

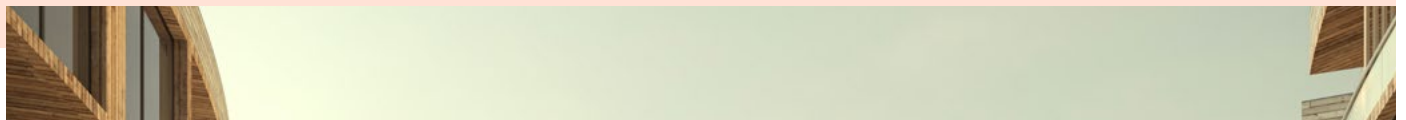
BRICKFIELDS™



Reawakened Spaces

The key trends set to positively reshape our built environment in a post-COVID world

June 2020



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Welcome to ‘Reawakened Spaces’ a trend communiqué in response to the COVID-19 recovery.

This remarkable time has many of us wondering what the future holds for cities, places and property. Undoubtedly, many of us have shifted how we behave during this time, either by choice or by legal restriction. However, while the immediate change is undeniable, the lasting change is more relevant to property owners and operators. While we are hesitant to draw definitive conclusions, this report offers four key trend areas that may have lasting impact for the property sector well beyond the COVID-19 pandemic.



01

Supportive Systems

The rise of commercial reinventions and investment in old-fashioned community spirit to support businesses and neighbourhoods through the recovery phase.

01 Introduction



As our global footprint expands, business owners and communities are countering with a new-found sense of local solidarity garnered during the peak of the pandemic. A number of systems have come into play to offer support to vulnerable individuals and businesses – with implications for our built environment. For retail and hospitality businesses, governments have expedited policies to allow for profitable trade within distancing restrictions, changing the shape of our streetscapes. Shopping centre owners have aggregated delivery systems to allow customers to safely access the breadth of their retailers. Meanwhile isolation and insecurity has been counteracted by neighbourhood initiatives and business owners pivoting operations – repurposing their spaces and product for social good. This period has offered a renewed appreciation for the value of supportive social networks and the role local spaces play in supporting these interactions and relationships.

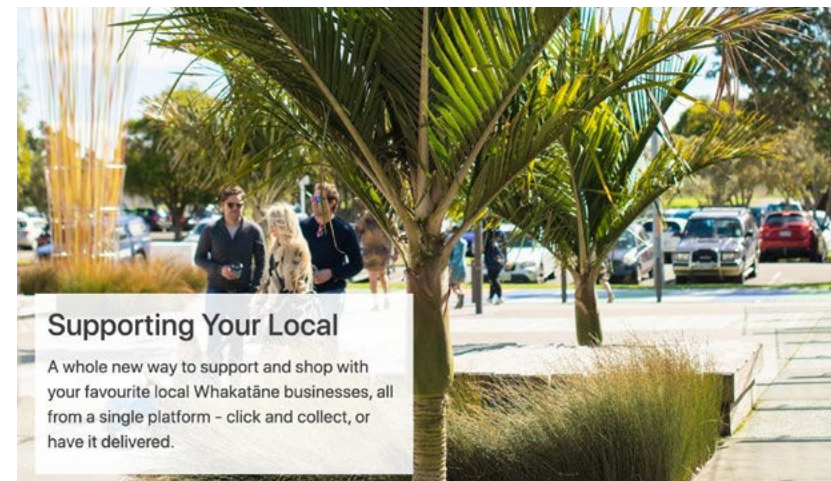


Aggregated retail – Creative initiatives for boosting trade

It's no secret that small and medium businesses have struggled during the pandemic, with 'business as usual' changing on a daily basis and normal operations tightly restricted. This highlights the importance of agility responding to changing conditions. In Australia, the Bureau of Statistics data revealed that between March and April 2020, one in ten Australian businesses halted trade, with some already shutting shop for good.

One support response has been the emergence of 'virtual shopping malls' which aggregate retailers into a single platform. One example is the Whakatāne Virtual Mall in New Zealand which brings together the town's local businesses and services in a centralised e-commerce site. Shopping centres owners are also adjusting their experience to support their tenants and customers.

Property developer Mirvac has launched the Essentials Express online marketplace, similarly allowing shoppers to purchase from multiple local retailers in their assets through a click and collect platform. The convenience experienced through





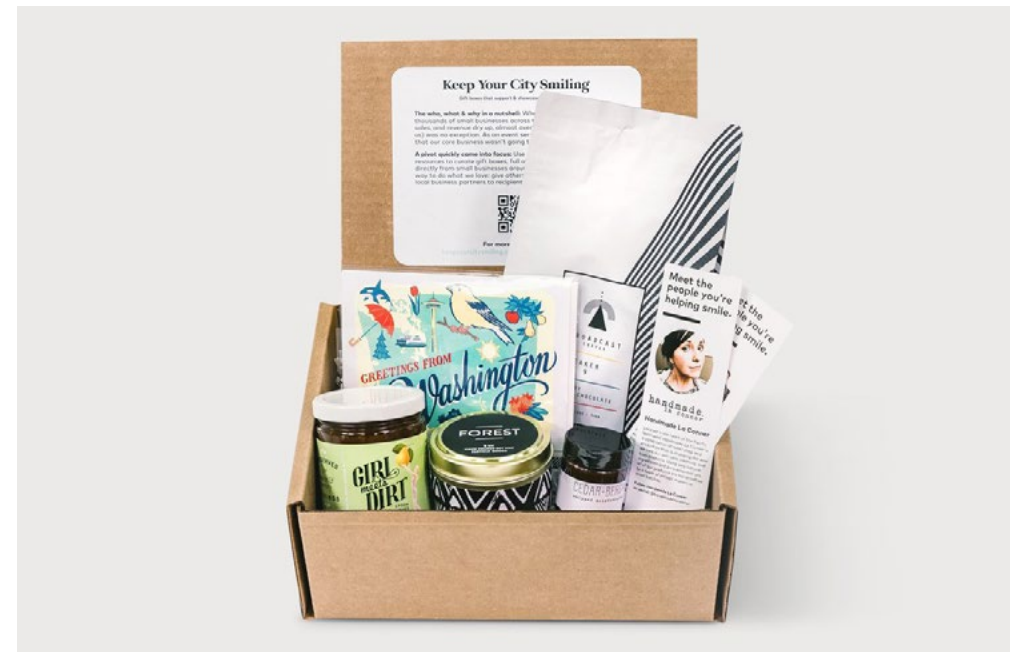
“How could we help out our small business community, as well as support our own team during this uncertain time?”

The SnapBar

these platforms may see customers expect this as a permanent offering.

Another way that businesses are boosting trade is to pivot their offer or services, not only to keep them afloat but also to better cater to the changing needs of communities. For example, American photo experience company The SnapBar has used this time to create the initiative 'Keep Your City Smiling'. This service allows customers to purchase curated gift boxes filled

with premium products (such as snacks, artwork, and skin care) from local vendors that showcase a city and its artisan makers. The outcome boosts business for the participating partners, whilst having a strong tourism purpose.



