

THE FUTURE OF THE MALL

A DESIGN EXPLORATION

CREATED BY TECHNOLOGY DISRUPTED BY TECHNOLOGY

THE AUTOMOBILE CREATED MALLS

Will the pandemic and e-commerce change them forever?



THE CAR VS. THE CLICK

In the 1950's, a post-war economy and advancements in automobile engine power and design made it possible for everyone to own a car, drive to a centralized location and load up on goods from multiple retailers - the mall.

Now technology is enabling another shift that is changing the way we shop.

THE MALL IS FACING A DAY OF RECKONING

Car ownership is declining. E-commerce, already on the rise before COVID, is skyrocketing. Where people live is in a state of flux. In many places, malls have barely been open to the public for close to a year.

Malls were under pressure before COVID. What does the future hold for this institution of North American retail?



We asked our designers to explore the future of the mall. In our first design, we look at best-in-class examples of how malls have coped with pandemic disruption. However, the second and third explore how the mall could be reimagined based on two key trends: permanent social distancing and the work from home trend becoming the new normal, respectively.

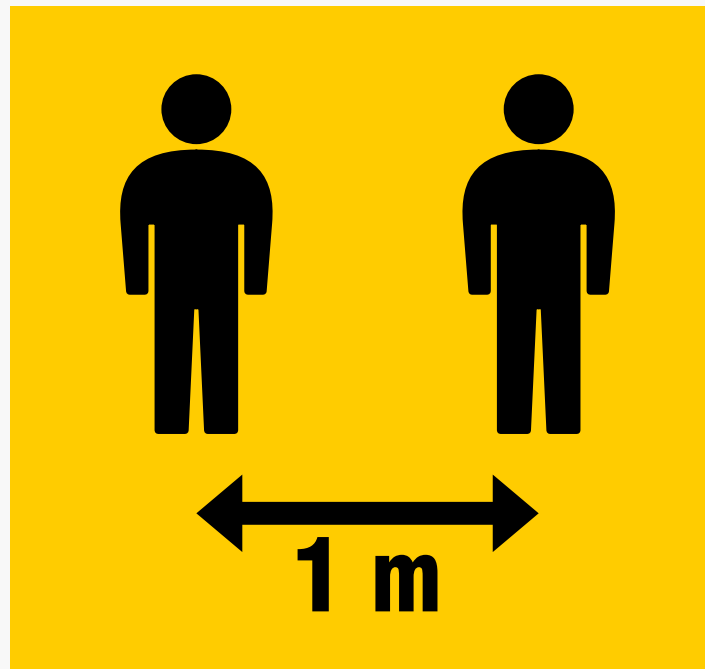
THE TEMPORARY COVID MALL

Making the most of existing space



PERMANENT SOCIAL DISTANCING

What if pandemics become common?



WORK FROM HOME

How could this impact malls?





WHY REIMAGINE MALLS?

Malls have long been the predominant shopping channel in North America. We have more real estate space dedicated to malls than any other place in the world and these investments are now facing disruption. Rather than raze them to the ground in a knee-jerk response, we wanted to explore whether the development of current trends could result in a reimagined mall experience that addresses emerging customer needs.



CONCEPT 1

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THE COVID MALL EXPERIENCE: MAKING THE MOST OF OUTDOOR SPACE

INFORMATION TO BUILD CONFIDENCE & AWARENESS

Best-in-class approaches to managing COVID have included thinking about alternative uses for outdoor space, strong visual cues to guide consumers, and temporary structures that catch the eye and provide a sense of place.

This concept explores temporary solutions that address present challenges.



THE COVID MALL EXPERIENCE

Key Customer Needs

SAFETY

Safe distancing, security and open air



NEW NAVIGATION

Wayfinding through the new journey



SENSE OF NORMALCY

Enjoyment in spite of challenges



GUIDE THE CONSUMER

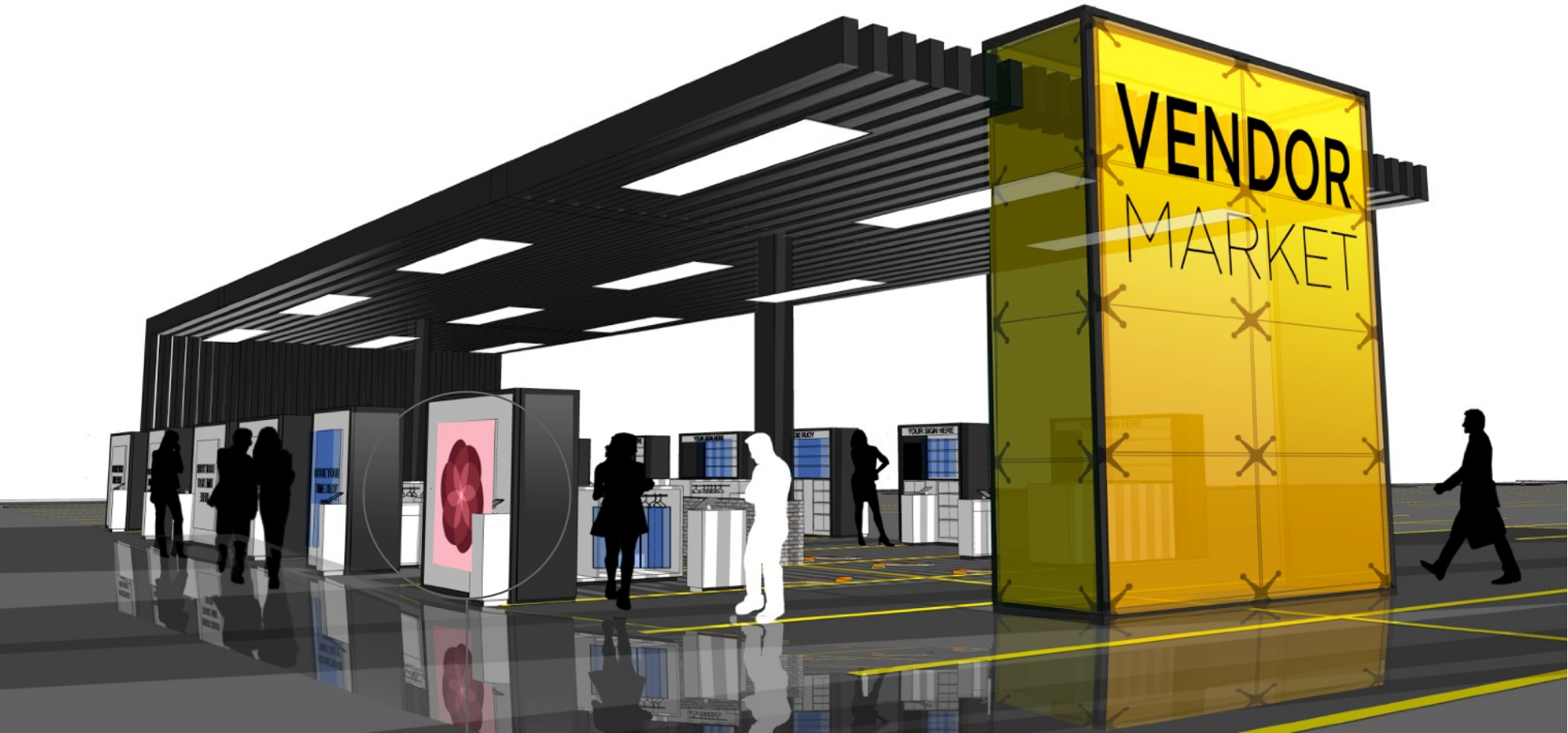


A new experience requires malls to help guide the consumer through the journey.

