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RETAIL BEHAVIOURS AND PREFERENCES OF OLDER ADULTS IN SUBURBAN MALLS

SUMMARY OF KEY FINDINGS AND RECOMMENDATIONS

Key findings

1. **Suburban malls act as vital "third spaces"[1] which maintain older adults' routines and social connections.** Older shoppers typically visit malls at least once a week (61.2%) for both functional activities such as buying necessities and non-essentials (91.8%) and dining out (77.3%) and leisure activities such as window shopping (54.3%). Majority also visit malls with companions (66.9%), underscoring the crucial role malls play in encouraging social interactions.

2. **Older shoppers value convenience and comfort.** The top three qualities they value in suburban malls were accessibility by public transportation (69.3%), walking distance to home (41.5%), and a good mix of tenants (40.4%), reflecting the importance of malls' convenient access and ability to meet a variety of needs. Additionally, elderly-friendly features such as resting areas (62.3%) and community spaces and services such as libraries and clinics (43.6%) were the most commonly used amenities, reflecting seniors' need for comfortable environments.

3. **Older shoppers place importance on value.** Compared to experiential or service-based rewards, older shoppers preferred direct monetary savings, with majority (73.4%) selecting senior citizen discounts as one of their valued incentives. Retail promotions and sales (41.3%) also emerged as the second most preferred mall activity.

Recommendations

1. **Improvements to hardware (amenities and built environment features) to support comfort, accessibility, and navigability.** Increasing the availability of resting areas, particularly in quieter non-prime zones, would support seniors with mobility needs without compromising tenant space. Enhancing visibility and usability of wayfinding tools, including digital directories, clearer signage, and age-friendly navigation features, can also improve overall accessibility. Expanding community-facing amenities such as multi-purpose rooms, library corners, and health or wellness spaces would further anchor malls as multifunctional hubs that support older adults' everyday routines, sense of belonging, and wellbeing.

2. **Improvements to software (promotions, incentives, and consumer-facing strategies) to deliver value and deepen social engagement.** Malls can expand senior-focused discounts or increase off-peak incentives during morning hours. Tailored parking benefits may further draw high spenders who typically drive. Beyond monetary incentives, mall activation strategies can strengthen malls' social role by offering programmes aligned with seniors' interests, such as food-related events, hobby workshops, cultural activities, and intergenerational programmes.

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[1] "Third spaces" or "third places" refer to informal public places outside of home (the "first place") and work (the "second place") where people gather, interact, and build social networks (Oldenburg & Brissett, 1982).

INTRODUCTION

Singapore's population is ageing rapidly, with projections indicating that one in four Singaporeans will be aged 65 and above by 2030 (Iparraguirre, 2019). This demographic shift presents significant opportunities for the Silver economy, which refers to economic activities, products, and services designed to meet the needs of older adults. As the market for products that enhance seniors' quality of life expands (Wong, 2007), the Silver retail sector, comprising businesses that provide age-friendly goods and services, has become an increasingly important component of this landscape (Colurcio et al., 2022).

Beyond economic implications, existing studies highlight that suburban shopping centres often function as essential community spaces that support older adults' well-being. The concept of "third places" describes everyday settings outside the home and workplace where people gather, interact, and build social networks (Oldenburg & Brissett, 1982). Applying this idea to neighbourhood places such as malls, research shows that semi-public interiors can offer older adults accessible, climate-controlled environments where they can walk, socialise, and spend time informally (Mawer & Kiddle, 2021; White et al., 2014; Pettersen et al., 2024). Mall-based activities and social encounters, in turn, have been shown to enhance older adults' social connectedness and reduce loneliness (White et al., 2014), while structured mall-walking programs have also been associated with physical, social, and emotional benefits (Farren et al., 2015).

In Singapore, similar patterns may be expected given the role suburban malls play in daily life. Retail and commercial activities were significantly decentralised in the 1990s under the Urban Redevelopment Authority's 1991 Concept Plan, resulting in the development of suburban malls near major public housing estates. These suburban centres, often regarded as "one-stop shopping" destinations (Ibrahim et al., 2004; Sim et al., 2002), have since become important sites where older adults meet functional, social, and leisure needs through routine shopping, dining, and casual activities.

Despite their significance, there remains limited research on the retail behaviours of older adults in Singapore's suburban malls, particularly in relation to their shopping habits, preferred activities and events, and the built environment that shapes their mall experience. More research in this area is therefore crucial to support commercial property companies in adapting mall environments to better meet the needs and support the well-being of older shoppers.

AIMS OF THE BRIEF

This study aimed to understand how older adults engage with suburban malls in Singapore. Specifically, we examined their shopping habits, travel and accessibility patterns, use of amenities and preferred improvements, spending behaviours, and the types of promotions and mall activities they value. We also profiled high spenders and frequent visitors to identify key shopper segments within the senior population.

METHOD

Data

This study draws on data from the Singapore Life Panel® (SLP), focusing on a sample of individuals aged 48 and above. The SLP is a nationally representative, monthly online survey of senior Singaporeans. It has been conducted since 2015, with an average monthly response rate of approximately 7,000 participants. For a detailed overview of the SLP methodology, refer to Vaithianathan et al. (2021). This study drew on a large-scale survey of 2,013 respondents participating in July 2025.