Agile leadership – Managing the transition out of restrictions

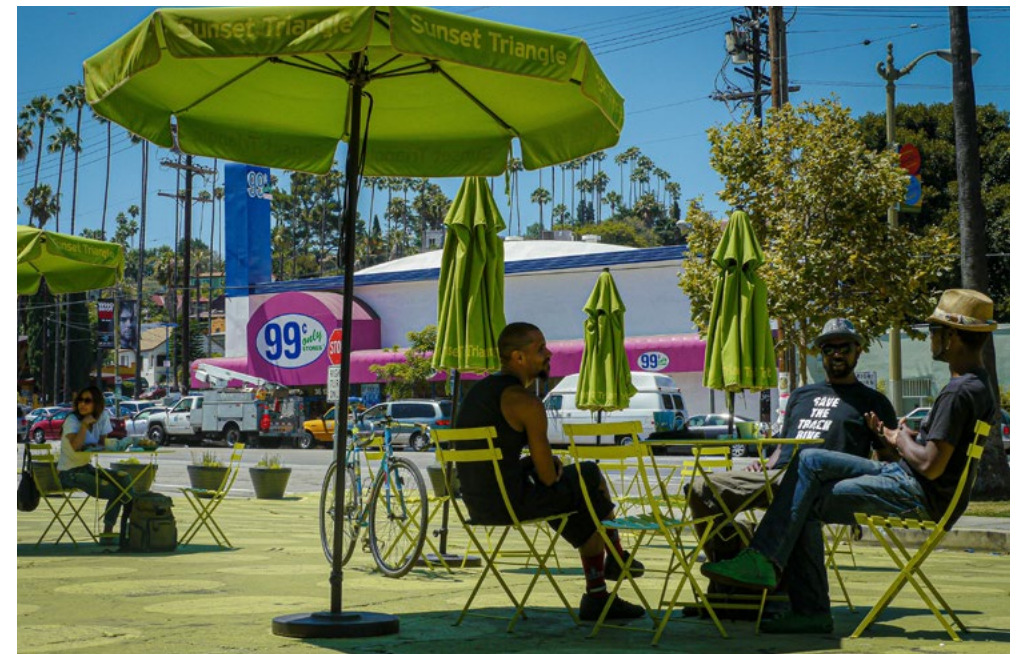
Government lifelines have been a critical part of the response to COVID-19, providing individuals and businesses with essential support services and subsidies. The range of support mechanisms has been broad, from temporary payments to retain staff, loans to small businesses, and working with banks and landlords to temporarily freeze rents. As businesses begin to reopen, governments at all levels must continue to act quickly and take a leading role in supporting this process, enabling businesses to operate profitably within restrictions. One of the major hurdles businesses have encountered is restrictive zoning rules and bureaucratic processes – and governments are taking note.

A particular example is the ‘Grand Outdoor Café’ campaign in the United Kingdom. The initiative has lobbied the national government to grant local authorities the power to relax zoning regulations. The intent is to allow hospitality venues to extend trading areas into the streets – making up for

trade lost by social distancing. It looks to have been successful. At the time of publishing, the government has indicated support and is considering allowing al fresco dining on streets. A similar initiative has also been delivered in Vancouver, with the city expediting a flexible process for restaurants to establish their own footpath dining areas.

In Australia, the New South Wales Department of Planning, Infrastructure and Environment has announced Streets as Shared Spaces grants for local councils to deliver short-term temporary activation projects. The goal is to dually attract people back into public spaces in a safe way whilst building momentum around local businesses.

This remarkable time has truly highlighted governments’ ability to expedite the development of new mechanisms and streamline processes to enable economic recovery. For most property owners and operators, this level of responsiveness is unprecedented, and should set a future expectation for the pace at which positive change can happen when enacted in a collaborative manner.





Community capital – Strengthening social connections

One of the most positive and heart-warming responses to COVID-19 has been the noticeable increase in sense of community. Commissioned research by the Food Foundation (UK) found that 40 per cent of respondents are noticing a stronger community feel in their local area. In terms of actual behaviour change, 39 per cent are more in touch with friends and family and 11 per cent are sharing food, toys, etc. with neighbours. Around the world this has also manifested in the emergence of support groups, the presence of convivial activities

(e.g., physically distant ‘street parties’ in driveways), an offer to run errands for the vulnerable, and simple acts of kindness.

One such example of feel-good community spirit is the Voices of Brussels bus. Taking advantage of quieter roads, Belgian public bus company STIB-MIVB has asked local Brusseleers to send in voice messages of love, support and hope, which are delivered by the bright red buses each day. The bus shares personal messages over loudspeaker to friends and families kept apart by COVID-19, bringing joy and happiness – especially for older family or friends that may not be tech-savvy enough to communicate through digital channels.



“40 per cent of people are noticing a stronger community feel in their local area and 39 per cent are more in touch with friends and family.”

The Food Foundation UK, 2020



Conscious companies – Purpose-driven operations

Consumers are also looking to brands and corporations to play a supportive role in the pandemic and economic recovery. This is in line with GenZ and Millennial preferences which favour brands with genuine corporate social responsibility, with nearly 75 per cent willing to retract loyalty from a brand if it does not share similar values in economic development and social justice (according to a 2017 Cone Communications survey). COVID-19 has truly highlighted the potential for companies to benevolently adapt their services.

A number of excellent responses early in the pandemic saw the transformation of restaurants into community kitchens and grocery stores. This allowed both the retention of staff as well as the provision of meals to those in financial hardship. A particular example was championed by José Andrés, a Michelin-star chef based in the United States. Andrés transformed eight of his restaurants into community kitchens offering affordable takeaway lunches for USD\$6–12. Those unable to pay were

also welcome, with the kitchens giving customers the opportunity to donate a meal.

This rapid response sets a precedent for how space can be utilised in the future during off-peak periods, with a particular focus on social good. Now is the moment for companies to actively look to their communities to see what resources can be shared.

“75 per cent of Gen Z and Millennials are willing to retract loyalty from a brand which does not share similar values in economic development and social justice.”

Cone Communications Survey, 2017





Insights and Implications

- Homebuyers will place an even greater value on residential product and master-planned communities that are hyper-local and self-sufficient – i.e., amenity rich, walkable, and with an active fostering of social connections.
- A precedent has been set for efficient government processes. Applying 'sanctioned informality' may be a long-term expectation for expediting commercial and community improvements.
- Retailers and shopping centres are delivering a more comprehensive blend of online and in-person shopping, dining and entertainment. As this holistic 'omni-channel' continues to aggregate product, experience and convenience, this may result in the reduction of tenancy footprints.



02

Recalibrated spaces

Airports, workplaces, retailers and city streets are showing new levels of dexterity – rapidly being repurposed and reconfigured to meet changing needs.



02 Introduction

The pandemic and the associated changes in behaviour have understandably altered how spaces are utilised. Cities and property owners have been taking advantage of quieter roads, parking lots and infrastructure to accommodate social activities and respond to unforeseen emergencies. Interior spaces are also being reconfigured to support the recovery, with workplaces in particular recalibrating their layouts and employee experience. The common driver across all these is health – whether in regard to perceptions of safety and hygiene or maintaining physical and emotional wellbeing.





Re-utilised assets – Supporting experiences in entertainment, leisure and dining

Strict social distancing requirements have impacted activities enjoyed by communities, such as sporting events, festivals, visiting the cinema and eating out, among others. While restrictions are lifting, the peak of the pandemic saw the creative repurposing of spaces allowing asset owners to remain relevant to their customers and support social livelihood.

One of the most novel examples was the collaboration between Vilnius International Airport in Lithuania and the Vilnius International Film Festival to host a drive-in cinema on the empty tarmac. The event attracted 150 cars, which were required to be parked two metres away from each other and hold a maximum of two people per vehicle. Dainius Čiuplys, the head of Vilnius International Airport, said he was excited to use this as an ‘opportunity to demonstrate how airports can perfectly combine aviation activities with events and projects of various formats’. This response also taps into wider trends which see airports as hubs of experiences and destinations in their own right. The opportunity may



**“...this opportunity demonstrate(s)
how airports can perfectly
combine aviation activities
with events and projects of
various formats.”**

Dainius Čiuplys, Head of Vilnius International Airport, Lithuania



“There’s the need for a lot of our street-level business—our restaurants and our retailers—to have the ability to increase their square footage or footprint.”

Kourtny Garrett, CEO and president of Downtown Dallas, Inc.

set the tone for more flexible and experimental formats for this asset class.

On a smaller scale, as previously mentioned, city streets are being allowed to host al-fresco dining experiences, reinstating a sense of public conviviality – albeit spread out. One typology that has been receiving renewed attention is the parklet. A recent pre-COVID study from the City of Perth, Australia found that parklets brought a 20–35 per cent increase in local footfall and had broad community support. An example in support of this evidence is found in Dallas, Texas. Within the city, food

and beverage operators now have the option to apply for a permit to set up temporary parklets in empty parking spaces to expand their capacity. Parklets can accommodate three tables (incorporating 1.5-metre social distancing) for up to nine diners. This approach also has the added benefit of freeing up space on footpaths for pedestrians to move around safely and alleviating potential anxieties of being in enclosed spaces.