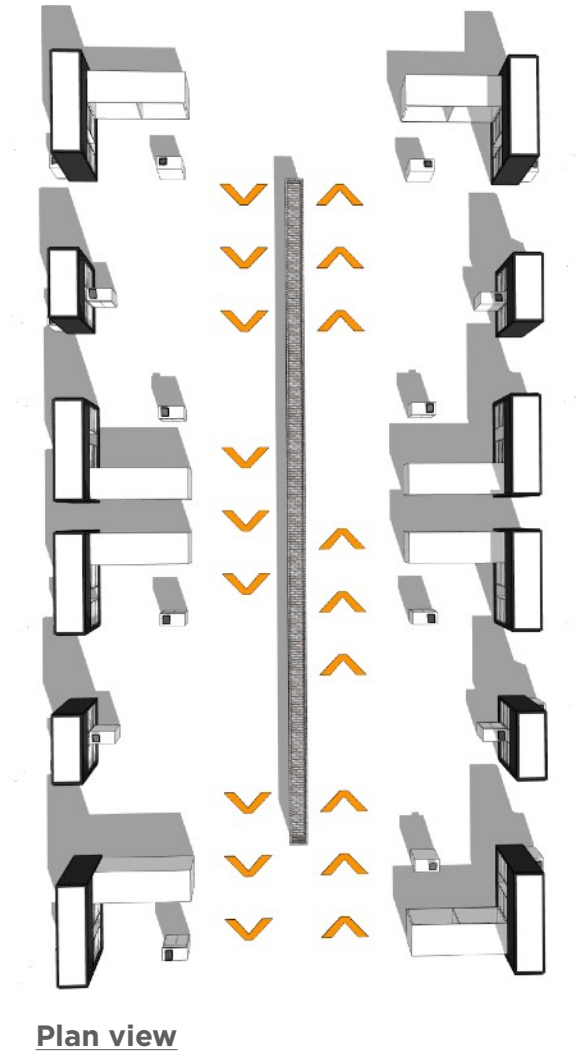
- Smart INFO pylons leverage the mall app to help guide the customer and to promote events.
- The INFO kiosk programs a safe route, creates appointments and shares a map to your phone.
- It also features a UV sterilizer for items such as bags, wallets and mobile devices.



OUTDOOR MARKET



An outdoor market allows the mall to capitalize on under-utilized parking areas. This COVID friendly open air environment lets guests shop a curated offering without going into the mall.



Plan view

The standardized outdoor footprint creates a shopping environment with defined entry and traffic flow.

BOPIS & CURBSIDE ACCELERATION

208%
increase in
BOPIS
YOY 2019 - 2020

110%
increase in
online
grocery
sales

52%
increase in digital
sales for US
retailers offering
BOPIS

High shipping costs
#1 reason for
cart abandonment

90%
increase in pay
now buy later

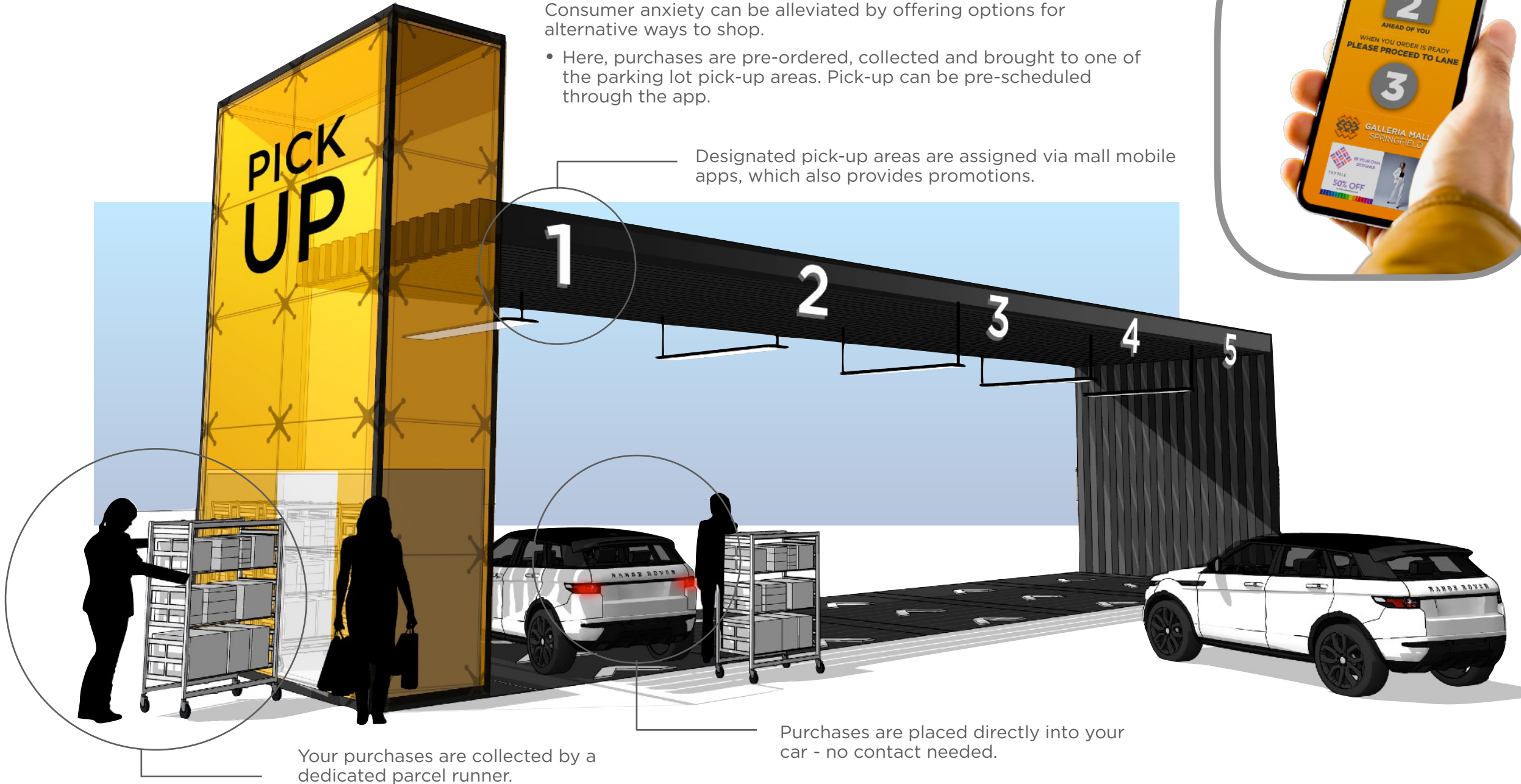
41%
increase in
subscription
enrolment

SUPERIOR CURBSIDE PICK UP

Consumer anxiety can be alleviated by offering options for alternative ways to shop.

- Here, purchases are pre-ordered, collected and brought to one of the parking lot pick-up areas. Pick-up can be pre-scheduled through the app.

Designated pick-up areas are assigned via mall mobile apps, which also provides promotions.



Your purchases are collected by a dedicated parcel runner.

Purchases are placed directly into your car - no contact needed.

PERSONAL SHOPPING VALET WITH IMPULSE OPPORTUNITIES

A Mall Valet fleet will pick up your entire order from multiple or single stores and deliver to your home. Real-time tracking via the app lets customers ensure they are home for their delivery window. Additional impulse products are also carried by the Mall Valet such as batteries, cleaning products and daily staples.



