

城市中国

超越城市的商场 集中式消费空间边界消弭

HYPER-MALLS THE DISSOLVING BOUNDARIES OF ENCLOSED SHOPPING SPACES IN THE CITY

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URBAN WISDOM ADVANCING WITH CHINA

78

超越城市的商场

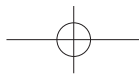
集中式消费空间边界消弭

HYPER-MALLS

THE DISSOLVING BOUNDARIES OF ENCLOSED SHOPPING SPACES IN THE CITY

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体验经济时代的商业综合体发展趋势

A TREND OF COMMERCIAL COMPLEXITY IN EXPERIMENTAL ECONOMY ERA

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Text / KUANG Xiaoming[Chief Editor of Urban China]



存量更新背景下，城市商业综合体肩负着引导街区复兴的重任，具有很强的生命力和合理性。随着城市发展进入美学主义、功能主义、人文主义、生态主义及智能主义等理念叠加的状态，以及经济技术的提升和人们生活方式的改变，未来的商业综合体发展需要充分发挥规划设计价值，面向人的需求，紧抓供给侧主线，围绕体验经济，以创新、绿色、共享为核心，打造具有持续运营能力、可持续生长、自我纠偏的经济聚集体。

城市综合体是以建筑群为基础，融合商业零售、商务办公、酒店餐饮、公寓住宅、综合娱乐、会展会议及便捷交通等核心功能，形成的大规模、多功能、现代化的服务业集聚地。城市综合体的出现是城市化演进的必然结果，是社会在物质空间上的表现。它的开发反映出城市的运营水平。商业综合体则是以商业功能为主，以大型购物中心为载体，城市生活空间的多种功能组合的经济聚集体。

店、居住、办公、娱乐、会展等，逐步适应人的多种需求。在美学主义、功能主义、人文主义、生态主义及智能主义五种发展理念的深度叠加下，经济发展推动商业功能，组织逐渐完善，并结合交通系统形成了不同属性的商业综合体。如以交通为支撑的TOD型、商务办公为主的CBD型和休闲娱乐主导开发的ROD型，在中国最多的是TOD型综合体，两轨或者多轨交汇，地铁上盖开发，兼具交通枢纽的部分特点。

商业空间发展演进 DEVELOPMENT OF COMMERCIAL SPACE

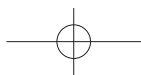
从工业革命到信息革命，城市的发展是技术和社会进步在空间上的反映。商业综合体经历了从注重空间设计、室内装潢到注重功能组织、人性关怀、文化创新、绿色共享、智能应用的演变。根据商业空间与城市功能的关系进行追溯，“底商”是最早意义上的综合体，综合了“住宅+商业”两项功能。底层商业店铺的连续集中形成商业街，如上海的四川北路；人性化改造后，人车混行的商业街变成步行街，如上海的南京东路；在步行街或马路的两侧加盖“屋顶”形成了外廊式商业街，比如两广、福建的骑楼。日本的京都、大阪也都经历了商业街加“顶”的过程，之后新建建筑将“步行街”内置，形成购物中心。商业空间的演变过程凝聚着功能多元化的融合，从“二维”功能逐渐涵盖商业、餐饮、酒

“以租金论英雄”到“以人气论英雄” EVALUATING CRITERIA, FROM RENTAL TO BUZZ

移动技术、人工智能在各领域的应用，带来人的需求和生活方式的转变。不同属性的城市商业综合体呈现出共同的表象。一是功能多元性，商、办、居、旅、展、会、娱等功能复合集聚；二是交通便利性，

不同属性的商业综合体
Comparison of commercial complex attributes

类型	区位	属性特点	举例
TOD 型商业综合体	多条轨道汇聚	交通支撑，上盖开发	京都火车站、虹桥商务中心、上海七宝万科
CBD 型商业综合体	城市中心商业中心区	结合办公楼进行功能的多元组织	六本木、郑州千玺广场
ROD 型商业综合体	大城市近郊	休闲主题公园为主，娱乐主导开发	广州长隆旅游度假区、深圳东部华侨城



七宝万科RAPUTA高线花园市集，将室内花卉集市与室外屋顶花园合二为一。(图片来源/上海房地产观察)
Qibao Vanke RAPUTA highline garden market combined the indoor flower market and outdoor roof garden. (Image Source/ Shanghai Property Insight)



