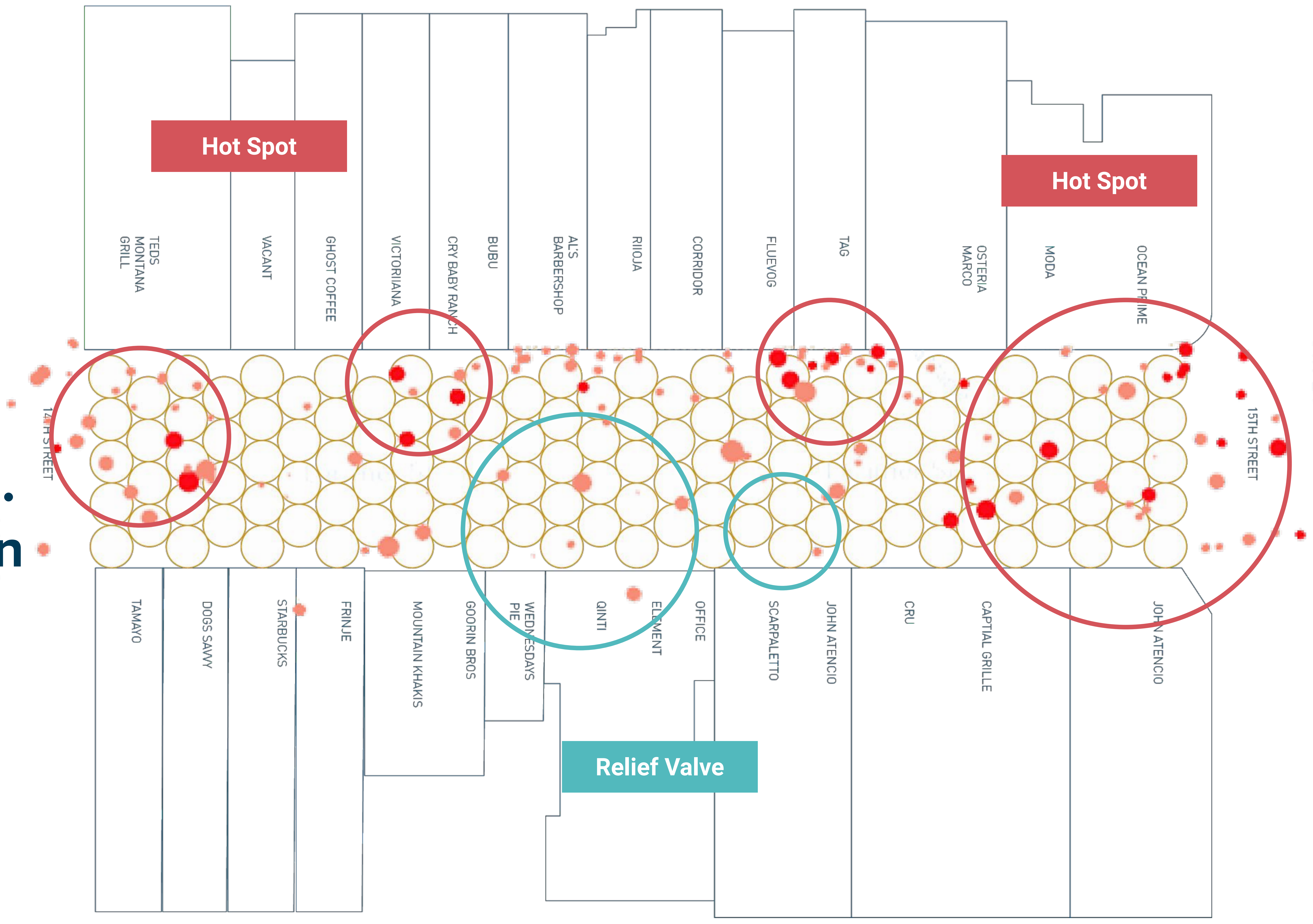
8ft allows for 2ft of distance between people in the same group



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.