Reconfigured layouts – Supporting new social etiquette at work and in retail

As the economy reopens in cities around the world, adjustments to enclosed and outdoor spaces are being required to prevent a second wave of the COVID-19 virus. Designers and strategists have been stepping in to reconfigure spaces to ease the transition process and rebuild public confidence.

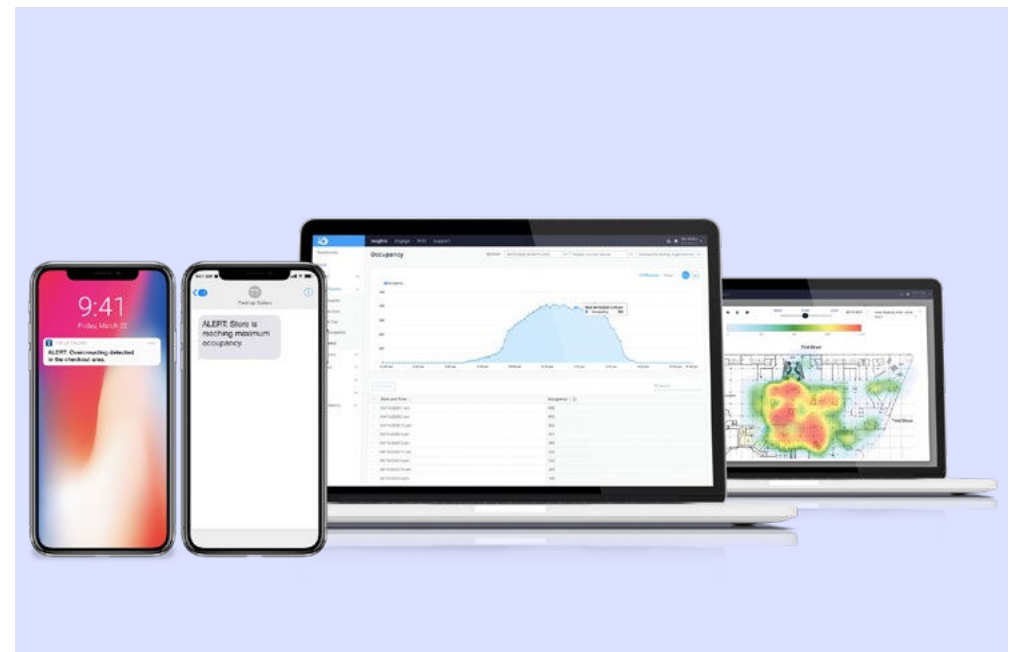
Workplaces are a key area requiring cautious management. Trends and commercial imperatives that have been growing over the last decade have been currently upended, namely tight floor-to-desk ratios, flexible spaces and shared amenity. In the interim, new layouts and technology are being trialled.

One example of this is the Six Feet Office, developed by Cushman and Wakefield. This concept was developed through assisting 10,000 companies in China to transition back to the office – and now serves as a guideline for companies around the world. It uses large

circles around desks to denote the socially acceptable distance of six feet, ensuring employees are separated safely at all times. The organisation has also developed a 'Recovery Readiness' guidebook to help landlords and tenants plan and prepare for a return to the office.

Along with reconfigured layouts, it is likely that PropTech products and services will take on increasing importance, particularly those that help determine occupancy levels and scenario planning. A particular response is OccupancyNow by Skyfii, a tool which combines real-time communications and automated counting technology. The visual data output helps asset owners and managers to monitor occupancy, social distancing and compliance with local COVID-19 regulations. It provides both reassurance to tenants and facilitates informed decision-making.

A similar approach is being utilised by Gensler, using their Wisp® software. The program helps major corporations visualise and communicate to their teams which seats are available at a floor, neighbourhood or departmental level. This high-level approach can be





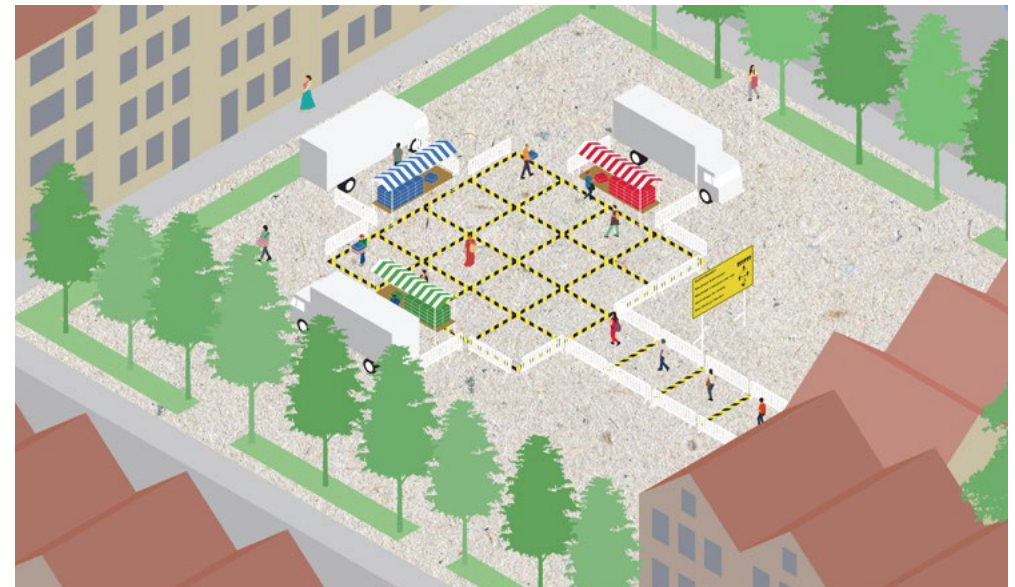
“Instead of you going to the market, the market is coming to your neighbourhood.”