Source: Metro St Louis



SAFETY NAVIGATION NORMALCY

Concept 1 Review

During COVID, malls, business areas and other shopping zones have taken a wide range of approaches to address consumer needs. Not all of the best ideas have come to fruition. Senior Designer Amanda Olfati considered what may be most helpful if we find ourselves temporarily locked down again in the future.



CONCEPT 2

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**WHAT IF SOCIAL
DISTANCING
BECOMES MORE
PERMANENT?**



COULD THIS HAPPEN?

Although it is likely that eventually the current pandemic will subside, it may take longer than anticipated and does not preclude future pandemic disruption.

Our closer physical proximity to livestock and wild animals as well as global population density and travel mean that pandemics may become more common in the future. If that happened, what could malls look like?

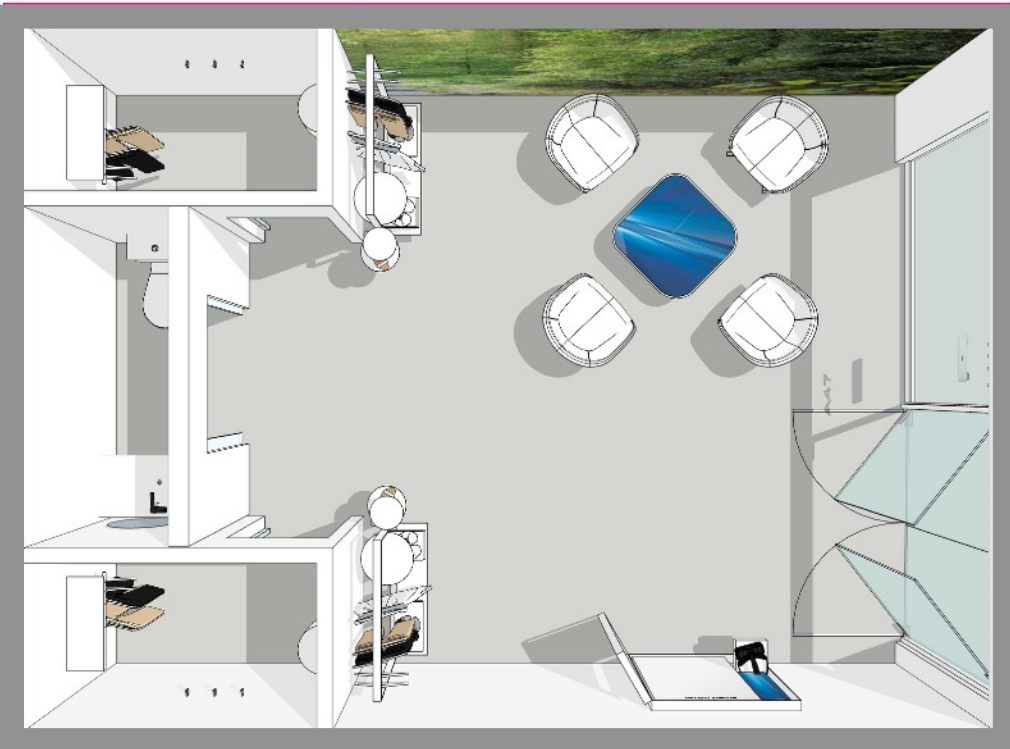
WOULDN'T MALLS ALL BECOME WAREHOUSES? THE DISTRIBUTION CENTER PROBLEM

Although there is a lot of talk about converting malls to warehouse/distribution centers, there are some snags. Though it's not impossible, it's not the magic pill many are looking for. Here are some of the key roadblocks to retrofitting malls as industrial warehouses.

- **CONVERSION:** Building requirements for malls do not allow for heavy industrial use, requiring significant investment to convert.
- **REZONING:** Malls close to residential areas are harder to re-zone due to community outcry and political reluctance.
- **TRAFFIC:** Industrial truck traffic will need sufficient access.
- **LOSS OF VALUE:** Converting a mall to an industrial site reduces its real estate value significantly.
- **MIXED USE CHALLENGES:** Creating a space where a portion of the mall is focused on distribution and the remaining portion is retail can be tricky to get right without negatively impacting foot traffic.

PRIVATE CONCIERGE MALL EXPERIENCE

By replanning the space and creating numerous small pods where consumers can view products, try on apparel, enjoy food and beverages, and be entertained, the mall becomes a safer destination offering a highly personal, customized experience.

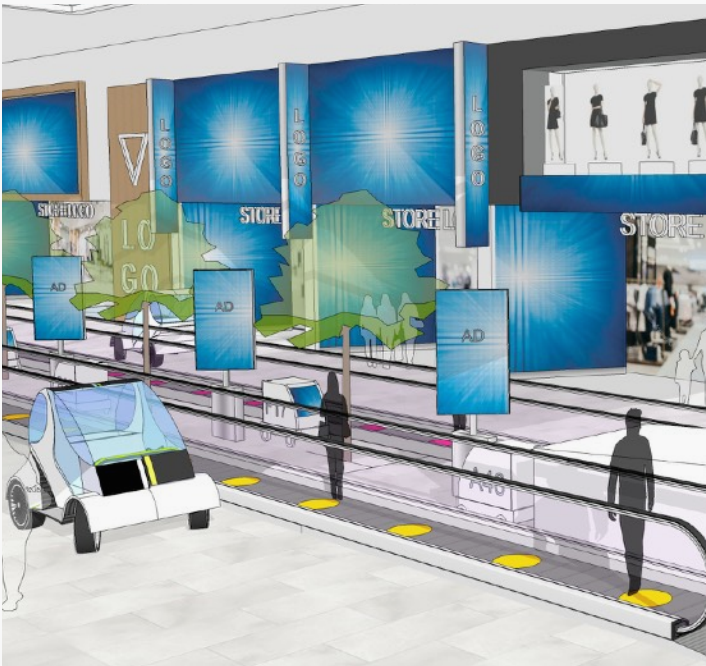


THE PRIVATE CONCIERGE MALL EXPERIENCE

Key Customer Needs

EASY SAFETY

Staying safely distanced conveniently



CUSTOMIZATION

Digital enables a personal experience



A LOT OF JOY

Getting out is hard - it better be worth it



SOCIALLY DISTANCED MALL SCHEMATIC

ROOFTOP
The outdoor space could be utilized for a variety of purposes:

- Dining pods
- Garden
- Playground
- Outdoor market & entertainment

**3rd FLOOR/
ROOFTOP**

2nd FLOOR
On the second floor, an automated concierge service delivers products right to your own pod:

- Private shopping pods – various sizes
- Personal car parking & charging
- BOH store inventory warehouse
- Robot concierge services & virtual shoppers

BOH

**2ND FLOOR
SHOPPING PODS**

CIRCULATION

- Moving walkways (horizontal)
- Mini electric cars
- Ramps & glass elevator pods carry cars & people between floors

