

EXCHANGE

Issue No. 2

Retail

Perspectives on

the future of

design across

different sectors

make

Contributors

CARA BAMFORD, a Partner at Make, is working with clients on a range of mixed use and retail destinations from Make's Sydney and London studios.

ERIN BOOTH, Head of Beauty and Retail Investments at Founders Factory, is tasked with finding the next generation of retail brands.

TOR BURROWS, Director of Placemaking at Grosvenor, is working on the evolution of Grosvenor's place-making strategy in the West End, which dates back to the 1720s.

JAMES CHASE is a Make Partner working with Vicinity Centres in Sydney to see how a flagship centre can diversify its offering.

ISABELA CHICK, Managing Director of Founders Factory Retail, runs an accelerator business finding the next generation of retail brands.

ALBERT CHU, National Director at TH Studio Shanghai, is a retail expert working with developers to deliver mixed use schemes across China and Hong Kong.

LAURA FERNIE, Senior Commercial Asset Manager at TFL, is looking after the delivery of TFL's White City arches project.

KATY GHAREMANI is a Director at Make, and oversees international architecture and interior design projects spanning many sectors, including retail.

RACHELE GODRIDGE, General Manager Consumer & Retail Operations at Vicinity Centres in Sydney, has been involved in the retail sector for her entire career.

PETER GREAVES, a Partner at Make's London studio, works closely with the Future Spaces Foundation, an in-house think tank that explores how the built environment can positively impact on communities.

GRIGOR GRIGOROV, a Partner in Make's London studio, is project architect on Make's portfolio of projects for Harrods. In 2018 he presented with Ralph Ardill at REVO on the future of shopping centres.

JAKE HARDY, founder of Number Six, is a London-based entrepreneur who runs

two retail spaces in the capital.

EMMA HINDES, General Manager of Westfield, has been involved in Westfield London's Phase 2 expansion.

IBRAHIM IBRAHIM, Managing Director of Portland Design, has some interesting and provocative views on the future of retail.

JEFF KINDLEYSIDES, founder of Checkland Kindleysides, works with leading retail brands, including adidas and AE Studio.

ALEX MCCULLOCH, Director of CACI, works with retailers and landlords to use data to inform future retail strategies.

KATERINA MERCURY, Central London Senior Asset Manager at The Crown Estate, is responsible for helping modernise the West End.

ALFRED NG is Studio Manager for Make's Hong Kong studio and conducted the vox pop interviews at The Mills, finding out first-hand why people choose to shop there.

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“This edition combines interviews and essays from leading developers and consultants, as well as ideas and analyses from our own team.”

Welcome

When we launched Exchange in 2018, the aim was to explore the trends and challenges the built environment industry is facing. We wanted to lean into each sector and look at the overlaps, the opportunities, the geographic differences and similarities, sparking a dialogue.

This is our second edition, and the focus is retail. We've brought together some brilliant thinkers, retailers, clients and consultants, and in these pages you'll find real food for thought.

As with Issue No. 1, which focused on workplace, this edition combines interviews and essays from leading developers and consultants, including Vicinity and Westfield, as well as ideas and analyses from our own team.

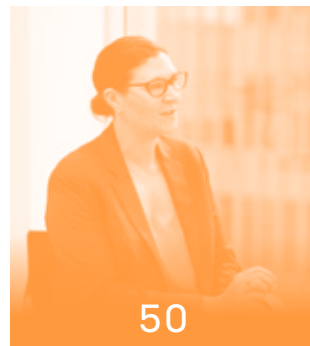
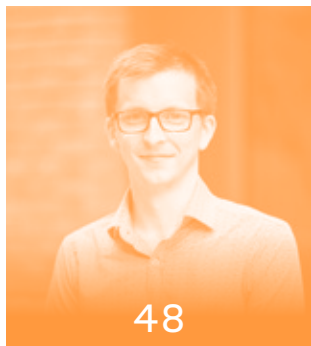
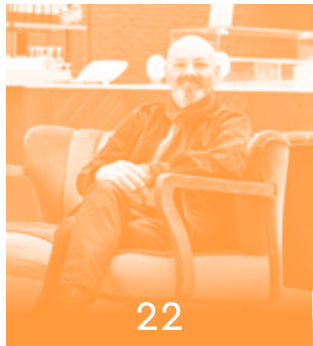
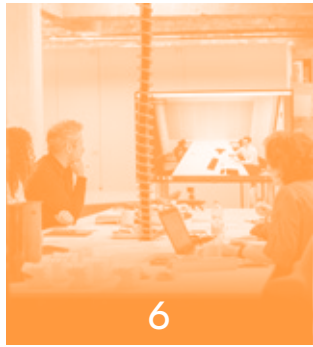
The retail sector is in tremendous flux, with major threats brought to bear from e-commerce, as well as the changing nature of how and why we shop. But of course with every threat comes opportunity. We hope this document will inspire lessons and ideas around the world.



Ken Shuttleworth
Founding Director, Make Architects

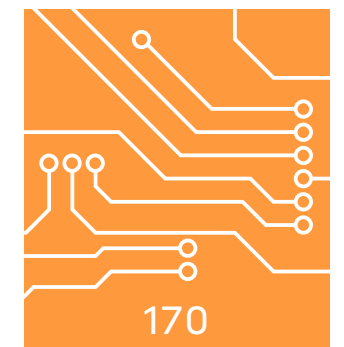
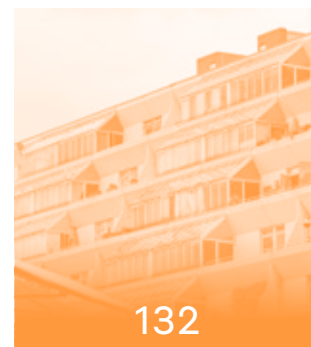
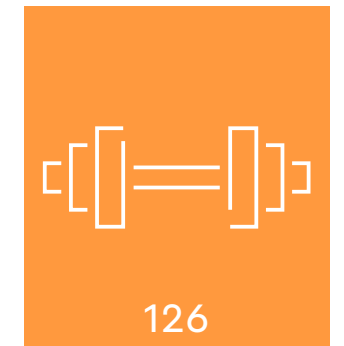
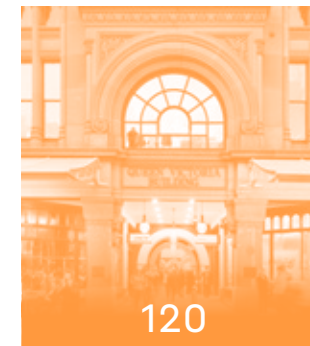
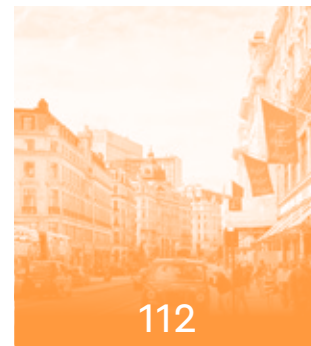
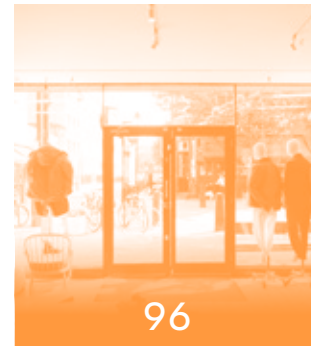
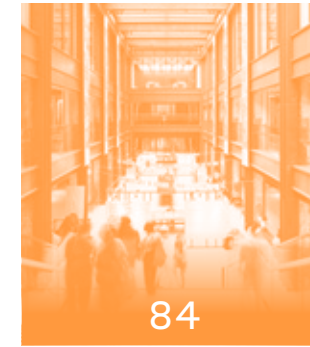
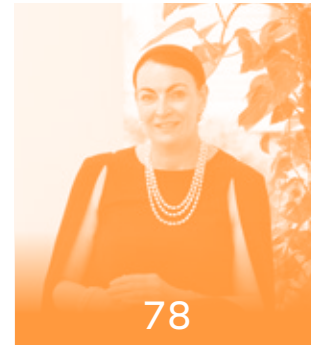
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MAKE ROUNDTABLE



Cara Bamford, James Chase, Katy Ghahremani,
Peter Greaves, Grigor Grigorov, Jack Sallabank,
Bill Webb, Sarah Worth

What does the future hold for offline retail, and how does the evolution of the retail experience influence how we design those spaces? Jack Sallabank chaired a roundtable with architects from Make's London and Sydney studios to explore the future of retail.

Jack Sallabank: Are we seeing the death of offline retail?

KATY GHAREMANI: No. I think it's a misnomer to think about offline versus online shopping, because even people who shop online still have a relationship with the physical store. We are going through an evolution, and offline retail is no longer just a place where transactions happen. Instead it's a place to build brands and consumer communities. I believe that offline retail has never been more important.

PETER GREAVES: It's an evolution, but it's a forced evolution. The story of retail used to be about how convenience is king. Now there are better, more convenient ways to get stuff, so you need to be offered more to actually go somewhere.

KATY: Matches is an interesting story. It started off as a shop in Notting Hill Gate, and it became

one of the first luxury shops to go online and in doing so became a massive online fashion retailer. Now it's gone back to physical retail and has taken a townhouse in 5 Carlos Place. It has practically no stock, and it's not about selling to you; it's about creating a very curated service. If you want to buy anything, they still order it online. The retailers that understand the evolution of retail in the way Matches has are the ones that will remain relevant.

CARA BAMFORD: It's about turning the shopping experience into an exhibition experience. I still want to feel the fabric on certain things. I want Debenhams to feel curated as opposed to a miserable, dour shop floor with things hung up unattractively.

Jack: What's the story in Australia?



JAMES CHASE: Tip to top, Australia is three times the length of the UK, and the separation between communities is much greater than in the UK. Also, there isn't the infrastructure in place, such as a strong postal service, to distribute goods and allow the likes of Amazon to build a business upon. As much as people want to be able to access things quickly, retailers in Australia can't fulfil that via online, so instead they challenge themselves and improve their shopping experience.

PETER: It's interesting that Amazon hasn't worked in Australia based on that one thing, which is not being able to deliver everywhere fast. That's all that online really offers – speed and convenience, which is only a small part of the retail experience.

KATY: I think we want to benefit from a range of retail experiences. We want fast, frictionless shopping for some things, but with others we

want a really personal experience. At one extreme you have craft-makers selling via DM on Instagram. They don't even have a website; you have to message them and have a conversation with the designer. We want all of it; it's not an either/or.

Jack: As designers, how do you respond to this change?

BILL WEBB: It liberates you. In my opinion, the reason why many retailers fail is they have so much stuff. What happens if they get rid of all of that? You let light in, you can have gardens, you can get people to stay for longer. If you can actually get rid of the product, you can create much nicer spaces.

KATY: For us architects, it's about making sure that spaces are designed to be as flexible as possible, because things are changing at such a pace that the best thing we can do from a sustainable development



point of view is make sure we have enough head height and the column grid is right.

JAMES: At bigger centres, individual tenants want the flexibility for further uses in their space, rather than a space just to sell a product. So, for example, they're going to need additional plumbing, as in the next ten years they may want their own coffee bar added in the space. We're building in that flexibility in the base build to future-proof their business and their future plans.

GRIGOR GRIGOROV: We're often seeing cases where you have to adapt existing spaces, such as car parks or disused industrial sites that no longer fulfil their original purpose, into retail spaces. What's important to us as designers is understanding how you can turn a car park that's hardly occupied into a space that can take thousands of people at one time.

Jack: How do we go about reimagining the UK high street?

PETER: Before the 1940s, high streets were mixes of civic uses, community uses and retail uses. People were going to these places to dwell and experience different things, and the retail was just one part of everything that was around. It's not going to work anymore to have high streets that are solely retail destinations. Instead we should consider bringing in other civic uses and other community uses.

BILL: The high street should be about self-care and the things you can't do online, such as hairdressers, skin care, nail bars, mental wellbeing, gyms. It seems to me that's where the future of the high street lies. It ties in nicely with the idea of civic space and looking after the community, and it provides places where we can meet each other.

KATY: I think a lot of the retail closures represent stuff no one really wants anymore, so why are we mourning it? The fact that they're going isn't a bad thing. In commuter towns we're seeing co-working spaces moving into empty retail spaces. This is a response to people being sick of commuting, and therefore we're seeing the rise of the 'metro-burb'. We need to think creatively about the uses of these spaces and make sure they're place-specific.

JAMES: When we talk to our clients, they want to bring experience back to a place because they want to bring people to the area and create a civic identity. The key is bringing people back to spend time together, and ultimately selling goods will come secondary to that.

KATY: We need to loosen up our planning uses on the ground floor. If a retail space has a gallery,

a coffee shop and a workspace, what type of space is it? We shouldn't be defining them. This is especially true for high streets. To allow high streets to evolve, we need to loosen up planning uses. Maybe we should have a use class which is actually about community and is not a specific use.

BILL: It's worrying that we've let so much of our civic identity on the high street as a nation fall into retail. It used to be the place of the church or the army or these big institutions, and now we have a void which needs to be addressed.

Jack: One of the challenges for retailers and landlords is understanding consumer trends. What do you see as the trends they need to be aware of?

BILL: The way our approach to hobbies has changed. What people do outside work is now almost semi-professional. People have



£10,000 bikes, and they go cycling every weekend. We have people at Make who make art, and they sell it, or they have their own website to sell jewellery. People don't just want a Saturday spent in the pub; instead they're doing a hobby which brings satisfaction.

JAMES: In Australia people are wanting to find different activities other than the norm, and lots of those involve meeting people or doing things that you wouldn't have done before. More often than not, things that historically wouldn't have been cool are now cool.

GRIGOR: Everyone is building their own idea of themselves on social media. Everyone has an idea of who they are and what their story is, and retailers have to plug into that and help people build their story. What people do in their spare time is about fulfilling these personal goals and the image they see of themselves.

KATY: A behavioural change we are seeing is competitive socialising, like Bounce or Flight Club. This is aimed at the younger generation, who have possibly lost the art of conversation, and therefore meeting and gathering around an activity helps get that communication up and running.

Jack: Who will be the future winners in offline retail?

GRIGOR: It will be the people who invest the time in understanding basic human needs and desires. That won't always result in having to sell a particular type of product. It will be the brands that hit a particular spot in that time and space that the general public can relate to. So I would say it's not about a particular type of store or space; it's more about understanding what people want, who you are serving and how you meet their objectives.



KATY: The winners will be those who treat retail as a service or amenity.

BILL: Selling has always been about aspiration. What do you want to be? How do you want to be perceived? We're going to help you be even closer to the people that you want to be. You used to aspire to have a big house and a big car; now it's not that cool, and it's about brands staying in line with what those aspirations are.

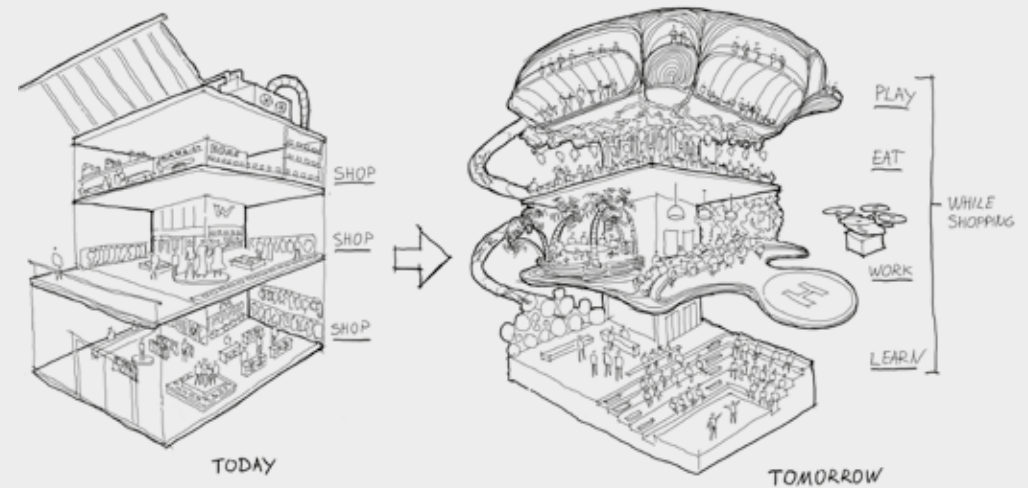
CARA: The winners will be those who can create places that get families in. It's not just about creating spaces for the extremes or the tribes, but also places which are the middle ground and bring the family in.

JAMES: Those mixed use developers who can take a holistic approach and programme to different parts of their spaces will be the winners.

PETER: The village pub is almost a microcosm of a lot of the things that we've been talking about. It was somewhere you went to socialise and meet people. They had competitive socialising with drafts and pool and skittles. They animated the space with events such as band nights and quiz nights. The business model was about getting people in and ensuring they stayed for a while, because when they're in they will spend money. That's a small-scale example of what these new retail spaces need to be.

MAKE MANIFESTO

At Make we believe retail plays a key role in improving cities and helping communities flourish. Here's a five-point manifesto explaining our approach to retail design.



ADAPTABILITY

Progressive retailers go beyond generic consumer profiles to target people's complex needs – whether that's to be entertained, to learn something or just be able to say “I've been there too.” As those needs change, the spaces where they're fulfilled need to be able to change too.