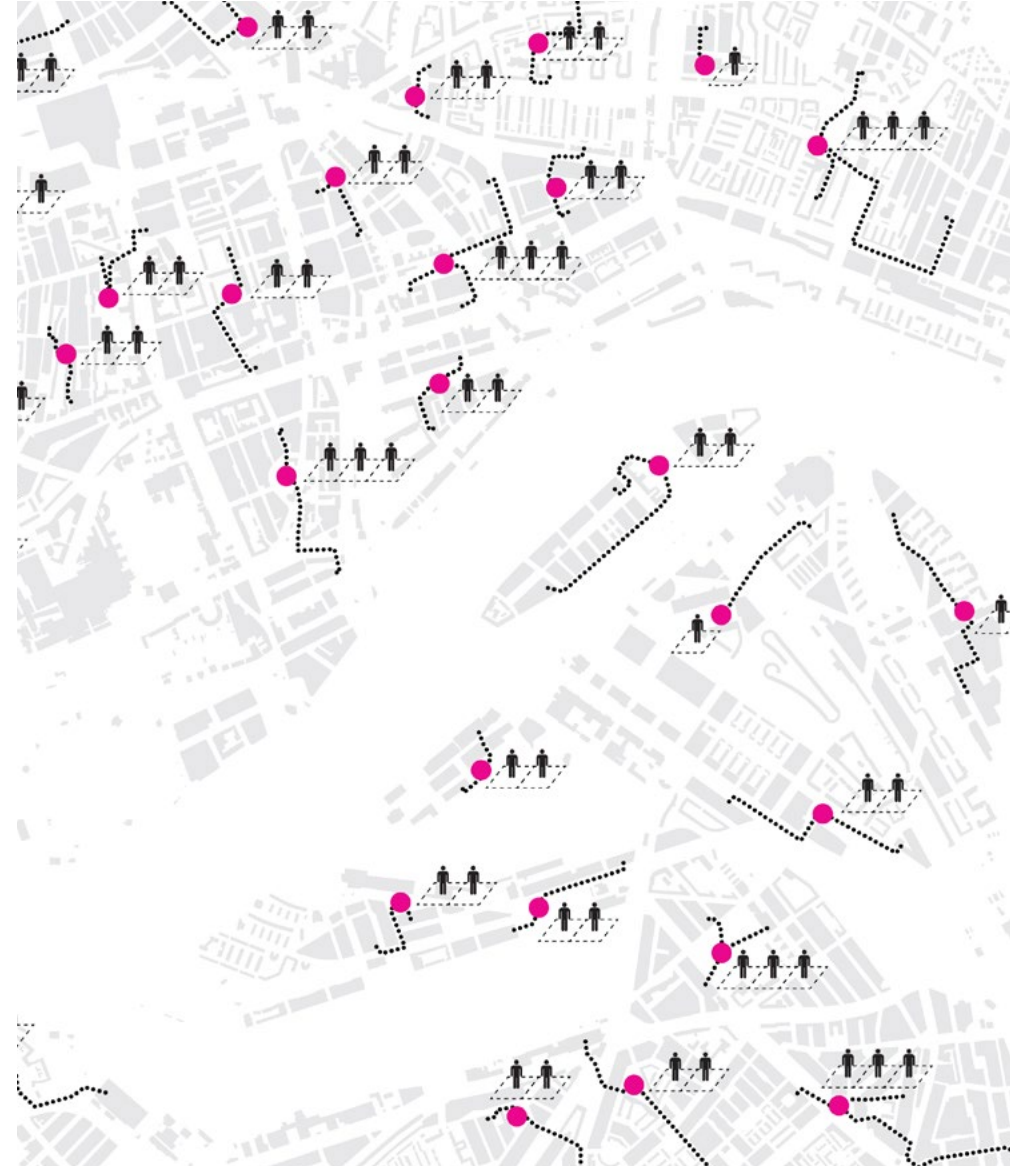
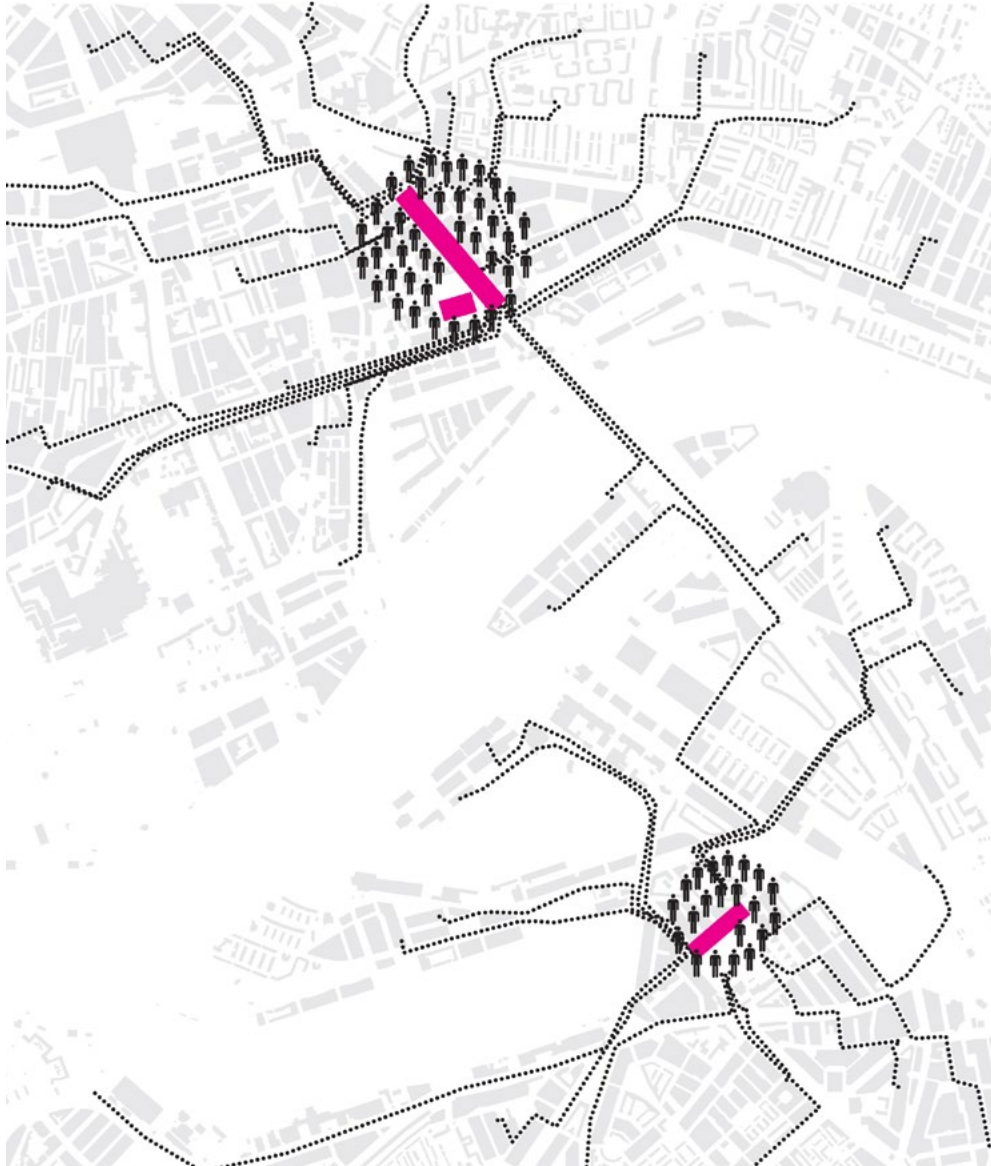
Thijs van Bijsterveldt, Oana Rades and Harm Timmermans, Shift Urbanism Architecture

quickly implemented across a portfolio for immediate physical distancing planning and future scenarios.

Localised outdoor spaces are being considered for reconfiguration. One approach sees the potential to better utilise small pockets of space spread across a locale for different activities. For example, the Hyperlocal Micro Market concept, developed by Dutch architecture firm Shift Architecture Urbanism, proposes rethinking produce markets from a concentration of stalls in once place

to a dispersed, mobile network spread across the city. The stalls are designed to accommodate three stalls set up around a grid of 16 squares that guides social distancing behaviour. During the pandemic, the markets would be restricted to a maximum of six people, where only one person could occupy a grid square at any time. In the future though, this could be a model for a concept that brings a rotating series of markets to neighbourhoods and fills under-utilised spaces.





Disaster relief – Spatial solutions for rapid response

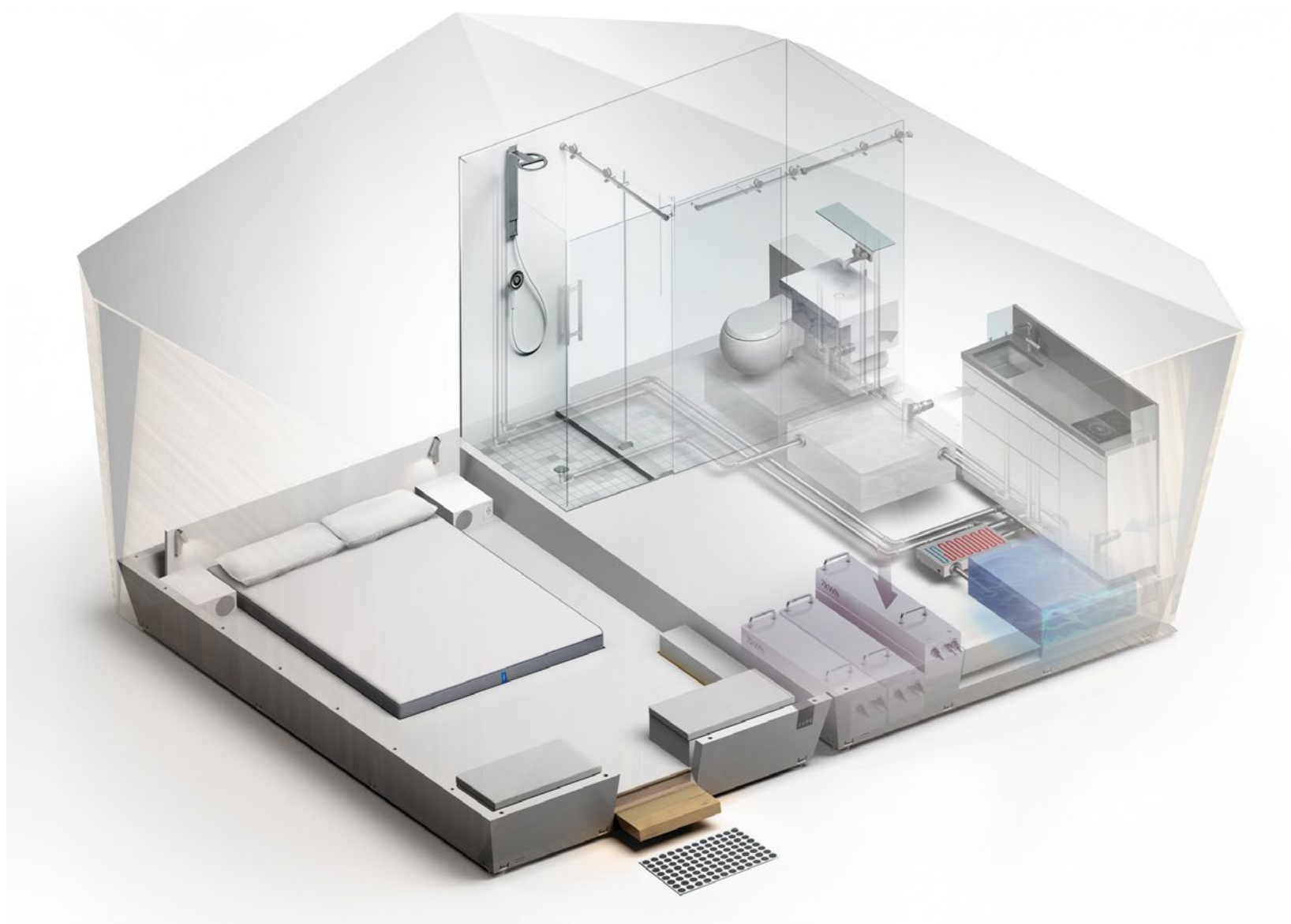
As with any crisis, the COVID-19 pandemic has highlighted the importance of speed when meeting disasters head-on. Often additional space is needed as hospitals are put under pressure or emergency housing is required. Therefore, the ability to quickly adapt under-utilised space is a key concern for asset owners, designers and response teams.