Anchors

**1st FLOOR
RETAIL**

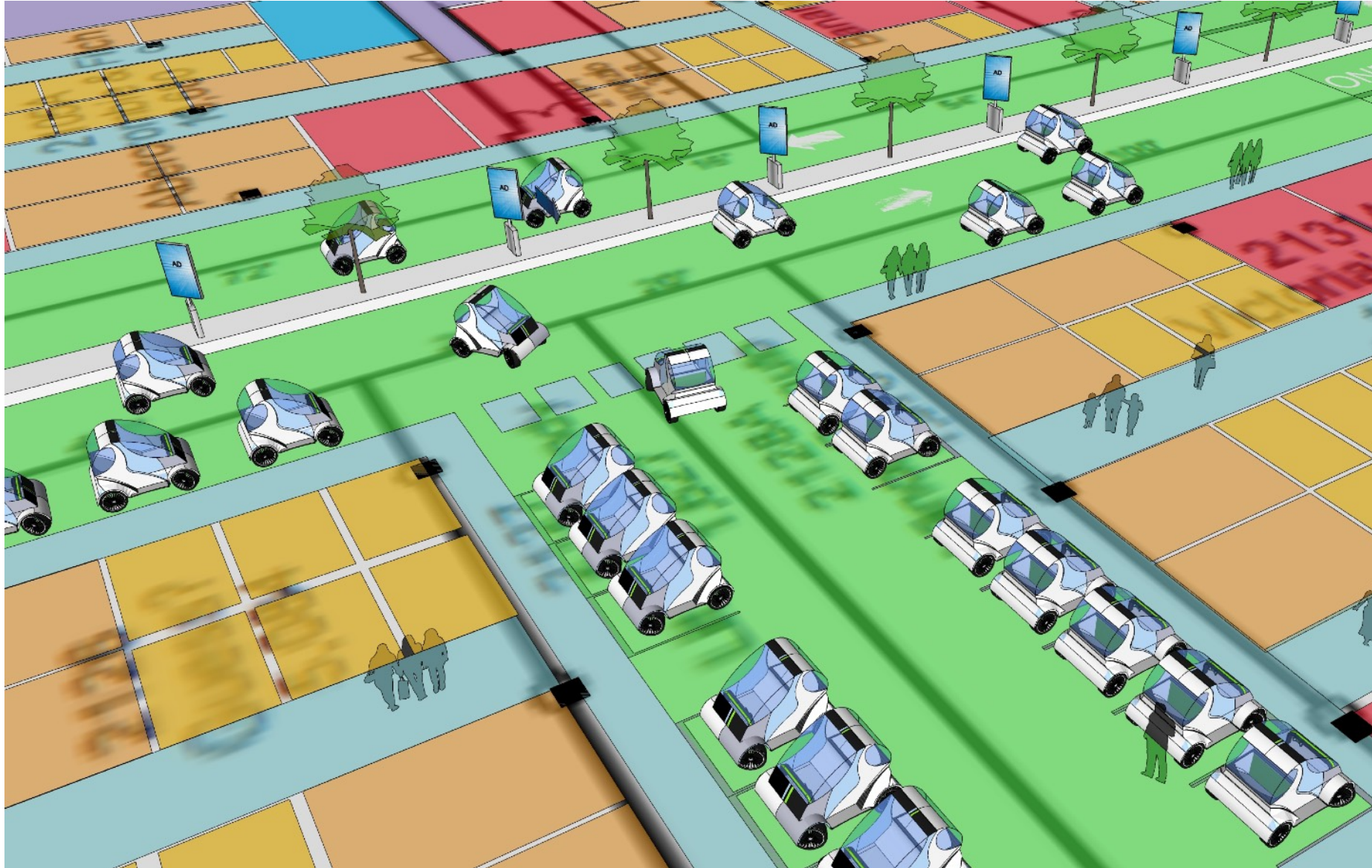
FEATURE

1st FLOOR
A digital window shopping journey uses AR to create an engaging gallery type space:

- Retail Stores – 50% digital windows
- New indie popups
- Tailor-made kiosks
- Shopper-tainment

- Drive-in immersive entertainment (changing installations)
- VR gaming

SHOPPING PODS – RETROFIT STORES ON 2ND LEVEL



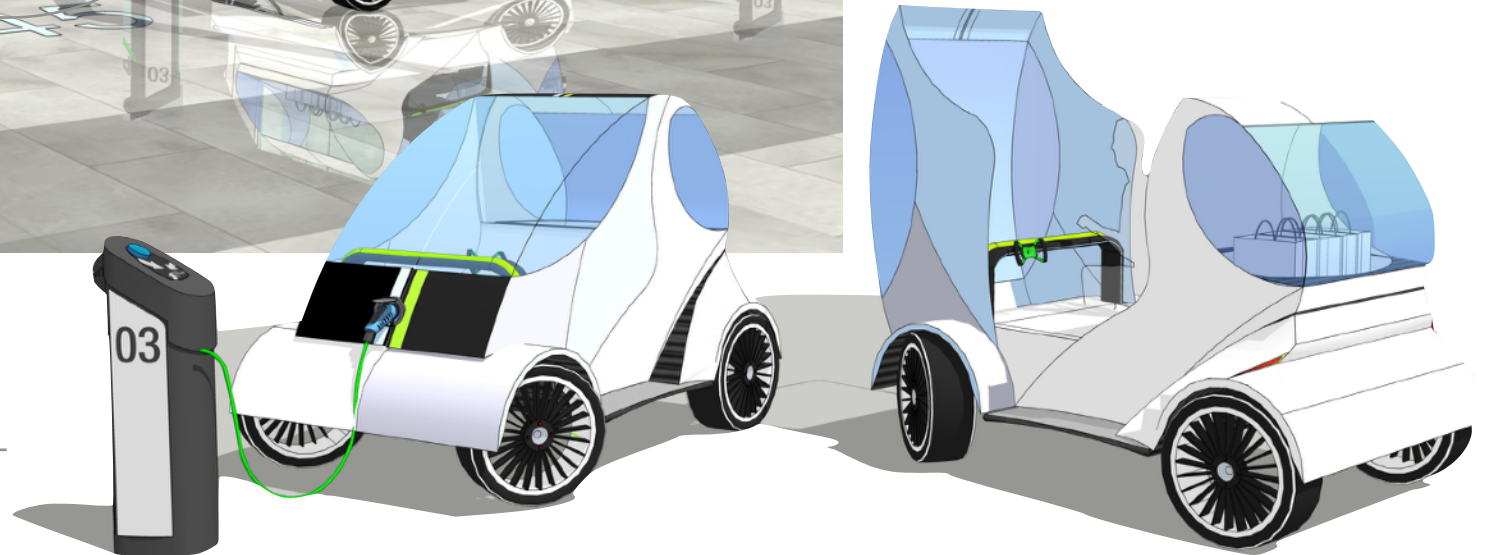
In our retrofitted 2nd level, customers can book a pod in advance and visit on their own to relax or enjoy social time with people in their bubble.

- Self-driving mini vehicles help people stay safely apart.
- Every pod has a robot runner and a mini car with a charger station. The runner will collect products and bring them to your pod.
- Concierge robots are shared within clusters with access to the BOH mall inventory warehouse and 3D printed food offerings.

PUTTING THE SHOPPER AT THE CENTER OF THE EXPERIENCE



Automated pedestrian and package delivery vehicles provide customers flexibility to shop remotely in in-mall shopping pods and have products delivered by way of self-driving electric vehicles.