Measures

Respondents were asked a series of questions to understand their retail habits and preferences in suburban shopping malls, defined in the survey as malls located in or near their residential neighbourhoods.

Shopping Frequency and Timing

Respondents reported how often they visited suburban malls (daily, several times per week, once a week, 1–3 times a month, or never) and whether they typically visited on weekdays, weekends, both, or had no specific pattern.

Purpose and Social Companionship

Participants ranked their top three reasons for visiting suburban malls, including buying necessities, dining out, taking a stroll, socialising, enjoying air-conditioning, or participating in events. They also indicated whom they typically visited with (e.g., alone, with family, friends, neighbours, or a foreign domestic worker).

Travel and Transport

To assess mall accessibility, respondents reported their typical mode of transport, whether by walking, driving, taking a bus or a taxi.

Consumption Patterns

Respondents indicated how much they typically spent at suburban malls in a week (less than $100, $100-$200, $200-$300, or more than $300).

Value Proposition and Promotions

Participants selected the qualities they valued most in their preferred malls (e.g., accessibility by public transport, walkability, tenant mix, affordability, disability access, ease of navigation). They also reported which shopper promotions would attract them to return, such as senior citizen discounts, loyalty programmes, off-peak discounts, mall redemptions, and wellness or in-mall programmes.

Amenities and Activities

Respondents identified the amenities they commonly used, such as resting areas, community spaces and services, Wi-Fi, mall directories, disability-friendly facilities, storage lockers, parcel lockers, and carparks. They also selected the types of mall events or activities they preferred, including food festivals, retail promotions, travel fairs, electronics events, cultural fairs, wellness activities, and workshops.

Analytical approach

To examine associations between variables, we applied statistical tests suited to the scale of measurement. For relationships between nominal variables (e.g., spending levels and mode of transport), we used Goodman and Kruskal's tau A, Cramér's V, and Pearson's chi-square to assess the strength of association. For ordinal variables (e.g., frequency of visit and housing types), we used Kendall's tau-b and Spearman's rho to capture monotonic trends. Only associations that were statistically significant at the 5% level ($p < 0.05$) are reported in this report, unless otherwise noted.

FINDINGS

Malls as social "third spaces" for older adults

Our findings indicate that suburban malls already function as important "third spaces" for older adults (Sugiyama et al., 2023), providing accessible environments where seniors maintain routines, social connection, and community engagement (Oldenburg & Brissett, 1982).

Across our sample, most seniors reported visiting their neighbourhood malls frequently: 35.7% visited 1-3 times a month, 30.3% several times a week, and 26.5% once a week (Figure 1). Patterns of visitation were flexible, with many seniors going on both weekdays and weekends (35.8%), or indicating no specific preferred day (29.4%), as seen in Figure 2. This regular and sustained presence underscores the mall's role as a familiar and predictable environment.

Figure 1. *Shopping mall visit frequency (%), N=2,013*

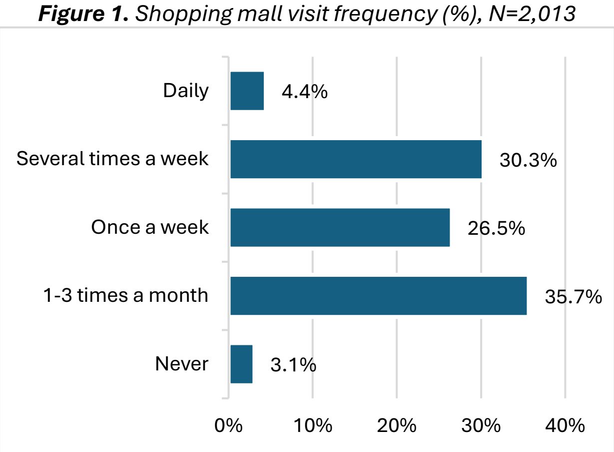
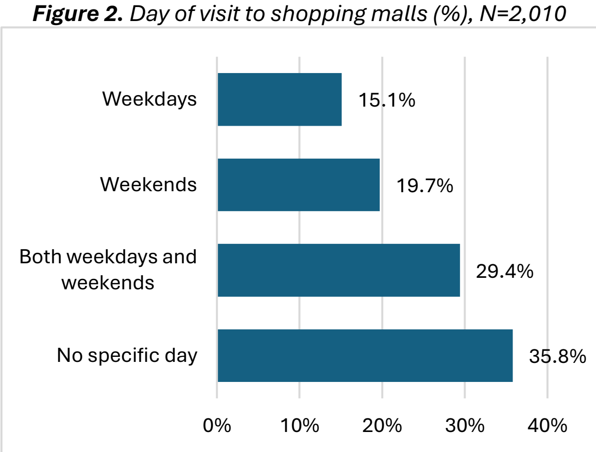
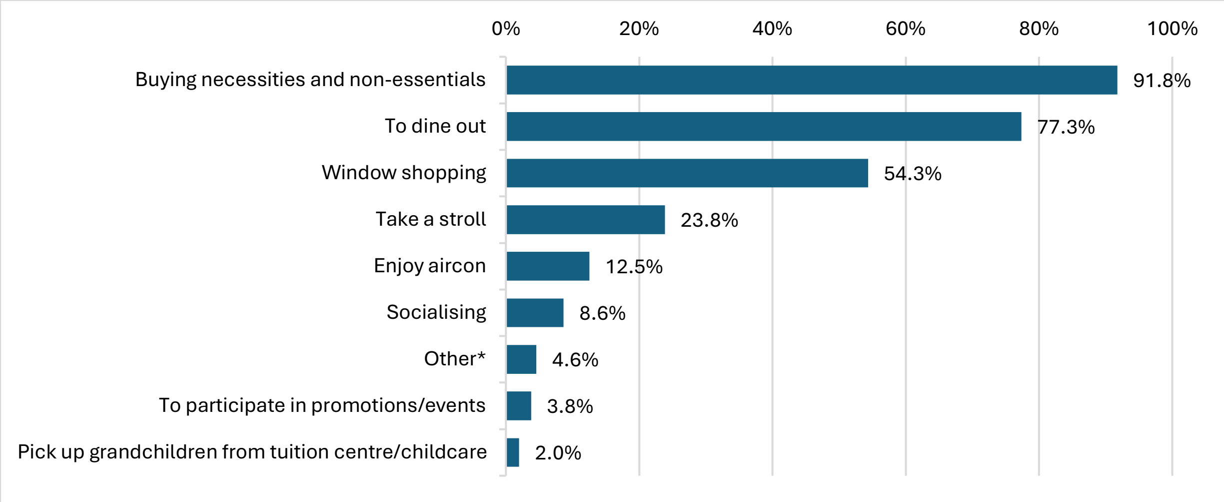