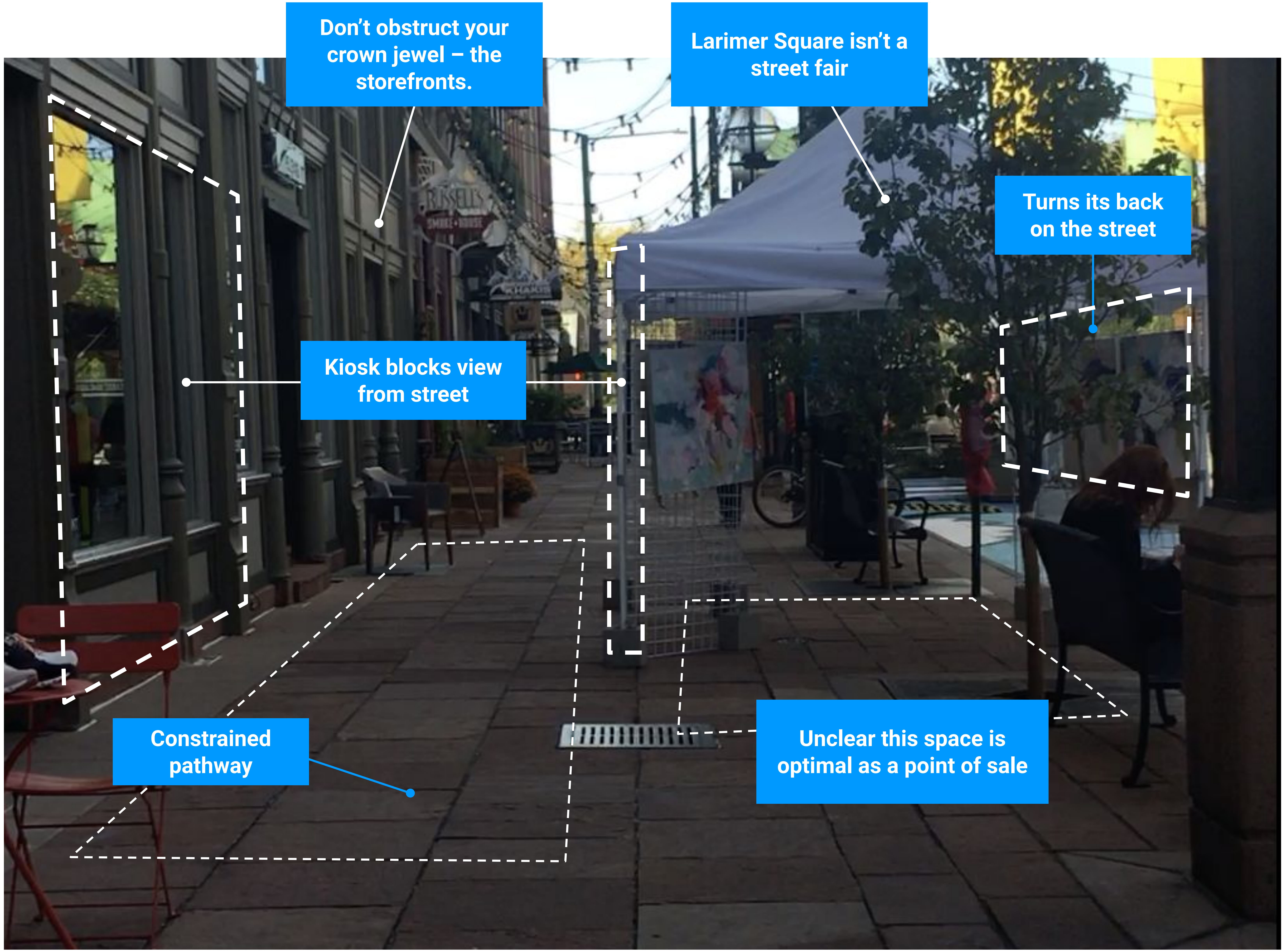
People Staying

Food and Beverage is taking full advantage of the street closure

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.



OPINION

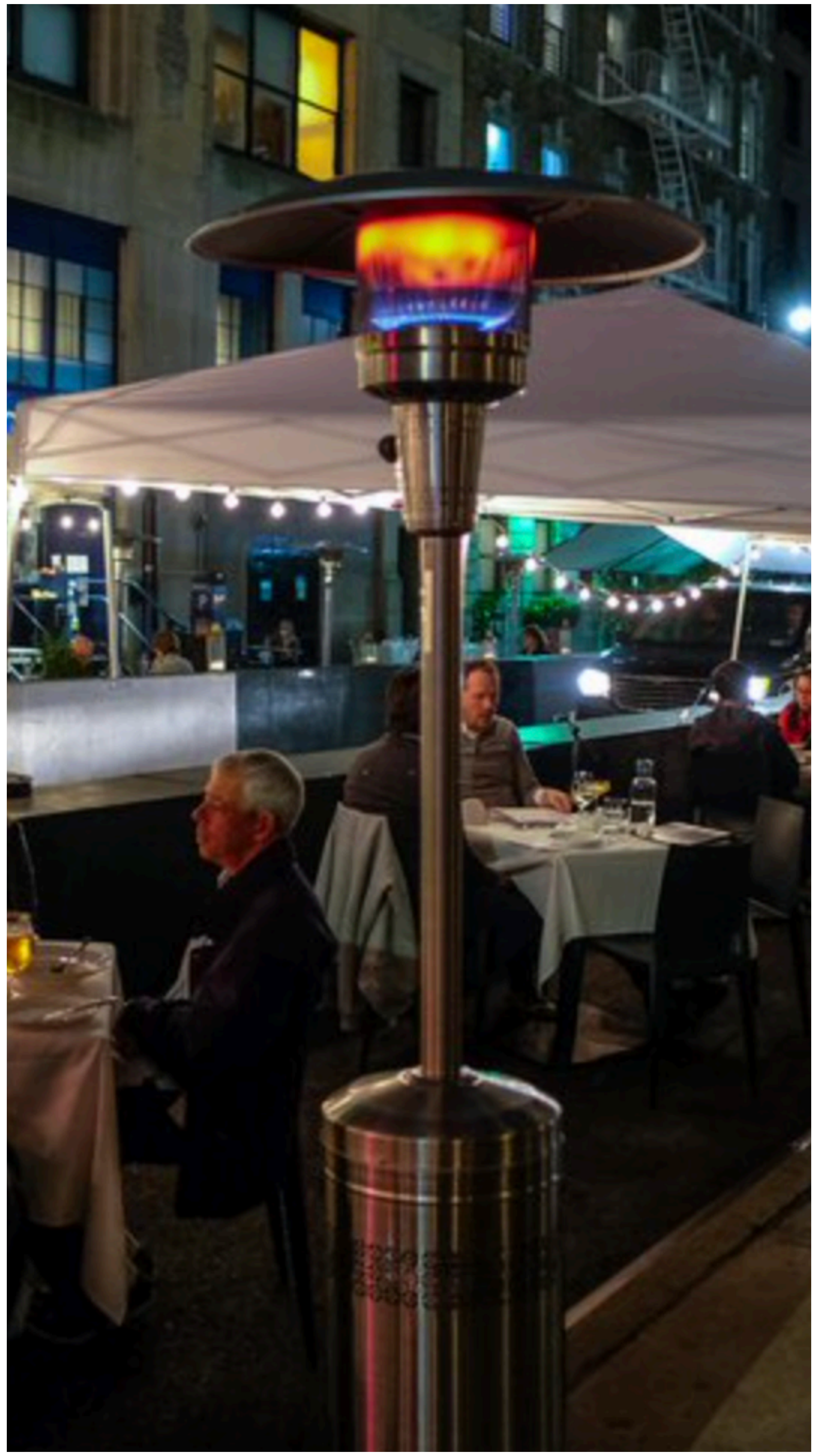
New York City is dead forever

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.

With the right ingredients... Not impossible!!