Public assets around the world are being converted into pop-up hospitals to meet the demand for hospital beds and medical facilities during the health crisis. A particular example in New York has seen the National Tennis Centre transformed into a field hospital accommodating more than 470 beds, including 20 ICU beds, a pharmacy, a lab and a meal package distribution centre. Similar examples exist in Chicago, with hotels being converted to support travellers in quarantine.

Other approaches are smaller in format, working at the scale of individual interiors. For instance, design start-up Jupe has designed

a flat-packed, pop-up room that has proven to be valuable during COVID-19. The various models can be used to accommodate hospital overflows, ICU beds, housing for frontline workers, or serve as a crisis shelter. The private nature of the designs is said to be both safer against virus spread and more comfortable for patients – as opposed to tents commonly used in relief situations. Despite being sold at cost, the units have come under scrutiny for their price, selling for USD\$14,500 and USD\$78,000 for the Rest and Care models respectively. While their product presents as high quality, it will be up to governments to decide whether this is an economically viable option.







Insights and Implications

- With the world having witnessed an increasing number of displacing global events, spaces will need to have in-built flexibility – adopting an approach of 'long life and loose fit' purported by Steward Brand in *How Buildings Learn: What happens after They're Built* (1994).
- Workplace design and experience has emerged as even more complex in a post-COVID world. The long-term implications of working from home are yet to be realised. This could result in reduced occupancy, modified work times, and constant hygiene practices. The transition will be tentative and experimental, balancing nuanced interests of employees and decision-makers regarding comfort, lifestyle, productivity and culture.



03

People-first Mobility

The imperative for safety, hygiene and health has accelerated Mobility as a Service (MaaS) trends, given a new purpose to autonomous vehicles and spurred government policy for tactical urbanism.

03 Introduction



The pandemic has refocused the imperative of mobility to put public safety, hygiene and health at its fore. This extends to the commuter, service worker or receiver of goods. As a result, trends in contact-free delivery have accelerated, with autonomous vehicles gaining a new role in this space. Technology has also stepped in to help rebuild confidence in public transport, supporting commuters to make safer decisions. However, the most positive of changes has been the blatant benefits of a reduced-car city where people have priority. Many have welcomed the quieter streets, cleaner air, and have also called for wider pathways and stronger cycling infrastructure. In response, the most progressive and agile governments are creating national policy to reshape their cities in this image.



Cyclable cities – Long-term plays for lasting change

Placemakers and urban strategists have long been advocating for more walkable, pedestrian and cycle-friendly cities – and they may just get their way. Throughout the pandemic many cities around the world have been reallocating road space from cars to pedestrians and cyclists. For city governments, much of the measures have been tactical and temporary, though there is a strong sentiment for long-term adoption.

A distinct approach is being taken by New Zealand with its Innovating Streets for People pilot fund, a program where tactical urbanism is national policy. The pilot invites cities to access funding for programs ‘that make it safer and/or easier for people to move around or access community spaces’. The funding is generous, covering 90 per cent of project expenses. According to Waka Kotahi New Zealand Transport Agency, applicants must ‘demonstrate the value of using tactical urbanism to advance a future permanent change and explain how they will move to permanent changes’. This represents a turning point to embed the positive city changes that have been created in the wake of the pandemic.



“If nothing else, it takes away one of the last excuses—that cities can’t afford to do it.”

Brent Toderian, Vancouver’s former director of planning,
speaking to Forbes on New Zealand’s policy response, 2020



“The bicycle is unrivaled in its resiliency and ability to bring a human element to city life while addressing the environmental, social, and public health pressures of the 21st century. ”

James Thoem, Director, Copenhagenize Design Company

The other layer of creating cycle-friendly cities is nurturing the culture of cycling itself – making it the ‘easy choice’ above other modes of mobility. One particular program is the Coup de Pouce Vélo by the French national government. A key support mechanism is the 60 per cent subsidy for installing temporary bicycle parking spaces in neighbourhoods, social housing estates, transport hubs, educational institutions, and student residences. The financing helps

mobilise these entities to provide such amenity, which also supports their competitive advantage. While these types of programs are not new, they do carry more weight in a post-COVID world.



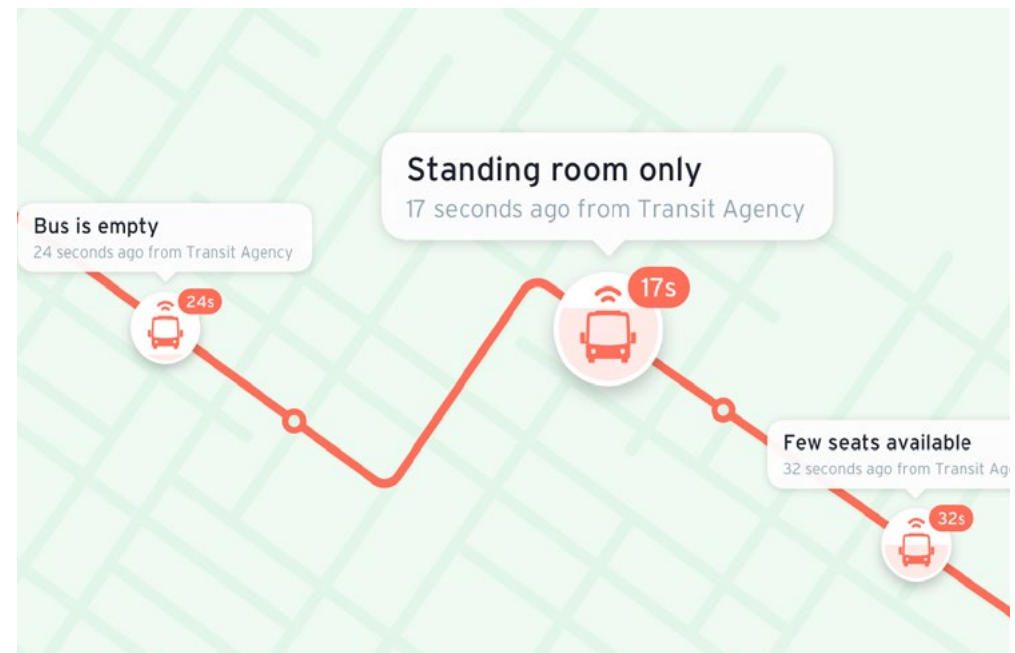
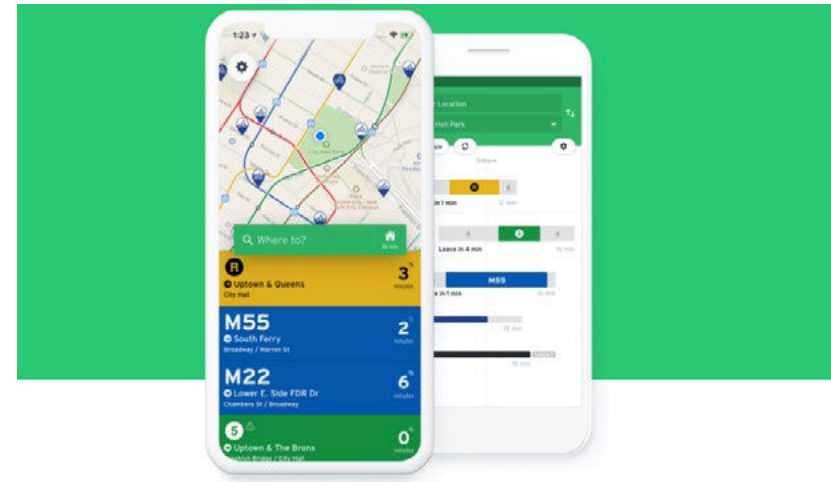


