BRICKFIELDS**



Futurecast 2024

A snapshot of the most influential trends set to shape retail, workplace, residential, mobility and construction.

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Introduction

Welcome to Futurecast 2024 - an exploration of the most influential property trends set to shape retail, workplace, residential, mobility and construction.

In this report we review the resurgence of neighbourhood retail - as experiential stores relocate to the suburbs. Driven in-part by working from home, customers are increasingly expecting more from their local areas. Equally, as work becomes more intertwined with lifestyle, new typologies of 'in-between' spaces are emerging in transport hubs, retail centres and upmarket restaurants. These spaces are flexible, pay-for-use, and support both collaborative and focused work.

Also on the rise, other sectors are also adapting, with equitable access to housing and urban mobility. For housing, tailored typologies are emerging in response to increasing single parenthood, homelessness and cultural diasporas.

Regarding urban transport, the rising popularity of e-bikes is being met with initiatives tackling cost barriers to enable better urban health, sustainability, and equitable access to transportation.

Finally, climate concerns are driving innovation in construction practices, be it new technology or sustainable building materials. Visionaries in the field are also seeking inspiration from indigenous methods to contribute to the development of a more sustainable future.

Each of these emerging practices and products represent the rapid change which we are experiencing in how we live. work, shop and travel.

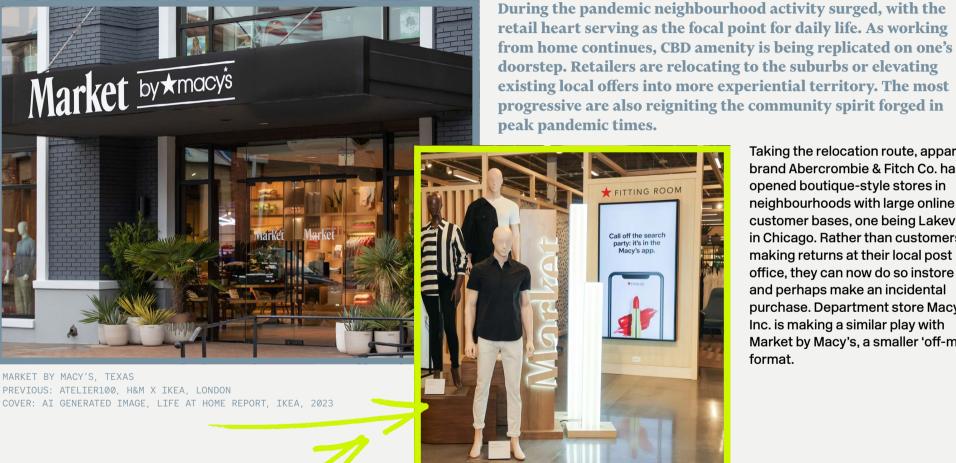
TREND #01

Retail

The Local Upgrade

Neighbourhood retail is resurging as customers seek localised convenience, and community connections.





Taking the relocation route, apparel brand Abercrombie & Fitch Co. has opened boutique-style stores in neighbourhoods with large online customer bases, one being Lakeview in Chicago. Rather than customers making returns at their local post office, they can now do so instore and perhaps make an incidental purchase. Department store Macy's Inc. is making a similar play with Market by Macy's, a smaller 'off-mall' format.

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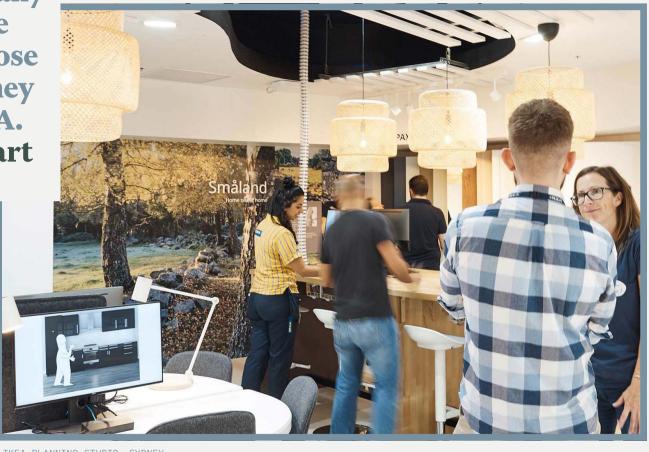
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"We will be where the many people are, offering more people the ability to choose when, where, and how they want to engage with IKEA.