Figure 2. *Day of visit to shopping malls (%), N=2,010*



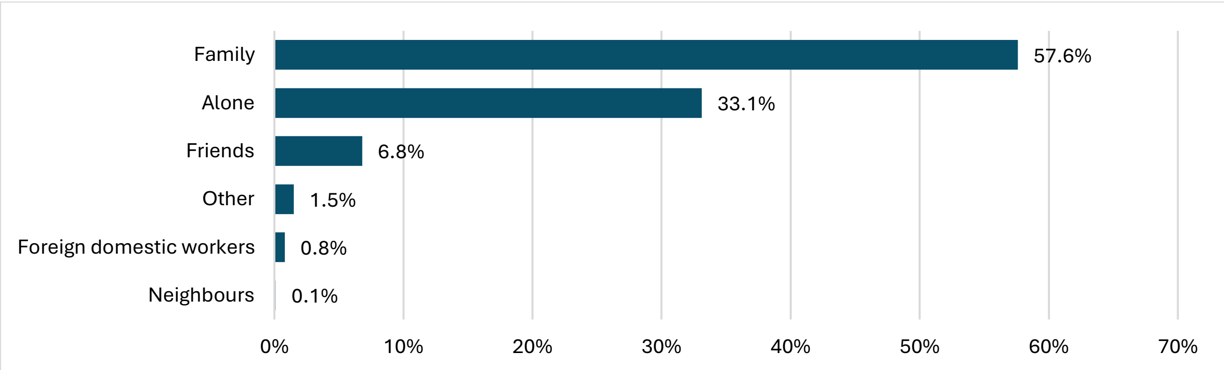
The purposes that draw older adults to malls further reflect this third-space function. The most common reasons for visiting were buying necessities and non-essentials (91.8%), dining out (77.3%), and leisure activities such as window shopping (54.3%) or taking a stroll (23.8%), as seen in Figure 3. These patterns indicate that malls serve not only as retail centres but also as comfortable, climate-controlled environments where seniors can spend time meaningfully, engage in light activities, and maintain daily routines.

Figure 3. *Purpose of visit (%), N=2,013; respondents ranked their top three*



Social connection is another key feature of "third spaces", and our findings show that malls facilitate this for many seniors. More than half (57.6%) reported visiting with family members, while others visited alone (33.1%) or with friends (6.8%), as shown in Figure 4. A Goodman and Kruskal's tau A test revealed positive and statistically significant associations ($p < 0.05$) between visiting alone versus with others and seniors' main purpose for visiting. Specifically, whether respondents visited the mall accompanied was significantly related to key purposes such as dining out, buying necessities, and window shopping. These positive associations indicate that visiting with others was consistently linked to a higher likelihood of selecting these activities as primary purposes.