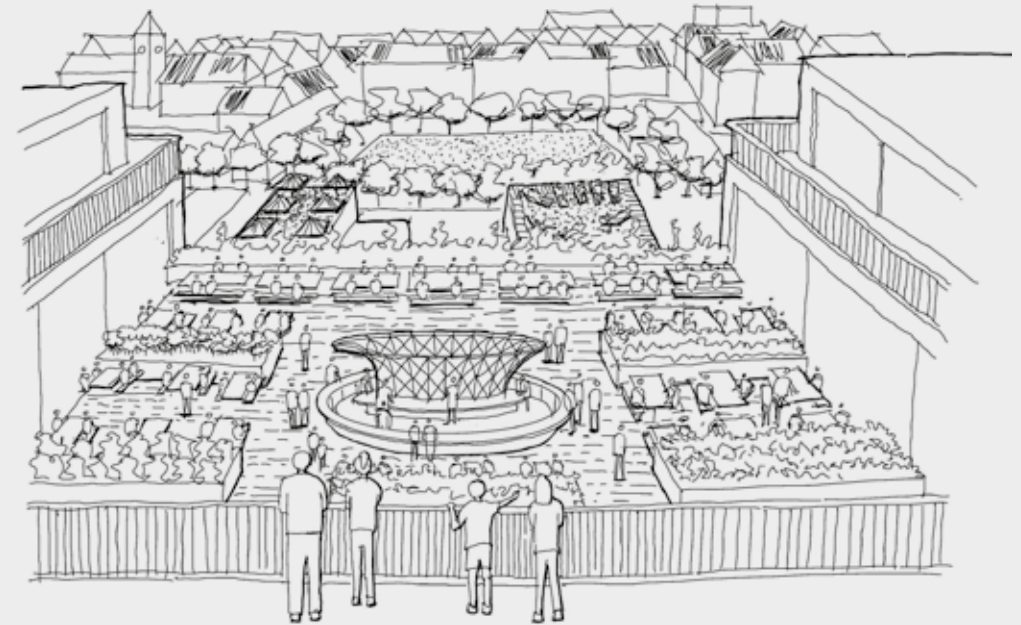
To make sure a space is flexible and adaptable for the future, we consider a number of factors. How can a space's occupancy be increased safely? Could it accommodate additional uses, like food production, manufacturing, events or large exhibits? Can we add floors above or below the building in the future?



MIXING USES

People undertake journeys to get to work, to socialise, to access goods and services. The more of those journeys a retail place can capture, the more time visitors will spend there and the more there will be to experience. This is part of the 'and then' concept, which relies on the successful combination of multiple uses in one place.

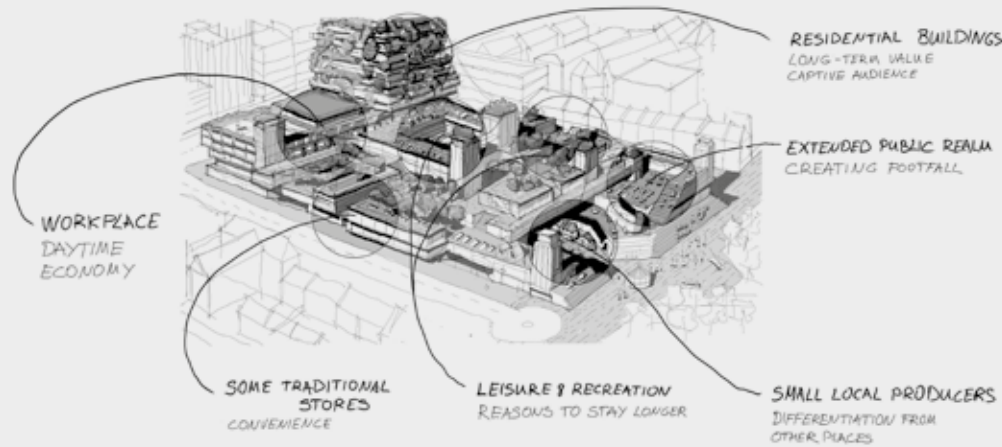
We always consider overlaying traditional retail with leisure, workplace, residential, hospitality and transport uses. We aim to design places that bring lots of people on their different journeys together, creating opportunities for exciting and multifaceted experiences.



PLACE

Retail destinations should enhance the civic identity of the places they're part of. Crucially, they should weave in local historical and cultural narratives, offering experiences, events and products relevant to the community.

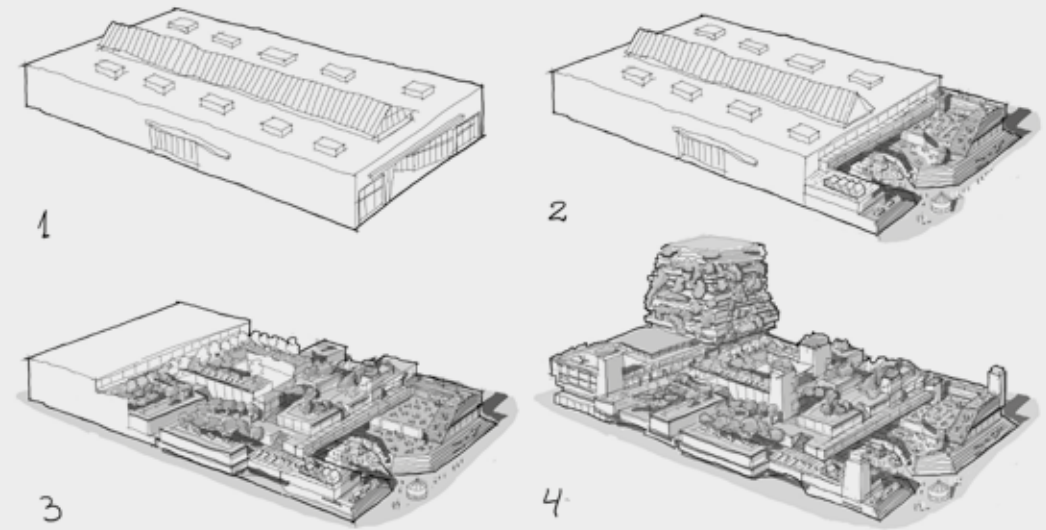
We ensure our retail schemes relate to their social and economic context by connecting them with surrounding environments via considered routes, scales and materiality. The aim is to bring together existing communities while also creating new ones in diverse and exciting ways.



VALUE

In sparsely populated contexts, the role of retail is to provide access to particular goods and services that aren't widely available. In denser areas, retail is often used for its halo effect of creating highly desirable places and bringing people together. In both cases, it increases the value and profile of surrounding homes and workplaces.

When designing a retail project, we set out a clear idea of the value we expect it to bring to a place. Even when it's not financially viable by itself, retail can play a crucial role in putting new places on the map or regenerating existing ones.



EVOLUTION, NOT REVOLUTION

Committing large amounts of investment to revolutionise retail property in a single push is an unlikely scenario. Existing assets don't need to be torn down and completely rebuilt overnight; it's far more effective to stimulate the development of a given place in a desired direction with gradual interventions and innovations, following the aforementioned principles.

We believe that considered evolution is the best way for retail to grow and develop sustainably in the 21st century. We think carefully about each retail scheme we undertake to ensure its continuous development over a long period of time.

State of the market London

by
Katy Ghahremani,
Make Architects



Retail is dying in the UK – or at least that's what you'd think if you just read the newspaper headlines. Some parts of the sector are indeed decreasing, but generally the Retail Spending Index (RSI) shows steady growth over time. The RSI measures sales spending on goods such as food, clothing and footwear, and household goods, both online and in store. Figures from May 2019 show a growth of 1.7% over the past three months compared with the previous three months.

Consumer behaviour is changing. Online sales now represent almost 20% of all spending; in-store convenience shopping has suffered. Department stores like Debenhams and House of Fraser fall under this 'convenience shopping' umbrella – they have many items under one roof, but aren't especially aspirational or experiential.

Conversely, we're seeing both the budget and luxury ends of the market grow. Harrods, for example – a longstanding Make client – has experienced substantial year-on-year growth in profit and sales. This hollowing out of the middle can be seen across the board, from restaurant chains (Carluccio's and Jamie's Italian) to retail stores (New Look and Mothercare) to the aforementioned department stores. Whether it's online or in store, consumers either want cheap, convenient and fast retail or aspirational and experiential retail.

RSI measures sales of goods, not of services, experiences or subscriptions. As we move towards a world where people are spending more on experiences and services rather than 'stuff', do we need to change the way we measure and review the health of the retail market?

+1.7%

% by which the Retail Spending Index grew between March and May 2019

20%

of all spending is now represented by online sales

“If you're innovative, agile and creative as a developer or brand, there's a huge opportunity to thrive. It's not that we no longer want to spend money on retail; it's that we want to spend it differently.”

I would argue that the retail sector isn't dying; it's just transforming and reinventing itself. Brands and retailers that understand consumers want to feel good about themselves when they shop are thriving. Whether it's Patagonia, which promotes a narrative around sustainability, or Rapha, which lets consumers connect with each other to create a community, more brands are offering retail as transformation rather than just transaction. We want to feel that we're creating a better world or a better version of ourselves when buying a product.

Smart brands also understand that we're moving away from ownership towards a subscription-based economy. For example, BMW, recognising a shift away from car ownership to car clubs, has set up Drive Now in London in conjunction with Sixt. The new brand offers a car club business model.

Contrary to what those newspaper headlines say, it's a very exciting time to be in retail in the UK. If you're innovative, agile and creative as a developer or brand, there's a huge opportunity to thrive. It's not that we no longer want to spend money on retail; it's that we want to spend it differently.

IBRAHIM
IBRAHIM
London

*Managing Director,
Portland Design*



“The physical retail space ceases to be a piece of property and becomes a piece of media.”

JACK SALLABANK: What is your view on the current retail situation?

IBRAHIM IRAHIM: My starting point is to ask what retail is supposed to be about. That is four things: recruitment, transaction, fulfilment and retention. Find a customer, sell them something, get it to them, and encourage them to come back. Those four things are still very relevant, but what is driving change is that the transaction and fulfilment part is increasingly moving away from the physical space and appearing online. That leaves the idea that the physical space is more about recruitment and retention. If we accept that, it changes everything. It means that the physical space needs to change in its experience and in its ability to programme; it affects its

location and its connectivity with other experiences and the public realm around it. Most importantly it changes the revenue model, and it changes the valuation model of the asset. That is what's exercising everybody and creating the real disruption.

JS: How does this affect the traditional business model of a retail space?

II: The physical space ceases, to a certain extent, to be a transaction space. Therefore, it ceases to be a piece of property and becomes a piece of media. If we accept that it is a piece of media and has a different

Intema Yaşam is a hybrid F&B and retail concept by Portland Design in Istanbul, Turkey.

We discuss... The retail experience, revenue models and retail as a piece of media.



type of revenue potential, we then accept that the asset is not just the physical space – ie, the real estate; the asset is what brings the revenue. What determines the revenue is the data. So valuations of the space won't be based on if its 1m² or 20m²; it will be based on who's passing, what they're doing and why they're doing it.

The KPIs of a retail space have been disrupted, and therefore the value of the physical asset cannot be determined by just what products are sold; its ability to influence a series of behaviours also matters. Those behaviours could be traffic to a website or photographing and sharing on social media.

“Far from the internet killing shops, it will actually liberate them. It's this liberation that's interesting.”

JS: The value of the space could therefore change on an hourly basis...

II: Absolutely. If it's a media platform and ceases just to be a piece of real estate, its success will be determined by its ability to programme itself and change and be fluid like a piece of media. The way all this affects designers is that it's no longer about shelves and glass fronts; it's about creating a stage, a platform which is completely programmable with technology, sound and multi-sensory experiences. It allows a brand to not just sell its stuff but tell its story.

Far from the internet killing shops, it will actually liberate them.

It's this liberation that's interesting. It opens the door to a whole host of new players who haven't seen a physical space as a channel and normally use their media spend on media. Now we're saying that part of that media spend can be used on the physical space. The asset owners that can understand that and have the balls to invest and change the way they view space are the ones that will win.

JS: What are the behavioural trends of consumers that are driving this change?

II: We believe it is a series of things. It's a busier and busier life.

There's a demand for consumers to have asset-light lives, with less and less stuff. It's a change of habit where people are less committed; they're commitment-phobes. We've seen a reaction against big brands, a massive trend in localisation and craft. Death of the logo, death of cookie-cutter retail – all of that is a reaction against establishment. These are the massive societal changes driving all of this.

Status has always been at the core of consumerism, but what's interesting is how it's now flipped from being about what you own to what you choose what not to own.



Pink Fish is a new F&B concept by Portland Design in Oslo, Norway.

JS: What will the retail landscape look like in the next five years?

II: There will be a clear-out of retailers that are not relevant. We are seeing the likes of Debenhams and House of Fraser going; I could have told you ten years ago that they are rubbish retailers, and they haven't changed. Why are those two going bust when in the same industry, with the same set-up, Selfridges grows by 20%? It's because they aren't relevant.

I think we'll see an emergence of some really exciting new players – an emergence of brands that have not been in the physical space sphere. We'll see a repurposing

of assets, and way more hybrid interweaving of different experiences, resulting in a greater convergence of work, shopping, leisure, culture and hospitality. It will be a very interesting time.

COAL DROPS YARD

*Creating a new
retail destination*

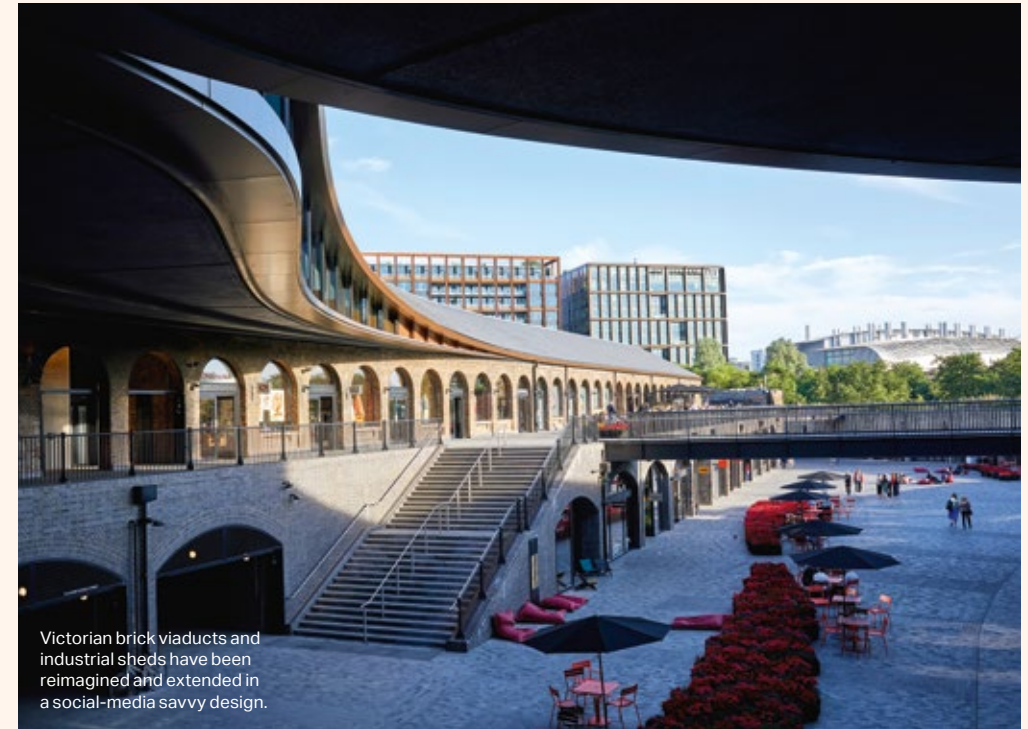
by Jack Sallabank
Future Places Studio

Over the last few years visitors to Granary Square, situated in London's redeveloped King's Cross, will have noticed a new architectural gem emerging from behind the hoardings.

Beautiful 'kissing' arch-shaped buildings form the centrepiece of London's new retail destination: Coal Drops Yard, opened in 2018. Designed by Heatherwick Studio, the scheme has repurposed two existing Victorian warehouses once used to receive and store coal delivered into King's Cross from the North of England. By adding an impressive roof structure to the warehouses, the Heatherwick design

has managed to contort the beautiful heritage brick buildings into an amphitheatre-like setting around a wide, open courtyard with retail outlets and food and beverage offerings.

The Heatherwick design is integral to the strategy adopted by Argent, the developer behind the project, creating a new retail destination for tourists and locals alike. On paper



Victorian brick viaducts and industrial sheds have been reimagined and extended in a social-media savvy design.



Argent has integrated significant public realm into the retail and F&B offer.

“We decided that we needed a standout architectural statement in order to create a retail destination.”



Anna Strongman
Argent

the location doesn't have the obvious attributes associated with a thriving retail destination, such as the 'to the door' transport infrastructure you get at Westfield Stratford and Westfield London. It's not located on a busy main road like the West End stores.

To overcome these challenges, Argent has put its faith in great design, public realm and achieving the right tenant mix. As Anna Strongman, who leads Argent's asset management team, explains: "We started to look in detail at the Coal Drops Yard development five years ago, and we realised the challenges and opportunities of the space. It's not an obvious location for retail, albeit it is in the centre of a thriving estate. We decided, therefore, that we needed a standout architectural statement in order to create a retail destination. We needed to create a tenant mix which is interesting and different from Westfield and Oxford Street, and we needed to think really hard about the public realm."

Curating the right tenant mix to complement the design of the location isn't a simple equation. The ethos behind the overall King's Cross development has been to create an open and inclusive place. Finding a tenant mix that fits this and plays to the narrative created by the Heatherwick design leaves limited options, given the lack of retailers which are different from the high street multiples.

Anna and her team have filled the 61 retail units with mid to high-end price point retailers which include well-known, design-conscious brands such as Aesop, COS and Paul Smith alongside lesser-known retailers such as Universal Works and Lost Property London, the

latter of which is an alumnus from the neighbouring Central Saint Martins. An interesting addition to Coal Drops Yard is a 3-storey concept store for Wolf & Badger which offers a curated selection of independent fashion, accessory, homeware and beauty brands.

While many retailers at Coal Drops Yard have made a good start to life in King's Cross, it is taking time for the centre to become established. Part of the answer will be in Argent driving awareness of the location through an increasingly prominent branding strategy.

"We did a lot of consumer research into what people were looking for, and off the back of that we worked on creating a strong visual identity for the Coal Drops Yard brand," says Strongman. "We wanted to make a bold statement with the brand, and it proved very successful at launch. Now that we have shops that are open, we're trying to evolve the brand so we can showcase more of what we have today, which will help people understand the breadth of what is here."