位于Grant Front六楼的近畿大学水产研究所，是日本第一家大学直营的养殖鱼专门料理店。(图片来源/“地产小学生”)
The Japanese restaurant operated by Fisheries Research Institute of Gyeonggi University at Grand Front. (Image Source/ 'dichanxiaoxuesheng')

人行、车行、停车以及电梯上下交通组织完善；三是技术性，商业空间对信息技术的运用越来越广泛；四是集约性，综合体几乎都坐落在城市中心区，土地高效利用。日本的综合体建设是全球的典范。商业立体化构建模式提高了集约高效的土地利用，内部由地下街道、地面街区和高空花园等构成的立体化交通体系，为功能互动和配套完善奠定了基础。比如六本木以“垂直城市”的形式出现，服装、餐饮、教育培训、酒店、办公等多种功能在垂直空间上的集聚。商业综合体的规划设计也呈现出复合化、规模化、立体化、人性化及艺术化的特点。从早年美国纽约的洛克菲勒中心、法国巴黎的拉德芳斯、北京东方广场、香港太古广场到侨福芳草、华润万象城等，商业综合体的功能复合从“百货+酒店”到多元集聚，总体建筑面积从初期的十万平方米左右到现在的30~40万平方米，其中商业空间一般约占15~16万平方米。随着城市的发展，轨道交通的普及，综合体建设大规模地利用地下空间，地下两层几乎均为商业空间。其业态布局和运营也越来越注重人性关怀，比如七宝万科广场的“老公寄存室”、儿童游乐空间，迎合了现代家庭的需求和以儿童为主导的社会发展趋势。日本的许多综合体在一楼布局生鲜食品和蔬菜柜台，取代以往的珠宝、化妆品等，贴近人的生活需求，体现了高度的人性化。同时，综合体也开始突出文艺性，比如大悦城、K11的艺术展、文化展，以及六本木的艺术中心。从“以租金论英雄”到“以人气论英雄”，是商业空间设计的巨大改变。

体验性、共享性、绿色性的发展趋势

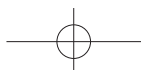
TRENDS TO EXPERIMENT, SHARING AND GREEN ECONOMY

随着信息技术的发展，线上消费对实体店销售造成巨大冲击。百货商店被综合体淘汰，传统意义上的商业综合体又被电商击败。目前，商业综合体的发展由复兴逐渐转向式微，但终将会在适应移动互联网的过程中再次崛起。按照马斯洛的需求理论，兼顾线上和线下的结合，突出体验特性，优化下线服务设计，将是未来综合体功能布局的主要方向。酒店、办公和住宅三大功能将更加强化，人气和流量成为综合体商业空间比拼的重点，线上线下一体化的加盟店，大、中、小立体化组织，将是支撑商业综合体的主体形态。其规划设计将呈现出

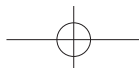
以体验经济为主，特色化运营的富有个性色彩的发展趋势，表现为美食、家庭、儿童、运动、科技、艺术及商务主题等个性体验。如上海金桥碧云体育休闲中心、迪卡侬的体育运动体验经济，除自行车、户外展帐篷等户外体育产品外，还包括溜冰场、攀岩、卡丁车、游泳馆及健身广场等特色体验，人气持续旺盛。再如上海五角场的万达广场，开业较早，但仍富有活力。除规模化和交通支撑外，功能复合和主题特色化运营是主要因素。相比而言，万达隔壁新开的合生汇，空间设计上主题不清晰，导致整体布局上对现代休闲经济的绿色、共享、体验等特点理解不充分，运营特色不突出，人气不足。

正如美国著名建筑师柯蒂斯·夏福禄 (Curtis J. Scharfenaker) 所认为，“真正的场所并不存在于大楼之间，而是存在于人们值得记忆的体验中”，未来的商业综合体需要紧紧围绕着体验经济，充分发挥规划的价值，设计出贴近百姓生活的空间感受和业态组合，打造符合人民需求的综合体，让大家在游玩过程中顺便买一些东西回家。较吸引人的花鸟业态，租金能力差，常被“丢”到郊区。七宝万科广场巧用屋顶空间不在容积率计算之内的规定，以“设计创造价值”，在楼上经营花鸟市场，结合儿童早教培训，搭配认知体验内容，打造绿色开放的休闲空间和接地气的个性体验业态。再如虹桥商务中心利用大型交通节点优势，紧密围绕商务客的需求，布局商务主题复合功能，突出便捷的体验特色。更为极致的还有日本大阪Grand Front，整合了高科技实验室、大学研究所、品牌博物馆、创客空间、汽车主题馆、科技体验馆、展廊空间、初创企业孵化器、沙龙空间等社会功能业态，创新体验式商业，将有机农园、特色料理、咖啡实验室、健康诊所等设计成了“一条龙”，现场设计、现场销售、现场体验。未来的商业综合体应该是一个智能、生态、文化、快捷交通高度复合的体验空间。