THE POD EXPERIENCE



ENGAGE



EMPOWER



IMMERSIVE EXPERIENCE

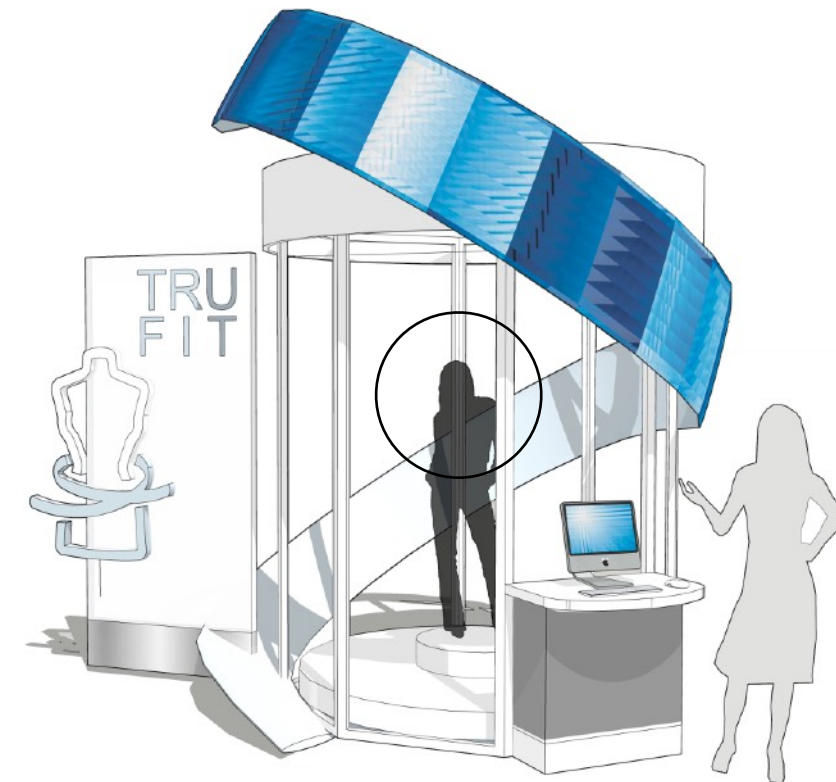
ASSIST





MAKE

Pre-select desired elements from catalogue and have them fabricated and personalized for immediate purchase.



MEASURE

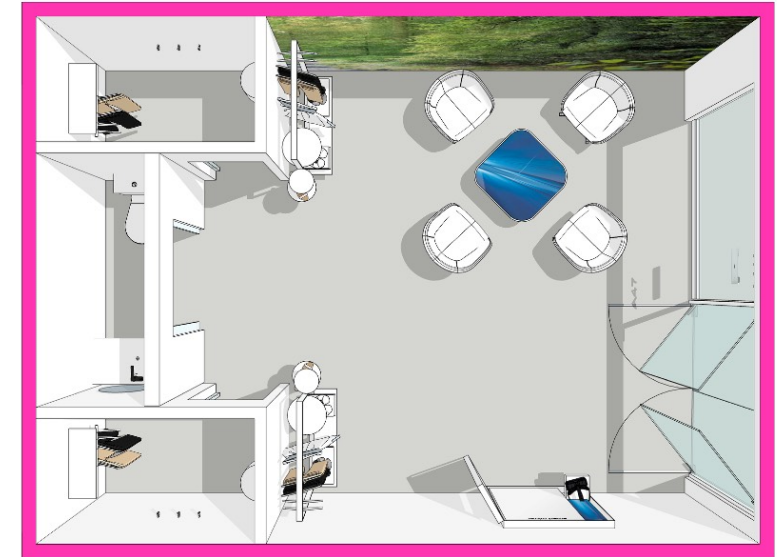
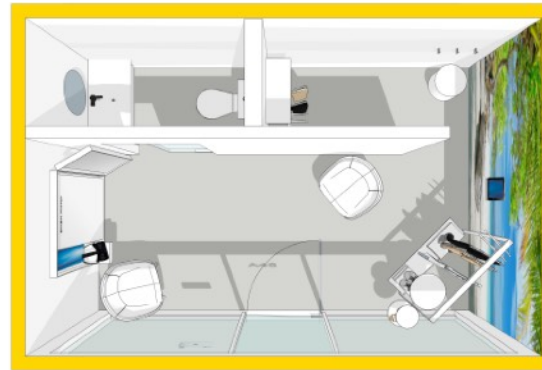
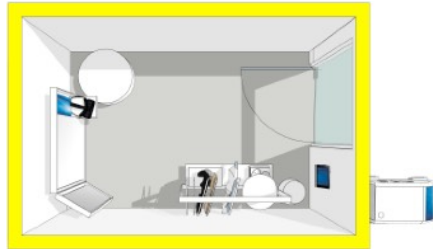
Leverage body scanning to reduce time spent finding fit.

RECOGNIZE

Curate the customer offering based on their wants and needs. Leverage their data with transparency to provide solutions they want.



SHOPPING PODS - SIZES



SINGLE POD 7'-4" x 10'-6"

- Smart mirror
- Closet 'Locker'
- Tablet & VR headset
- Room Controls & sanitization
- Hooks for personal items
- Ottoman seat
- Glass door (smart privacy)

DOUBLE POD 16'-0" x 10'-6"

- Smart mirror
- Closet 'Locker'
- Tablet & VR headset
- Room Controls & sanitization
- Private fitting room w/ hooks for personal items
- 2 pc Water closet
- 2 Chairs
- More glazing (window) & door

VIP / GROUP POD 16'-4" x 22'-0"

- Smart mirror
- x2 Closet 'Lockers'
- Tablet & VR headset
- Room Controls & sanitization
- x2 private fitting rooms
- 2pc Water closet
- 4 Chairs & smart table
- More glazing (windows) & door

SOCIALLY DISTANCED MALL SCHEMATIC - GETTING AROUND

Malls have an opportunity to reimagine how guests shop while being able to social distance. Self-driving electric cars transport guests to stores for pre-scheduled appointments, maintaining store optimal occupancy loads via realtime customer data. Large digital screens update to reflect current shopper preference or interests. Dedicated lanes for people movers and vehicles ensure constant flow without congestion.



EASE CUSTOMIZATION JOY

Concept 2 Review

In this scenario, finding ways to allow people to have a fun experience out of the home (while minimizing the negative impacts of social distancing) led Senior Designer Julia Morgan to consider a highly customized experience that allows everyone to be a VIP.



CONCEPT 3

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**WHAT IF PANDEMIC
ARE A NON-ISSUE
BUT WORK-FROM-
HOME BECOMES THE
NORM?**



COULD THIS HAPPEN?

The benefits of working from home at least on a part time basis have become overwhelmingly undeniable, while the drawbacks employers feared have largely been proven unfounded. There are many reasons a shift to WFH is almost inevitable.

A greater work/life balance, rising cost of housing, climate change, increased traffic, increased productivity and cost of office space are key factors that will drive this trend post-COVID.



SMALL, LOCAL, MODULAR FOOTPRINT

In this version of the future, the “destination mall” is replaced by smaller hubs that serve a variety of communities.

Our vision of the mall in this future is one that allows for easy change to address local needs through modular transportable store components. The regular refresh of brands and offerings increases consumer interest in repeat visits and allows brands to be highly localized in approach.