Space Heater

+

Warm Blanket

+

Hot Toddy

=

The Atlantic

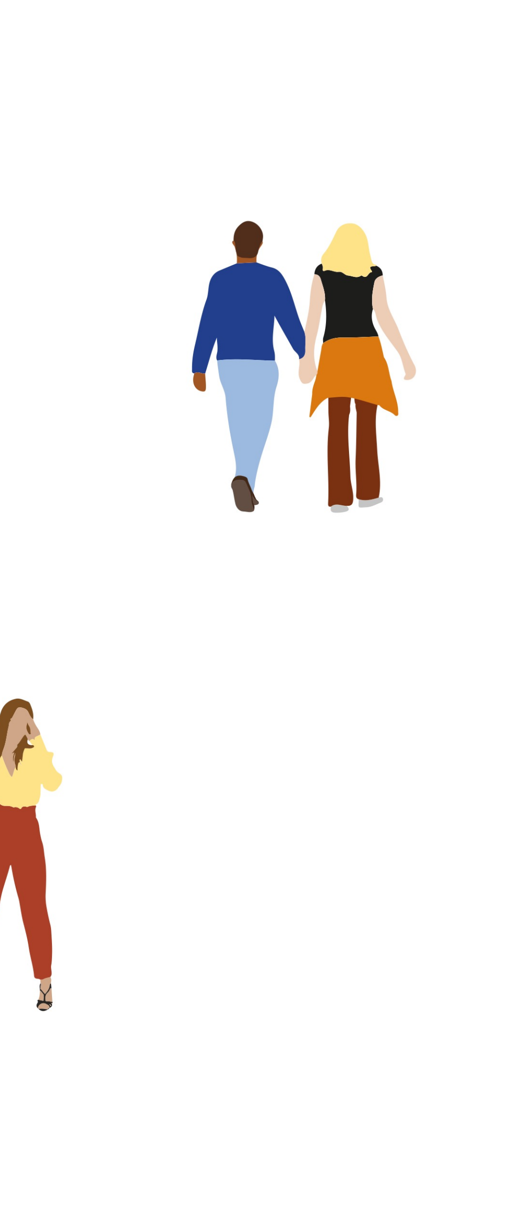
Prepare for the Roaring Twenties

The human desire to socialize will survive the pandemic.

Yascha Mounk
Contributing writer at *The Atlantic*

Two women wearing flu masks during the 1918 flu pandemic (GETTY)

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

Gensler

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**.

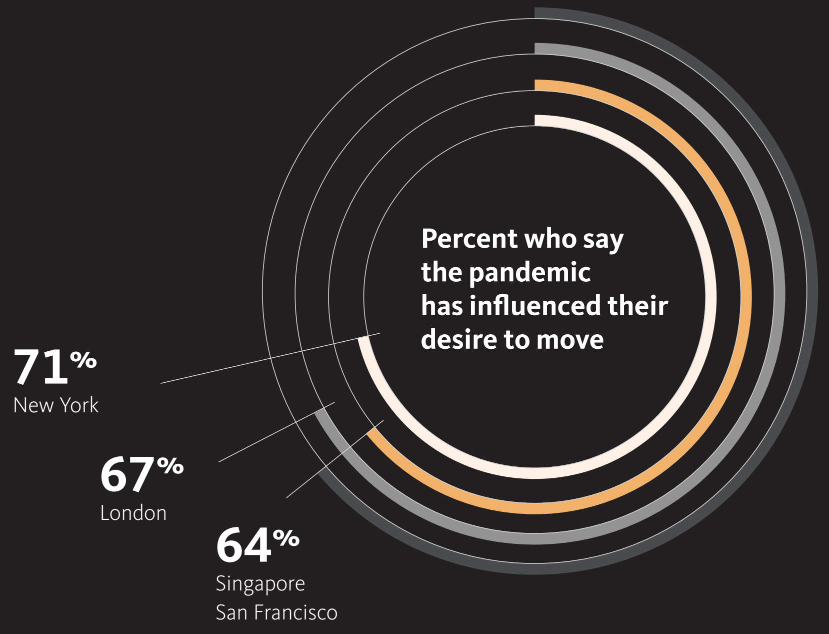
4. Design solutions that **prioritize human experience** offer the best opportunities to emerge stronger from the crisis.

5. We must define the **next generation of places and spaces in a post-COVID world.**

GENSLER RESEARCH INSTITUTE

CITY PULSE SURVEY

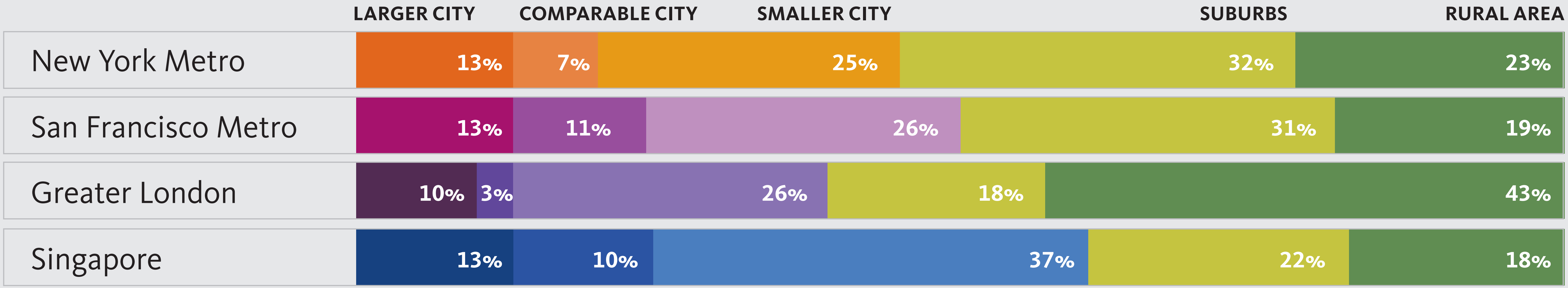
People's relationships with their cities are shifting due to health concerns over public transportation and density.



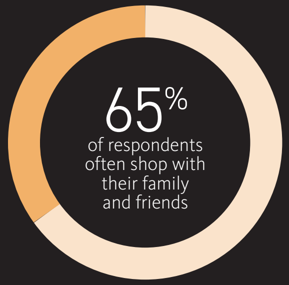
—GENSLER CITY PULSE SURVEY

THE PLATFORM AT GRATIOT | DETROIT

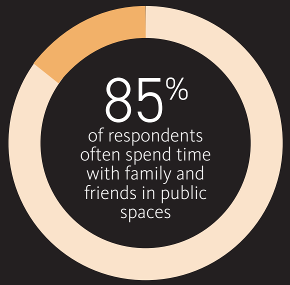
NEARLY HALF OF RESPONDENTS STILL WANT TO LIVE IN AN URBAN SETTING



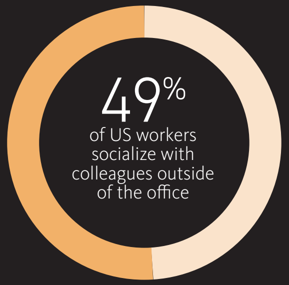
The pandemic helped us remember what's truly important: **life with other people.**



RETAIL



PUBLIC SPACE



WORKPLACE

—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?