Convenience is at the heart of our strategy."

MIRJA VIINANEN, CEO, IKEA AUSTRALIA

IKEA is also adapting with its convenient neighbourhood-based Planning Studios and collection points. At only 300-500 square metres, these lite-format stores provide customers with complex interior design advice, particularly on kitchens and wardrobes. Diversifying further. IKEA has also delivered the experiential Atelier 100, a makerbased concept store for local creatives, delivered in Partnership with H&M. According to Bloomberg CityLab, these moves are off the back of 2022 seeing a total of 1395 brickand-mortar store openings in the United States - the second highest number in recent years, many of which were in the suburbs.



IKEA PLANNING STUDIO, SYDNEY

MANAGER OF AMERICAS FOR THE AT



cheese tastings are held every Friday evening. The benefits are clear with locals 'looking forward' to doing the groceries and customer numbers being up near 20% on the previous vear.

Other brands are taking a more experimental and playful approach to appeal to their local communities. For example, footwear retailer, The

Athlete's Foot (TAF) is piloting a neighbourhood concept store in midtown Atlanta with events tailored to the creative set. Locals can drop into a sneaker customisation class. a complimentary shoe clean, or live performances by neighbourhood artists - among other events. These experiences not only build brand engagement but create opportunities for community connection



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Leveraging the Trend Provocations for Property Professionals

Could neighbourhood retail experiences rival events in major galleries?

Recent studies have shown the number of active immersive specialist companies in the UK alone has more than doubled since 2018 – this includes virtual reality (VR), augmented reality (AR) and mixed reality (MR). PwC also estimates the sector to bring a \$69.3 billion boost to the UK economy and enhance over 400,000 jobs by 2030. We may well see a merging of retail and immersive events at a neighbourhood scale – bringing new life to local community assets.

Will localised, experiential-based retail continue?

Brickfields Consulting's own quantitative research of 72 UK retail centres shows that experiential drivers are holding strong. Specifically, the number one motivation for visiting a centre was to 'treat myself', alongside other social drivers such as 'time spent with family' and 'dining and drinks'. As cost-of-living pressures rise, these free or low-cost moments for connection will be ever more important, and a valuable way to maintain loyalty when spend may wane.

Leveraging the Trend Provocations for Property Professionals

What is the role of AI in neighbourhood retail?

Automation and predictive services will continue, making rudimentary transactions increasingly seamless, as we've seen with Amazon Fresh and Boxy (a Parisbased autonomous convenience store). As personal service becomes rare, it also becomes more valuable and special. Opportunities for retailers to lead with genuine care and exceptional service will be important going forward.

Further Inspiration:

- Charity Supermkt: Multi-charity shop with a collection of second-hand fashion
- At Pearl: Localised community of artisans and makers
- Outernet London: Cultural venue with immersive exhibitions, entertainment and branded experiences

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OUTERNET LONDON

TREND #02

Workplace

The In-Between Spaces

Flexible, unexpected spaces that equally cater to lifestyle and work needs.



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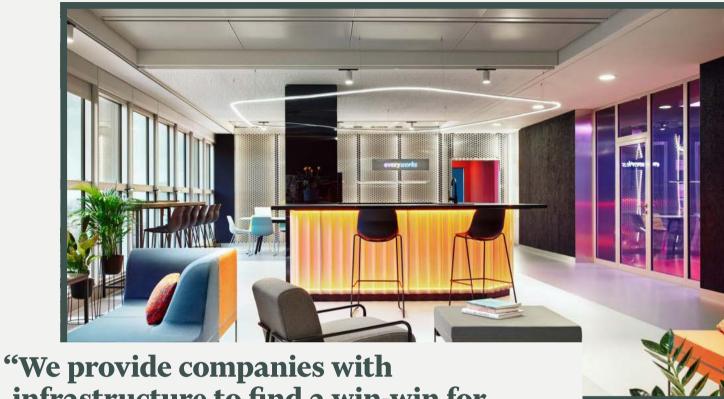
Post-pandemic, hybrid modes of working have become the norm and continue to strongly influence how people structure their daily lives. According to a Gallup poll, only 20 per cent of people work on-site - leaving a remaining 52 per cent using a hybrid schedule, and 28 per cent working remotely. The outcome has been a workforce on the move, kept agile by cutting-edge tech, to work between offices - where and how they please. This fluid professional landscape has given rise to a set of blended spaces which stitch one workplace to another, catering to different lifestyle modes.