The development of Coal Drops Yard is just another layer in the unfolding story of the King's Cross regeneration, with 30% of the estate still to be completed. Over the coming years Argent has 600,000ft² of Facebook offices to complete in addition to the new HQ for Google and DeepMind. The developer also has a couple more significant residential blocks to be built and a 600-seat theatre. At the moment Coal Drops Yard is close to ongoing construction work, but over time it will sit very much in the heart of the King's Cross regeneration.

Argent's involvement in the project from its inception has given Strongman

unique insight into the current state of the retail market and the changing role of the landlord. “Retail is going through lots of changes. There are fundamental shifts in the market, with a movement towards smaller units. There is a consolidation of property portfolios. Retailers are looking for prime locations and sites. At the heart of it is a partnership approach to develop a relationship between landlords and tenants, and to get away from this traditional adversarial relationship which is set up by the Landlord and Tenant Act. I believe there is a lot of potential in retail, and it’s an incredibly important community and social interface.”



One of the successes of the scheme is its variety of architectural styles, where retained heritage buildings meet new architecture.



Coal Drops Yard is stitched into the broader King's Cross scheme.

THE NEXT GENERATION OF RETAIL BRANDS

*by Jack Sallabank
Future Places Studio*

London



**FOUNDERS
FACTORY.**
**RETAIL
AND BEAUTY
POPUP**

Founders Factory Retail hosts pop-ups like this one in Seven Dials to promote new brands.

Debenhams may have become the poster child for the big-box retailer failing to move with the times, but another high street name which has acquired an unwelcome reputation as being too big and old to evolve is Marks & Spencer. However, an innovative joint venture between M&S and Founders Factory – called Founders Factory Retail – suggests that change for the high street retailer is afoot.

Founders Factory Retail is an incubator and accelerator model which seeks to support the growth of six start-up retail brands a year. At the end of its three-year programme, the JV will have seen 18 new retail brands come to market, with 3 built from scratch and 15 invested in and accelerated to market.

For Isabela Chick, Managing Director of Founders Factory Retail, the venture is a clear sign of the ambition of M&S, led by CEO Steve Rose, to

transform itself. “They understand that to evolve they need to have skin in the game and actually work with start-ups. That means co-create with start-ups, invest in them, test with them and ultimately help them scale.”

Founders Factory, started in 2015 by co-founder of Lastminute.com Brent Hoberman and Henry Lane Fox, has recruited an impressive team to help identify and provide bespoke support for its portfolio of start-ups. The fund invests in start-ups early, typically pre-seed to Series A, and seeks start-ups that have identified a market opportunity, come up with a good idea to address it and established a strong founding team.

Working alongside M&S and the new breed of retail start-ups, Chick is in a unique position to identify the drivers of change in the retail market. “There are three axes retail is changing on. Consumers are interacting with the retail space differently, they are interacting with different brands and in a different way, and their expectations of convenience and fulfilment are now very different.”

This consumer-led change is shifting the retail space from a place where customers access stock to one where a brand tells its story and interacts with customers on a deeper level. For the start-ups coming through Founders Factory, having their own retail space may not be the strategy; instead they might opt for a shared physical space with like-minded brands, a requirement some retailers are responding to. “Big retailers are diversifying their offering to incorporate much smaller brands, which means the whole nature of what retail looks like is changing from one store/one brand to multiple brands and a different nature of how one shops around the store,”



Isabela Chick, Founders Factory Retail



Alice Sandelson (left) and Erin Booth (right), Founders Factory



explains Alice Sandelson, Head of Partnerships at Founders Factory.

For Erin Booth, Head of Beauty and Retail Investments, this move from retailers is a return to a shopping of old. “Historically, you would go to your butcher for the best meat, your baker for the best bread and your shirt-maker for your favourite shirts. In recent history, we have shifted to a big retailer model, with one brand catering for everything in one place. Now, though, we are seeing the consumer push back against the massive retailer-type model, and we’re going back to an older way of shopping.”

A return to the ‘mom and pop’-style retailer of yesteryear has in turn led to the emergence of a marketplace leasing model in which one brand takes the headline lease on a space and then sublets that space to smaller brands. Such a model has been seen at

Coal Drops Yard with the launch of Wolf & Badger, which describes itself as a “curated marketplace for independent brands.”

For Chick, the Wolf & Badger model is a welcome move and one we can expect to see more of with the growth of a WeWork-style offering for retail spaces. “We will see a turnkey solution for retailers, with high-spec spaces with full-on services that you can turn on and off. Ultimately, these new brands coming onto the market won’t have a ‘Head of Retail Space’ and instead will benefit from a supplier who offers a ‘space as a service’ model.”

To see the impact a WeWork-style model can have on a traditional leasing market, the retail world should look no further than the disruption caused in the office world. Not only should the office analogy provide an important lesson for retail landlords, but it should also point



them in the direction of one of their key priorities: data.

“Data in the retail space will become vitally important,” says Booth. “How do brands understand what their customers want? In the retail space, brands can engage with their customers; they can collect information through IoT devices and in-store surveys or questionnaires.”

While headlines predict the death of physical retail, a morning spent with the team at Founders Factory Retail and some of its cohorts illustrates that the opposite is the case.

But as the next chapter of retail continues to unfold, more brands will fall away as the battle for consumer engagement intensifies. For those brands big and small that seek to prosper, success will be defined by their ability to pivot their offer and brand to be relevant, unique and meaningful to the modern consumer. Teaming up

with and investing in the bright minds coming out of Founders Factory Retail might prove to be a very wise decision for M&S.

At a Founders Factory pop-up event, we met representatives from three new brands bringing bright ideas to life.



JONATHAN KRUGER
CEO, THE DROP

The Drop is changing the way menswear is made, discovered and bought by building a sustainable fashion supply chain for the future.

You're currently an online brand. Will you always be online only?

I always used to think we would be an online only brand, but having some sort of physical presence, albeit small but impactful, is very important for building trust and customer relationships. We are very light on overheads, so it wouldn't make sense to have a permanent location; we might do a series of pop-ups or a concession model where we work with a big established retailer.



SERGEY KLIMENTYEV
FOUNDER AND CEO, TEXEL

Texel develops and manufactures solutions that enable high-precision 3D capture, measurement and analysis of the human body.

Your product helps make the retail experience easier for the consumer. Do you see a future for offline retail?

Yes, we don't feel like offline is dying. It is definitely going through a change, but it is more like a spiral, and it is going through a period of change where offline will transition from being a place just to shop to a place where we can see a demo of products and it's easier to engage with different types of products.



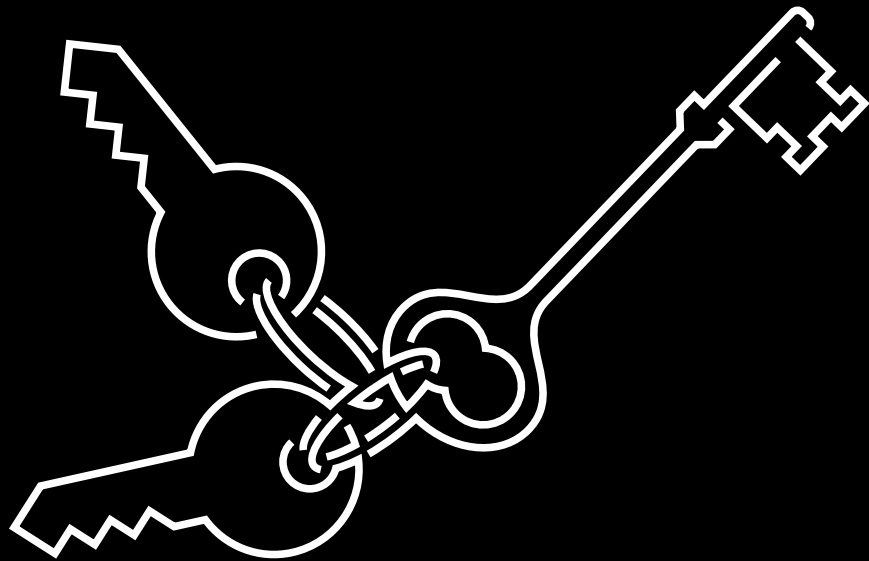
ARUNUS MATACIUS
FOUNDER, ROCKETO

ROCKETO is reinventing dog food by combining the benefits of raw feeding with the convenience of dry food.

You're about to launch in M&S. How important is having a physical retail presence for your brand?

For brand building, for awareness, for sales, no one can beat having a physical presence. People want to touch a product, read the labels and learn about the brand. We often see that big online brands are now going into physical retail, but we chose the path of physical retail and online retail from day one.

The CHANGING NATURE *of* RETAIL LEASING



Richard Scott
Director,
Nash Bond

The changing nature of retail leasing 43

There are several economic factors playing their part in reduced retail demand – a perfect storm, if you like. The B-word (Brexit) is undoubtedly deterring investment into London from some quarters, but others are able to see past this. More importantly, the other B (business rates) has had a dramatic effect on total occupancy cost, with the result that many retailers simply cannot afford to trade from a large part of the store portfolio.

There's no doubt that the retailer requirement for a 100-plus store portfolio is limited now. Only key shopping centres and major London thoroughfares and districts will meet the new retail criteria.

Probably more important than these factors is the change in shopping habits that is here to stay and will

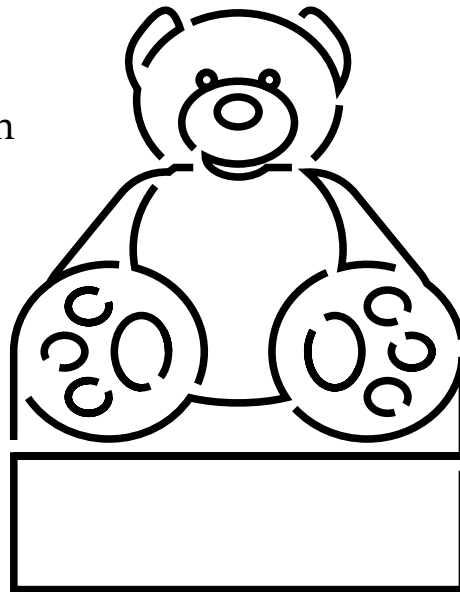
shape the future of physical store requirements. 'Phygital' is the new term, and I like this.

Phygital is a marriage of online and physical store environments. Customers want to try and feel the product while enjoying the benefits of the digital experience in store and then potentially completing the purchase at home, online. Retailers such as the furniture brand MADE have embraced a forward-looking retail experience that directs customers into the store, where they use a tablet to view prices and product information and ultimately make their purchases; there are no tills. This in-store experience is less about selling from every square foot than conventional retail models.

At Nash Bond we are actively engaged with many online retailers from overseas seeking a physical store presence in the UK. They know that a physical store offers a window for the customer to experience the

brand and interact with the product, though not every store needs to be an Apple store. In any case, good personal service is undoubtedly a benchmark for success.

It comes as no surprise to me that store turnovers are dropping, but the

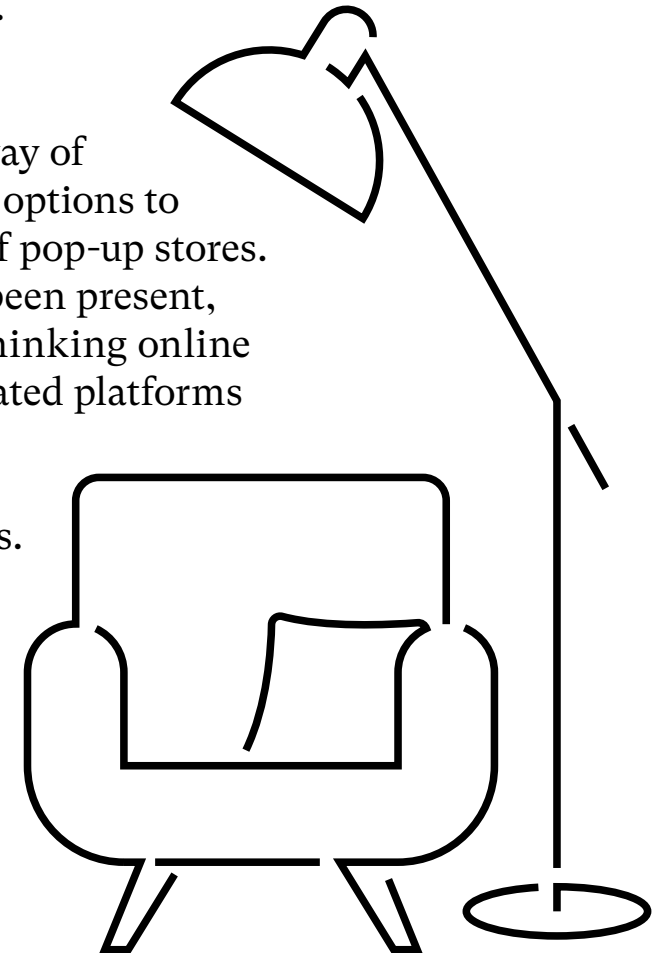


property industry should really have a new metric for understanding the value of a physical store to the retailer's overall turnover. The future of retail is not physical or digital; it is phygital.

It is clear that neither landlords nor tenants have the detailed information to understand where the sale is actually made, and while this continues, and with wider economic factors at play, the retailers will seek to use this as an opportunity to drive the best possible leasing terms. Why wouldn't they? Continued collaboration between parties can only assist with future placemaking.

Flexible leasing is becoming more commonplace, by way of shorter lease terms, options to break and the rise of pop-up stores. These have always been present, but some forward-thinking online businesses have created platforms to make it easier for global brands to secure flexible leases.

Surely all leases will be short-term in the future. Market forces – simply supply and demand – will shape this. The pop-up market has





The Make-designed retail kiosks in Canary Wharf are designed to double as pieces of art.

seen some take up, but for the majority of retail sites, most retailers need time to garner a loyal customer base.

The best sites on the best streets are still in strong demand. Importantly, many landlords are keen to let their estate or shopping centre with a collection of lease lengths and flexible leasing as they seek out all types of brands that can invigorate their destinations. Often it can be the retailer that becomes stale and needs refreshing, and in this case a long lease is not preferable for the landlord.

The landlord and retailer relationship hasn't changed, but the nature of retailing is. Both parties are having to work ever closer together and learn the new language.

State of the market Sydney

by
James Chase,
Make Architects



In Australia, retail centres are very much still the hub of the community. People treat them as destinations – places to gather and share.

In a country that experiences extremes in both distances and weather, retail plays an important role in providing shelter and spaces for families and friends to congregate. Large shopping centres offer better value for money and wider selections, with everything under one roof. And people are willing to travel, given the cheaper fuel and spread-out, car-reliant society. If you build it, they will come.

Internationally, the retail industry is diversifying to compete with pressures from the online giants – like their ability to source cheaper products and a wider range of goods – exacerbated by high rental prices on the high street. The same online giants are in Australia, but they don't have the same hold on

the market. Here, the population is spread across a huge continent with over 25,000km of coastline and minimal infrastructure between townships. E-commerce delivery times are more often offered in weeks than in days or even hours; the country has some way to go before it can offer the speed of delivery demanded by today's society. For this reason, the online convenience factor doesn't exist to the same degree. This helps explain why traditional bricks-and-mortar retail is still thriving.

Australia has consistently been a desirable place to live, work and play. Both the population and tourist numbers grow year on year, and this alone is helping the retail sector grow. In response, the government is expanding existing cities and identifying locations for new ones. For example, in Sydney the Greater Sydney Commission is implementing its Three Cities plan

to meet future population demands. Three new 'cities' will expand the Sydney conurbation rather than increase density within the existing centre.

These new townships will create places for people to come together, and the model is being replicated across Australia. As new communities are built, retail is being established early on to provide food, shelter and community activities. In some cases, a new area is formed without any existing infrastructure; the retail comes first, establishing the rules for the location.

Equally, though, retail needs to

food pop-ups. Shopping centres are often lifestyle-focused, with greenery and outdoor space. Co-working and integrated living have also seen huge growth in retail centres. Landlords willing to embrace the change are finding opportunities that lean towards mixed use models rather than retail-led ones. Flexible space within retail is also utilised by smaller start-up brands to market their new products to a wide audience.

We're currently helping integrate a wider range of uses and experiences at Chadstone in Melbourne. The Link,

“At Make, we're helping clients reimagine the future of their existing centres by creating new experiences for customers, adapting to meet the needs of the local demographic, delivering new identities, and looking for ways to maximise opportunities for the wider area to help communities to thrive and grow.”

evolve to remain relevant. At Make, we're helping clients reimagine the future of their existing centres by creating new experiences, delivering new identities, and maximising opportunities for the wider area to help communities to thrive and grow.

When retail centres offer a wide array of services, choices and experiences, they become destinations. Just like in Europe, it could be argued that experience is becoming as important as shopping. But Australia is ahead of the curve – it's long had thriving food courts, restaurants and

our new pedestrian walkway for Chadstone, integrates hospitality and new restaurants into the existing centre. It merges the indoor and outdoor, extending a thriving centre with highly Instagrammable spaces that act as a new front door.

Does retail offer social opportunities that are disappearing in a digital-trended world? We feel that it's social-based trends encouraging the transformation of the sector. The challenge – and opportunity – for retail developers is to adapt and embrace how retail is experienced.

JOANNA
RUSSELL
Sydney

*Retail Development
Manager, Frasers
Property Australia*



“Developers have a responsibility to create places which enable and create connections between people and place.”

We discuss... Sustainable shopping centres, communities and beautiful design.

JACK SALLABANK: Frasers Property looks to create places that foster connection. Why is that important to the business?

JOANNA RUSSELL: The need for people to have a greater sense of connection to each other and their environment is a global priority. Developers have a broad responsibility to create places which enable and create those connections between people and place. There has been a movement in Australia where dwellings are getting smaller, and communities need the amenities to bring people together.

The ‘super neighbourhood’ term, developed by Frasers a few years

ago, is a response to our broader responsibility to create places that are more than just places to show and are instead central places to bring the community together. This places a great deal of emphasis on design and curation. Our centres need to be designed with the local community in mind and to make sure we create the right service mix to fit our particular catchment.

shopping centre. We have used biophilic design to connect the people and the community to nature, and we hope it will result in a much more comfortable environment where people will want to spend time and enjoy the surroundings. Burwood Brickworks will also have an urban farm located on the top of the shopping centre that will make it stand apart from other centres within that catchment. It’s about creating a unique experience for the community to gather, connect and contribute to a place which is there to serve them. The urban farm will connect with the restaurants, which can use the produce grown on the farm.