Reassuring technology – Rebuilding confidence in public transport

Public transport has undergone significant shifts in usage and public perception. As lockdowns lift, commuters are wary about the risk of contagion. In Australia, among factors discouraging workplace use, the risk of contracting or passing on COVID-19 while 'travelling to or from work' increased from 24 per cent in April to 33 per cent in May, according to Brickfields Consulting and Skyfii's COVID-19 Business Impact Tracker (CBIT) survey. This is reflected globally too: at the time of writing the United Kingdom began a phased return to work, with polling revealing that 57 per cent of Britons planned to reduce their public transport usage.

To ease in the transition and rebuild confidence in public transport, a number of apps are creating features to help commuters make safer decisions. One example by Dutch NS trains is the in-app 'seat seeker' function, which guides travellers to available seats. The app utilises weight sensors installed in carriages to determine capacity.

Another similar example is the Transit app's real-time crowding information feature available in participating Australian and American cities. Utilising passenger counters, the app provides bus users with a spectrum of capacity from 'empty', 'many seats available', all the way to 'full'. Again, this technology existed pre-COVID-19 – primarily for comfort and convenience – but now has a new role in public safety and economic recovery.





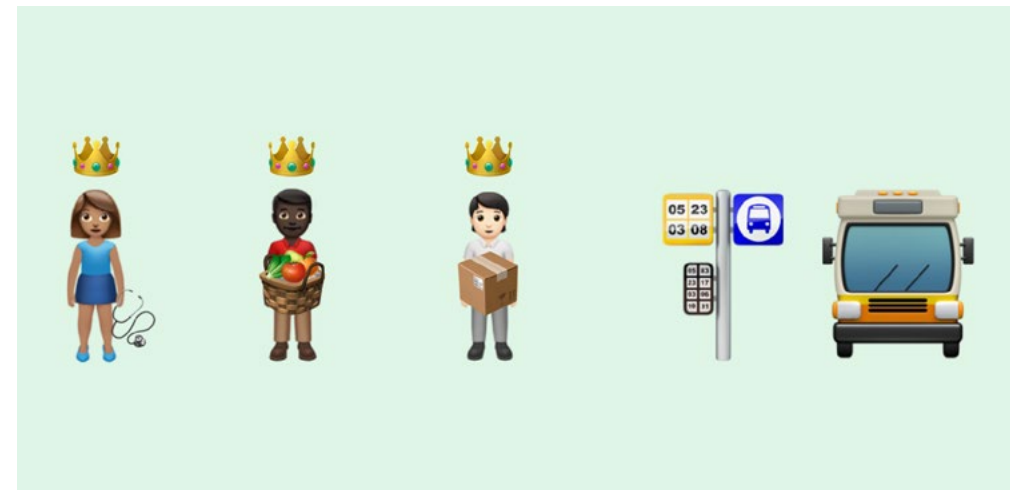
“Of the remaining public transit users 92 per cent were commuting to work, with almost 20 per cent working in “food prep” and near 20 per cent working in healthcare – in New York City, this is 35 per cent.”

Transit app user research, April 2020



Special note

- It is important to raise that prior to the ‘return to work’ for non-essential workers, usage of public transport during the lockdowns’ peak highlighted inequalities, particularly in the United States. Research by the US Department of Transit in April 2020 revealed that of the remaining public transit users 92 per cent were commuting to work, with almost 20 per cent working in ‘food prep’ and nearly 20 per cent working in health care (in New York City, this is 35 per cent). More than 70% of remaining users earned under USD\$50,000 a year. Black and Latino riders made up the majority of the public transportation users in April, with Caucasian users declining by half. While there is a greater appreciation for essential workers in the public psyche, it is important that over time this translates to higher quality and safer services, at least where transport is concerned.



Autonomous vehicles – A renewed purpose for contact-free delivery

How we move around cities does not just encompass movements of people, but also movements of products and services. Changes in delivery modes are occurring to support consumer fears of the risk of contagion. Brickfields' CBIT survey revealed increased preferences for home delivery with no face-to-face interaction, and further to this, in regards to shopping centres, over 70 per cent of respondents would 'only visit for contactless click-and-collect services'.

Autonomous vehicles and delivery robots once deemed a novelty are now considered a viable solution to support this preference. This accelerates an already growing trend, with the value of the global autonomous last-mile delivery industry projected to grow to \$76 billion by 2030, according to a recent report by market research service Research and Markets. One particular example experiencing growth is Starship Technologies, a small robot delivery service, which has seen a rise in demand since the

COVID-19 outbreak. The company has helped support vulnerable individuals, the elderly and those with health conditions who cannot access food due to self-isolating, according to Vice President of Marketing Henry Harris-Burland, speaking to the US National Retail Federation.

Autonomous vehicle companies have also pivoted their operations to support frontline workers. The most notable example of this practice is Nuro, a delivery robot whose typical purpose is grocery and food delivery. During the pandemic, Nuro robots were deployed to transport food, personal protective equipment and other supplies within California's two field hospitals.

“The value of the global autonomous last-mile delivery industry is projected to grow to USD\$75.6 billion by 2030.”

Autonomous Last Mile Delivery Market by Application, Solution, Range and and Vehicle Type:
Global Opportunity Analysis and Industry Forecast, 2021-2030, Dec 2019





According to *The Verge*, an online technology news publisher, the device is completely contactless – workers receiving goods need only give a thumbs up to the vehicle's camera, which signals to a Nuro staff member to open/close the doors remotely. The innovation also frees up healthcare workers from performing this task, leaving them to higher value duties.

The advent of the pandemic has given increased validity and a diversification of uses for autonomous vehicles. Though the technology is not yet seamless (at times requiring human intervention) and governments are at different paces in deploying regulatory frameworks (which can be inconsistent in different cities and regions), this sector is set to gain more attention of city planners and policy makers.



“Between April and May 2020, when visiting shopping centres, over 70 per cent of respondents would only visit for contactless click-and-collect services.”

COVID-19 Business Impact Tracker, Brickfields Consulting and Skyfii, May 2020



Insights and Implications

- Tactical initiatives have a stronger chance of creating lasting change if they have a strategy for permanency from the outset, backed by government policy.
- The pandemic has highlighted the inequalities of essential workers and minority groups as the dominant patrons of public transport. With a heightened value placed on these workers, it will be difficult for decision makers not to create a better, safer system for these groups.
- Interim innovations that continue to rebuild confidence in public transport usage are key to honouring macro global goals of sustainability and more liveable urban cities.
- The new role of autonomous vehicles as an imperative for public health and inclusivity may accelerate their adoption in urban areas, with policy makers and retail asset owners giving greater consideration to regulatory and urban design requirements.