NATALIYA-VAITKEVICH, PEXELS
PREVIOUS: AI GENERATED IMAGE, LIFE AT HOME REPORT, IKEA, 2023

"A total of 80% of current office occupiers have adopted and will sustain hybrid work policies"

THE MATH BEHIND THE HYBRID WORKPLACE, CBRE, 2024

A particular case fulfilling this shift is Everyworks, a series of subscriptionfree workspaces which cater to the remote and inter-city worker. Delivered by the national German rail organisation Deutsche Bahn, each site is equipped with shared and private workstations, café spaces and the latest video-conference technology. Most conveniently, these spaces are located at inter-city train stations, minutes from the platform. Burkhard Rönnefarth, Senior Project Manager of Coworking, describes Everyworks' role as "to provide companies with infrastructure to find a win-win for themselves and employees; a third space located in a transport hub supports employees' efficiency and well-being that companies would feel satisfied by." Currently across Germany with plans to grow, Everyworks is a solution for transport hubs looking to diversify their offer and serve a progressively mobile workforce.



EVERYWORKS, BERLIN

'We provide companies with infrastructure to find a win-win for themselves and employees; a third space located in a transport hub supports employees' efficiency and wellbeing that companies would feel satisfied by."

BURKHARD RONNEFARTH,
SENIOR PROJECT MANAGER, EVERYWORKS

"10% of Gen Z workers say third places are now their preferred place to work."

RESET, RESTORE, REFRAME - ENABLING WELLBEING THROUGH FLEXIBLE WORKING, SWINBURNE EDGE & DELOITTE, JUNE 2022



Other nimble providers are also stepping in to offer power, Wi-Fi and privacy in the most convenient and interim of locations. Combining hospitality and workspace, Serata Hall in London provides hot-desking within its boutique restaurant, event space and distillery. The upmarket ambience is a welcome escape from the office floor, and a prime spot to transition into after-work drinks.

For those between destinations and requiring shorter stays, there is Taskpod. These are workplace 'pods' everywhere from shopping centres to airports, offering self-contained, bookable spaces. Workers can take calls, meetings and charge devices in 15-minute increments.

Lifestyle providers are also joining the 'in-between' trend to serve the workday. A particular example is PT Pods – a 1-person gym that offers a range of equipment and classes that can be booked for as little as 10-minute increments, at any time of day.



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Leveraging the Trend Provocations for Property Professionals

Can in-between spaces be a solution to social challenges that impact the workday?

Once a specific need is ascertained, spaces hold enormous potential to be fine-tuned to care for people in unprecedented ways. PT Pods does this by catering to women who feel uncomfortable using traditional gyms and prefer to exercise privately. The intimate scale of the pod achieves this, as does the privacy screen which can be turned on and off. Property owners are right to learn the nuances of their customers' needs, and offer convenient, valueadd features that make them feel seen and supported throughout the workday.

How might in-between spaces add a sense of awe and inspiration to the workday?

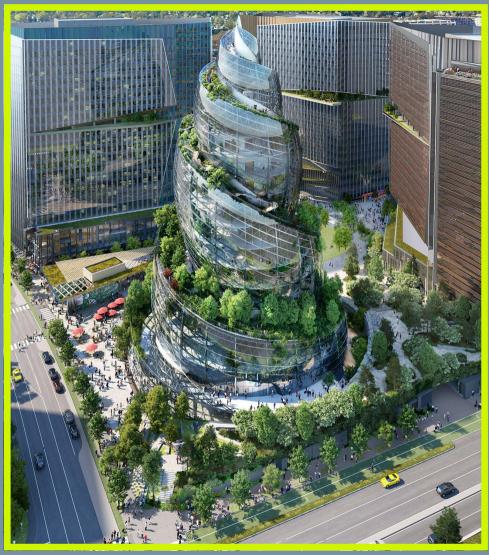
The presence of nature is known to have diverse benefits on wellbeing from the restorative to the aweinspiring. There is potential to create such moments on a micro-scale to reinvigorate the workday. The Citi Wealth Hub in Singapore achieves this with spaces cocooned in greenery. On a grander scale, The Helix, Amazon's headquarters in Virginia, features walking trails of native trees which spiral around the exterior of the building. The route offers a 'mini hike' without leaving the city. Where investment cannot be made in nature, property owners could consider digital art and micro-galleries to tap into similar levels of inspiration.