THE LOCAL MODULAR MALL EXPERIENCE

Key Customer Needs

ACCESSIBLE

Walkable, bike-able, quick transit



DISCOVERY

Relevant offerings that update frequently

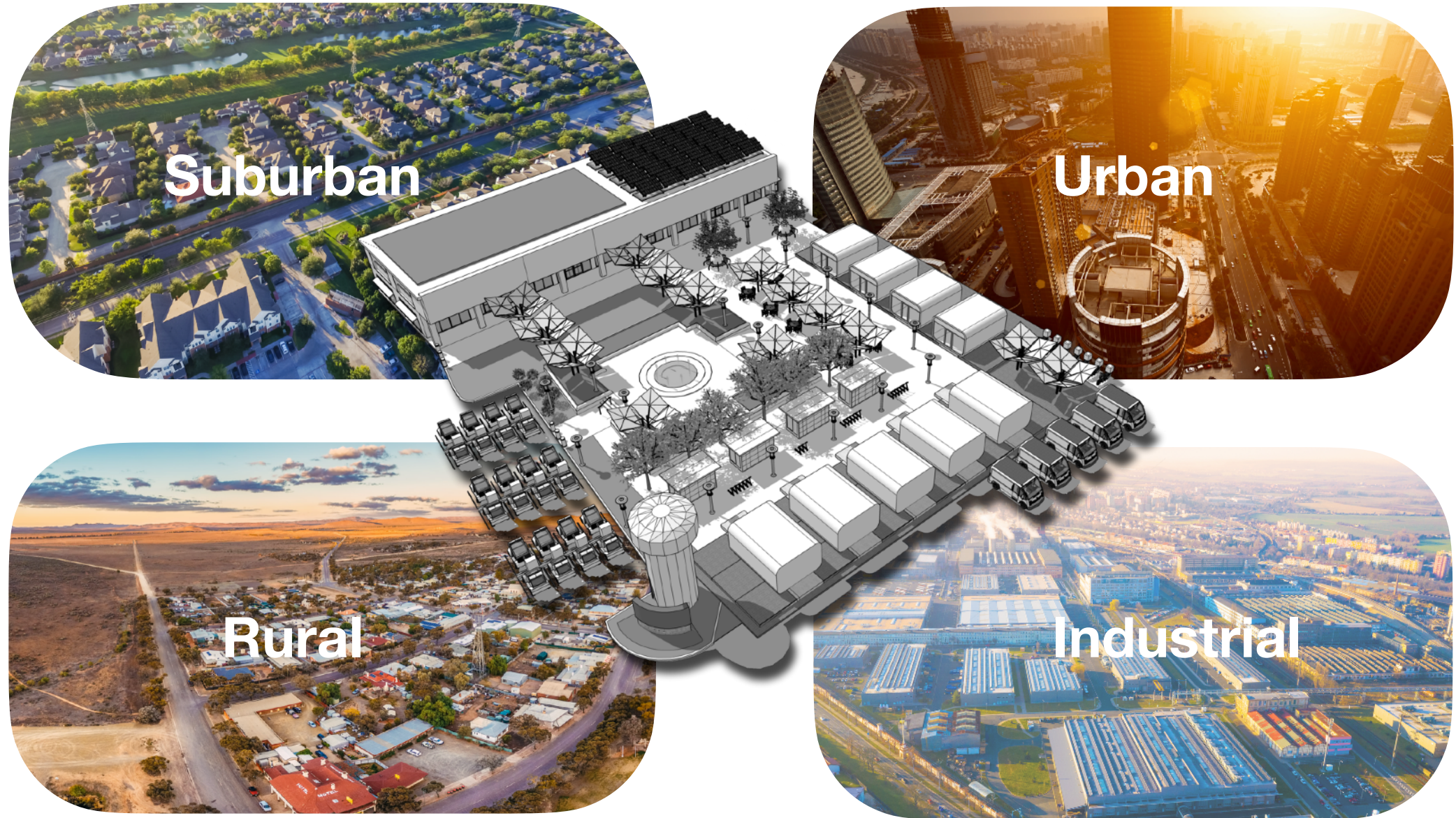


COMMUNITY

Reflects our values



MICRO MODULAR MOBILE



The flexibility of this concept allows it to fit anywhere with a customized offering to meet local needs.

DESTINATION MALLS ARE OUT, NEIGHBOURHOODS ARE IN

17%

increase in cost
of residential
real estate in
2020

\$7.25

US Federal
Minimum wage
- unchanged
since 2009

13 million people
in the US to be
displaced by
climate by 2100

**121% increase in
median home prices
since 1960**

**29% increase in median
household income**

**900,000
people in the
US displaced
by climate
events in 2019**

40%
of urban
dwellers in the
US said they
would consider
moving to less
populated
areas

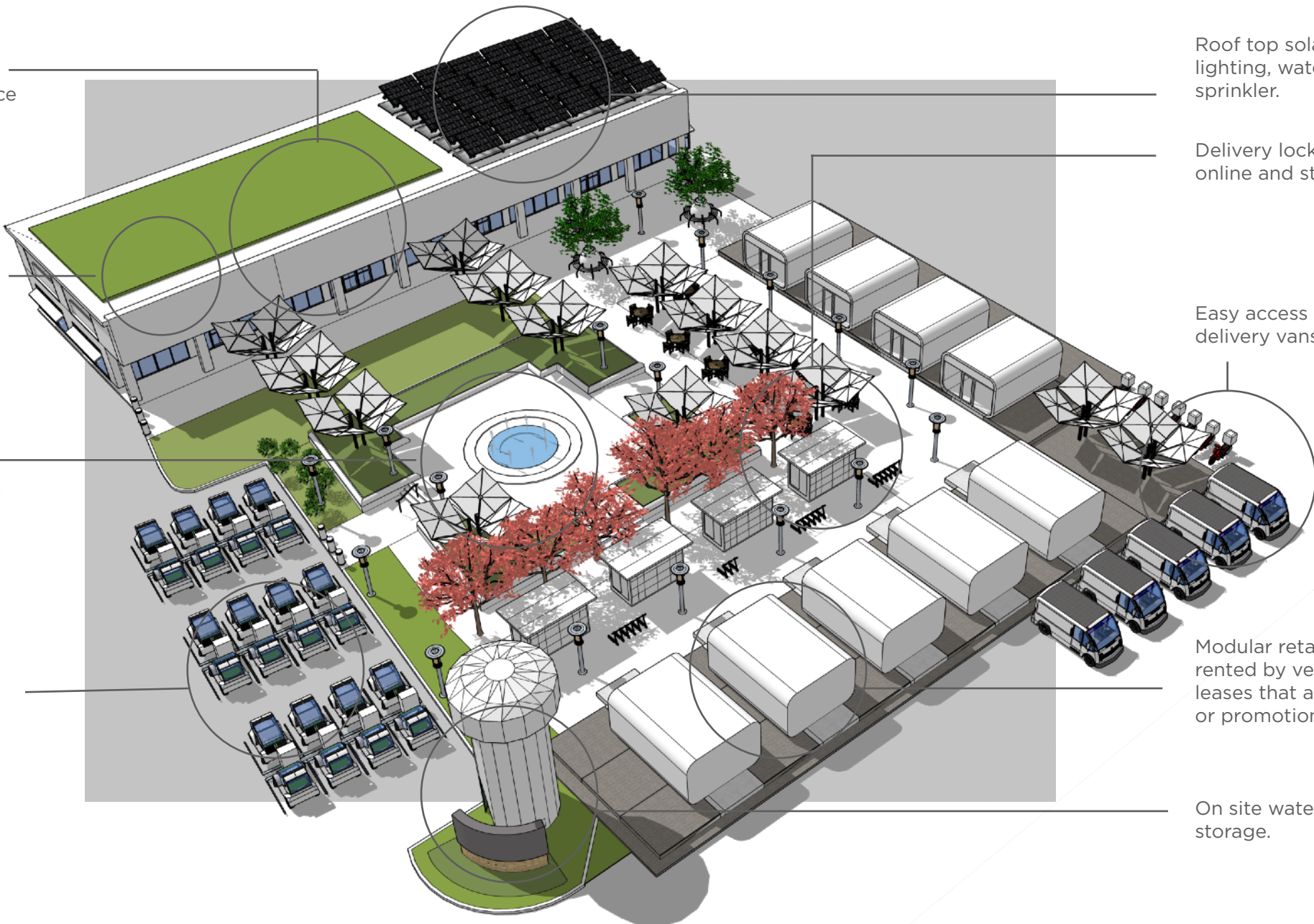
MICRO MODULAR MOBILE

With the cost of real estate ever increasing, this concept utilizes a smaller footprint with modular vendor areas to offer experience retail at a neighbourhood scale.