FULL TIME IN OFFICE	1 OR 2 DAYS AT HOME	3 OR 4 DAYS AT HOME	FULL TIME AT HOME
29%	**28%**	**24%**	**19%**

52% **OF U.S. WORKERS WOULD PREFER A HYBRID WORK MODEL.**

KEY FINDING #2:

A DESIRE AND WILLINGNESS TO RETURNING TO WORK, SCHOOL, AND SHOPPING

THE CBD IS NOT AN ENDANGERED SPECIES; OPPORTUNITIES FOR NEW, MORE MIXED USES.

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

MOST COMFORTABLE

LEAST COMFORTABLE

KEY FINDING #3:
CONTINUED APPREHENSION ABOUT TRANSIT, FLYING AND GATHERING

LOCAL, WALKABLE DESTINATIONS TAKE ON NEW IMPORTANCE.

Rank	New York Metro Area	San Francisco Metro Area	Greater London	Singapore
1	Grocery shopping	Grocery shopping	Grocery shopping	Grocery shopping
2	Returning to work/school	Returning to work/school	Returning to work/school	Returning to work/school
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MOST COMFORTABLE

LEAST COMFORTABLE

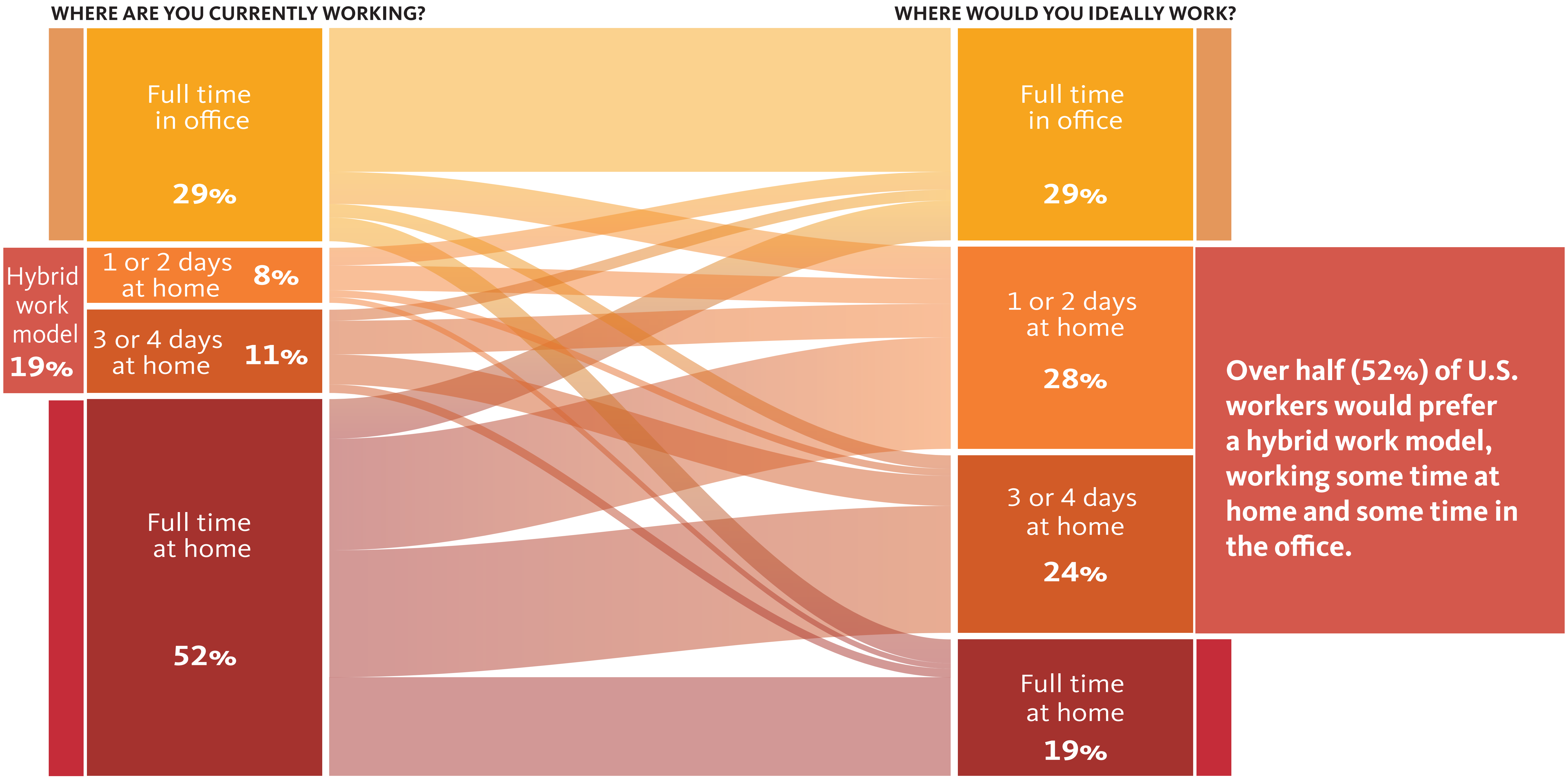
TRENDS & STRATEGIES FOR THE

WORKPLACE

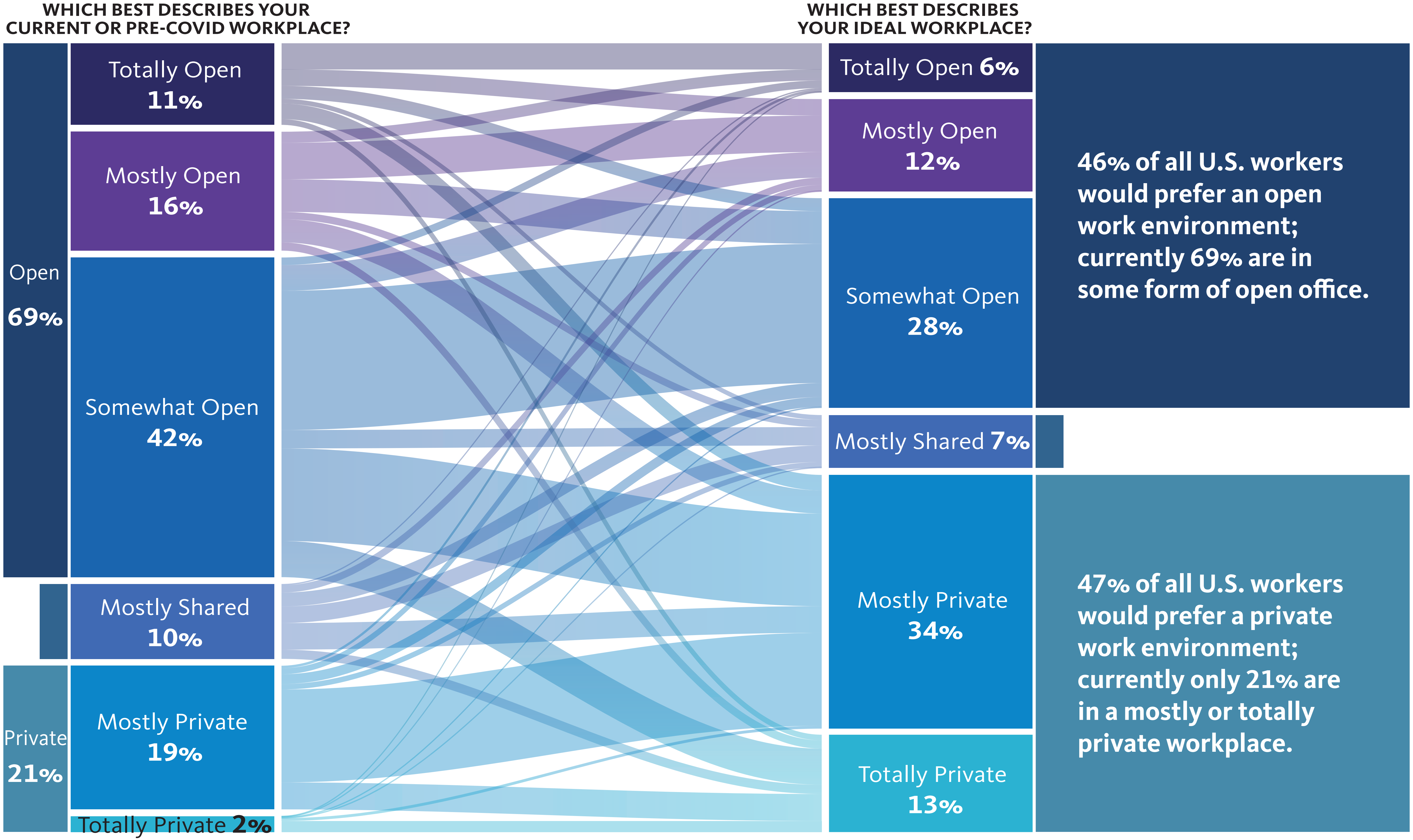
OVER HALF OF U.S. WORKERS WANT THE **FLEXIBILITY OF A HYBRID WORK MODEL.**

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

Source: Gensler U.S. Workplace Survey | Summer/Fall 2020



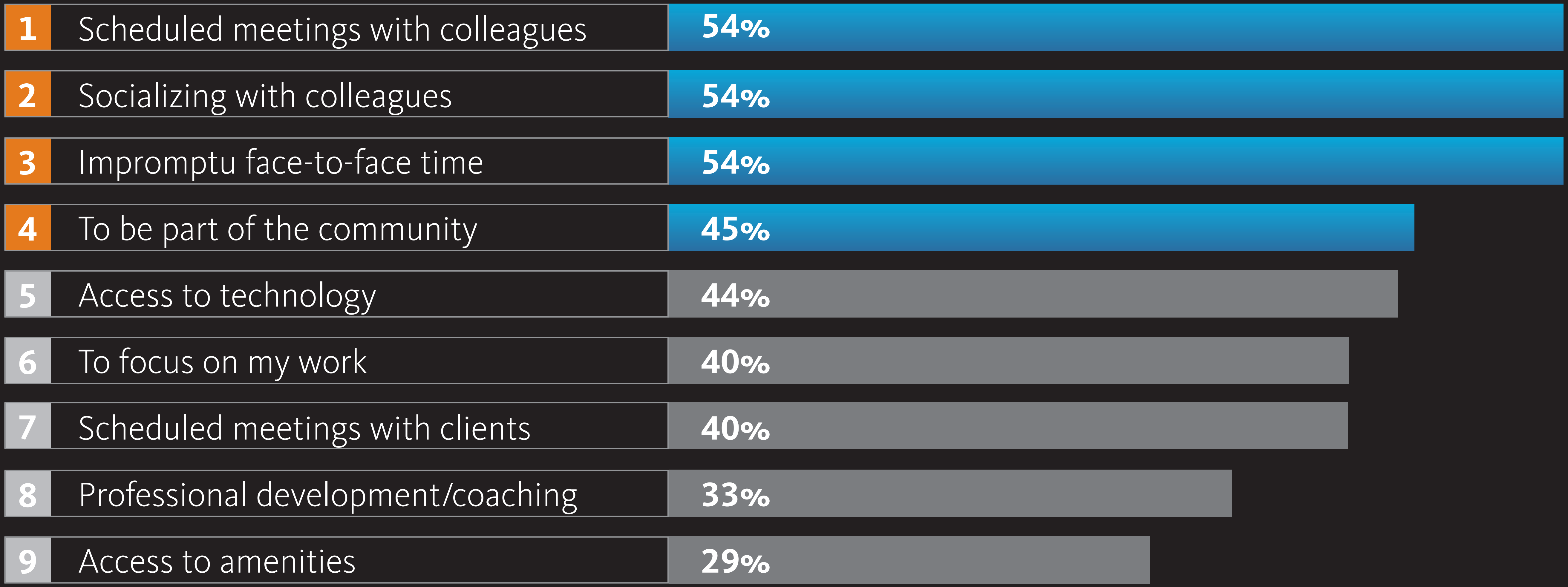
Source: Gensler U.S. Workplace Survey I Summer/Fall 2020