PT PODS. LONDO



CTTT WEALTH HUR STNGAPORE BY MINISTRY OF DESIGN PIE LID



THE HELTX AMAZON HEADQUARTERS VIRGINIA

TREND #03

Residential

Adaptive Affordability

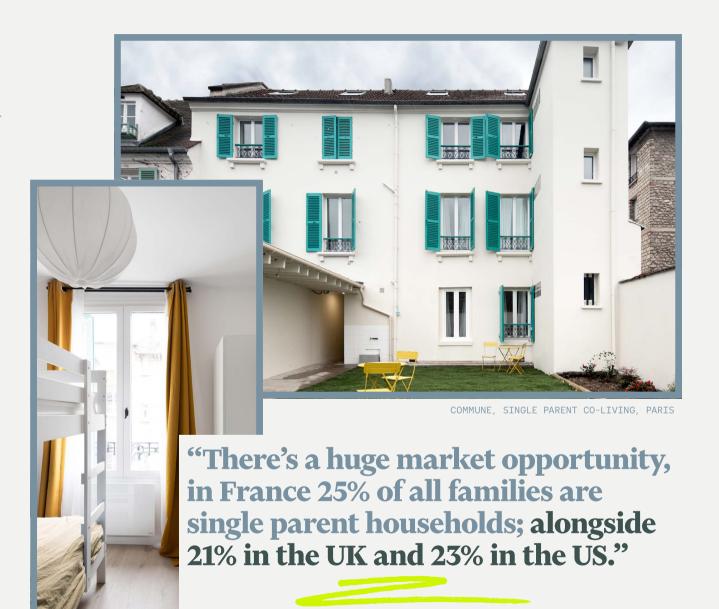
Housing affordability is not a one-size-fits-all solution. Instead, tailored approaches are emerging to cater to specific audiences and cultures.



Visionary models which challenge the status quo are needed to change the game on housing affordability. While this is slow moving in many global cities, the most progressive start-ups, property owners, and city governments are exercising increased levels of ingenuity to respond.

New housing, finance and construction models are coming to the fore to achieve new modes of affordability- not only providing lifelines to vulnerable groups, but pushing the envelope for housing design.

Leading the charge is Commune, a
French start-up providing affordable,
co-living residences for single
parents. Representing 25 % of
families in France, a single-parent
scenario means reduced income,
resources and time. As an asset
manager, Commune counteracts this
by offering low-cost fully furnished
homes with access to facilities and
services. Some include babysitting,
meal preparation, play halls and even
raclette machines – all within a likeminded community.



MAHITAB DARWICH, HEAD OF REAL ESTATE, COMMUNE



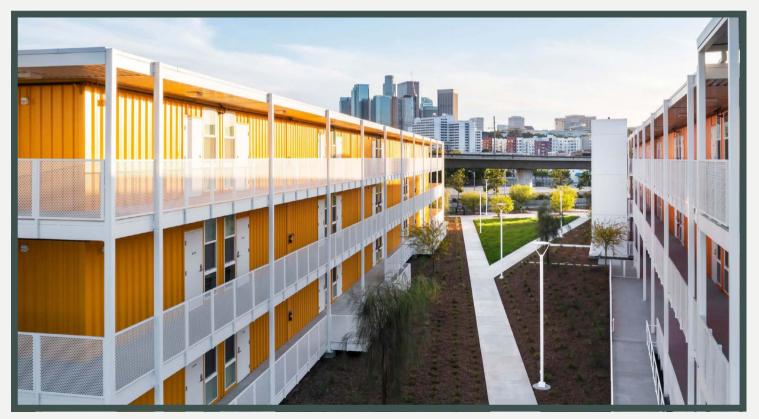
OTHALO MODULAR HOMES, SUB-SAHARA AFRICA

"What if we could use the plastic waste problem to solve the housing deficiency problem? What if we could create a system that allowed us to use the local plastic waste to solve the local need for housing?"