Tenants have the flexibility to sign micro leases, allowing for a much shorter occupancy. The modular design allows vendors to easily rotate in and out of the mall (think like a pop-up).



MICRO MODULAR MOBILE



Main building has large rentable community space and a flexible retail floor space that can be easily subdivided.

Green roof community garden.

Open park acts as social gathering hub, water feature and performance space.

Smart car parking and charging.

Roof top solar panels power lighting, water collection and sprinkler.

Delivery lockers facilitate online and store purchases.

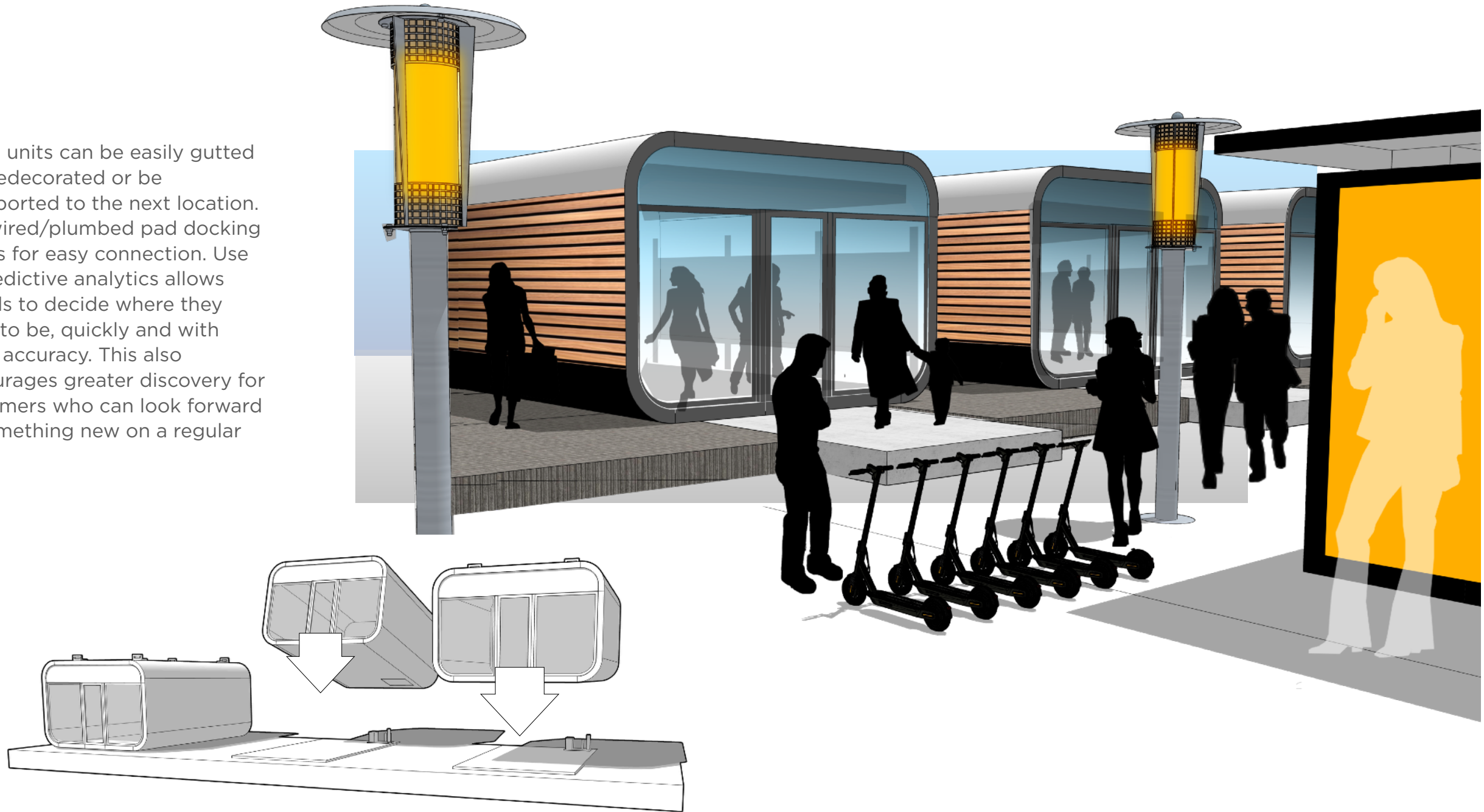
Easy access parking for delivery vans and bikes.

Modular retail store can be rented by vendors for micro leases that align to seasonal or promotional calendars.

On site water collection and storage.

MICRO MODULAR MOBILE

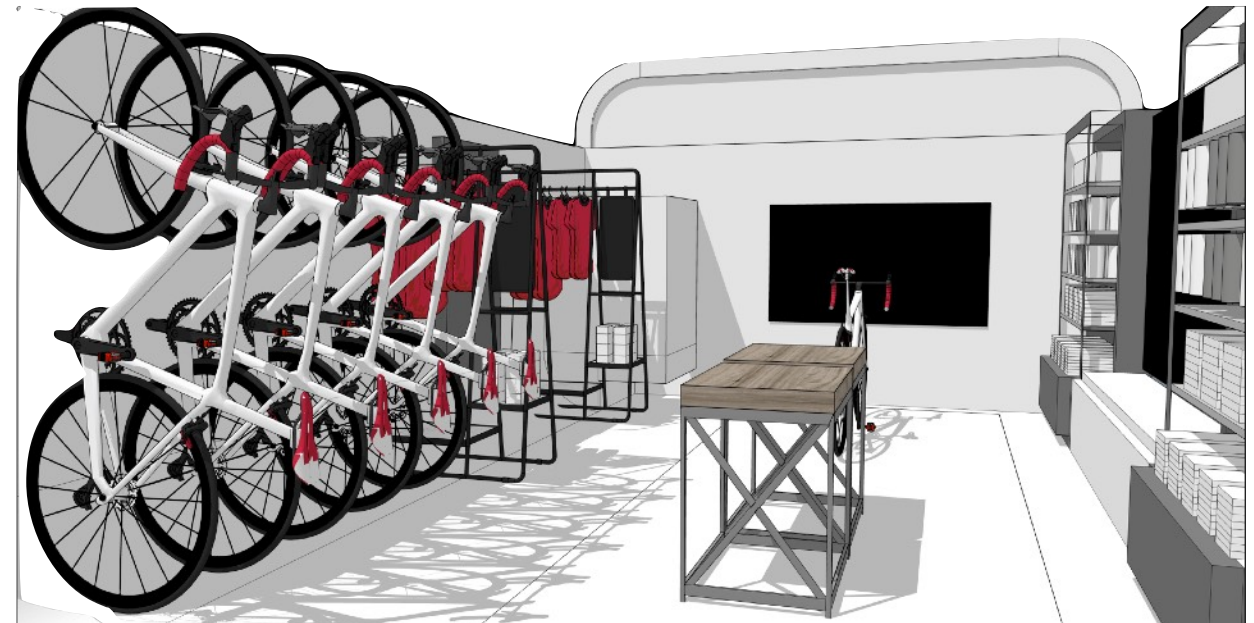
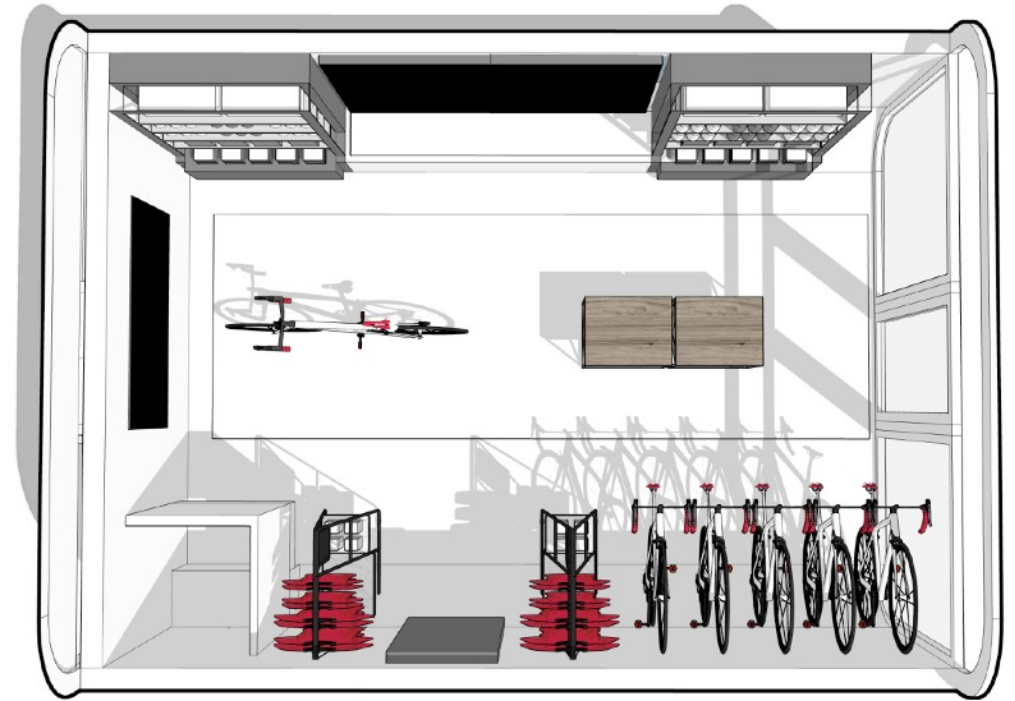
Retail units can be easily gutted and redecorated or be transported to the next location. Pre-wired/plumbed pad docking allows for easy connection. Use of predictive analytics allows brands to decide where they need to be, quickly and with great accuracy. This also encourages greater discovery for customers who can look forward to something new on a regular basis.