Figure 4. *People who respondents visit the mall with (%), N=2,013*

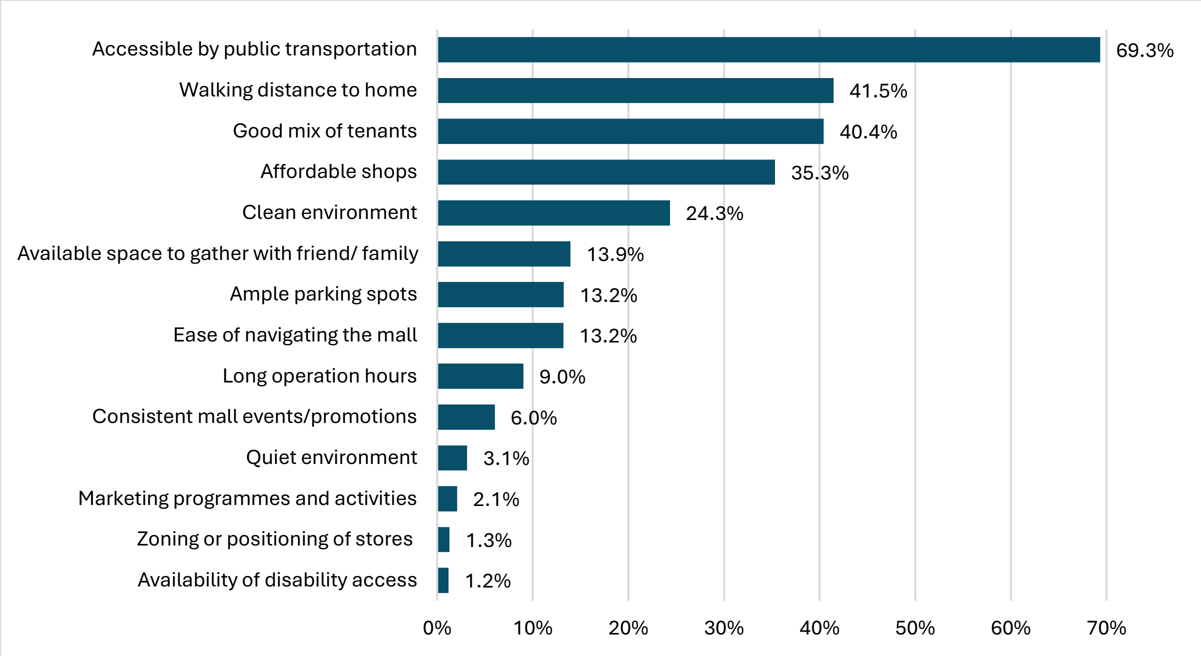


*Other include depends on purpose and spouse

Seniors value convenience, accessibility and comfort

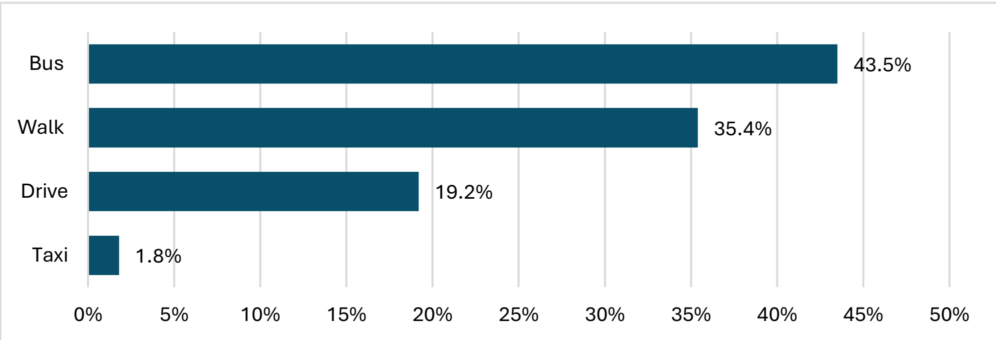
Convenience was consistently observed to be a key driver of seniors' mall experiences. When asked for the qualities they value most in their favourite suburban malls, accessibility by public transportation (69.3%), walking distance to home (41.5%), and a good mix of tenants (40.4%) emerged as the top three factors (Figure 5). This suggests that the strong appeal of suburban malls lies in their accessible location and function as convenient one-stop centres.

Figure 5. *Value proposition (%), N = 2,009; respondents selected up to three qualities*



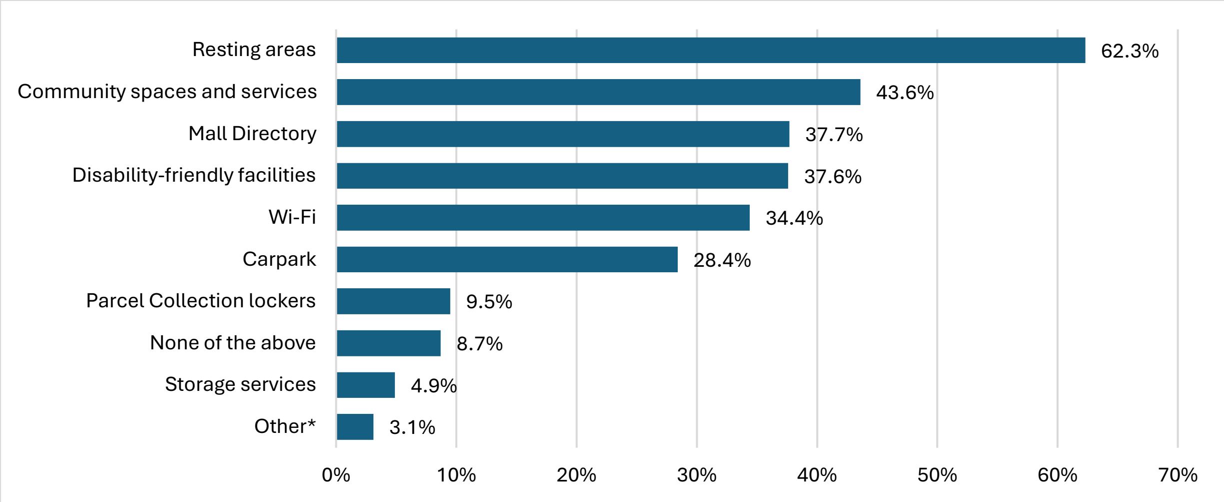
The importance of convenience is further reflected in seniors' travel patterns to suburban malls. As shown in Figure 6, most older adults rely on public transport (43.5%) or walking (35.4%) to get to the mall, while much fewer drive (19.2%) or take a taxi (1.8%). This indicates that malls located near bus routes and within walkable distances are especially accessible to seniors.