FRANK CATO LAHTI, FOUNDER AND CTO OF OTHALO 'OTHALO SOLVES AFRICA'S HOUSING SHORTAGE WITH PLASTIC WASTE'.BUSINESSNORWAY.COM 2023

Similarly, the African Canadian
Affordable Housing Lab Project
shares this link to community and
social sustainability. Run by the
Rwandan Canadian Healing Centre,
the project aims to create housing
that is low-cost, intergenerational
and culturally relevant for African
Canadians. Replicating a traditional
African village, the housing will
focus on the values of community
and family, while also embedding
opportunities for healing and
wellbeing.

Another way to unlock housing affordability, is to leverage financially and environmentally sustainable solutions in construction. Othalo, a tech-construction company, is doing both at once. Utilising plastic waste to build modular homes, Othalo will produce low-cost housing, provide local jobs and circumvent material shortages. Their first project is set to commence in Africa with prototypes already underway.



HILDA L. SOLIS CARE FIRST VILLAGE, LOS ANGELES

Also proving successful with modular homes is the Hilda L. Solis Care First Village, a 232-unit development in Los Angeles by NAC Architecture. The streamlined construction enabled a six-month turnaround from concept to occupancy, and allowed the rapid settlement of local homeless people. The quick timeframe also allowed the city to receive an almost immediate return on investment, and is likely to incentivise similar future projects.

ECIAL EDITION: FUTURECAST 2023 BRICKFIELDS CONSULTING 21

Leveraging the Trend Provocations for Property Professionals

How might affordable housing become more holistic?

To drive systemic change and break cycles of poverty, affordable housing must also connect with services supporting healing and prosperity. This scenario begs the questions:

- What new ownership models are needed for this unique situation?
- What are the opportunities for reciprocity within these communities and wider services?
- What additional spaces are needed to support this?

Organisations such as Commune and the African Canadian Affordable Housing Lab Project offer much to learn from.

What if the building costs significantly decreased?

History has shown us that construction and material costs have typically risen over time, a pattern society has come to expect. But what if this norm was rejected, and the industry mandated the opposite? Through new construction techniques or materials, could industries devise and exclusively utilise the most cost-effective ways to create housing – without compromising on quality? Beyond materials, this may require a review of the development and delivery journey – ascertaining opportunities to streamline and pass on savings to buyers.

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Leveraging the Trend Provocations for Property Professionals

How might housing benefit from innovations in disparate sectors?

As the world's challenges become more intertwined, innovators from increasingly disparate sectors will join forces to solve multiple problems at once. Innovation has shown us that this is where the most astounding and inspiring solutions lie. Property owners should dare to collaborate and ask:

- How might housing affordability relate to challenges in fields of medicine, food production and fashion?
- How might we combine capabilities and support multiple human and non-human stakeholders?

These are the types of questions Frank Cato Lahti posed in founding Othalo, a low-cost housing organisation repurposing 'waste': "What if one could use the plastic waste problem to solve the housing deficiency problem?".

Further Inspiration:

- Kindroom: Reduced or rent-free living in exchange for sharing skills
- New Ground Housing Co. Retirement living co-developed by an for women over 50 years
- Rambla Climate House: Design techniques to support biodiversity in residential living

TREND #04

Mobility

Chain Reactions

The growing popularity of e-bikes is reshaping global cities for better urban health – with initiatives addressing sustainability, barriers to cost, and equitable access.

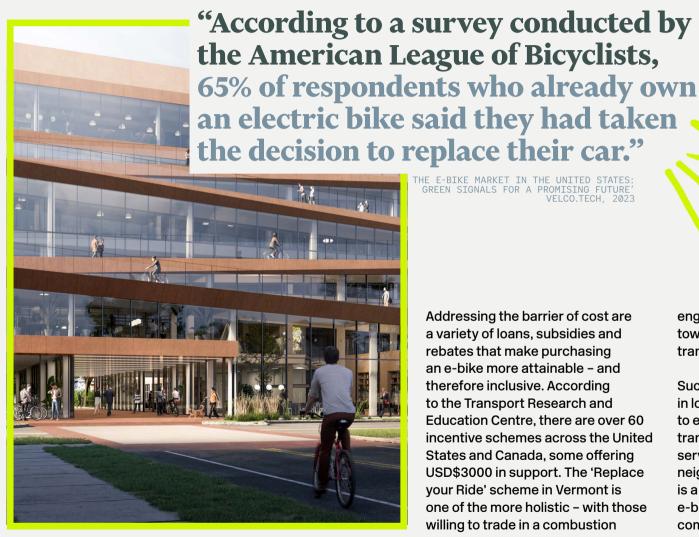




ABOVE: IJBOULEVARD UNDERWATER BIKE PARKING, AMSTERDAM BY VENHOEVENCS ARCHITECTURE+URBANISM, PHOTOGRAPHER OSSIP VAN DUIVENBODE PREVIOUS: ASHEA MEDIA, PEXELS