Source: Gensler U.S. Workplace Survey l Summer/Fall 2020

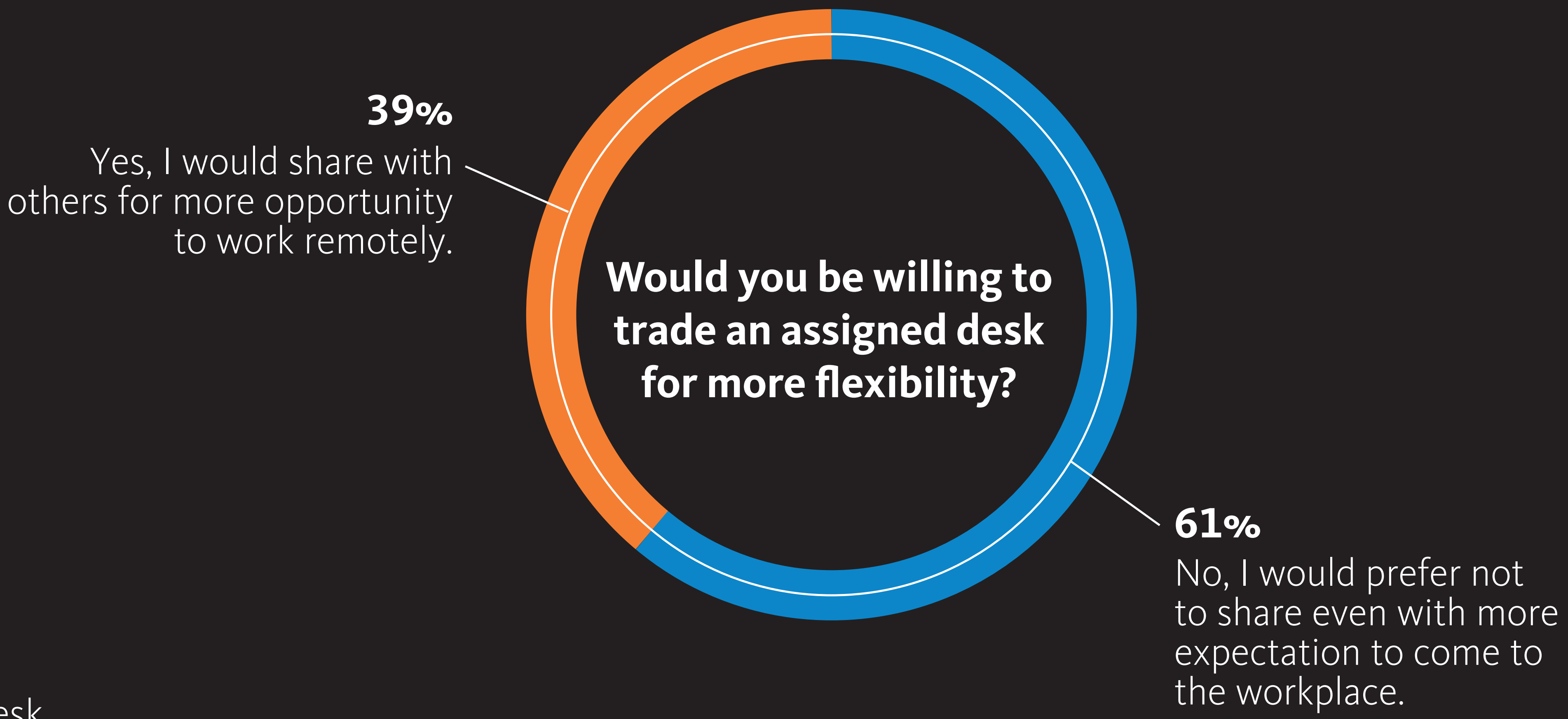
THE TOP REASON EMPLOYEES WANT TO COME TO THE OFFICE: THE PEOPLE

Employees see the office as most important for what's hardest to do at home:
MENTORSHIP, PROBLEM-SOLVING AND CONNECTING.



Source: Gensler U.S. Work From Home Survey 2020

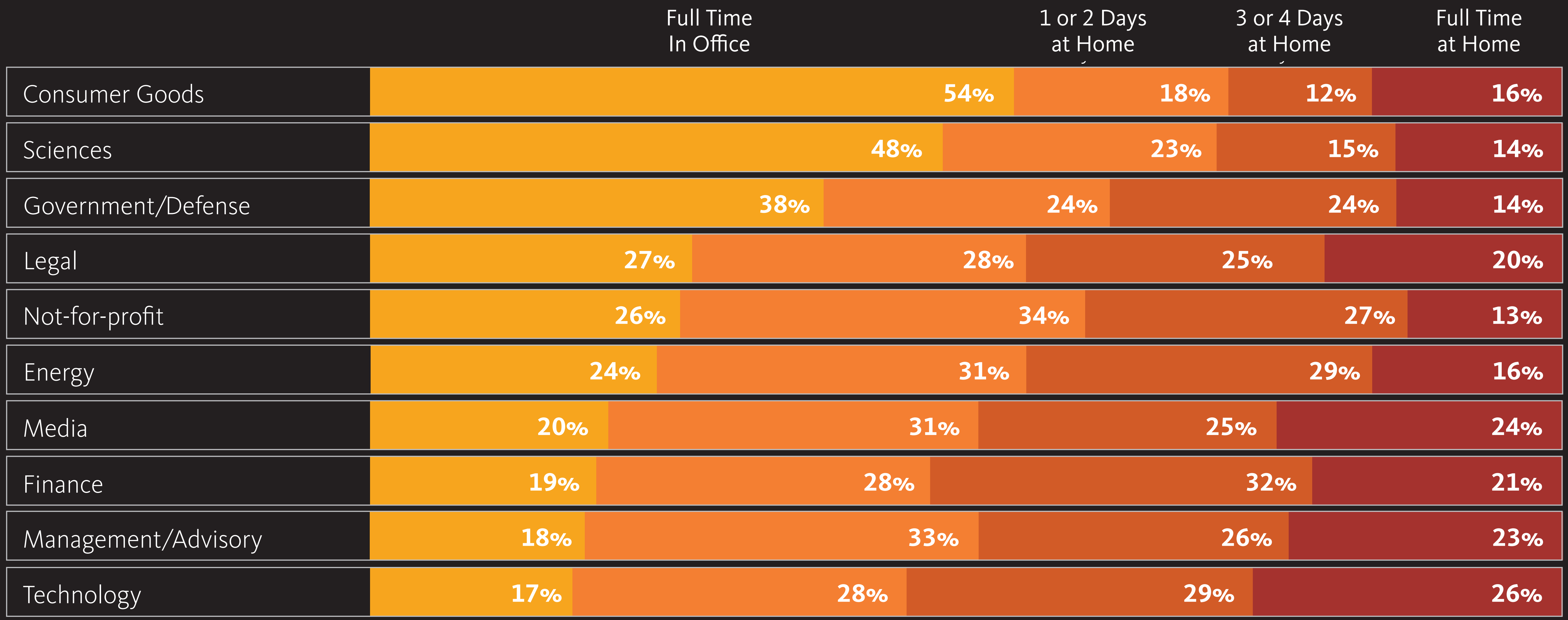
U.S. WORKERS DRAMATICALLY PREFER ASSIGNED SEATING—AND DESPITE A DESIRE FOR FLEXIBILITY, TWO-THIRDS ARE WILLING TO TRADE FLEXIBILITY FOR AN ASSIGNED SEAT.