“The role of the shopping centre is evolving and will continue to evolve.”

JS: One of your upcoming retail projects is Burwood Brickworks. How have you used design to create a sense of connection here?

JS: One of your upcoming retail projects is Burwood Brickworks. How have you used design to create a sense of connection here?

JR: At Burwood we are aiming to create the world’s most sustainable

JS: What are your key design considerations when creating a retail destination?

JR: We design local. Each super neighbourhood centre must respond to and enhance the area it serves.

We design in flexibility. A fluid retail offer that is regularly refreshed is important to keep people engaged, and the physical infrastructure of the centre should enhance the flexibility and the adaptability to new ideas and concepts.

We design beautifully. We create centres which meet people’s everyday needs while not compromising on aesthetics.

Creating something beautiful means delivering an asset the community can feel pride in and ownership of.

We design sustainably.

Frasers Property recently became one of the founding signatories to the first global net zero carbon buildings commitment. It means that every new building we create must operate at net zero carbon for 2030, and our existing buildings must operate at net zero carbon by 2050. It's a real challenge to get to net zero carbon, so the super neighbourhoods that we're designing and creating now are continuing to push the envelope in terms of what's possible in a sustainability sense.

JR: What are the short to medium-term opportunities in the Australian retail sector?

JR: The role of the shopping centre is evolving and will continue to evolve. We have to listen to the community and be flexible in approach to make sure we have a fresh and current approach to retail in our shopping centres in order for them to become the focal heart of any community.

We are also going to see more and more introduction of mixed use elements and community services in shopping centres, such as medical, childcare and co-working spaces. The importance of a compelling entertainment and dining offer will continue to grow, creating places that people want to spend time as they increasingly view their local super neighbourhood centre as an extension of their homes.



Burford Brickworks is aiming to be the most sustainable shopping centre in the world.

CARRIAGEWORKS

by Nicole Partridge
Journalist

Sydney

With the charm of a French country market juxtaposed against late Victorian industrial architecture, the Carriageworks Farmers' Market, located 4km south of Sydney's central business district, is a popular shopping destination for both Sydneysiders and tourists. Eveleigh Carriageworks, as it was originally known, is the heritage-listed former NSW Government rail yards. Built between 1880 and 1889, the yards and buildings were used for the maintenance and repair of steam train locomotives, and for 100 years formed the largest workshop of its kind in the Southern Hemisphere. The site was decommissioned in 1920.

In 2006, Tonkin Zulaikha Greer Architects was contracted by the NSW Government to transform the precinct into a multi-purpose arts centre which now includes three theatre spaces, rehearsal rooms, administrative offices,



Carriageworks has converted a former rail yard into a multi-purpose arts centre with a hugely popular farmers' market every weekend.



The market is supported by a wider series of food events that attract up to 5,000 visitors.

workshop spaces and amenities. Along with six resident multi-disciplinary companies, Carriageworks also plays host to some of Australia's largest festivals and events, including Mercedes Benz Fashion week, the Sydney Writers' Festival and Vivid. Each Saturday, the precinct is transformed into a bustling under-cover growers' market. Farmers from all over NSW haul in their produce and set up stalls in the large vaulted steel shed. Everything from organic fruit and vegetables to cold-drip coffee, pasta, artisan breads and boutique wines is on offer.

Weekends are abuzz with activity as more than 5,000 shoppers flock to meet the farmers directly and sample the best of NSW's freshest seasonal produce. Adding variety to the market experience are curated summer and winter night markets that feature some of Australia's most renowned chefs and producers, along with cooking demonstrations and live music.

Not to be outdone by its European counterparts, the precinct comes alive in December with popular Christmas markets that sell everything from wine to ceramics to candles.

Journalist Nicole Partridge asked shoppers and workers at Carriageworks why they choose to come here.



GABRIEL AND MICHAEL

Gabriel: We love the Farmers' Market for a number of reasons. It's very social. We'll often meet up with a group of friends, and then we'll have a chat with the local producers, who seem all very interested in talking with us about what they're selling.

It's great that we can buy seasonal fresh food that's good for us. I'll often fill up a family-sized cart each week, which is enough to feed my large extended family. Parking is good, and the markets are close to home, so it's perfect for us.



VICTORIA

Saturday morning at the Farmers' Market has become a bit of a date morning for my husband and me. We come every Saturday because it's one of the few markets in Sydney that actually sells organic groceries. Typically, I go home with the staples: garlic, onion, leek and carrots. I'll also add some leafy greens and a good selection of meats and fish. I can get all my vegetables for less than \$30, which I think is very reasonable.

Everything is super fresh. One time I was picking up a vegetable and the farmer was like, "Oh sorry, that one's a bit dirty – I picked it this morning and didn't have time to give it a wash." I think the markets are so popular because there is so much variety, it's organic, and you can form relationships with the farmers.



LISA

I used to be a regular customer who was just really interested in the food and where it came from, and then I met a business owner who taught me how to plant herbs and seedlings. Now I work here one day a week.

I love the family dynamic between the store holders. Everyone looks out for each other. I also love chatting with my customers and find that many of them are interested in where their food comes from. They appreciate that the farmers have handpicked their produce on the day.

Aesthetically, I love the high ceilings and the sense of space, and there's an added bonus: on any given week, there might be a free art exhibition in one of the heritage buildings. Every month, Carriageworks showcases a top-end chef, which is also a bonus. Today we have a cheesemaker giving a half-hour presentation.



CHRIS

Friendship brings us to the markets. Every week a group of us will do our vegetable shopping first, and then we meet and have a coffee and croissants, and then one of us will recite poetry. It's very much about connecting with each other and developing a sense of community.

It's like a French market out in the country where you can stroll up and down, taste the produce, and form relationships with the stallholders. It's all so personal. And the upshot is that the market is covered, which means wind, rain, any type of weather, we can come.

The parking is easy, and there are cooking demonstrations and free entry into the galleries. I think the market suits our personalities – very eclectic.

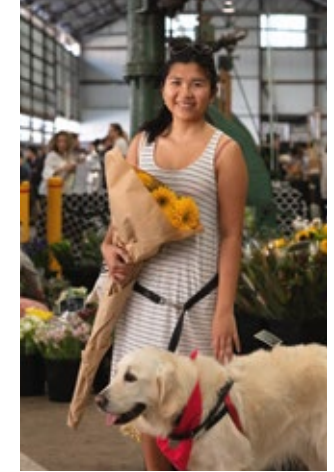


PAUL

The market is unique because it's one of the only markets in the Sydney metropolitan area where people can bring their dogs. I see dogs at other markets tied up to posts on the outside, looking forlorn and waiting for an appointment with a doggy psychologist. Here the dogs are just as welcome as the people.

The food is also fresh and delicious and juicy, and that's because it's usually been handpicked the night before. There is taste in the avocados and the mushrooms, and the miso soup is authentic. I like that the 25 varieties of artisan breads are made in little backyard kitchens.

I'll usually come here with my two bags, and I'll take time to have a chat with some of the local characters, like the French guy who manufactures saucisson sec, which is wet and dry sausage.



NADIA

Being able to bring my dog Munchie to the markets is a big thing for me. I work all week, and Munchie is on her own, so on Saturdays we go for a 20-minute walk and stroll the markets together.

I love that there is so much variety here and that I can buy local produce. Munchie has enjoyed being patted by lots of people. The Inner West has a big dog population, and it's a dog-friendly area. I see a lot of dogs at the markets, big and small. It's good for Munchie to socialise.

Each month the markets bring in a well-known celebrity chef like Kylie Kwong, and she'll do a cooking demonstration, which I find really interesting.

LESSONS *from* *the* NORDICS



Grigor Grigorov
Partner,
Make Architects

The advent of online shopping and shifting consumer expectations has greatly disrupted the UK retail property sector. I recently took part in a Nordic retail study trip organised by Revo, formally known as the British Council for Shopping Centres. Over 6 days I visited more than 30 retail destinations of varying scales and business models across Oslo, Stockholm, Malmö and Copenhagen. Here are three aspects that make these contemporary Nordic stores exciting places to visit.

Product and presentation

Many of the shops I visited offer customers not just physical objects and services, but also a sense that they're connoisseurs who can discern product quality, properties and provenance.

- The Normann in Copenhagen sells beautiful designer furniture and household objects, though its store looks nothing like a furniture shop. Instead, it's curated like a gallery or an art installation. Visitors meander through curious arrangements of



opportunity to see products presented in an unusual, quirky context.



designer household products – cups, chairs, storage boxes, tables, china. The layout of the store changes often, creating the impression that each visit is a one-off

- Stockholm-based The Lobby has recognised that digital brands don't need huge shopping floors but a showroom-style presence at the social heart of the city. The brand rents this space by the square metre for periods between one and four months, with each shelf, hanging rail and display unit representing a different designer or product. The store provides a snapshot of the latest and coolest independent brands, to be seen in one place for a limited period only.

Dwell time

The concept of dwell time is simple: make a place attractive, and it will become commercially successful. Several of the sites I visited have been conceived not so much as stores but destinations, with high-quality retail acting a backdrop to an intriguing or unusual place.

- Along with 200 shops, Malmö shopping centre Emporia has a 27,000m² rooftop park. The owners are using this accessible space to turn Emporia into a major destination, attracting locals



and visitors and increasing sales and revenue. The park has already hosted a series of events, including an ice rink.

- International restaurant brands, rentable meeting rooms, artwork and planting help establish Mood Stockholm as a boutique alternative to the usual corporate mall. The space is designed as a continuous

landscape of shops, restaurants and cafés, and features a large beauty department with 'styling bars'.

- International chain Eataly features a three-pronged offer of restaurants, shops and a cooking school. The restaurants range from quick-service counters to full-service dining, while the shops sell groceries and homeware. Knitting these components together gives the brand a strong identity and helps engage a wider customer group.



Convenience

Convenience is a key advantage for e-commerce customers. Even with advancements in digital technology and services, however, there are still ways bricks-and-mortar shops can use consumers' pursuit for convenience to their advantage.

- The Frederiksberg Centret in Copenhagen has a pedestrian promenade connecting with the nearby Copenhagen

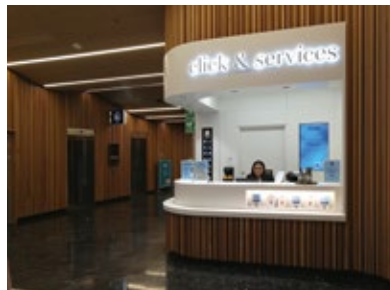


Business School and beyond, offering coffee, takeaways, clothing and more to people en route. It also incorporates an underground station entrance in front of its supermarket anchor store. Situating retail units in the public realm like this makes it convenient for passers-by to shop there – potentially even faster and easier than online.

- Click-and-collect centres, found in both Mall of Scandinavia and The Lobby,

have simplified the online shopping returns process by providing changing rooms and post office facilities in one place. Customers can receive all their deliveries in one place, try on any clothes they've ordered, and immediately send back what they don't want.

- Many Nordic shopping centres have cafés and workstations geared towards solo customers.



These areas support the retail use, but in the future they could become standalone facilities for freelancers, attracting a new type of customer.

Clearly, the future of retail is not just online. We're living in exciting times for retail, where choice and competition between platforms are transforming high streets and shopping centres into destinations for new ideas, learning and collaboration. More importantly, they're becoming places with social value, reflecting and serving the communities they're part of. Our role as architects is to help shape and materialise the spaces where those exciting interactions happen.



WHITE CITY
*Retail as part of the
placemaking mix*

by Jack Sallabank
Future Places Studio

For the better part of the last decade, West London's White City has been a construction site. Five different landowners have set to on building new homes, office space, a university campus, and a significant quantum of retail and F&B.

Cranes will still punctuate the skyline for a few more years, but over the last 12 months residents have moved in, offices have been occupied, and shops and restaurants have begun to buzz with activity. The regeneration of White City, established as a GLA Opportunity Area in the 2004 London Plan, is edging closer to completion.

For Stanhope, Westfield and TfL – three of the developers engaged in

transforming White City – attention has turned to animating the location and creating a greater sense of place. In particular, there's a heightened emphasis on retail strategies that bring communities together.

Jack Sallabank met up with these developers to learn about their approach to retail, their observations about the current market and the role of retail as part of the placemaking mix.



The former BBC television studios are the centrepiece of the White City development.



A mix of uses – including office, retail and F&B – spills out into public realm.

“You have to make sure that you work hard to get little things right, such as wayfinding, signage and branding.”



Millie Wilson
Bruce Gillingham Pollard

One of the first projects in White City to achieve PC and start welcoming guests was the newly renovated Television Centre, formally the home of the BBC. Millie Wilson from retail agent Bruce Gillingham Pollard acted on behalf of Stanhope for the Television Centre and White City Place schemes.

Jack Sallabank: Television Centre is an iconic building which has been opened up to the public for the first time. What was your approach with retail and F&B?

Millie Wilson: Two things were important. Firstly, Westfield was already here, which is a huge anchor for White City. Secondly, just before we were appointed to work on Television Centre, Soho House members' club had signed a lease which definitely helped put the building on the map, given that they are such a strong tenant. Our strategy needed to ensure that we differentiated ourselves from what Westfield offered and instead built on the back of how iconic the building is and on complementing Soho House. Effectively our strategy has been to create more of a premium side, but with a range of offers that make it accessible and welcoming for everyone.

JS: What are the key things to get right when introducing retail into an area like White City that's undergoing so much change?

MW: It's not just what the retail is, but it's getting the environment that it sits within right. You have to make sure that you work hard to get little things right, such as wayfinding, signage and branding. These are all hugely important to a placemaking approach.

JS: You advise on a number of retail schemes across London. How is the market changing?

MW: The entire landscape is changing, though reading the newspapers would make you think it is just doom and gloom for retail, which is really not the case!

Retailers are looking at the number of stores that they need and in some instances disposing of those that are surplus to requirement. But more interestingly, we are seeing more things going on in stores, and they are not just a place for you to go and try on a product and leave. This is creating more of a community where retailers can get to know their customers more.

Also, the size of restaurants and retail units is getting much smaller. Five years ago your 'traditional' retail unit would have been between 3,500ft² and 5,000ft². We are now creating 1,500ft² units because people don't want to feel like they're sat in a vast area; they want a more intimate experience. Again, this is changing the way we plan schemes and customers experience the space.

South of the Television Centre, towards Westfield, are 31 TfL-owned railway arches that bridge over Wood Lane. Nigel Pickup, Head of Commercial Property, and Laura Fernie, Senior Commercial Asset Manager, are currently part of the TfL team responsible for transforming the arches into a curated retail mix.

Jack Sallabank: What's been your approach to these disused arches?

Laura Fernie: We are surrounded by these amazing developments, which have presented TfL with a unique opportunity to refurbish and bring our arches into the commercial estate. The arches have dual frontages opening onto both Westfield Square and White City Living's new public park, which is a massive benefit to our tenants and will help activate the public realm. The first few arches will likely be occupied by cafés, bistros and independents. Thereafter, we want to provide convenience and amenity retail to the thousands of residents moving to the area.

Alongside the commercial arches, we have introduced pedestrian arches to help connect the different developments in White City. We're in the heart of this area, and the refurbished arches aid permeability and have helped create a sense of place. For TfL, it's about making sure our arches act as an opportunity and not a barrier.

JS: Your arches front onto Westfield. Is that a blessing or a challenge when creating your own retail offering?

Nigel Pickup: We're trying to create a tenant mix that complements but is somewhat different to Westfield and

the big branded retail. We have an opportunity, because of the nature of the arches, to be different and provide something that supports the local community. We want to provide a different curated type of retail which provides for the needs of the workers in White City and for a nightlife economy as well.

JS: These arches sit as part of a wider portfolio of over 800 arches spread across East, West and North London. What is the wider approach in terms of the arches' development?

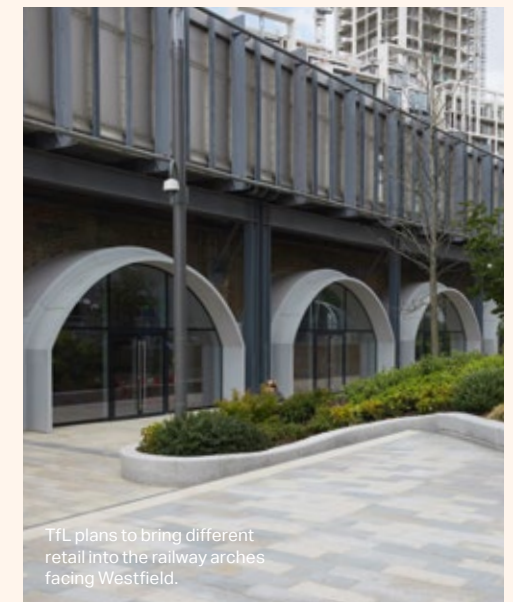
NP: Our focus is to invest in those arches to bring forward opportunities for businesses to thrive and grow within new and refurbished work and retail spaces in core locations. Our approach is to try to integrate within the local communities to give businesses the chance to take space in refurbished opportunities where we can assist with the growth of London both from a retail and also a workspace perspective.



White City stitches into the wider area, providing links and connectivity.



Laura Fernie (left) and Nigel Pickup (right), TfL



TfL plans to bring different retail into the railway arches facing Westfield.



John Lewis and Primark were the two most requested retailers for Phase 2 of Westfield London.



Emma Hinds (left) and Katie Wyle (right), Westfield



Leisure concepts and 80 F&B venues sit alongside 100 new retail units.

Sitting opposite the TfL arches is the Phase 2 expansion of Westfield. Opened in 2008, Westfield London was the brand's global flagship scheme. General Managers Emma Hinds and Katie Wyle are responsible for making sure that ten years on, the Phase 2 development allows the brand to remain relevant.