While some pandemic trends have faded, the surge in cycling continues to reshape our cities - be it for purpose or pleasure. This is marked by the global e-bike market being projected to reach USD\$73.82 billion by 2028 according to Statista. Additionally, a survey conducted by the American League of Bicyclists found 65 per cent of e-bike owners had taken the decision to replace their car.

This has catalysed a host of initiatives. Overall, the end goal is to make cycling the 'easy choice' and deliver higher levels of urban health, sustainability, and equitable access to transport.



LEDGER, ARKANSAS BY CALLAGHAN HORIUCHI

Addressing the barrier of cost are a variety of loans, subsidies and rebates that make purchasing an e-bike more attainable - and therefore inclusive. According to the Transport Research and Education Centre, there are over 60 incentive schemes across the United States and Canada, some offering USD\$3000 in support. The 'Replace your Ride' scheme in Vermont is one of the more holistic - with those willing to trade in a combustion

engine able to receive USD\$5000 towards an e-vehicle, e-bike or public transport voucher.

Such libraries are also emerging in lower income neighbourhoods to enable equitable access to transport and services. Electro-Bici serving Pacoima and surrounding neighbourhoods in Los Angeles, is a particular model offering free e-bikes for nine months to frontline communities.

Urban interventions are also addressing common challenges associated with using an e-bike, such as charging and parking. French start-up Acton is rolling out universal e-charging stations, supporting all types of Light Electric Vehicles (LEVs). These all-in-one docking, locking, and charging stations are powered by existing street fixtures such as advertising boards, bus stations, and street lighting. This flexible format offers widespread convenience, being integrated in almost any urban setting.

Workplaces are also becoming more bike-friendly and even cycleways in their own right. Most notable is Ledger, in Bentonville, Arkansas, with its 1.19 kilometre bike ramp, which wraps around the building facade. The path connects office-workers to their floors, whilst welcoming locals to rooftop gardens and retail spaces. The design challenges traditionally 'insular' office formats, while embracing the local mountain-biking culture.



DANA MARIN AMSTERDAMIAN, UNSPLASH

parents when they are travelling to school with their kids, a choice to use a bike rather than a car..."

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LEDGER, ARKANSAS BY CALLAGHAN HORIUCHI

JTURECAST 2024 BRICKFIELDS CONSULTING 2

Leveraging the Trend Provocations for Property Professionals

How will the on-demand economy offer more convenience to cyclists?

As the industry booms, it is likely that startups will continue to solve niche pain-points in every aspect of the cyclist's journey. Already, on-demand charging providers are emerging to meet EV and e-bike owners at their location to recharge their vehicle. This is the ultimate convenience, reducing the need to find a charging station. Property owners and councils could explore connecting with emerging startups and universities to pilot similar mobility initiatives in their communities.

Could the e-transport revolution unlock the financial prosperity of local communities?

Glimmers of this are emerging in Copenhagen with Elby, a start-up integrating chargers into the walls of existing multistorey buildings. Building owners receive up to 60% of profits generated from their Elby sockets. Pushing this idea further, landlords could reinvest these profits into their local communities. This could be in the form of subsidised electricity bills or initiatives that enhance local livability.



FLBY EV CHARGER COPENHAGEN

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Leveraging the Trend Provocations for Property Professionals

How might AI be used to advocate for cycling infrastructure?

Al artists are set to become more sophisticated and have the power to sway policymakers through compelling visuals of optimal urban scenarios. Dutch bike subscription service Swapfiets has already begun leveraging this mechanism to lobby city councils of Amsterdam, Rotterdam and The Hague to reinstate car-free Sundays. They have also generated images of London, Amsterdam and Berlin showing fewer roads, and more green spaces and street dining. These were based on findings from a poll of how respondents imagine car-free life.