Figure 6. *Actual mode of transport to mall (%), N=2,012*



Commonly used amenities further highlight that seniors value comfort and accessibility in their mall environments. The most frequently used amenities were resting areas (62.3%), community spaces and services such as libraries and clinics (43.6%), mall directories (37.7%), disability-friendly facilities (37.6%), and Wi-Fi (34.4%), as seen in Figure 7. These patterns reflect seniors' need for navigable and comfortable environments where they can rest, access services, and orient themselves easily.

Figure 7. *Commonly used amenities (%), N=2,012; respondents selected all that apply*

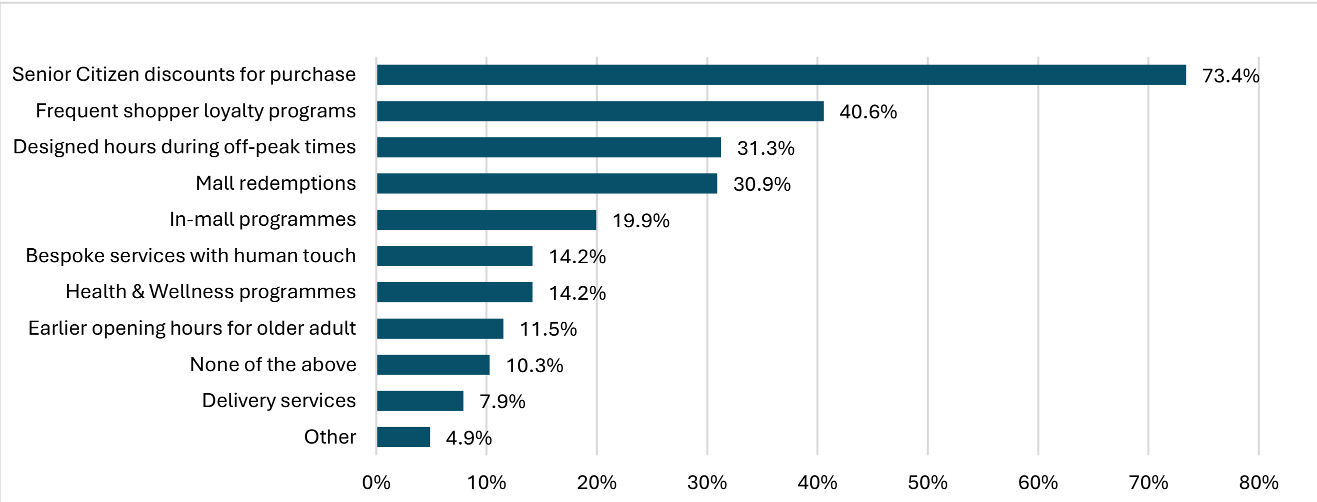


**Other include clean toilet and supermarket*

Seniors prioritise value

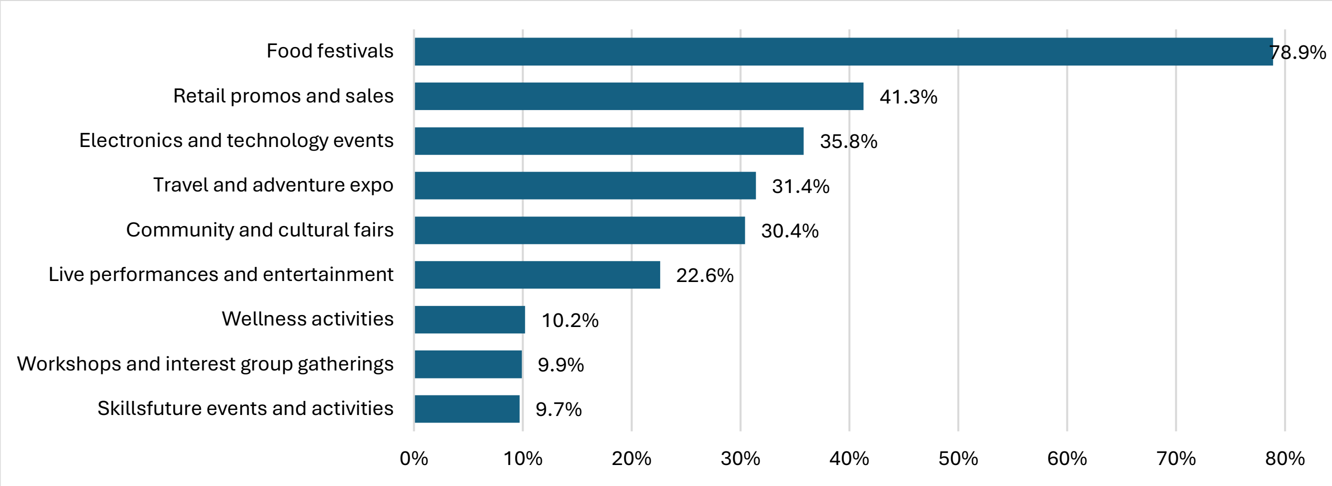
Respondents showed a strong preference for Senior Citizen discounts for purchases, with 73.4% selecting it as their one of their valued incentives (Figure 8). Other commonly preferred promotions included frequent shopper loyalty programmes (40.6%), off-peak shopping hours (31.3%), and mall redemptions (30.9%). In contrast, fewer respondents valued options such as delivery services (7.9%), earlier opening hours for older adults (11.5%), and bespoke or wellness programmes (14.2%), indicating a clear emphasis on direct monetary savings over experiential or service-based rewards.

Figure 8. *Preferred promotions (%), N = 2,012; respondents selected all that apply*



Another feature of malls that add value to visitor experience is in-mall events and activities. In particular, retail promotions and sales such as lucky draws and specialty deals (41.3%) emerged as the second most preferred mall activity, suggesting once again the importance of value to older shoppers (Figure 9).

Figure 9. *Preferred events and activities in mall (%), N=1,984*

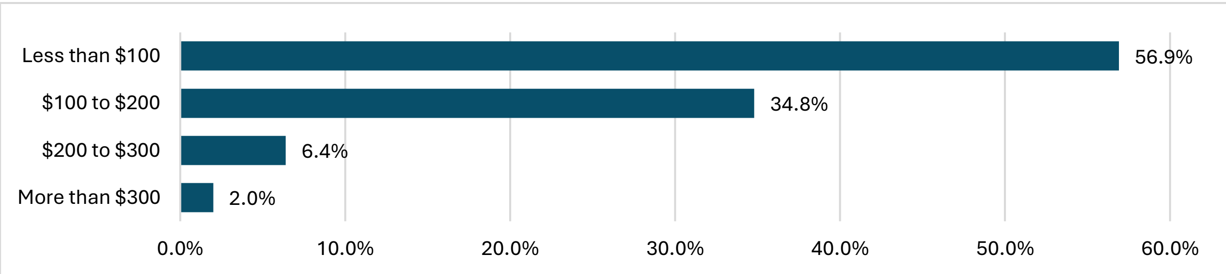


Profile of high spenders and frequent visitors