Jack Sallabank: What drove the Phase 2 expansion of Westfield London?

Emma Hinds: The Phase 2 expansion took place within a planning framework, which is the White City Opportunity Planning framework. Other transactions were taking place in the area with other developers in White City, so it felt like the right time to expand.

As part of the development we've managed to bring in John Lewis and Primark, which were our two most requested retailers. We've brought in approximately 100 new units, which is a mixture of retail, restaurants and leisure. We've enabled some of our existing tenants to expand into more space and have brought in some new retail concepts. Most importantly, with Phase 2 we've transitioned the centre from being a retail centre into a mixed use development.

JS: What are some of the mixed uses that you have added to Westfield?

EH: We now have 80 places to eat across the centre. We've brought in new leisure concepts such as All Star Lanes Bowling, Putt Shack and FirstLight Cycle. There's been a real focus on bringing in more leisure uses and transitioning the centre to be a place for everyday use. We are constructing a new entertainment venue in the

Dimco building, which will be run by Broadwick Enterprises, for up to 3,000 people.

JS: You've opened Phase 2 at a difficult time in the market. What are your observations on the market?

EH: We've successfully filled a Phase 2 scheme which is a shopping centre in its own right and is the equivalent of Brent Cross Shopping Centre in size. In a challenging market, which it is, we're very happy with what we have delivered. What we're finding is that space requirements do change. Within ten years of launching the original scheme, space requirements are very different, and retail has evolved.

Although retailers are reporting that the market is incredibly challenging for a number of reasons, what we're seeing is there's still significant opportunity in the retail market to bring in retailers that we don't already have and to bring in other uses that are growing, such as leisure.

JS: What does the future look like for Westfield?

Katie Wyle: The brand Westfield is synonymous with great shopping and great shopping centres, and we hope to still be known for creating flagship shopping destinations. However, with the assets that we own in the UK, Europe and the US, there's opportunity to bring in mixed uses. There seems to be a trend of people wanting to live in high-quality, urban areas, so clearly there will be a transition to produce more mixed use developments which respond to this. Over time the brand will be known for not just providing great shopping centres but also for building great urban cities.

RACHELE
GODRIDGE
Sydney

*General Manager
Consumer &
Retail Operations,
Vicinity Centres*



“The consumer is firmly in the driving seat, and they are pushing brands, retailers and shopping centres to design better solutions, products and experiences.”

We discuss... The shape of Australian retail, how retail has changed over the years and the role of technology.

Rachele Godridge

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JACK SALLABANK: Can you tell us about your role at Vicinity?

RACHELE GODRIDGE: I support the thinking around the consumer experience in our shopping centres and destinations. I work across marketing, leasing, data and insight to ensure we are deeply understanding of our customers and communities and therefore providing relevant destinations for our customers. In addition, I also look after our Retail Delivery Team, which means I work with retailers to deliver their new stores and upgrades.

JS: You have been involved in retail for the majority of your career.

become secondary to the experience. Customers still want to go to physical retail stores, but retailers now need to give the consumer a reason to go to their specific store, because they are spoilt for choice.

JS: In the UK a number of our big traditional retailers are struggling, and some of our high streets are also struggling. Is there a similar story in Australia at the moment?

RG: It's not dissimilar to the UK; retail is in an unprecedented state of flux. There's a lot of media coverage about store closures and the death of retail. But what is becoming clear is that retail is far from dead, though

“Smart mirrors have been talked about for a long time, and they are starting to hit the market.”

Can you reflect on some of the changes you've seen over the years?

RG: If we go back many, many years to when I started my career in retail, the consumer was reliant on the retailer to provide product expertise to inform their buying decisions. The retailers were in the driver's seat. Now the consumer is firmly in the driver's seat, and they are pushing brands, retailers and shopping centres to design better solutions, products and experiences.

Another big change I've witnessed is the shift from highly transactional spaces to spaces that appeal to human desire and create social connections. The product has

we are in the midst of a reimagining of the industry and the shift of the purpose and form of physical spaces.

Transactions can happen online, but emotional connection and engagement need to happen in person. Bricks and mortar retail gives the opportunity for retailers to humanise their brands and create community at the same time as showcasing their product and service.

JS: At Vicinity you talk about reimagining places of the future and creating places where people can connect. How do you achieve that?



The Link is Make's extension to Chadstone, which is managed by Vicinity Centres and is the largest shopping centre in the southern hemisphere.

RG: At Vicinity we spend a lot of time getting to know our local community – who they are and what they need. For us to be successful, we need to balance our unique and local insights with wider universal and social trends. For example, a big trend that we're responding to is about 'one place'. The customer no longer wants to have one place to live, another place to work and another place to play; they want it all, and they want it all on one place. This is about blending uses and being able to serve the whole person and create a place where everyone feels included.

JS: What role does technology play in helping you to innovate in your centres?

RG: What we're seeing is the increased ability to access data and insight in our stores and then using that insight to think about who is shopping and how we provide better spaces for them. We're also seeing some big innovations come forward such as augmented reality, which is likely to take a larger role in the future in our shopping centres to make shopping easier for customers. Smart mirrors have been talked about for a long time, and they are starting to hit the market. With a touch of a button the consumer can have a virtual shopping experience with on-screen sizing, colour options and connections to the staff on the shop floor. Also, there is a move towards personalised navigation, so the use of robotic shop assistants to help customers find products that they are looking for and to inform them about offers and tailor specific offers to customers.

THE MILLS

by *Jana Rock*
Make Architects

Tsuen Wan,
Hong Kong

The Mills is located in the New Territories, not far from Mainland China. It is the former home of Nan Fung Textiles and comprises a series of former factories across a site of 24,000m². The factories closed in 2008, although Nan Fung Group retained ownership. The developer decided to overhaul the plant in 2014.

Nan Fung Group's vision was based on the textile heritage of the site, and has created a cultural complex within the original architecture that combines retail, exhibition and gallery spaces, as well as co-working and workshop spaces, all with a textile focus. Nan Fung has dubbed this mix 'The 3 Pillars'.

The first pillar, the Centre for Heritage, Arts and Textile (CHAT), houses permanent and changing exhibitions and workshops. Archival material on display informs visitors

The Mills

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The Mills is a complex
of converted textile mills.

of the local area, the history of the building and its industrial importance.

CHAT is linked to the second pillar, The Mills Fabrica, which supports small makers and crafters who have a strong online or social media following but can't afford to rent space in the typical Hong Kong retail mall. It operates as an incubator programme, providing co-working space, workshops and studios, and allows young start-ups to innovate, collaborate and accelerate their growth.

Tenants at Fabrica can also test their products at The Mills Shopfloor, the third pillar. Shopfloor is different from a typical shopping mall. Focused around experiential retail, it deliberately builds on its links with CHAT and Fabrica to provide shops and F&B in a hands-on, immersive environment to engage and relate to customers.

This mix is The Mills' USP and is a model for retail in multifunctional

buildings. According to Ray Zee, Nan Fung's Chief Designer, it's all about giving customers a reason to make the journey. "At the best malls, things are constantly changing. They have an event every few weeks – a car show, a Lego show. There's always something to draw people to go there. If you don't make it exciting enough, no one's going to come."



Make partner Alfred Ng interviewed workers and shoppers at The Mills to find out what they like about the venue.



ARIAL

This is my first time at The Mills. We chose to come on a weekday so that it would be less busy and we could really explore it.

I love the natural sunlight coming in and the way they make the most of the space. It's very different from the other places to shop in Hong Kong and away from the hustle of the city.

We'd heard that there are different brands here, and wanted to come and visit. The rates are so high in Central Hong Kong that it's only the big brands and franchises that can afford it; all the unique shops have gone, which is sad. It's great that this is here, as it will help regenerate the area and expand the community.



RICK

I'm here today with friend who's just recently returned from Canada. There aren't many places like this around here, so I've been a few times.

I'm not working at the moment, so I wouldn't call myself a customer, but I used to always visit a grand shopping plaza like PMQ, and I prefer the environment here. I like that it's different. In terms of how I choose where to go, the stores are almost secondary to the place itself.



SHARON

I own the Shabibi Sheep Workshop. We make Scandi-style fair-faced concrete products for the home. We do everything, from the designs to the sanding and marketing, right here in this workshop. We love that the old factory is concrete – there's a really nice connection between what we sell and where we are. This space is big enough for us to hold exhibitions, so it's more than just retail.

We watched the factory come to life from a deserted place to pop-up markets and now this. We love that they've kept the authenticity with the original architecture and the green walls. It suits us because we're designing handcrafted products. People aren't used to things with individuality and imperfections; they're used to a machined, identical finish. Our products are unique, so this is about educating people as well as retail.

CONNECTING PEOPLE *and* PLACES



Jeff Kindleysides
Checkland
Kindleysides

An undeniable desire to re-identify and reconnect with what it means to be human is driving heightened consumer demand for tactile interaction, sensory stimulation and social experiences. This socioeconomic shift is influencing new re-engagement strategies by urban planners, shopping centre developers and global retailers.

At the start of this decade, Accenture predicted that the next five years would bring “more change than retail has seen in the last 100 years.” Now, in the midst of this unprecedented evolution, what are the fundamental changes driving the new rules of modern retail?

Undeniably, all categories have seen major disruption from online challenger brands, new ownership models

and the experience economy, all of which have redefined consumption. Legacy brands that have failed to adapt or innovate during this time have become victims of the heavily publicised 'retail apocalypse'. On top of this we have also seen a plethora of 'fail fast, fail often' digital experimentation, widespread bandwagon tactics diluting ideas almost as quickly as they emerge, and more strategic retail portfolios, with fewer stores offering diversified experiences as opposed to globalised rollouts.

So while there has been noticeable change and disruption, looking forward there are growing calls for retailers to be even braver with their physical brand spaces and digital ecosystems. The future of retail is a complex mix of ingredients, but one thing is certain: branded spaces must offer more than a traditional transaction. Look at progressive brands like The Conservatory at the recently opened Hudson Yards in New York, which foregoes transactions and inventory completely, focusing instead on discovery and inspiration with a 'try not buy' strategy; or ACNE's Project Store in Shibuya, which amplifies

BEYOND TRANSACTIONS

adidas Originals: the local hangout

In the heart of London's Shoreditch, at 15 Hanbury Street, is a multi-layered experience shaping the future of physical engagement. Together with the adidas Consumer Experience team, we created a destination for the sneakerhead community that offers limited-edition experiences, playing host to local creatives, brand activations, exclusive product drops, DJ sets and panel discussions.

The thinking behind this concept was to create a malleable, living space embedded in the sneakerhead community and local culture – somewhere to be entertained, be highly informed and meet like-minded people. This new way of engaging this audience has proven to be a commercially effective proposition, with the space now one of the most successful in the brand's portfolio.



AE Studio: creating brand fans

American Eagle's AE Studio forms an extension of the diverse and vibrant New York University community. We designed every aspect of the store with the target audience and locality in mind.

The space is positioned directly under NYU's student gym and includes meaningful in-store services such as free laundry for students. Students can relax with friends while waiting for their laundry or study in the studio bar, which offers refreshments, free wifi and a view of Union Square. A makers' studio also facilitates on-the-spot alterations and customisation, empowering this creative community's desire for self-

expression. Even the store's product collections are tailored: a 'dorm edit' features homeware products, and NYU merchandise is available to buy in-store. Furthermore, American Eagle's social media team is housed on site, placing them directly in the heart of the action to engage with customers, create content in real time and keep their finger on the pulse of the brand.

This space forms part of American Eagle's overarching strategy to appeal to a younger audience. It has now successfully established itself as the second favourite apparel brand of American teens.



Connecting people and places

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the transactional experience, changing the entire interior aesthetic and experience with each new product drop. Both of these concepts demonstrate approaches that nurture far deeper emotional connections with consumers by going beyond the transactional relationship.

Spaces to engage people and places

The evolution of permanent retail spaces beyond a place to purely hold and distribute product demonstrates a clear opportunity for these spaces to be repurposed, providing greater meaning in people's lives.

Brand spaces can and should play a vital role within our communities, connecting people and places to build a sense of belonging and human connection that can't be replicated online. Taking up the mantle as facilitators of social engagement, brands can utilise new and existing spaces to address the isolation and disconnect felt in our digital age, picking up where public services and local governments have fallen short.

We like to think of these spaces as orchestrated experiences, places that indulge the key human characteristics of play, socialisation, curiosity and status, allowing people to co-create the narrative of the space, to immerse themselves in the brand culture and connect with like-minded people. This is one of the approaches Checkland Kindleysides has collaborated with the most progressive retailers to test, try and develop, leading to a greater sense of purpose as well as greater commercial outcomes.



Nixon, Bondi Beach, Sydney.

The future of retail

Retail is witnessing unparalleled and accelerated levels of change, but there has and will always be a need to evolve and keep pace with shifts in culture, technology and economics. However, the possibilities change presents for brands, developers and their creative collaborators to reimagine the future is limitless. Even the smallest of retail spaces with the most purposeful and resonant experience can become the most impactful of places.



Warehouse concept in London.

BRINGING THE BRAND TO LIFE

by Jack Sallabank
Future Places Studio

London



Men's fashion retailer Number Six
on Lamb's Conduit Street.

Instagram, Facebook and Twitter have given brands of all sizes the means to introduce consumers to their products while also enabling them to create a brand story which goes beyond the product. Pick a brand you like, check its Instagram account, and you'll likely find a mix of product shots, aspirational lifestyle images and posts supporting social movements. Successful brands are expert at tapping into our ideologies and aspirations and presenting them in a way that makes us see the bits we like about ourselves in their brand. It's clever, powerful and necessary for a brand to be able to do.

The challenge now facing these brands is how to replicate the engagement they've created through a screen into the real-life setting of a retail space. In an increasingly omni-channel retail world, no longer is social media the sole place for 'likes' or the

sole place for stock. Instead, the physical space is now the place where a brand should be telling its story and creating a far deeper connection with the customer.

Reframing a space in this way will liberate brands to be more creative in how they design and programme a retail space, and in doing so will provide a far richer and more enjoyable retail experience. For larger brands like Nike or adidas, introducing out-of-hours activity in the space, such as DJ sets or TED Talks, is relatively easy to do. But for smaller brands or start-ups with limited space and budget and a smaller reach, the task of making their space do more than what it was originally intended for may seem a stretch too far.

I met up with two London-based entrepreneurs to learn about their businesses and how reprogramming their space has become a part of their brand identity.

Number Six

Having sold his e-commerce agency in 2012, Jake Hardy launched the men's fashion retailer Number Six, which now has two physical stores in London, on Lamb's Conduit Street and at The Old Truman Brewery in Shoreditch.

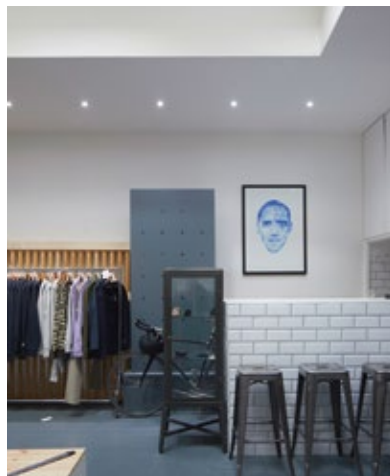
JACK SALLABANK: Your core business is as a men's fashion retailer, but you also use your space on Lamb's Conduit Street for a range of events. How does the design of this space lend itself to this?

JAKE HARDY: We have designed the space in such a way that we can contract and expand the shop when we want, which means we can free up space to do various activities. We put on pop-ups; we do collaborations

with other brands; we do band T-shirt nights, sample sales, music nights. We sometimes rent out the space in the back during selling season, and that brand will also take an office downstairs, which helps make the space affordable for me.



Jake Hardy, Number Six



The rear part of the store is used for a range of events and collaborations.

JS: Why do you go to the trouble of doing events?

JH: Nowadays a brand like ours has to be more than a retail space, because of the level of competition. Events are about creating new audiences or sharing audiences with other brands that we like and introducing our customers to cool and interesting brands.

On Lamb's Conduit Street there's a great community among the different retailers, so we do lots of events in partnership with other retailers from the street. The events we run fit with our ethos, which is to have the best products and tell customers why we have the best. We will never try to sell to someone; we talk about the weather or whatever, but it will never be a hard sell. If we talk about the product,

it will be to educate them, and then they can make their own mind up.

JS: You have a digital background. How do you integrate digital and physical retail?

JH: We make sure digital is key to every bit of our business, online and offline. Nearly 50% of our sales are online, which is up from 20% a year ago. We have a mobile app, which is now 5% of our business. Of our online customers, 20% are click-and-collect.

We're pretty good at using digital channels. We post across eight different social media platforms a minimum of once a day, which is to stay in people's minds and drive traffic. We sell across channels such as Amazon, Depop and eBay. In the store we have screens up just behind



Events and collaborations bring in new audiences and visitors to the store.

the tills, and any content we create online will be on the screens in store. We data capture with the iPads in the store, and all receipts are email receipts.

JS: With the growth of your digital sales, do you see the brand always having a physical presence?

JH: We have two physical stores in London, and the growth of digital does make me ask if it's sensible to have two retail spaces, especially as landlords are putting rents up. It's a tricky decision to make, so we will have to see what happens.

Wander

Alexis Noble is the chef and owner of neighbourhood restaurant Wander on Stoke Newington High Street. Originally from Sydney, Alexis had been a chef for 13 years before taking the plunge and opening her own place in London.

JACK SALLABANK: Opening a restaurant in London can't be an easy task. How did you find the experience of getting started?

ALEXIS NOBLE: The hardest thing about restaurants in London is finding an A3 premises, especially in Hackney. This was a Thai restaurant before I took it which had been abandoned for about a year and a half.

I didn't have much money, so it was about working with what I have. I could always see the bare bones were good. It's a very small space, but the high ceilings make it feel bigger than it is.



Wander, a design-to-share restaurant in Stoke Newington, hosts a ceramics market once a month.



A lot of my friends thought I was crazy and I shouldn't have done it, but when I saw it I felt it was a space that we could make into what I wanted. It took me six months to negotiate the lease. I opened on 8 November 2017, but I didn't actually sign my lease until 25 November. It was so close to Christmas, and I just had to be open for Christmas.