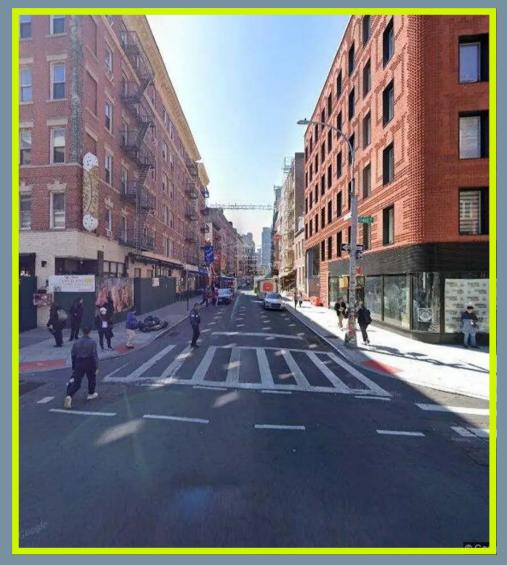
Further Inspiration:

- Gender equity in cycling: Biking infrastructure designed by women
- Copenhagenize Design Co.: Best practice in planning, design, communications and education for city-wide cycling strategies
- <u>Pipedream Labs</u>: Freeing-up the streets with a network of subterranean tubes for food delivery



ELBY, EV CHARGER, COPENHAGEN

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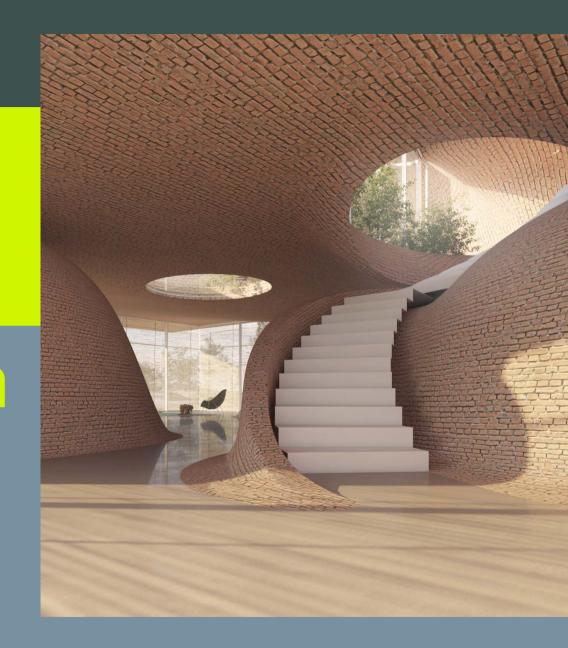
'BEFORE' AND 'AFTER' STREETSCAPES. AT GENERATED TMAGERY CYCLING LIFESTYLE AT NETHERLANDS

TREND #05

Construction

Synergetic Solutions

Climate concerns are reshaping construction practices, driving innovation and drawing inspiration from pre-industrial techniques to forge a more sustainable future.



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LIVING ROOT BRIDGE, LO-TEK DESIGN BY RADICAL INDIGENISM, JULIA WATSON PREVIOUS: GUYIM VAULT HOUSE, IRAN BY NEXTOFFICE

Many sustainability advocates will attest that the greenest building is the one that is already built. This is particularly true considering 40 per cent of annual global CO2 emissions are attributed to the built environment. Additionally, 23 per cent of this are due to concrete, steel, and aluminium, according to Architecture 2030, a climate advocacy non-profit. In response, a set of innovators are developing new building methods and materials, that operate in synergy with existing structures and with nature.

One way this is manifesting is via visionary approaches to retro-fitting and extensions - giving spaces a new lease on life. For instance. Hydronic Shell has designed prefabricated panels to retro-fit ageing apartments and upgrade their facilities. Affixing seamlessly to the exterior, these panels integrate insulation, heating, cooling and ventilation. They also have the potential to reduce tenants' energy use by over 90 per cent. Further, the easy installation allows tenants to remain in their home, rather than facing relocation.

A similar example is 1 Wall Street, a commercial tower utilising ancient architectural techniques to build additional storeys, potentially making an office-to-residential conversion more affordable. By utilising a voided concrete technique, the redevelopment has added six new floors to a 1920s office tower. The air-filled cavities reduce the weight of each floor, cutting overall concrete usage and the need for support columns, ultimately decreasing emissions. Such approaches signify a shift towards an anti-demolition future.