Source: Gensler U.S. Workplace Survey I Summer/Fall 2020

COMPARISON BY INDUSTRY

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



Source: Gensler U.S. Workplace Survey | Summer/Fall 2020

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.**

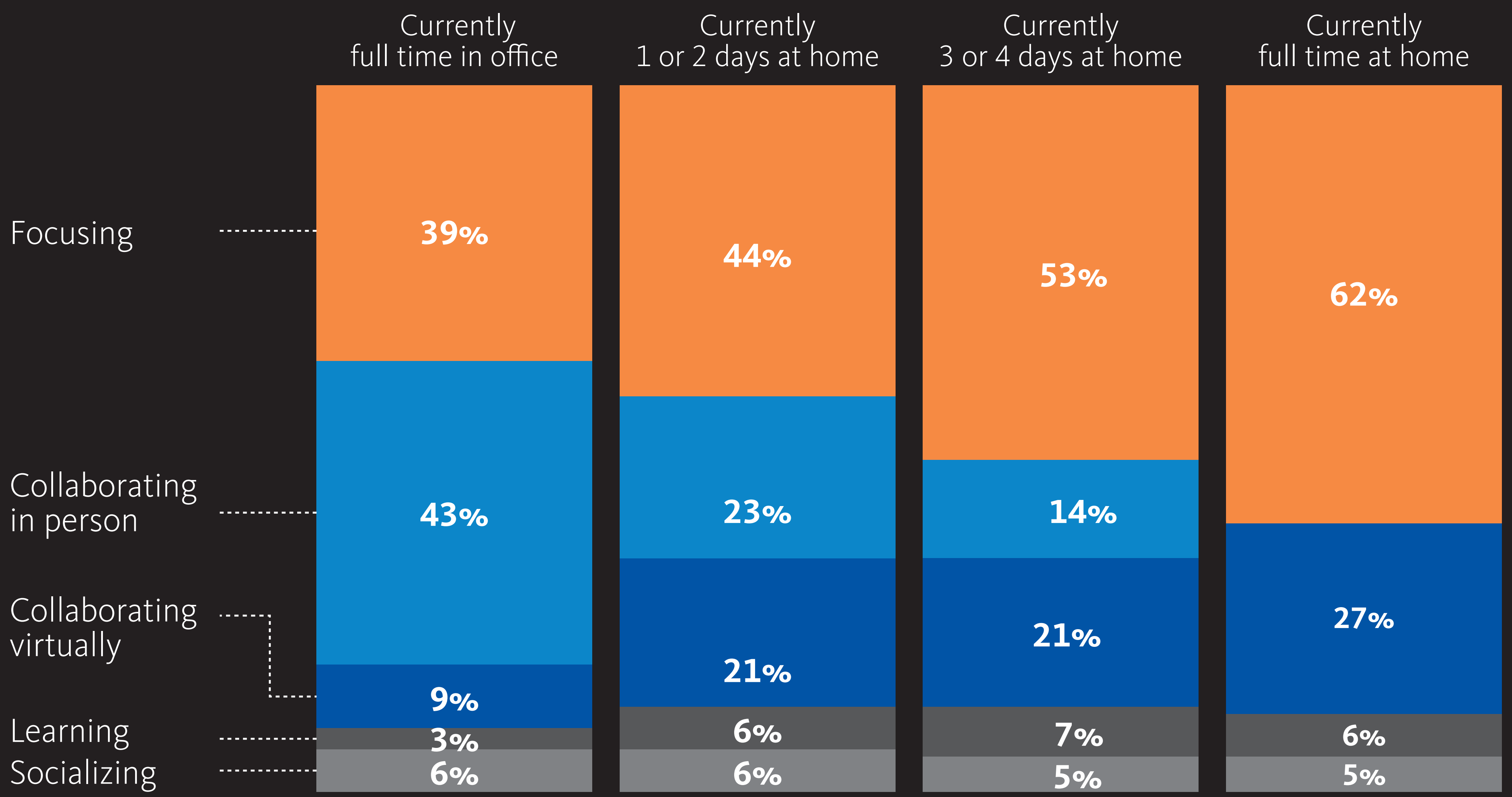
WORKERS ARE ASKING FOR **MORE ACCESS TO PRIVACY IN THE WORKPLACE.**

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 I 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.