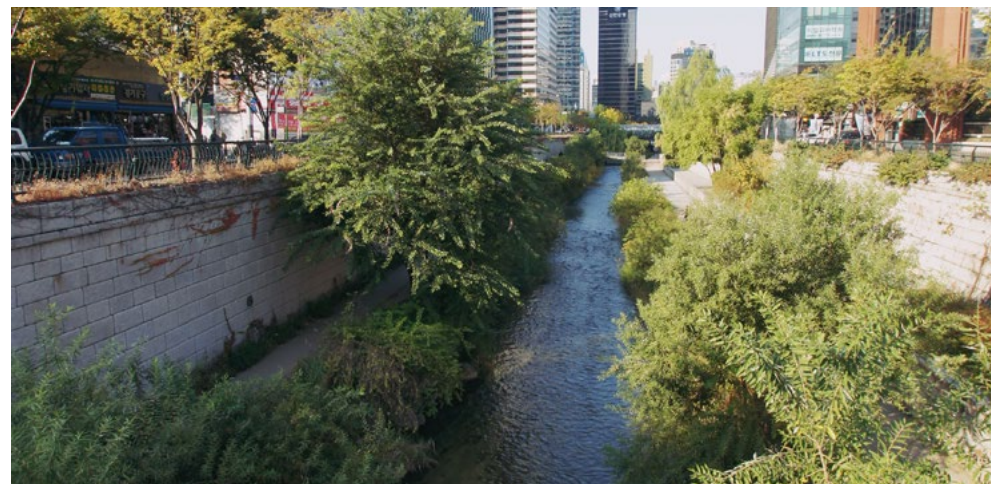
04

Slowed-down Culture

Virtual experiences, localised travel and self-sufficient practices are supporting a slower, more discerning lifestyle pace, with positive implications for our urban lifestyles.

04 Introduction

While the pandemic has caused profound social and economic distress globally, it has also diffused the frenetic pace of our social and cultural lives. The change of pace has offered room for reflection, with only 9 per cent of Britons wanting life to return to normal, according to research commissioned by the Food Foundation UK. Part of this perception likely taps into the growing movement of 'slow culture', a mindset shift that favours 'doing everything as well as possible, instead of as fast as possible', according to Carl Honoré, author of *In Praise of Slowness: How A Worldwide Movement Is Challenging the Cult of Speed* (2013). The movement is also a confluence of the growing wellness industry, mainstream adoption of mindfulness apps, as well as preferences in ethical consumption.



In the context of the built environment, we are likely to see consumers exercising more discernment in how and when they venture out for social, cultural and travel experiences – with the rise of virtual platforms offering more flexible and affordable entry points for engagement. Urban agriculture and distribution systems are also set to change, as more consumers grow their own food and exercise preferences for local suppliers – marking a shift towards regenerative and circular neighbourhoods.



Virtual experiences – Curating social and cultural experiences at a gentler pace

Enforced lockdowns and the blossoming of virtual reality experiences has seen the domestic home assume a more significant role as the epicentre of entertainment, culture and comfort. The attraction of experiences enjoyed in this domain may have ongoing appeal for consumers beyond COVID times. A key sector with a strong presence in this space is arts and culture. During the pandemic, institutions worked quickly to translate more of

their experience into a virtual offering, allowing cultural enthusiasts to take their fancy at archived theatre performances, tours with curators and participatory experiences. A notable example is London's Soho Theatre, which launched an on-demand streaming service showcasing the theatre's plays and comedies. Content can be accessed for as little as GBP£4, with proceeds going to the National Health Service (NHS) and a new fund supporting creatives in the field of comedy. Opening up its virtual doors too was the Museum of Modern Art in New York, which now runs free virtual tours every Thursday profiling a particular collection hosted by a curator.



“Instead of asking, ‘Is there a reason to do this online?’ we’ll be asking, “Is there any good reason to do this in person?” — and might need to be reminded and convinced that there is.”

Deborah Tannen, Professor of Linguistics at Georgetown University, cited in *Politico* March 2020



While these digital formats can never replace the tactility and energy of live experiences, they do democratise access – particularly for those on low incomes, the time-poor, or those living distant from institutions. For some, virtual experiences may be the preferred option.

At the time of writing, lockdowns are lifting, and galleries and museums are reopening for reduced numbers – allowing their experience to take on a slower pace. This quiet moment offers an opportunity to consider how we might better manage the capacity of cultural sites, particularly those subject to over-tourism – and in ways that balance commercial realities.



Slow travel – A growth in virtual and localised experiences

Attitudes towards travel have been gradually changing prior to the pandemic, and air travel in particular has lost its zeal among the eco-conscious. In one form this was marked in 2017 by the emergence of the Swedish word *flygskam*, meaning 'flight shame' associated with climate guilt. In practice this involves eschewing air travel in exchange for rail or staycations. The movement has been popularised by climate activist Greta Thunberg and has been gaining traction.

With global flight bans in place, consumers keen to engage in travel experiences have no choice but to opt for 'slow' options and staycations. One such example filling this gap is the Chōsen brand's programs for self-exploration and peak performance. In lieu of going to New Zealand or South Africa participants can opt into virtual events in arts, music, nutrition and goal-setting. Virtual dinners with home-delivered meals are also offered to build community and connection. While this particular case is pitched to elite entrepreneurs and professional athletes, conceptually these types of wellness experiences are important for individuals suffering from loneliness, anxiety and potential



**In 2019, Swedish Railways found
37 per cent of respondents chose
to travel by rail instead of air,
compared with 20% in early 2018.**

Swedish Railways 2019 Sifo survey



job-losses. Pandemic or not, the virtual format is mainstreaming contemporary options that support mental health. These 'lite' formats also provide a more affordable entry point for the customer while expanding the reach of the operators.

As lockdowns lift, travel is likely to remain localised with travellers venturing only a few flying hours from their home. Speaking to *Forbes*, CEO James Thornton of Intrepid Travel foresees that 'travel will come back hyper-local to begin with'. In response to social distancing requirements, Ben Perlo, managing director for the G Adventures anticipates an uptick in

smaller sized group tours and private group travel. Responding to this is tour company FTLO Travel with the relaunch of their Weekender Series. The tour invites small groups of young professionals from the same city to explore a location within a 300-kilometre radius. In the context of a recovering economy, this type of localised travel offers support to struggling small businesses.

**“Travel will come back
hyper-local to begin with.”**

James Thornton, CEO Intrepid Travel, speaking to *Forbes*, May 2020





Regenerative systems – Shortened supply chains and localised agriculture

The pandemic brought a fraught and acute experience of how we access and consume food. Panic-buying, disrupted supply chains and lack of access to certain items catalysed a new host of consumer behaviours, many of which are linked to slower processes, self-sufficiency and localised purchasing. According to The Food Foundation UK, 38 per cent more Britons are cooking from scratch more regularly, 16 per cent are eating more fruit and vegetables, and an additional 3 per cent were growing their own food.

These shifts are complemented by a surge in direct purchases of vegetable boxes from farmers and local growers. According to research by YouGov in the United Kingdom, 3 million people have ordered a vegetable box or ordered direct from a farm for the first time since the pandemic began. In the United States, the Northeast Organic Farming Association of Vermont has also seen over 10 per cent of the Community Supported Agriculture farms (CSAs) report booms in demand.

In Australia, organic supermarket Spray-free Farmacy reported veggie box orders skyrocketing from 300-350 boxes per week to 800 during COVID-19. In the United States, the Northeast Organic Farming Association of Vermont has also seen over 10 per cent of the Community Supported Agriculture farms (CSAs) report booms in demand.

This is particularly interesting as CSAs offer a subscription model for consumers to purchase direct from their local farm. This signals that consumers are placing a greater reliance and trust in resources closer to home. If the growth is maintained, it builds the case for stronger investment in urban farms and food production systems.

“38 per cent more Britons are cooking from scratch more regularly, 16 per cent are eating more fruit and vegetables, and an additional 3 per cent were growing their own food.”

The Food Foundation, UK, April 2020





This micro-trend is part of a bigger narrative in developing regenerative and self-sufficient communities. In recent years property developers have begun to adopt circular economy principles in residential developments, with the most progressive influencing sustainable habits among residents.

produces their own solar and biogas power, grows organic vegetables, farms fish and chickens, and recycles waste into fertiliser. Homes will start at €200,000 plus about €500 a month for food and services.