"As it stands, 40% of annual global CO2 emissions are attributed to the built environment, in which 23% of emissions are blamed on concrete, steel, and aluminum."

ARCHTTECTURE 2030, ORG

"Every time you double the cumulative amounts of solar-power modules that the human race has made, we bring the

cost down about 29%."

JENNY CHASE, LEAD SOLAR ANALYST AT BLOOMBERGNEF 'THE WORLD HAS ALREADY CROSSED A 'TIPPING POINT' ON SOLAR POWER'. BLOOMBERG 2023

> Designing with nature is also unlocking new potential for building materials. In particular, solar technology has advanced into an array of new formats. Researchers at MIT have developed solar windows - a transparent window glass which harnesses energy like a solar panel. Similarly, solar designer, Marjan van Aubel has designed a set of 'stained glass' style PET panels which generate electricity. Meanwhile, the Solar Pavilion at the recent Dutch Design week also exhibited photovoltaic roof tiles which negate the need for traditional solar panels. Paired with similar innovations such as solar paint and solar glass bricks, these could allow future homes to be entirely self-sufficient of external energy sources.

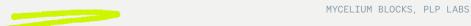
SOLAR PAVILION WITH PHOTOVOLTAIC PANELS. BY V8 ARCHITECTS



Living materials such as moss and fungi are also revolutionising how we build. For example, mycelium bio-composite blocks by PLP Labs are a biodegradable alternative to concrete and steel developed from the root structures of fungi. These blocks are currently suitable for interior architecture uses, including insulation, lighting and flooring. They also hold promise for future structural and exterior applications due to their fire resistance, thermal properties and compressive strength akin to an adobe brick. Such materials are a genuine step towards a circular construction industry.



of modular system using 84 mycelium bio-composite blocks... It took approximately three months to grow the installation."



Leveraging the Trend Provocations for Property Professionals

What is the role of indigenous building techniques in urban contexts?

Construction utilising indigenous techniques has seen excellent applications in award-winning public institutions, culturally specific homes and small-scale social infrastructure. Notable examples being Guyim Vault House by Next Office in Iran, and Rammed Earth Health Hub in Western Australia by Kaunitz Yeung Architecture.

However, we are yet to see this at scale in more urban and commercial applications. Could integrating indigenous construction be the bridge that rebalances our urban environments to be more symbiotic with nature and cultural understanding? Could developers and architects uncover new techniques by looking to their local contexts and learning from traditional owners?

How might building materials change consumption habits and achieve carbon positive targets?

Multiple solar products are being developed to enable our future homes, warehouses and offices to run solely on the sun's energy. In particular, IKEA is speculating about the development of bio-solar wallpaper which integrates algae to generate electricity.

Scaling-up, these innovations combined could eventually power neighbourhoods, localised agriculture, or even cities. This could be done without the footprint required by a wind farm or other sustainable power sources. In the future, such models which encourage local self-sufficency will be increasingly important as communities future-proof themselves against the impacts of climate change.



RAMMED EARTH HEALTH HUB, WESTERN

Leveraging the Trend Provocations for Property Professionals

Is micro-ecology the future of reducing carbon in our cities?

The use of mycelium bricks and air-purifying moss panels are part of a wider movement that goes beyond planting trees to 'green' a development. This wider view recognises other parts of our ecology as equal players in reducing carbon in our cities and regenerating the quality of our flora. Co-founder and CEO Peter Sänger at Green City Solutions GmbH confirms that micro-ecology matters, telling us that: "it's a symbiosis of habitat, flora and fauna. Mosses help the resilience of trees flourish."

Increasingly, the building industry has a role to play in continuing to integrate ecology into its construction techniques to improve urban quality of life.

Further Inspiration:

- Automorph: A collective of designers, physicists, and architects developing shape-shifting materials
- Green City Solutions GmbH: Moss-panelled construction technology
- Respyre: Upcycled, bioreceptive concrete with moss coating, Amstelveen
- Cool Roofs: Heat-reducing paint, New York City



CITY TREE BY GREEN CITY SOLUTIONS

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ABOUT BRICKETELDS

Brickfields Consulting specialises in evidence-based strategies empowering our clients to deliver successful places.

We deeply understand our clients' customer, and the trends driving them, to unlock the true value of place. For over a decade, we have been translating customer insights into strategies that enable our property clients to exceed customer expectations.

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