JS: You describe this as a "Sydney restaurant." What do you mean by that?

AN: At home there are way smaller places; here there are bigger restaurants with more investment, but if you don't have a lot of money, you just make do with what you have, and then you try and grow.

The menu is designed to share, which is the type of food my friends

and I would eat in Sydney, but for a smaller place, doing sharing is actually a necessity. The kitchen is small; the pass is small; we don't have hot lamps, and the limited amount of plates, glasses and cutlery we have means we have no option but to be a sharing restaurant. People criticise hipsters just creating more design-to-share restaurants, but actually it's a far more economical way to do it. It's more functional for kitchens to do sharing. You don't have to put four plates up at once, so it's also better quality.

JS: You operate as a restaurant from Wednesday to Saturday, and hold a ceramics market on the first Sunday of the month. Tell me about that.



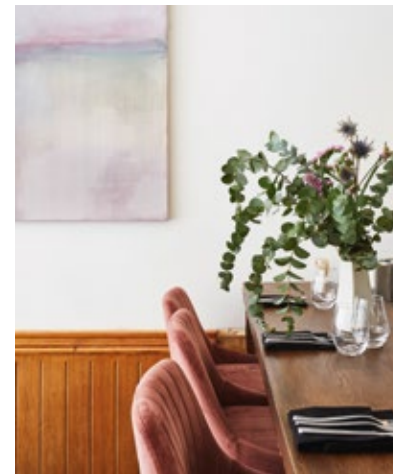
Alexis Noble, Wander

AN: A lot of people come into the restaurant and really like the plates, but they don't know where they can get them, so we have a market to help introduce them to some really creative talent, including the artists who made our plates. We put all of the chairs downstairs and push the tables back and set the space out as a ceramics market. Lots of people come, and the ceramists do really well. We're closed on Sundays, and I like people to be able to use and benefit from the space.

JS: Is holding such events important to your business?

AN: The first six months was about getting open. Then it was about getting the business to stay open. Now that we're 18 months in, we are sustainable and will always have guests, so I'm thinking about what to do now with the space. The common thing is that you must open five days a week as a restaurant, but why? What can I transform the space into when I am not here? I've thought about the space for freelancer creatives or as a café. We have a private dining room downstairs, but that could be used for wine tastings.

I'm a chef, so all of this is new to me. The ceramics market has been good for the brand and a different way to interact with customers. But it's also been really lovely to do it with the girls who have made the ceramics, because they have all really helped me. It's nice to work with people who understand the process of starting something and the self-doubt that you experience when opening a place.



The space operates as a restaurant from Wednesday to Saturday.

State of the market Hong Kong

by
Jana Rock,
Make Architects



The Hong Kong retail scene has changed dramatically in recent years. There are still the glitzy shopping malls that cater for the wealthy Hongkongers, mainland tourists and expats. But alongside these you'll now find alternative malls built around strong brands that promote wellness and experiential shopping. These centres often incorporate galleries, co-working spaces and food outlets.

K11 Musea is one such destination, by New World Development. Located right on the harbourfront in Kowloon's Tsim Sha Tsui (TST), it is set to open in summer 2019.

The building is designed with global millennials in mind. It showcases an extensive selection of international brands but is not solely about shopping. Instead, it blurs the boundary between retail and other amenities by merging art and culture with retail. An outdoor

interactive events space can host fashion shows to attract visitors beyond shopping as well as movie screenings to encourage caterers to serve food outside the confines of their restaurants.

Musea also houses a public art collection, displayed across the building; a 550m² flagship store by New York's Museum of Modern Art (MoMA); and one of the largest integrated green walls in the world, with a surface area of over 4,600m² – equivalent to 18 tennis courts.

Elsewhere in TST, the Ocean Terminal has maximised its seafront location to create a strong sense of place. Newly opened at the end of 2018, the old docks have been remodelled to offer shopping, pop-ups and family-oriented retail as well as F&B, all under one roof. Some of the restaurant's terraces step down towards the harbour, giving views across to Hong Kong Island and beyond. Conveniently located on the ground floor

are popular family shops and brands such as Bookcastle, Molo and Bonpoint, combined with restaurant favourites like Pizza Express, Muji Café & Meal and City Super's cooked deli counter.

In 2010, the Hong Kong government established a new policy to make it easier and cheaper for developers to convert industrial buildings into non-industrial use, as long as they're more than 15 years old. In 2018, two major new developments in former vacant heritage buildings – Tai Kwun and The Mills – opened their doors with new uses to the public.

into what is now JP Contemporary, a not-for-profit new exhibition space, as well as 1,500m² of smaller galleries. On the former prison steps, movies are screened and dance performances given, geared towards many demographics, including families.

Tai Kwun has also launched its own app that encourages a further level of engagement and interaction with visitors and customers. Designed as a game, it offers users rewards such as discounts at its restaurants.

With many Hong Kong factories relocating to mainland China or South

“You'll now find in Hong Kong alternative malls built around strong brands that promote wellness and experiential shopping. These centres often incorporate galleries, co-working spaces and food outlets.”

The Hong Kong Jockey Club, in partnership with the Hong Kong Government SAR, invested HK\$3.8 billion into the former development, converting an historical police station, barracks, armoury, magistrates' court and prison into a carefully curated cultural complex that includes contemporary retail, performing arts spaces and galleries. Tai Kwun is located in Soho, one of Hong Kong's prime real estate areas, and is bounded by the Central district's skyscrapers.

Tai Kwun has brought 16 heritage buildings back to life with new concept restaurants, shops, workshop spaces and a teahouse. The complex allows people to walk through the former colonial Victoria Prison and Magistrates' Court

East Asia, these two schemes are an important model for future mixed use retail development.

ALBERT CHU
Beijing

*National Director,
TH Studio
Shanghai*



“One of the things driving the evolution of mixed use is millennials. They have a totally different perspective on what these places should be.”

We discuss... The Chinese retail market, mixed use developments and designing for people of all ages.

JACK SALLABANK: What is the background to your business?

ALBERT CHU: We are a strategic full-service consultancy with a focus on retail. We are boutique in size with 50 people, headquartered in Shanghai, and I am stationed in Beijing. We have offices in Hong Kong, Shenzhen and Chengdu. We get involved at the early stages of a development project, and help scrutinise the possibilities of a project and the role that retail plays. As part of that, we will look at the design of a project, and we work very closely with great architects like Make. We also work on the leasing of a project and then the ongoing asset management of a project.

JS: What is the state of play for Chinese retail?

AC: The market is still growing steadily. There may be upturns and downturns, especially given a possible trade war with the US. But the overall trend is upward, both in offline and online retail.

One thing to consider is that China is such a massive country. It is the scale of Europe and three times the population of Europe. We have so many provenances which operate like individual economies. So you might have a case where a particular brand in a tier-one city will suffer from a downturn because it has become saturated, but that same brand may be doing really well in a third or fourth-tier city where it still has room to grow.

I am very optimistic about China, not because there will be no downturns but because the overall trend and energy is moving upwards.

But as I always say, tomorrow looks better, but make sure you survive tonight.

JS: What changes have you seen in mixed use schemes that involve retail?

AC: What we have seen over the last few years is mixed use schemes in China evolving to become more experienced-orientated, and this in part has been led by the retail. More recently, we are seeing the blurring between the spaces in a mixed use scheme. We see retail getting mixed with co-living spaces, with offices, with hotels.

One of things driving the evolution of mixed use is millennials. They have a totally different perspective on what these spaces should be. It's no longer about having a retail podium and then offices above and a separate hotel with a small entrance. Instead we have to think about how people want to spend time in those spaces and how they want to flow between the spaces. We need to create spaces where people can work, meet people and explore ideas with one another.

We work with tier-one cities like Beijing and Shanghai and emerging cities like Shenzhen, but also cities that we call the 'upcoming first line', like Wuhan. Some of those cities are a bit behind, but each has its own interesting trends, which is why we enjoy working in China.

JS: On a mixed use scheme, would you advise your clients to create spaces that may generate less income but help animate the overall project?



Retail adjacent to The Temple House, a Make-designed hotel in Chengdu, China.

AC: There are financial pressures on schemes to achieve certain rentals, but because of the need to create an animation and experience it is important to have these spaces that may generate less income but help bring the overall project to life.

You have to achieve a critical size with these spaces which are big enough to draw people in to visit and have them come and spend half a day there. People will now share their experience with friends, and they will find photogenic spots to take their pictures. When you have created

in such a way that we can still create great experiences in a less preferred space.

JS: How do you create projects that bring people of all ages together?

AC: There is no simple or single answer. What I would say is know who you are, and do what you can.

You can't always be all-encompassing. If you get kids and families, it probably means you don't get millennials. But if you get the

“We always advise clients with a mixed use project to do it larger rather than smaller, because you need to have the critical mass to draw people in.”

that, it is the winner. Therefore, we always advise clients with a mixed use project to do it larger rather than smaller, because you need to have the critical mass to draw people in.

JS: From a design perspective, where should you put the spaces that help animate the scheme?

AC: It very much depends on the project and the profile of the cities. We don't want the animation spaces to be in the conventional high-rental spaces, so we will still have the retail at ground floor, facing the streets. But ultimately this comes down to people like Make designing the space

millennials, then the likelihood is that they don't have the spending power for you. Again, it comes to working with the architects. How do we differentiate the souls of a project? How do we work with different anchors and different spaces to attract a mix of people?

WEST END

*Blending the old
with the new*

by Jack Sallabank
Future Places Studio

“If you come to the West End and Mayfair in five years, you won’t recognise it. We are going to leap 20 years in 5 years, but we are going to go back before we go forward.” This is the view of Jace Tyrrell, CEO of the New West End Company, a global business partnership of 600 retail, restaurant, hotel and property owners stretching across the 74 streets which make up the West End.

Anchored by Bond Street, Oxford Street and Regent Street, the West End dates back over 300 years and today is one of the world’s biggest retail destinations, with a turnover of £9 billion a year. Some 200,000,000 visitors a year descend on the area, half of whom are international and domestic tourists. In addition, 150,000 people work in the West End, and 25,000 residents live there.

Despite the high volume footfall and the range on offer – with everything from Primark to Prada – the West End isn’t immune to the current challenges experienced across the retail sector. Oxford Street’s HMV, Miss Selfridge and New Look all closed in the last six months.

“Global consumer demands are changing quite fundamentally, which is creating



Carnaby Street is one of the most famous streets in London's West End.



Jace Tyrrell, New West End Company



Kingly Street, a secondary route, is still bustling.

“It’s about not forgetting the past but moving with the times. It’s modern-day retailing but in an historic setting.”



Katerina Mercury
The Crown Estate

a challenging situation for this location,” explains Tyrrell. “In addition, we are dominated by currency flow. International customers will decide if they want to come to London based on the value of the pound.”

It is against the backdrop of a challenging retail market, an unstable pound and increased retail competition across London that two of London’s oldest developers, Grosvenor and The Crown Estate, must deliver their retail strategy to ensure the West End prospers in the future.

For Grosvenor, which has been placemaking in this part of London since the 1720s, the approach to retail success is underpinned by five pillars: providing better integrated districts, creating the right tenant mix, providing retailers with flexibility, ensuring place activation and investing in insight to understand the customer.

“We invest a lot in non-property assets such as our public realm, green spaces, streets and animation. We see our role as very much a stewardship role but also a curation role,” explains Tor Burrows, Director of Placemaking at Grosvenor.

To create streets with an attractive mix of tenants, Grosvenor has introduced a selection of lifestyle sectors the modern consumer craves, such as culture, gyms, F&B, spas and co-working. Such tenants may have been deemed too risky in yesteryear, but as we enter a ‘post-Debenhams’ era of retail, a more flexible approach to tenancy structures may come to define the reset model of offline retail. No longer should a 30-year lease lock a retailer into a location come rain or shine. If it’s a fresh and interesting mix of brands and use classes that

landlords are after, then pop-ups, flexible lease lengths and turnover rents are must-haves.

“Some of the businesses we are bringing to the area have more unconventional business models, and we are working with them to make sure we create a mutually beneficial structure,” explains Burrows. “If your retailer can’t afford the lease they’re on, ultimately it becomes our problem.”

Alongside a range of lifestyle brands, tourists to the West End this summer will be able to visit the European flagship store of tech giant Microsoft, which is launching on Regent Street in partnership with The Crown Estate. This new arrival illustrates a strategy to bring the best brands to the area.

As The Crown Estate’s Central London Senior Asset Manager, Katerina Mercury, explains: “Every time we look at brands, we look at what they’re going to do for us that is unique. It has to be best in class, and it has to be unique. Microsoft does this, but so do smaller brands that we have recently introduced, such as the wellness brand Glow Bar.”

For the likes of Microsoft and Glow Bar to flourish, The Crown Estate places an emphasis on the quality of design in its retail spaces, offering the market buildings with character, fresh air and natural light. Animating those spaces with talks, DJ sets and fitness classes will become increasingly important for retailers as they seek to tell their story and form a deeper connection with their audience. But with more social and environmentally conscious shoppers, brands that wish to stand the test of time will need to do far more than just talk the talk.

“Shoppers want to see something of themselves in a brand,” says Mercury. “It’s not just enough for them to buy a product. People are paying more attention to where the product was made and how it was made. The next generation, who will be our future shopper, will have a different mindset to those that have been before.”

Alongside the work of The Crown Estate and Grosvenor, the West End is powering ahead to a fresh and prosperous future thanks to a number of large infrastructure projects. The opening of the Elizabeth line in 2021 is forecast to bring an extra 60,000,000 customers and £4 billion spend to the area. In addition, a £150 million public realm scheme on Oxford Street will transform this currently congested location. Improving air quality is a key focus for the stakeholders who

operate in the area. A pilot scheme on Bond Street over the last two years has consolidated deliveries and waste collection and reduced vehicles going to Bond Street by 80%. A similar scheme will soon be rolled out in East Mayfair.

For Mercury, a successful future for the West End lies in pushing forward with progressive new projects while remaining attached to the area’s history. “The beauty of London is being able to work with the old and the new. It’s not about forgetting the past but moving with the times. It’s modern-day retailing but in an historic setting.”



Regent Street, redeveloped by The Crown Estate, is now home to leading global designer brands.



Tor Burrows, Grosvenor



Kingly Court is full of quiet pockets of F&B.

EXCHANGE

120

QUEEN VICTORIA BUILDING

by *Nicole Partridge*
Journalist

Sydney

QUEEN VICTORIA BUILDING

The Queen Victoria Building is an early example of mixed use architecture, built in the 1800s to house a concert hall, coffee shops, offices, showrooms, warehouses and a wide variety of trades.

Spanning an entire block in the middle of Sydney's bustling CBD is one of Sydney's most iconic shopping destinations: the Queen Victoria Building (QVB). Designed by George McRae, a Scottish-born architect who worked for the City of Sydney at the turn of the century, the building – named after the reigning monarch at the time of construction – is a perfect example of American Romanesque architecture. The 180m-long sandstone exterior boasts signature arches and a roofscape that showcases its most dominant feature, a 1.9m glass and copper-clad dome surrounded by 20 smaller copper domes. Construction of the QVB started in 1893 and was completed in 1898, and over the decades it's been repurposed to accommodate a municipal library, offices and a post office. While the facade of the building retains its original features, the interior



The interior has undergone extensive refurbishment to echo a grand Victorian arcade.

has undergone extensive renovations and refurbishments, all designed to recreate the imagery of a grand Victorian arcade.

Today the QVB is home to 170 retailers, boutiques and dining experiences set against a backdrop that captures the beauty and elegance of a bygone era. It's the attention to detail on all five floors that lures shoppers from all over the world. From wrought iron balustrades and ornate stained-glass windows to hand-cut mosaic tiles and the world's largest animated turret clock, the craftsmanship is truly unique. Dappled sunlight streaming through the glass and steel barrel vaulted ceiling casts a perfect glow on the upper levels, while chic, well-lit high street fashion and designer stores grace the lower levels of this iconic building. There are also buzzy cafés, restaurants and wine bars.

Each year, the QVB attracts more than 33,000,000 visitors, which is an average of 90,000 people per day, ranging from visiting tourists to local office workers to those who make a special trip to enjoy the centre's ambiance. A highlight in the QVB calendar is the annual installation of a 24m Swarovski Christmas tree decorated with more than 100,000 Swarovski crystals – a must-see during the festive season. The centre hosts numerous culturally aligned activities throughout the year.

Listed as one of Sydney's top tourist destinations and dubbed by the fashion designer Pierre Cardin as one of the most beautiful shopping centres in the world, the QVB is an architectural gem and one of Australia's most successful retail complexes.



QVB, owned and managed by Vicinity Centres, is one of Australia's most successful retail complexes.

Journalist Nicole Partridge interviewed shoppers and workers at the QVB for their take on this iconic retail destination.



PRANEETA

When we walked into the Queen Victoria Building earlier this morning, my children, who are 12 and 14, whispered to me, "Oh Mum, this place is very fancy!" They couldn't believe this was a shopping centre, because the ones we have in Bombay are concrete and modern, whereas the QVB has so much character and charm.

I can understand why it's so popular. I love the art deco feel and that the centre has been maintained so beautifully. It hasn't changed all that much from when I was here 17 years ago, although I have noticed a greater variety of shops and some local brands that are completely new to me.

For me, today is about reminiscing. For my boys, it's about shopping. They've already spotted the Hobbyco shop.



CAROLINE

I'm not really a shopping person, so other than grabbing a few cosmetics from Mecca, I don't come to the QVB to shop. But I do have meetings in one of the cafés located within the centre. The eateries are always reasonably priced and have quality food.

After my meetings here, the people I'm with often enjoy going off to explore the shopping afterwards. They're always really impressed with the architecture and that the centre, particularly on the upper levels, is so peaceful. Having the Town Hall train station underneath makes the QVB really accessible and convenient.

I also love the history and the vibe, especially the special touches like the grand piano, which is available for customers to play. Sometimes I just linger and listen to the beautiful music.