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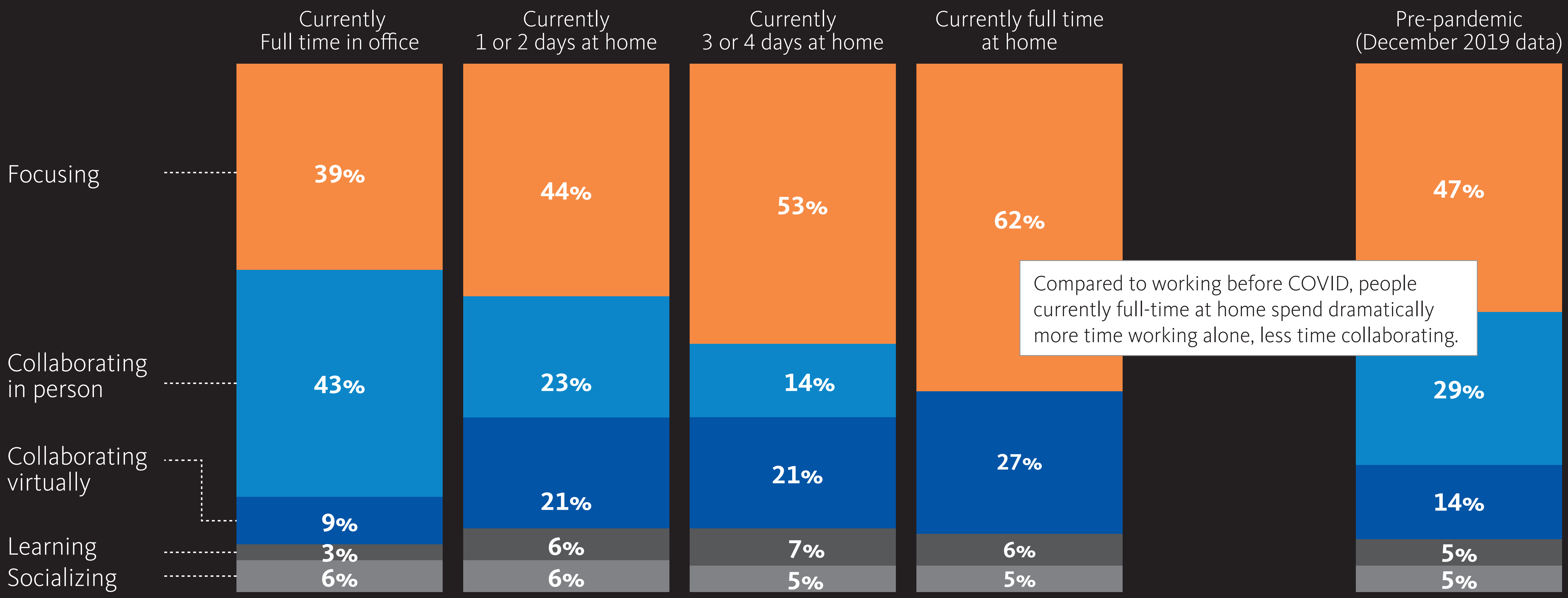
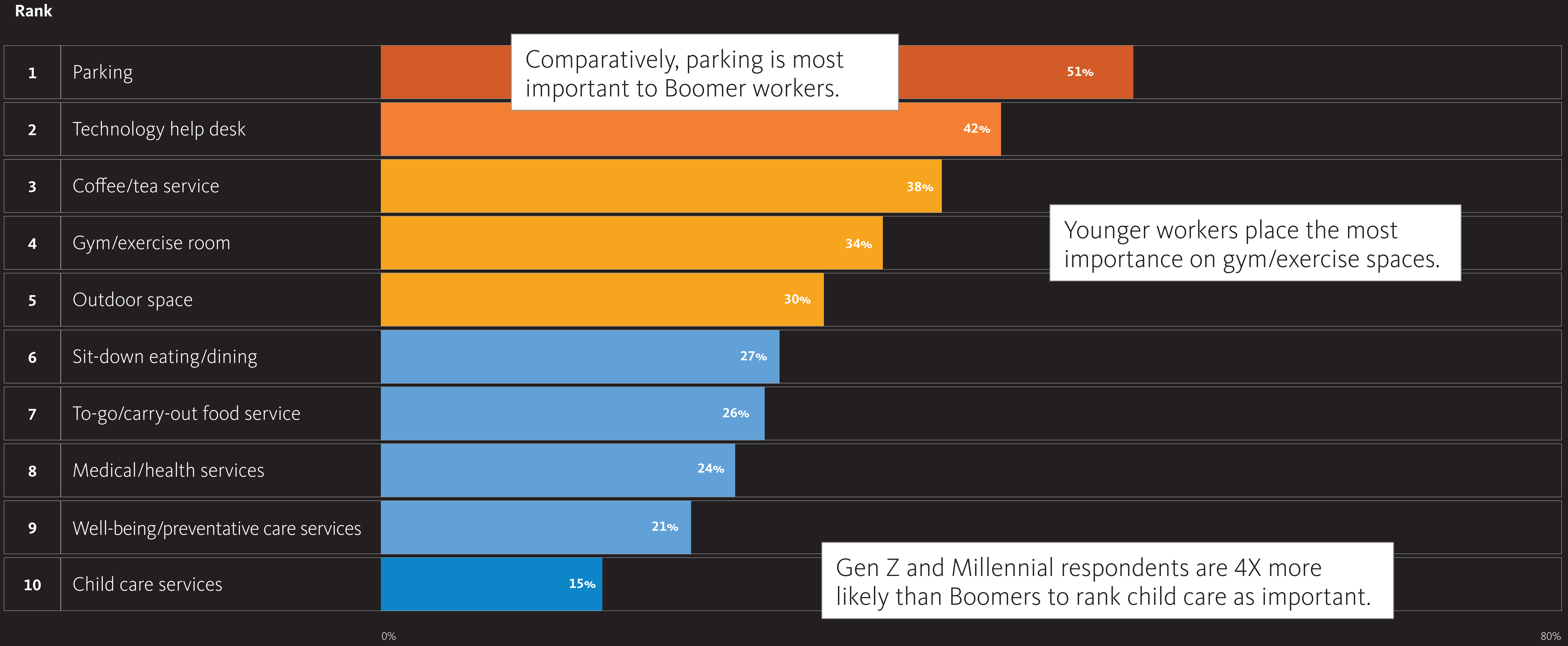


Source: Gensler U.S. Workplace Survey I Summer/Fall 2020

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.



Source: Gensler U.S. Workplace Survey I 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.

LINKEDIN | CHICAGO

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THANK YOU!

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