High spenders and frequent visitors represent an important group for suburban malls, not only because they contribute substantially to overall retail spending, but also because their behaviours shape how malls function as everyday "third spaces" that support seniors' well-being. Understanding who these groups are, how they travel, and what amenities they value can help malls design interventions that promote ageing well, strengthening their role as social, accessible, and health-supportive environments for older adults.

We observe that a majority of respondents spend less than $100 in a typical week (56.9%), while 34.8% of respondents spend $100 to $200, 6.4% of respondents spend $200 to $300 and only 2.0% of respondents spend more than $300 (See Figure 10).

Figure 10. *Spending in a typical week (%), N=2,013*



High spenders

The analysis by spending category shows that younger seniors consistently make up the highest proportion of high spenders (see Table 1). Among those spending between $200 and $300 per week, the largest share was found among respondents below 50 years old (20.0%), followed by those aged 50-54 (8.9%). Beyond this age, the proportion of individuals in the $200-$300 bracket declines steadily. A similar pattern is observed in the highest spending category of more than $300 per week. This distribution demonstrates a clear age gradient: younger seniors, especially those below 54 years old, form the bulk of the high-value clientele, while older seniors are disproportionately concentrated in the lowest spending category of under $100 per week.

Table 1. *Crosstabs between spending patterns and age group, housing type, mode of transport, and companions (alone vs. with others)*

		Spending patterns			
		Less than $100	**$100 to $200**	**$200 to $300**	**More than $300**
Age groups (p<0.001)	**Below 50**	60.0%	20.0%	20.0%	0.0%
	50-54	42.2%	42.2%	8.9%	6.7%
	55-59	51.9%	36.9%	8.3%	2.9%
	60-64	55.9%	35.4%	6.8%	1.9%
	65-69	59.5%	33.9%	5.1%	1.6%
	70-74	69.5%	27.6%	2.9%	0.0%
	75+	100.0%	0.0%	0.0%	0.0%
Housing type (p<0.001)	**HDB 1-3 rooms**	63.7%	30.7%	4.0%	1.6%
	HDB 4-5 rooms	57.3%	34.9%	6.0%	1.7%
	Private housing	44.6%	39.5%	11.6%	4.3%
Mode of transport (p<0.001)	**Walk**	63.1%	29.4%	5.3%	2.2%
	Taxi	37.8%	35.1%	21.6%	5.4%
	Bus	61.0%	33.9%	4.1%	1.0%
	Drive	38.0%	46.8%	11.9%	3.4%
Companions to the mall (p<0.001)	**Alone**	69.9%	24.7%	3.4%	1.9%
	With others	50.4%	39.7%	7.8%	2.0%