JENNIFER

As a child, I remember this building as a monstrosity, and for a long time it wasn't occupied, but in the last 30 years, it's been renovated to become a truly unique shopping experience.

I'm at the QVB regularly each month for appointments with my doctor and my dentist. I'll typically spend a couple of hours strolling around window-shopping or meeting my sister for coffee. It's such a relaxing place. Occasionally, I'll buy something special for myself or wander into the museum and gaze at the delightful collection of earrings.

The architecture is wonderful. I love the art deco style and how the vaulted ceiling allows light to stream in and the historic clock that chimes every hour. Online shopping is so boring! It's so much better to have a face-to-face connection in a beautiful setting.



DUMITRU

I'm the assistant manager at Cicchetti Wine Bar. It's an enormous privilege to work in such an iconic place and one that provides tourists with an insight into Australia's history. Visitors will often ask me about the building's heritage, and I always take pleasure in sharing what I know with them.

The centre attracts many interesting people from all over the world, including prime ministers and celebrities, who often visit with their families at Christmastime to admire the huge Christmas tree, the lights and the stunning decorations.

Even though I escaped Romania in 1987 as a political refugee, today I am a proud Australian and immensely proud of this beautiful centre.



LOUISE AND DOREEN

Louise: I'll often say to overseas visitors, "If you have a couple of days in Sydney, you must see the Queen Victoria Building." For me, it's like stepping into some fantastical world. There are so many elements that make this place special: the mosaic tiles throughout the building, the arches, the domes and picture windows. The attention to detail is extraordinary.

I often think about the architects and designers who had the original vision for this place. Every now and then, I'll stop on the stairwell and have a look at the historic photographs of construction. Doreen and I both work in the city, and we've been coming here for a number of years – mostly for lunch, but occasionally, we'll venture into one of the antique jewellery stores. It's lovely that you can live in this world of fantasy, even if it's for just an hour in your lunchtime.



GRACE LEE

When I was a student at Sydney University, I would often come to the Queen Victoria Building with my friends. This is such a distinctive building with a rich history. Nowadays, I can easily spend half a day enjoying the food and shopping.

The QVB has a lot of European brands that are not available at my local shopping centre, such as Coach and Les Nereides. This hat I'm wearing is from one of the unique designer shops. The shopping here is exceptional.

FUTURE *of the* HIGH STREET

Barber
Shop

GYM
[[[=]]]
CLUB



NAILS

OPEN

Bill Webb
*Partner, Make
Architects*

Another day, another bad news story for British retail. Whether it's Borders or BHS, Maplin or Mothercare, we're told daily that the industry is on its knees.

Walking around central Darlington, it's easy to see the damage that can be done to a town's civic identity by highly visible empty stores. Once-proud flagships on prominent sites are now boarded up – ghostly reminders of the power of debt. Living alongside these carcasses from the global economic crash of 2008 hasn't done much to inspire Britons that the retail outlook is bright.



But are things that bad? It's fantastic that groceries are delivered straight to our home, meaning Saturday afternoons can be spent in places other than the supermarket. It's fantastic that streaming services let people living in even the most remote parts of the UK watch the latest international dramas. It's fantastic that bus journeys can be spent choosing trainers and where to go on holiday.

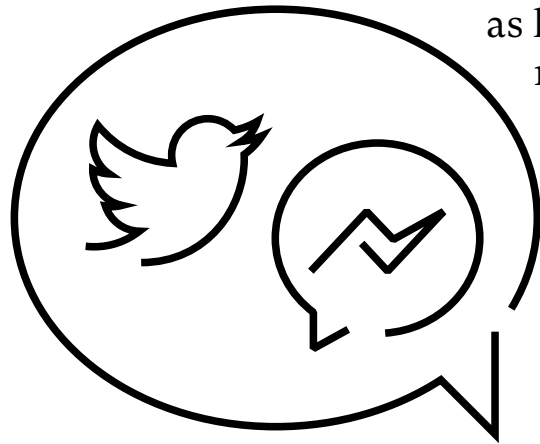
From its earliest lifeform, retail has been where community happened. Trading is how cities were created, and retail was the environment where our communities happened, from markets to malls. Studies over the years have confirmed the role of the high street in particular as an important public space that promotes social inclusion and cohesion. It's safe to say that its



erosion is having a significant impact on our society, particularly as it occurs in tandem with the erosion of publicly provided public spaces like community centres, leaving a shortage of safe, dry spaces where citizens can escape the elements at little to no cost.

At the same time, though, large retail environments like Westfield are breaking down building mass to a scale that feels familiar to the user and creating far more movement between inside and outside. The appeal of their offer and subtle mimicry of the high street environment suggests that there may well be life in the high street yet.

Consumerism is changing, with a growing emphasis on wellbeing and self-optimisation over material ownership. This shift plays well for the high street,

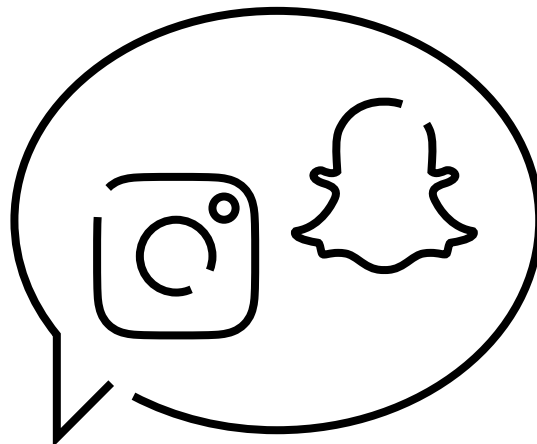


as looking after yourself still requires retail facilities with a physical presence – gyms, hairdressers, nail bars and dentists, for instance. Clustering these services, which require in-person transactions, continues to address certain

metaphysical and psychological needs, like human interactions, connectivity and community. Also, food shopping is holding strong thanks to a renewed interest in farmers' markets and their positive connotations of local, authentic exchange. While we want our cleaning products and household essentials delivered straight to our home, we still want to pick out something delicious for dinner and meet fellow shoppers excited by the range of items on display.

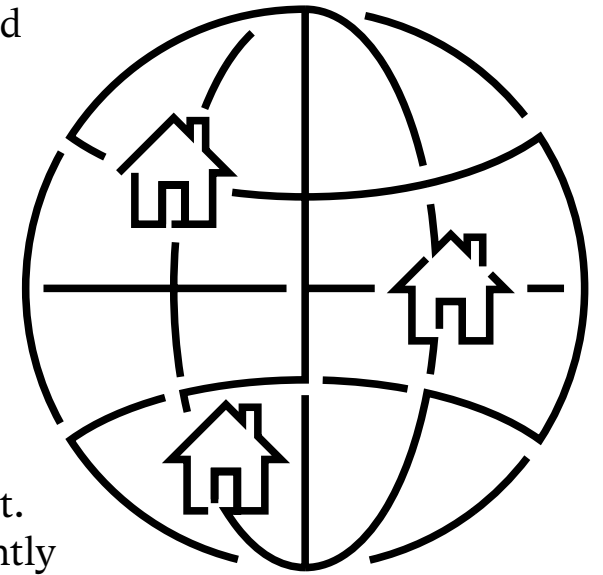
Thanks to global connectivity and social media's role within that, we're taking our non-work activities more seriously than in yesteryear.

The internet lets us plug into niche communities, contribute to and comment on unique video content, and enjoy direct access to our heroes. Emboldened by this, we spend more time and energy on these



pursuits, and are in need of places to indulge and enjoy them. The high street is well positioned to fulfil this need by being, at once, a physical presence – a place to share, meet and talk – and a platform for online sales and content.

Localisation is currently playing out across many spheres, from politics to food. In this age of encroaching globalisation, demand is increasing for local industries that deliver home-grown products and services at a local point of sale. This trend, which signifies the growing crossover between traditional and experiential retail, presents a golden opportunity to reinstate the high street's civic identity and put it back in the centre of the community.



*From markets
to car parks*

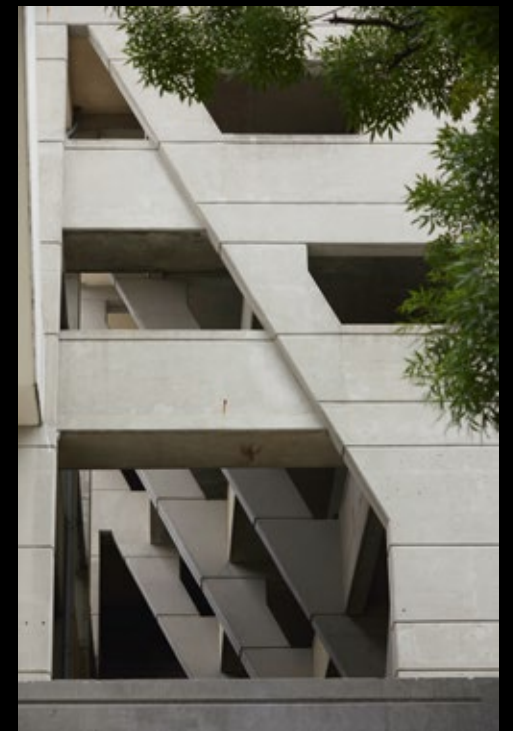
London is blessed with a range of architectural forms, giving architects, designers and brands an inspiring canvas for creating interesting and impactful spaces and places. Make's in-house architectural photographer, Martina Ferrera, explores four such locations, each with a thriving retail offer and unique architectural story.

Brunswick Centre
Lamb's Conduit Street
Peckham Levels
Spitalfields Market

BRUNSWICK CENTRE

The Brunswick Centre was designed in the mid 1960s by Patrick Hodgkinson and was initially planned as a private development. In 2000 the brutalist development achieved Grade II-listed status, and between 2002 and 2006 a £22 million renovation project transformed the ground floor space of the centre into a retail and F&B offer with predominantly high-street brands.







LAMB'S CONDUIT STREET

Lamb's Conduit Street, located in Bloomsbury, dates back to the 17th century and was named after William Lambe in recognition of the £1,500 he gave for the rebuilding of the Holborn Conduit in 1564. The street is owned and run by Rugby School, and contains many independent retailers that combine to create a relaxed, village-like atmosphere.

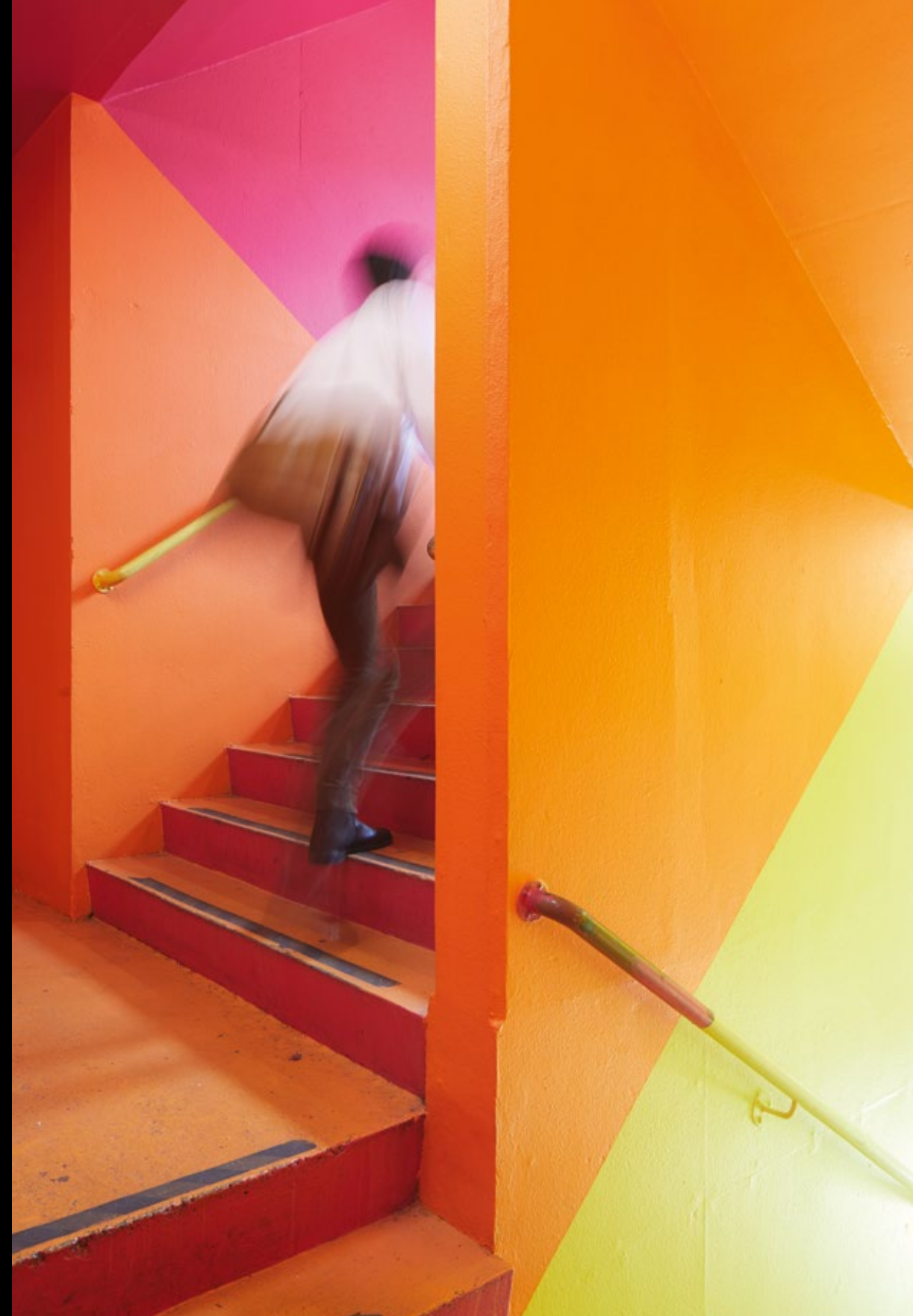






PECKHAM LEVELS

Peckham Levels, delivered by Make Shift, was opened in 2017 to provide affordable and inspiring spaces for businesses and local entrepreneurs to work, grow, trade and learn. It has given new life to an underused space inside the town centre car park in Peckham.





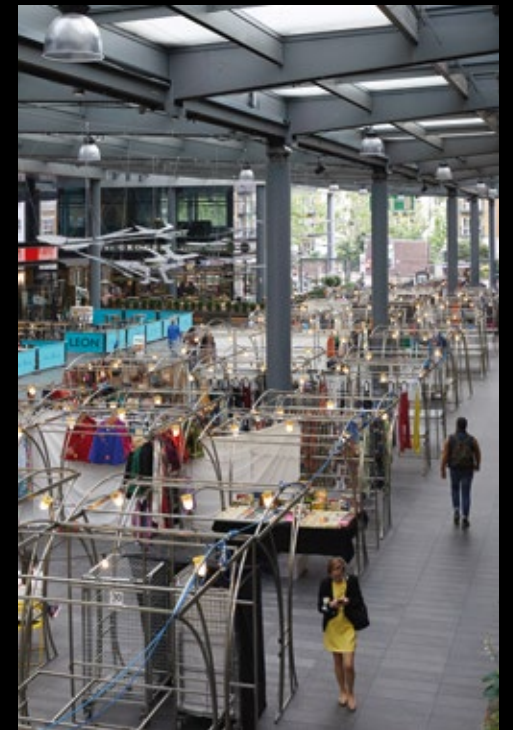
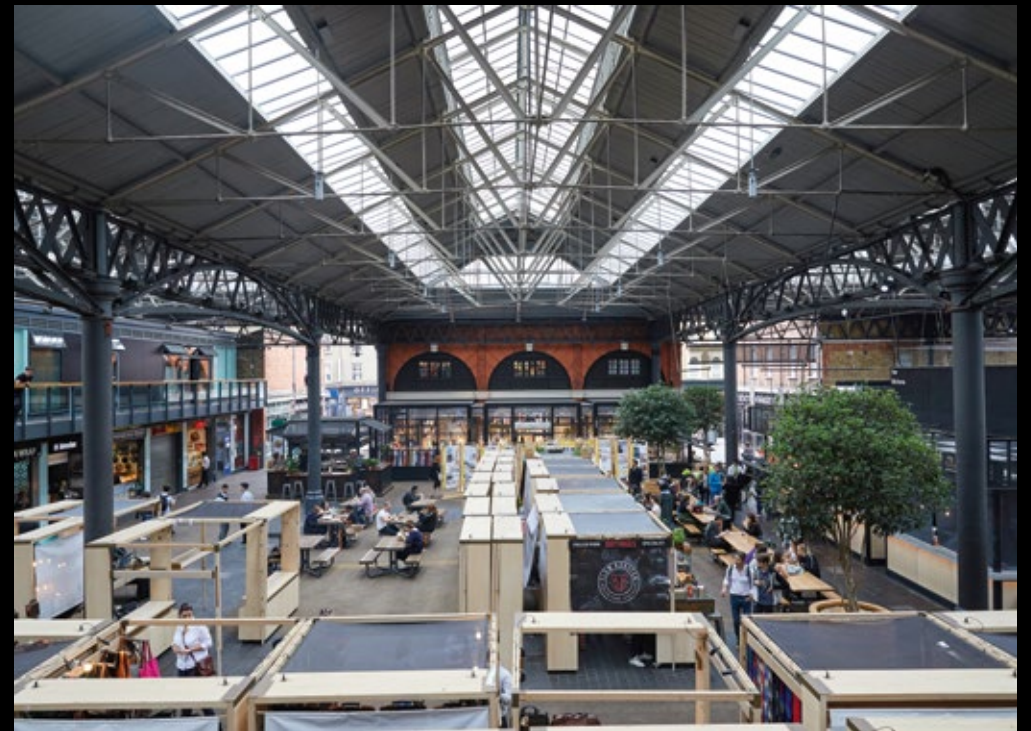




SPITALFIELDS MARKET

Spitalfields Market, located in East London, is a lively market of independent stalls showcasing handcrafted and hard-to-find pieces. The history of the site as a market dates back to 1666, when traders began operating beyond the City gates and on the site where the market stands today.