One particular example is ReGen Villages in the Netherlands. The scalable model sees the creation of self-sufficient residential communities, made possible by the company's VillageOS™ software which rapidly masterplans and incorporates circular infrastructure. The villages are planned such that a circle of homes exist in a closed-loop system that



Insights and Implications

- The time spent indoors has made people acutely aware of the quality of their home and where developers have fallen short – be it in sufficient natural light, air quality, balconies or communal spaces. Homebuyers will approach residential product with a new level of discernment regarding quality of life.
- How we manage over-tourism and capacity at major cultural sites will be up for consideration. The question should be asked whether we need to decentralise our cultural spaces and include more in our local neighbourhoods and mixed-use developments. For arts and cultural institutions there is an ongoing consideration: how can the next iteration of virtual and remote participation be compelling enough to rival a physical space?
- Consumers are placing a greater reliance and trust in local food systems. If the growth is maintained, it builds the case for stronger investment in urban farms and residential product with regenerative infrastructure.



A final word

A Bright Future – Quotes from Industry Leaders

At Brickfields Consulting we are keen collaborators, knowing that any project is made richer by the collective imagination and optimism of our peers. As such, we have reached out to our global network of clients and collaborators to capture their perspective on what the future holds. Their expertise is far-reaching, spanning retail, hospitality, workplace, transport, urban planning, technology and analytics, arts and culture, and education.

We asked:

For owners and operators of physical places, what do you see as the biggest opportunity arising from this period of tremendous change?

Here's what they said:

On community

“A new horizon of opportunities exists to meet the global demand for living in self-reliant communities outside of cities, matched with the commitment of government stimulus investing over 10-Trillion euro for post-COVID Green Transition infrastructure solutions.”

James Ehrlich, Founder, RegenVillages

“Society will now better appreciate the importance of public spaces, community and each other's health and wellbeing ”

John Rankin, Chief Operating Officer, Skyfii

“The best design impacts well beyond the physical – it’s inclusive, socially conscious, and shapes culture. It has the power to reconnect us. ”

Steve Coster, Managing Director, HASSELL, Melbourne, Australia

“We are each other’s neighbours, and we are all owners of place, and any place that excludes just the one person is a failed space and a damning reflection on us all. We are in a time of environmental, racial and economic reckoning: It is our job as placemakers to work for a place-based climate and social justice led by the experts of that place, the communities we are in the service of. That is our opportunity now, as it ever was and should have been.”

Dr Cara Courage, social practice placemaker, researcher and curator, and editor of the forthcoming Routledge Handbook of Placemaking

On community

“The pandemic has exposed brittle parts of the city – speculative, single use, disconnected. We have an opportunity to diversify and connect these places, and focus less on building anew, if we want to support society through uncertainty and reduce our industry’s impact on the environment.”

Nicola Hudson, Arup Studio Lead, Arup Australia

“We need to avoid the sterile economy and ensuing sterile city – particularly suburban models which cause isolation, poor social cohesion, obesity, mortgage stress and fuel price vulnerability. We need a third way that keeps us safe and enables cities to be the confluence of people, ideas, markets and networks.”

Michelle Tabet, Director, Left Bank Co.

“It is the right time for the radical reimagination of cities and their core purpose and function within society. We should be asking, what will we stop, start and continue? What will need to be true to transition towards more just and livable worlds?”

Grace Polifroni Turtle, Strategic Design and Futures Research Lead, Deloitte Netherlands and Becoming Studio

“We have a rare opportunity to realise public spaces and streets as the anchors of our communities and local economies - finally reclaiming street space and turning businesses inside-out in ways the placemaking movement has long dreamed.”

Ethan Kent, Founder PlacemakingX, Vice President of Project for Public Spaces

On economies

“There is an opportunity is to apply circular economy thinking to real estate to capitalise on our needs for more flexible and adaptable spaces and buildings while achieving social purpose. In particular, supporting social enterprises, artists and community groups.”

Georgia Vitale, Associate Principal – Social Value and Urban Regeneration, Arup Australia

“Across all industries, changing priorities and ways of operating to create a more sustainable future is really the critical opportunity. For the creative sector, sustaining the local cultural industries to adapt and thrive, and finding new ways of collaborating with international creatives and producers, is both an immediate need and a long-term investment.”

Sophie Forbat, Cultural Strategist and Public Art Curator

“The biggest opportunity is to rethink the local. Successful destinations in a post-COVID city will be those that attract, engage and retain local customers.”

Lucinda Hartley, Co-Founder, Chief Innovation Officer Neighbourlytics

“This period of lockdown has presented an incredible opportunity for many businesses who hadn’t previously done so to move into the online/home delivery space where they can reach many more consumers and specifically target their ideal clients. It’s also shown that many businesses can operate more efficiently by allowing their staff to work from home and by delivering consults/meetings/courses online.”

Kristen Ottaway, Spray-free Pharmacy

On space and infrastructure

“The bicycle is unrivalled in its resiliency and ability to bring a human element to city life while addressing the environmental, social, and public health pressures of the 21st century. Post-pandemic urban life may look and feel different, but the affordability, accessibility, and convenience of the bicycle will persevere. City builders must lead by incorporating more attractive onsite cycling facilities.”

[James Thoem](#), Director, Copenhagenize Design Company

“We have realised that not only is change possible and survivable, but big steps for the benefit of many can be made with haste. If we apply this learning to our cities, there are countless possibilities for addressing widespread issues from access to secure housing to the efficient delivery of infrastructure. If anything, I hope we have learned that the time can always be now.”

[Dr Natalie Allen](#), Director and Urban Strategist, The Urban Advisory

“Our physical spaces will change in a way that refocuses on humanity to provide greater safety, inclusion and connection.”

[Adam Di Marco](#), Publisher and Founder, The Urban Developer

On workplace and education

“The need to go to the office will not go away, but we should more fundamentally question why we are going there. The focus needs to be on acknowledging our diverse needs and circumstances to enable people to have more options and choices to do their best work, support their life and wellbeing.”

Tica Hessing, Human Geographer and Tenant Advisor, Cushman & Wakefield

“There is an opportunity for AMP Capital to partner with our customers by supporting them in the return to the workplace and providing a destination and community environment where their workforce wants to be, feels safe and welcome.”

Michelle Stahmer, Head of Property Management, Office & Logistics, AMP Capital

“Let’s work with the workplace as we left it but schedule its use for purposeful collaborative activities with those we need to work with, allowing local and remote work for focus time, and steering a small fraction of the huge sums saved in under-populated real estate for investment in digital tools, future-capable kit, local co-work membership and other low cost/high value benefits. ”

Neil Usher, Chief Partnerships Officer, GoSpace AI

“Remote learning has broadened the educational repertoire of students and their parents. Harnessing their insights will be invaluable in reimagining school environments.”

Fiona Young, Studio Director, Hayball, Sydney, Australia

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Our Team

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Researchers

Stephanie Bhim
Samantha Choudhury
David Grant
Heidi Krohn
Jeanette Lambert
Belinda Lord
Stefanie Matosevic

Writers

Stephanie Bhim
Stefanie Matosevic

Editor

Ginny Grant

Designer

Michelle Teh
www.michelleteh.com

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Skyfii automated occupancy and social distancing management toolkit

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Hyperlocal Micro Market

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pop-up hospital

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Jupe pop-up hospital room

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About Brickfields Consulting

Brickfields Consulting delivers customer and market insights that enable dynamic and innovative property investment solutions.

Over the past ten years, we have developed a reputation in the property sector for unlocking project possibilities through a progressive and adaptable mindset. Our commissions involve a complex challenge which requires our clients to embrace change and seize future opportunities.

By partnering with the owners and operators of physical assets, we provide the insight through research which ensures that places develop a competitive advantage, allowing them to command a price premium and achieve financial returns above the market.

Brickfields Consulting offers a range of services covering four broad capabilities: user research, market strategy, customer experience and design activation. We provide custom strategy solutions as well as standard research and strategic tools.