Looking across housing type, private housing residents formed the largest share of high spenders, with 11.6% spending $200-$300 per week and 4.3% spending more than $300, more than double the proportion of those in HDB flats. Transport mode further underscores this divide: taxi users and drivers were most likely to be high spenders, with over one-fifth of taxi users spending $200-$300 and 5.4% spending above $300, while nearly 12% of drivers fell in the $200-$300 bracket. In contrast, bus users and walkers were heavily concentrated in the lowest spending group of under $100 per week. Whether they visit the mall alone or with others also played a role, as those visiting malls with companions were more likely to report higher spending than those who went alone; for example, 7.8% of accompanied visitors spent $200-$300 compared with just 3.4% of solo visitors.

Taken together, these findings highlight a clear profile of high spenders in suburban malls: they are disproportionately younger seniors, private housing residents, travelling by car or taxi, and visiting in the company of others.

In terms of activities such as purposes of visits, preferred retail offerings, and commonly used amenities, no distinct utilisation patterns were observed across spending groups. To further explore behavioural differences, we therefore examined housing type as a proxy for higher socio-economic status (see Table 2).

Table 2. *Crosstabs between housing types and commonly used amenity (carpark), preferred event (travel and adventure expo)*

		Housing types		
		HDB 1-3 rooms	**HDB 4-5 rooms**	**Private housing**
Commonly used amenity - Carpark (p<0.001)	**Not selected**	19.2%	73.5%	7.3%
	Selected	7.7%	69.9%	22.4%
Preferred events - Travel and adventure expo (p<0.01)	**Not selected**	17.3%	71.4%	11.2%
	Selected	12.1%	75.2%	12.7%

Carpark use was strongly associated with residence in private housing. Among those who reported carparks as a commonly used amenity, more than one-fifth (22.4%) lived in private housing, compared with only 7.3% among those who did not select carparks. This indicates that carpark facilities are disproportionately valued by higher socio-economic status (SES) groups, who are also more likely to drive or arrive by taxi. A similar pattern was observed for event preferences. Among a list of events including food festivals, electronics and technology events, community and cultural fairs, we observed that only preference for travel and adventure expos differed significantly by SES. Respondents who expressed interest in travel and adventure expos were more likely to be from private housing (12.7%) compared with those who did not select this event type (11.2%). While the overall differences are less pronounced than for carpark use, the trend suggests that higher-SES groups, particularly private housing residents, are somewhat more inclined toward lifestyle- and aspiration-oriented events such as travel and adventure fairs.

Frequent visitors

Another noteworthy profile of shoppers are the everyday runners, representing shoppers who visit malls frequently for routine shopping and errands. Transport mode was closely linked to frequency of visits (see Table 3). Among those who visited malls several times a week, the highest proportion were walkers (41.6%), followed by bus users (27.2%). This indicates that such everyday runners are typically nearby residents who rely on accessible modes of transport for routine trips. By contrast, drivers and taxi users were more likely to be represented in the lower-frequency categories, with more than half of taxi users (54.3%) visiting only once or a few times a month.

Table 3. *Crosstabs between frequency of mall visits and mode of transport, commonly used amenity (community spaces)*

		Frequency of visit				
		Never	**1-3 times a month**	**Once a week**	**Several times a week**	**Daily**
Mode of transport (p<0.001)	**Walk**	2.4%	24.9%	25.6%	41.6%	7.9%
	Taxi	5.7%	54.3%	20.0%	22.9%	2.9%
	Bus	4.0%	43.0%	26.8%	27.2%	3.0%
	Drive	2.4%	43.4%	32.5%	22.0%	2.1%
Commonly used amenity - Community spaces (p<0.01)	**Not selected**	4.0%	38.8%	27.4%	29.5%	4.3%
	Selected	2.1%	34.2%	27.4%	33.5%	4.9%

The use of community spaces and services was also more common among everyday runners (see Table 3). Among respondents who reported using such amenities, 33.5% visited several times a week and 4.9% visited daily, compared with 29.5% and 4.3%, respectively, among those who did not use community spaces. This suggests that those who frequent malls most often do so not only for shopping but also for accessing a wider range of services such as libraries, clinics, and gyms.

Together, these results indicate that everyday runners of suburban malls are more likely to be nearby residents travelling by foot or bus, and that they value the integration of community spaces and services, which strengthens the mall's role as a convenient and multifunctional "third space."

DISCUSSION & RECOMMENDATIONS

The findings of this study reinforce the central role that suburban malls play in the daily lives of older adults in Singapore. Seniors visit their neighbourhood malls frequently, often several times a week and without a fixed schedule, and use these spaces for a range of purposes including buying necessities, dining out, window shopping, and spending time with family or friends. This regular and flexible visitation underscores the mall's function as an accessible "third space" that supports older adults' routines, social connection, and everyday engagement.