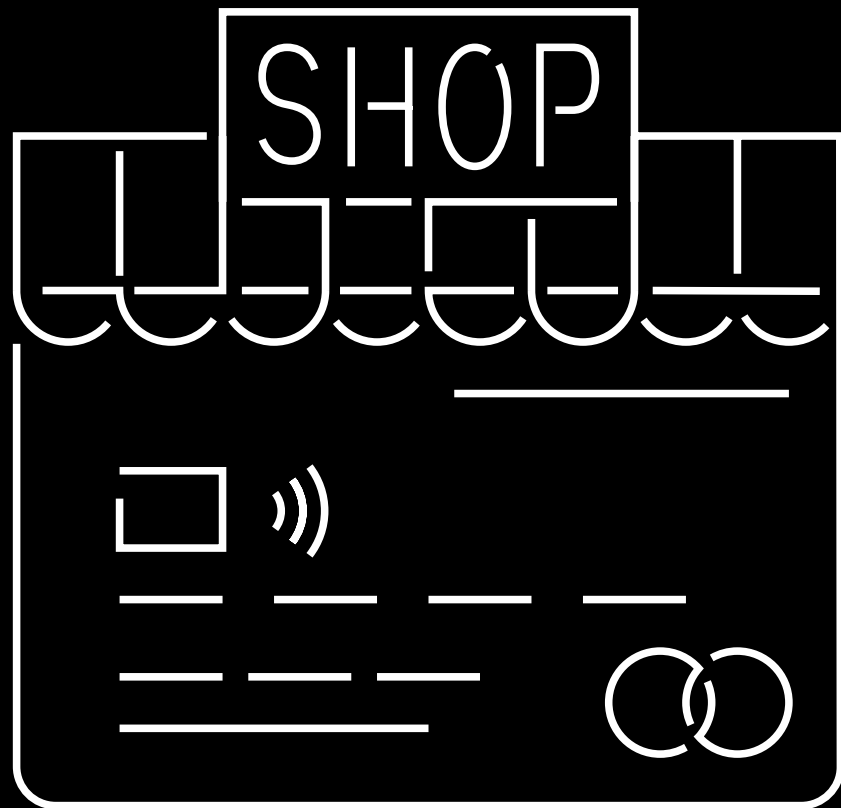








HARNESSING DATA *on the* HIGH STREET



Alex McCulloch
CACI

Harnessing data on the high street 163

The British high street currently faces a number of challenges: business rates, the impact of online shopping, determining the role of a store, and Brexit. Underpinning them all is consumer behaviour and how it's changing. At a recent CACI event, almost half of retailers and landlords identified this as their biggest business challenge.

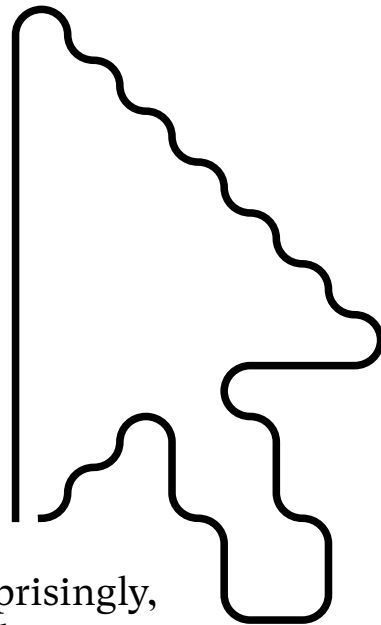
According to the Office for National Statistics, in less than 30 years, 25% of the UK population will be over 65 years old. Should the UK maintain its current position as the country with the third-highest e-commerce sales (after China and South Korea), this shifting demographic should bring about far more integrated online behaviour. In other words, we expect the popularity of online



shopping will only continue to grow. Nonetheless, we know that the path to purchase is currently still a mix of online and offline engagement, and that 85% of UK consumer spend still 'touches' a store in some fashion, according to recent CACI research – whether that's viewing

the item first, collecting it or returning it. So stores remain important to shopping, but they need to differentiate themselves in ways that online shopping cannot, and must make themselves more relevant to the communities they serve if they want to stay alive and thrive.

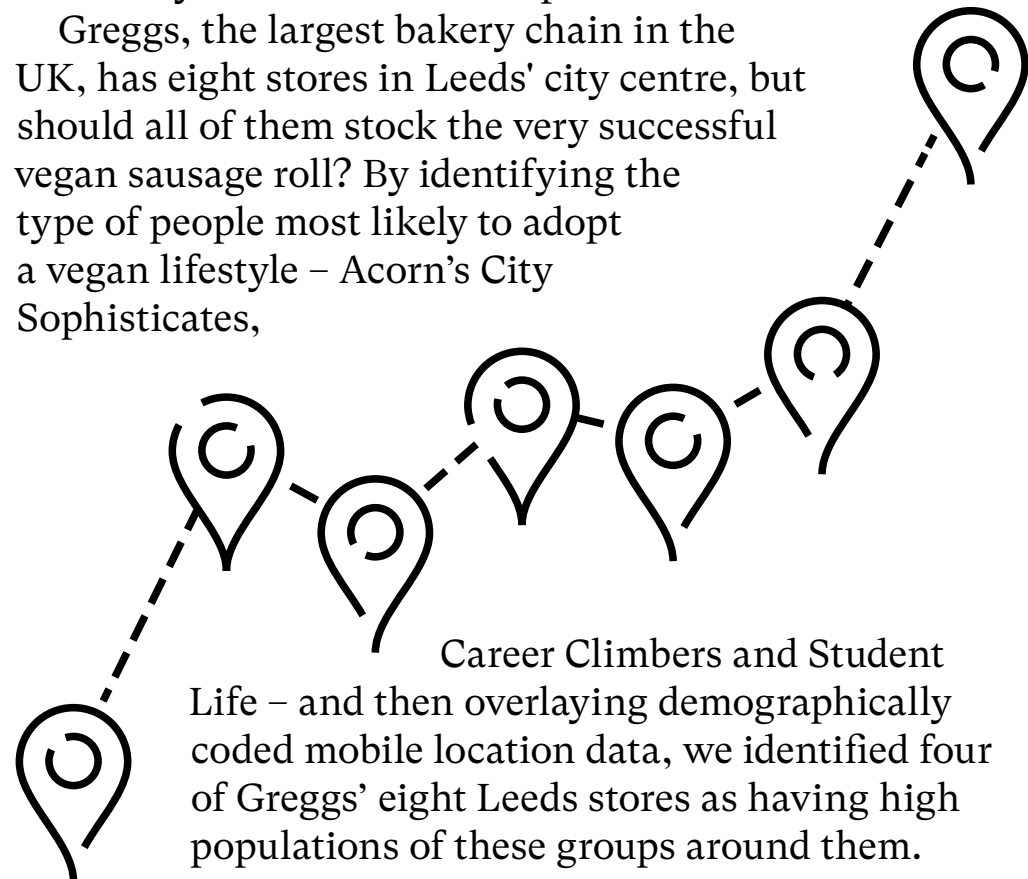
Lewisham and Islington are both inner-city London boroughs, but the former is home to less-affluent households, students and young professionals, while the latter has double the London average of what CACI calls 'City Sophisticates' – younger, well-educated, affluent city-dwellers. Yet many of the high street brands on offer in these two areas are the same, the store formats are the same, and even the stock is the same. Unsurprisingly, the retailers perform differently in each area,



these methods with another layer of data generated by the two items a person almost always has on them: their phone and wallet. This information provides a whole host of new data sets, including beacons, wifi, apps, network credit, and debit and banking transactions, all of which can be used to answer key questions for owners and occupiers alike.

At CACI we use Location Dynamics mobile data in two different ways, allowing us to understand the catchment around a shopping centre, as well as the movement within the centre, across the UK and Europe. We code up with Acorn to understand the customer and always ensure GDPR compliance.

Greggs, the largest bakery chain in the UK, has eight stores in Leeds' city centre, but should all of them stock the very successful vegan sausage roll? By identifying the type of people most likely to adopt a vegan lifestyle – Acorn's City Sophisticates,



Mobile data can also be split by the time of day or week, and the potential consumer in and around the shop. This information can be used to create a more localised offering and store fit-out for a brand like Greggs, better connecting it to its customer.

When used well, data enables retailers to revive their position in the high street. However, it's important to not lose sight of the question at the heart of your research, or the business challenge you're trying to answer – and don't underestimate the amount of analytics needed to do so. New data sets are exciting, but require GDPR best practice and data compliance, as well as heavy lifting on data analytics and bespoke software tools. And don't forget that sometimes old-school methods are still best, depending on the question at hand. The data world today is complex; you need to navigate it and engage with it, but remember that new data is simply another tool, not a solution.



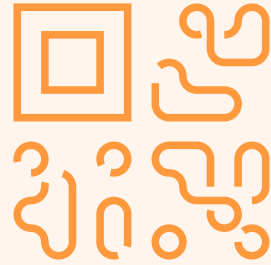


FRICTIONLESS RETAIL

A range of innovative tech solutions are making their way into retail stores as brands seek to offer customers a frictionless offline shopping experience. Jack Sallabank from Future Places Studio highlights a few to keep an eye out for.

QR CODES

Customers can scan QR codes on products to get more information, view lookbooks and videos featuring the product, and in some cases benefit from quick cashless payment systems.

**AUTONOMOUS SHOPPING CARTS**

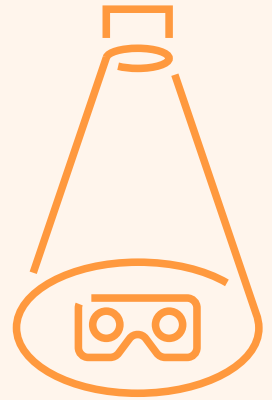
Robotic shopping carts follow customers around the store, making the shopping experience easier, especially for those pushing buggies or wheelchairs.

**AUTOMATED CHECKOUT**

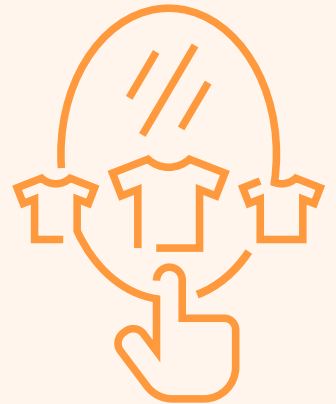
Amazon's Go stores use a combination of computer vision, deep learning and sensor fusion technology to automate the payment and checkout process. Customers can pick up items and leave without checking out; payments are made automatically through the Amazon Go app.

**VR SHOWROOMS**

Virtual reality showrooms offer a dynamic, interactive buying experience, letting people don VR goggles and see products in a real-world setting. In car showrooms, VR even enables the customer to make changes or upgrades to the car of their choice.

**INTERACTIVE MIRRORS**

With this technology, retailers can scan the items the shoppers want to try on, which are then displayed on an interactive mirror in the dressing room. The mirror can be used to choose a different colour or size, and to select other items of complementary clothing.

**FACIAL RECOGNITION**

Facial recognition software installed in stores recognises shoppers as they approach, activates their loyalty accounts and, based on previous purchases, can make product recommendations.



Conclusion

Retail, perhaps more than any other sector, is subject to the whims and demands of consumers, many of whom value convenience more highly than any other factor. Interestingly, the majority of our contributors – from developers to consultants to retailers themselves – see this time of flux as a huge opportunity. This view is not widely represented within the media, which appears to focus on the challenges facing the global market.

Throughout the compilation of this issue, key themes emerged, echoed in essays, discussions and interviews from Hong Kong and China to Sydney and London. These include localism, flexibility and the creation of additional attractions to which retail can provide a backdrop. Developers and retailers are integrating more uses, bringing back a more tactile experience and providing other reasons for customers to dwell.

It's interesting that where developers are willing to experiment and adapt, customers are returning. Whether that stays the case in the long term remains to be seen, but with rooftop parks emerging in Swedish shopping centres and urban farms cropping up in Australian malls, it's clear that the typical model is being torn up.

Retail design in this environment is hugely exciting, if challenging. But as with workplace design, adaptability will need to take precedence. That could be adapting an offer to a specific local

market, to include technology or to become more environmentally sustainable. Or it could be adapting what happens within the space for different uses over different times of the day. Providing spaces that are flexible in the long or short term will be key to delivering what retailers' specific customer bases want. One thing is certain: it's no longer just about transactions.

Credits

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Printed by

Pureprint Group, a Carbon Neutral
Printing Company

Edited by

Future Places Studio
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p. 4–5: 50, 56, 78, 84, 104, 120 – John
Madden
p. 5: 106 – Albert Chu
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Australia
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Kindleysides
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p. 107 – Albert Chu
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across London.

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in Make's Hong Kong
studio, and is working
on a range of mixed
use interior design
and architecture pro-
jects across
Hong Kong and China.

JOANNA RUSSELL,
Retail Development
Manager at Frasers
Property Australia,
is working on
delivering the world's
most sustainable
shopping centre,
Burwood Brickworks.

JACK SALLABANK is
Founder of Future
Places Studio, and
works with a range of
thinkers and innovators
across the real estate
sector to discover
trends and spark new
collaborations.

ALICE SANDELSON,
Head of Partnerships
at Founders Factory,
works with the
next generation
of retail brands.

RICHARD SCOTT, Di-
rector of Nash Bond,
is an agent for the
London-based retail
advisory firm.

KEN SHUTTLEWORTH
is Founder of Make
Architects and oversees
the design development
of all Make projects.

ANNA STRONGMAN,
Partner at Argent,
has spent the last few
years delivering Lon-
don's newest
retail destination,
Coal Drops Yard.

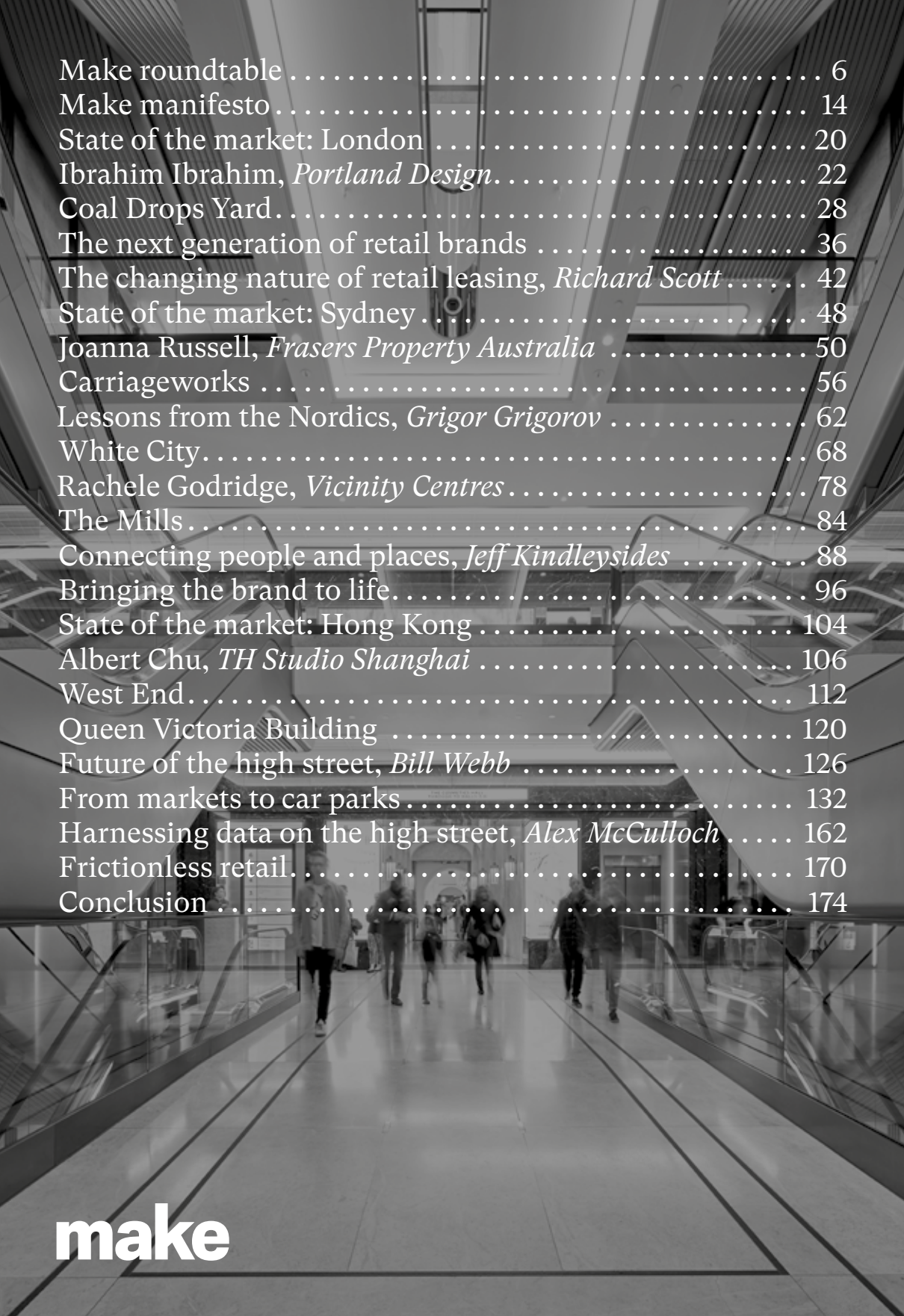
JACE TYRRELL is the
CEO of the New West
End Company, the
BID responsible for
the West End and its
74 streets.

BILL WEBB, Partner at
Make, has worked for
the practice in both
China and London,
leading the design
and delivery of several
mixed use projects.

MILLIE WILSON, Direc-
tor at Bruce
Gillingham Pollard, is
a retail agent working
on Television Centre
and White City Place
on behalf of developer
Stanhope.

KATIE WYLE, General
Manager of Westfield,
has been involved in
Westfield London's
Phase 2 expansion
and now runs
Westfield London.

RAY ZEE is the Chief
Designer at Nan Fung
Group, responsible for
the design development
of the group's buildings
portfolio.



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