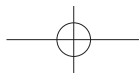
城市商业综合体的各功能全方位、立体化的发展和融合，实现了城市空间室内化，多功能一体化，交通组织立体化。在未来相当长的一段时间里，随着城市化进程的不断深入，土地价格的提升，它将具有强大的生命力和合理性，作为城市规划的开发单元，对于引导存量更新、资源科学合理配置和人口聚集，将起到更重要的作用。它不仅是一个地产模式，更是一个城市发展和运营的问题，在新理念的引导下，城市商业综合体将转向更加高效生态型发展模式。●



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黄页
Yellow Pages

英文版《城市中国》(部分)
English Version of *Urban China* (Partly)

Commercial Complex: The Arena for Current Population and Future Trend

Text / Gehry[UCRC]

When people wantonly advocate the electronic commerce will rewrite the business logic, the entirety business has sped up its peace of counterattack when the former one into the downturn. Featured as customization and cultural colonization as well as being available to be experienced, the commercial complex has showed the surprising development pattern offline. Nowadays, people can easily identify which are commercial complexes even though they have little knowledge about the differ-

ent academic definition and classification between commercial complexes and urban complexes. As is known, the most significant feature of a commercial complex can be summarized as it is operated by the unified property developers, consisting of a centralized business space with a variety of commercial combinations. Moreover, whether office property or living product is a single building cannot be regarded as the unpeeled element of a commercial complex, which has built a more pure-

ly urban space type; and in global metropolis, especially in high-density cities within East China, it has transferred into a directive symbol. Today, this symbolic space has gradually permeated consumers' lives with various dimensions, and thus the emergence of this phenomenon involving art display, cultural implantation and creative interaction seems to be the ultimate success of business. In addition, the sale of architectural space and theme recreation project have potential risks of being reduced to another 'epidermalism', but this still does not interfere with the danger of becoming a unique means for commercial complex to find differentiated characteristics. Apparently, the role of 'Internet Plus' has gradually acted as the basic service.

The Portrait of Subdivisible Customer Groups

A frustrating reality is people in the city, hidden behind illusory prosperity, do not have much choice of freedom, their most leisure time are occupied by commercial complexes. Perhaps this constraint makes consumers reflect their multidimensional appeals into functions of commercial complexes. In other words, the most challenge for commercial complexes to overcome is these excessive customer demands. In contemporary society, it can no longer classified customer groups into several simple tags, such as white-collar workers or the generation of 90s, as each person in different time-dimensions has differentiated into a completely different form of consumption – sometime they turn a deaf ear to consumer responsibility (e.g. intellectual property), sometimes they pay the bill for their specific 'feelings'; sometimes they crush for luxury goods, and sometimes they spare no effort to look for highly cost effective goods. Thus, it makes no sense to use so-called 'tags' to define customers' behaviors.

The Transferred Space and Culture

At the end of 19th century, people's perception of culture was much more narrow – visiting museum or art gallery seems to be the mainstream of cultural consumption and fashion. Today, despite the criticism of consumerism within the whole world, it does not limit goods and consumption to





material satisfaction. Thus, the entire commercial space including space, architecture and atmosphere etc. has become the objective of consumption, not confined to goods itself. According to this reasoning, why can not the commercial space itself be the same as the theme park for charge? In fact, current commercial complexes have been stressed on space design as well as creation of cultural atmosphere, and the process of paying fee implicitly passes to merchants, then the fee passes to customers who are attracted by these cultural space. It can be said that such procedure is the main reason why commercial property developers are keen to create space and atmosphere as well as implant culture. Moreover, the urban boundary has been changed as the public open functions of a city (squares, park etc.) becomes an additional product of these complexes.