A clear pattern across the results is the strong emphasis older adults place on convenience and comfort. Our findings have consistently shown that older adults value suburban malls as one-stop hubs which meet a variety of needs through diverse retail offerings, elderly friendly facilities and convenient access from their homes. Their frequent use of amenities such as resting areas, community spaces, mall directories, disability-friendly facilities, and Wi-Fi further reflects their need for comfortable, navigable environments where they can rest, orient themselves, and access essential services easily.

Another key takeaway which emerged was the importance of value among older shoppers. Senior citizen discounts were the most preferred promotion by a large margin, and retail promotions and sales were the second most preferred mall activity. These patterns indicate that many older adults are value-conscious and respond strongly to incentives that offer direct cost savings.

Profiles of seniors also reveal meaningful shopper segments. Everyday runners, who visit several times a week, tend to live nearby, travel by foot or bus, and rely on a range of community-facing amenities. In contrast, high spenders are more likely to be younger seniors who travel by car or taxi and visit malls with others. While these groups differ in spending and transport, both rely on malls as social and multifunctional environments. This presents opportunities for malls to cater to distinct needs through differentiated strategies while strengthening their role as inclusive neighbourhood spaces.

Based on these key takeaways, we recommend enhancements to both mall hardware (amenities and built environment features) and software (promotions, incentives, and consumer-facing strategies) to strengthen malls' role as age-friendly, accessible, and engaging spaces for older adults.

1. Strengthen hardware to support comfort, accessibility, and navigability

Resting areas were the most frequently used amenity among older adults, underscoring their importance in creating comfortable and age-friendly spaces. Increasing the availability of seating, especially in quieter, non-prime areas, would support seniors with mobility needs and provide more opportunities for social interaction without affecting tenant space.

High usage of mall directories, community spaces, disability-friendly facilities, and Wi-Fi further reflects seniors' need for environments that are easy to navigate and supportive of everyday routines. Malls may consider improving visibility of wayfinding tools or expanding community-facing amenities (e.g., multi-use rooms, learning corners) to better serve regular visitors who rely on the mall for errands and services.

2. Enhance software to deliver value and deepen engagement

Promotions and incentives

Value-driven incentives remain a major motivator for older adults. Expanding senior-focused promotions, particularly in everyday spending categories, and improving the visibility of such discounts through clear in-store signage can help attract and retain older shoppers. Given that high spenders are more likely to drive or take taxis, time-limited parking incentives (e.g., off-peak senior parking hours) may encourage visits among this group while also appealing to value-conscious shoppers.

Programming and activation of mall spaces

Beyond promotions, malls can strengthen their social role by offering programmes that appeal to seniors' interests and encourage routine engagement. Events such as food-related activities and promotional fairs, which were popular in the survey, can be scheduled during off-peak morning hours to draw more footfall.

Malls could also explore low-barrier interventions that support seniors' routines and wellbeing, such as:

- Senior-friendly menus in F&B outlets (e.g., smaller portions, lower salt and oil, reduced carbohydrates) to attract older diners and promote healthier eating in a familiar setting.
- Curated weekly activity schedules for older patrons, such as light learning workshops, hobby groups, or themed morning programmes that take advantage of quieter mall hours.
- Intergenerational engagement opportunities, such as co-learning spaces, where older adults can share skills or stories with younger audiences.
- Community drop-off or supervised play corners that create opportunities for older adults to volunteer or engage with children, fostering mutual support among residents.

These initiatives align with the idea that neighbourhood malls can evolve into dynamic "third spaces" that offer more than retail, providing accessible hubs for routine activities, social interaction, intergenerational exchange, and community participation.

CONCLUSION

Overall, our findings show that suburban malls already play a meaningful role in supporting the daily routines, social engagement, and well-being of older adults. Seniors value malls that are convenient, accessible, and comfortable. Distinct shopper profiles also highlight opportunities for more targeted strategies that cater to both high spenders and everyday runners. As Singapore's population ages, there is potential for malls to further strengthen their function as inclusive neighbourhood hubs by enhancing age-friendly amenities, improving accessibility and comfort, and expanding community-oriented programmes that support social connection and healthy ageing.

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ABOUT THE CENTRE FOR RESEARCH ON SUCCESSFUL AGEING (ROSA)

ROSA is a multidisciplinary research centre based in SMU. It was established with an MOE Tier 3 social sciences research grant, as well as the generous support of The Ngee Ann Kongsi. Research at ROSA seeks to define and measure a holistic construct of well-being and to identify the factors that impact Singaporeans' well-being as they progress through the later phases of life. Through close collaboration with government and other partner agencies, ROSA also aims to translate research insights into policy innovations that advance the well-being of older adults holistically and promote successful ageing in Singapore. ROSA brings together a diverse team of leading international and local researchers in ageing and age-related issues from various disciplines. Through empirical evidence derived from a longitudinal methodological approach, the multidisciplinary and multi-institutional research team advances propositions that promote successful ageing in Singapore.

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