INFINITE OPPORTUNITIES



Modular retail units can be easily fit out to accommodate a variety of retail experiences. This smaller footprint allows for a more intimate brand experience.



DELIVERY & STORAGE LOCKERS

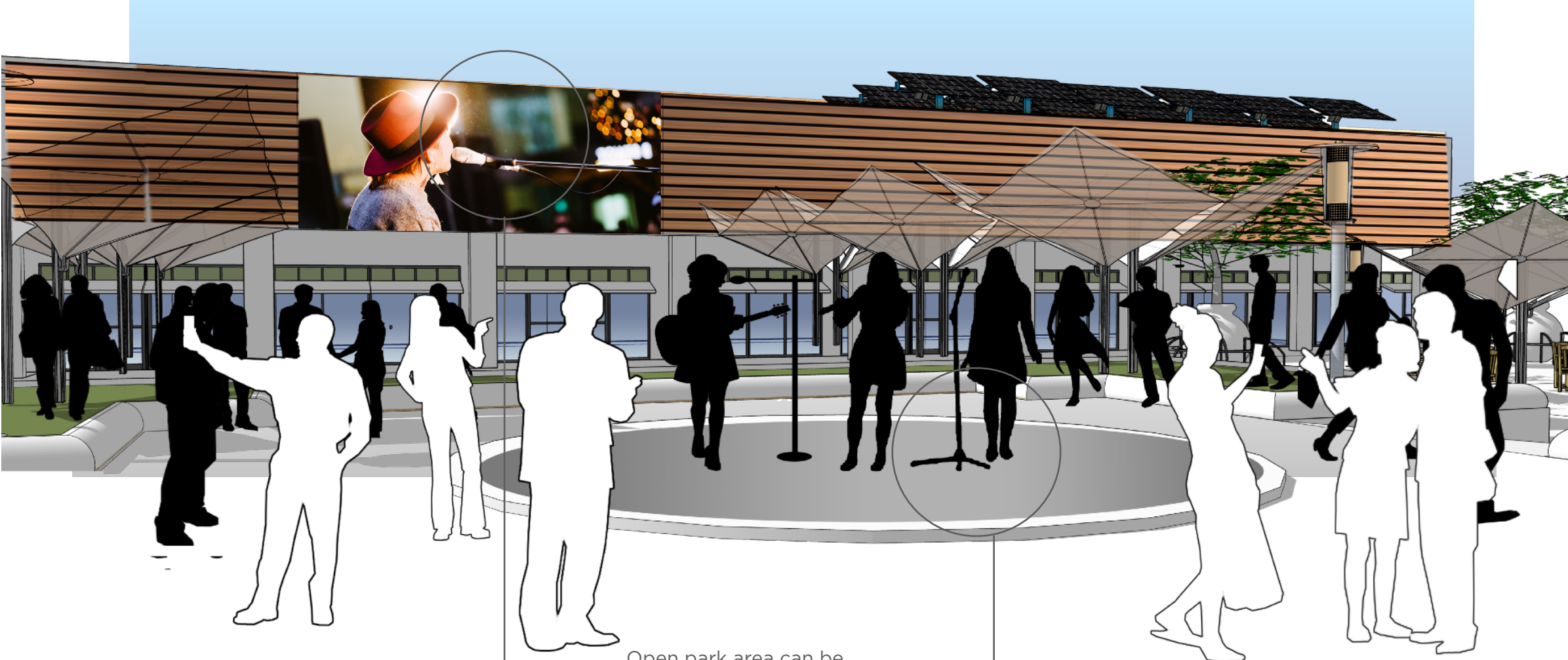
Delivery lockers allow shoppers to pick up their purchases when they choose. They can also act as additional warehouse space for stores.

Customers can use the mall app to find their delivery locker.

The mall is a hub for rentable bikes and scooters which feature charging and repair stations.



MICRO MODULAR MOBILE OPEN PARK



Integrated digital screen can show a variety of content to support music performances, movies and social gatherings.

Open park area can be customized for music, social events and meetings based on community offering.

ACCESS DISCOVERY COMMUNITY

Concept 3 Review

In this scenario, occupying smaller spaces with a more flexible branded experience allows for walkable community malls. Creative Director Sharon Eugene did not want to force consumers to travel outside their immediate neighbourhood to a central location in this scenario, but also wanted to ensure discovery was a major feature of the concept.

IMAGINING THE FUTURE HELPS US INNOVATE AND BE PREPARED FOR DISRUPTION

We can't predict what will happen, but we can explore what is possible.

At SLD we believe firmly in taking a future-focused approach to design. What does that mean? It means scanning trends for indications that a dynamic shift may be coming. It means imagining problems we don't have yet and then solving them. It means exploring multiple futures that could unfold to stretch our thinking uninhibited by present conditions. When we do this, we sometimes hit upon a solution for a challenge we have today, develop a new approach that could be a game changer, or prepare ourselves for a scenario that could have major impact in the future.

THE DESIGN TEAM

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