Upgrading Technology

The technology's impact on commercial space has not yet shown the subversive phenomenon, facing issues of concept replacement, such as 'Internet

Plus', online payment, new retail and other vocabularies. However, it is reasonable to believe that science and technology has significantly affected human society, especially for those commercial complexes (the gathering center of human activities). As the invention of elevator has brought commercial space from the plane to three-dimension, not all popular technologies are suitable for the development of commercial complexes. Currently, more practical application might be the mall's intelligent services or internet services supported by the big data. We can image the possibility that each consumer comes to the mall, he/she can be automatically identified by the sensor to receive his/her preference's recommendations. More fantastic imagination can be summarized as no commercial space for stores – the boundary between commodity and urban public space will disappear, commercial complex itself will be the completely open space, being full of pleasant scenery; and all procedures are associated with online transaction. It makes no sense to discuss the new development

tendency of commercial complex without any customer-related studies, namely the nature of commerce. Nevertheless, it is certain that contemporary urban life has been inundated with consuming behavior represented by the commercial complex, gradually making the boundary between urban public space and commercial consumption space be ambiguous. Thus, noting the 'commercialization' phenomenon caused by the implantation of urban functions of urban complexes, this issue aims to illustrate the widespread trend within global business development field based on three typical case studies, namely the mainland, Hong Kong and the United States. Furthermore, it intends to find the inherent similarities and logics of its tendency by analyzing types of customers and also their life-styles. In addition, as science and technology acts as a dominant means or the outbreak of huge energy, this issue uses the situational magazine language and an imaginary utopian model to provide suggestions for future development pattern of commercial complexes.

Mall and More

Text / YANG Yang

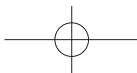
Today, mall has already been our most familiar daily place for leisure. It is interesting in Chinese context, people never give 'mall' an accurate Chinese name - 'shopping center' is perhaps too general to express differences between mall and traditional retail industry. In English dictionary, description and explanation of 'mall' are mostly based upon the closed and large-scale commercial shopping complex, namely a group of stores organized around the open atrium, occurs in North American suburb in the mid-1950s. Back to history, the name of 'mall' comes from a tree-lined trail called 'The Mall' located in St. James Park in London in 1830s, a popular pall-mall (pallemaille, a game similar to a concept, originated in France, with a mallet hit the ball into the ring circle) stadium. This explains one of the most vital features of mall in the modern sense – the place dedicated to pedestrians. That is, buying is defined the purpose of mall, and walking is determined the mall's form.

Let's image the form of mall in the year of 2049. As long as external decoration exists, the mall can be any shape. Escalators (automatic trails) revolve around a huge rosette in a loop, located infinitely

within a limited interior. If the elevator provides a smooth movement in the garbage space, then the smart car can be incorporated into the seamless convergence of the infrastructure, and further to increase the movement's smoothness. The automatic car will do the long-distance parking after driving shoppers directly to the destination. Thus, in the future, parking will become an urban exclusive infrastructure, no longer being the function and space provided by the mall, which definitely will reduce the cost. Moreover, the AR technology will bring changes to good's classification; in other words, there is no need to distinguish functions by the category of products – clothing, furniture, dining and entertainment can be unified within a specific space, according to their brands and themes. Mall will only need to provide space – sand, snow and ice will be separated by a wall within the temperature-controlled indoor. It can remain new under circumstances of modifying the projection's scene, and it is also the most attractive theme park, where people can overlook the whole city without going to the top floor of a skyscraper. In addition, customer's purchasing behavior will be conducted

by scanning, which means whatever you can see, products can reach to customers by means of scanning. 3D printers will present their new function because the production process of raw materials becomes one of new attraction points for mall – highly-customized products will be produced right on the spot in mall, which will simplify both long-distance factory production and transportation needs. This kind of mall we call it 'Hyper-O-Mara', being similar to a studio or a show place. It tempts customers to voluntarily experience, thus, selling products seems to be an additional function of a mall.

'Being rich' no longer means making money, but it means to build a large shopping center. It has changed the traditional way of shopping – shopping does not mean it requires you to buy real products, actually its form will be acted as a performance. Mall only needs to provide the right space, the so-called 'garbage space'. When lights being turned off, the mall might be return to its original form – the trail. Perhaps mall has never changed since the consumer's culture itself is trying to live by constantly self-examination.



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ENCLOSED SHOPPING
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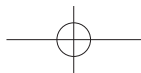
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