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The Retail City in Greater Birmingham - The changing face of urban retail districts as a result of retail-led regeneration and containment policy

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The Retail City in Greater Birmingham – The changing face of urban retail districts as a result of retail-led regeneration and containment policy

Herman Geyer

Abstract

The paper critically reviews retail-led regeneration and retail containment policies and their effects on the urban retail in the UK by analysing the effect that retail-led mega-schemes regeneration projects have on the economic growth of inner cities. There is significant controversy whether mega-schemes in retail-led regeneration initiatives contribute to the growth of local economies or whether it leads to the pitch shifting and marginalisation of local retail. The research focuses on two neighbouring strategies in Birmingham and Solihull to determine differences in the application of retail-led regeneration in inner city and peripheral locations. Birmingham's Bullring centre and Solihull's Touchstone centre was researched using quantitative data on the growth of the retail sector in Birmingham and supplemented using interviews with key actors. The paper critically analyses whether retail-led mega-schemes have a net positive effect on the economic revitalisation of the deteriorating inner cities. The results of the research indicate that the retail-led regeneration initiative brought about a dual economy with a global inner core of national retail and the outer core of marginalised local retail. The economic motive of implementing retail-led regeneration is doubted, as the research delivers mixed results. However the research indicates that the strategic benefits of restructuring and marketing the city have become equally if not more important in retail-led regeneration initiatives than the actual economic benefits for the local economic community.

Introduction

The face of urban retailing has radically changed in the past thirty years. The short period of development liberalisations during the 1980's created powerful retail monopolies in the form of regional shopping centres developed at the outskirts of cities. This period of unencumbered retail growth had developed over 1.5 million m² of retail floorspace to compete with traditional high street retail (Wrigley, 1998: 154). This has had a serious impact on traditional high street retail and the self contained local economy. The UK economy, formerly an inward focussed and self-sufficient social economy was suddenly and irrevocably integrated into the global economy. In order to minimise the impact of the peripheral shopping centres two policy trends have been implemented since the 1990's: retail-regeneration strategies and urban containment policies.

Retail-led regeneration of deprived inner cities has been promoted as an important mechanism that local authorities have in their arsenal to kickstart lagging localities into generating 'real economic growth, jobs and creative and exciting urban spaces' (DTZ, 2008: 5). The common received wisdom amongst planners is that large regionally competitive retail schemes are needed as an anchor to encourage commercial growth in uncompetitive locations, especially when competing against peripheral centres. As was stated by a former planning manager of a national supermarket group:

"The concept of small retailer-based solutions to the problems of increasingly derelict district centres in areas of severe urban deprivation is arguably naive and rather over precious. There are notions about large supermarkets coming in and swamping existing centres. But if you go and visit the local district centre, which might be falling apart at the seams, a new store with all the bells and whistles, in qualitative terms, is exactly what is required. My criticism is that those people get a little bit precious about these district centres where really development is the only option (Willis, 2001:19)."

Politically this is not a neutral issue. Numerous research papers indicate that retail-led regeneration initiatives provide demand spillovers to stimulate a net increase in investment and retail injections from elsewhere leading to an increase in economic activities in the local region (Yuo *et al*, 2003:1). This has been supported by a number of case studies (Cummins

et al, 2005:295; Lowe, 2000:268; Bromley *et al*, 2004:661; Thomas and Bromely: 2002:795; Oc and Tiesdell, 1997:253; Lowe, 2005:450; Wrigley *et al*, 2002:2109). Additional research also highlights other benefits such as employment and the eradication of food deserts. Business interest groups such as the National Retail Planning Forum, Business in the Community and the British Council of Shopping Centres have also put their weight into lobbying of government and publishing best practice case studies highlighting the economic and social benefits of retail-led regeneration. However a number of studies have concluded that large retail schemes crowds out local businesses by means of increasing economies of scope and scale associated with large retail developments (Thomas and Bromely: 2002:793; Bromley and Thomas, 2002:112; Robertson and Fennell, 2007:155; Monbiot, 2000:4). Large-scale retail is notoriously exclusive in its profile of retail offerings and thus there is a danger that mega-schemes could in fact recreate the same economic conditions as edge-city retail by drawing customer footfalls and anchor retailers away from smaller existing retail centres and high street shopping.

The concerns regarding the crowding out of local retail and the decline of the high street as an essential part of community life was also combated using containment policies. Containment policies have promised the redevelopment of toxic brownfield land use in deprived inner cities by channelling large retail schemes to inner cities combined with directed public revitalisation of the urban environment. This was to be followed theoretically by an influx of professional white collar workers with spillovers of increased employment and more demand for local retailers (Meen and Andrew 2004: 209). The implementation of containment policies in the mid 1990's forced shopping centre developers and competitive national retailers to expand to inner cities or to downscale their peripheral outlets. The level of success of containment policies is debatable because the total volume of retail floorspace opened by major retailers has not diminished despite containment policies (Wrigley, 1998:160).

It is questionable whether retail-led regeneration initiatives and containment policies have contributed to the economic revitalisation of existing inner-city retail or whether these projects merely lead to pitch shifting of retail and the further deterioration of existing inner-city retail. The case studies of retail-led regeneration policies certainly have had mixed results, and it is certain that retail-led regeneration and retail containment are not a panacea for healthy retail economies (Dixon, 2005: 180).

The aim of this paper is to critically analyse the effect that both retail-led regeneration policies and containment policies have had on the growth of local retail economies. The paper will attempt to analyse the qualitative differences between retail-led regeneration in a town centre and in a peripheral location on the edge of the city. The results of two particular retail-led regeneration projects, Birmingham and the Solihull, will be analysed. The significance of these two retail-led regeneration schemes are that both developments opened within two years of each other and are in direct competition with each other, containing overlapping market areas and competing for the same anchor tenants. Of greater significance though is the distance between the two centres is their location relative to the city centre. Birmingham is a true city centre scheme whereas Solihull, although located within its own council, is in reality a satellite of Birmingham and therefore an out-of-town scheme.

The Retail-Led Regeneration Model

The current retail-led regeneration model was originally a concept imported from the United States in which a number of declining inner-city areas were successfully redeveloped by private developers. There the concept is called 'Rouseification' after Rouse, a private developer specialising in inner city retail developments, in particular waterfront and festival marketplace themes (Pacione, 2005:337; Loftman, 1995: 301). Retail-led regeneration initiatives consists of a large department store, hypermarket, or regional shopping centre development serving a catchment beyond the boundaries of the local council or district which it serves, creating a net injection of retail spending within the local economy (Lowe, 2005:450). The development of a large anchor store should theoretically restructure the local economy to provide the physical space for new economic activities based on the diversification of the economic activities, enable the growth of agglomeration economies, and attract outside investment (Healy,1991: 99).

Retail-led regeneration initiatives were widely implemented throughout Britain during the post-war Keynesian planning period. Planning policy was strictly against superstore development, out-of-town retail developments on the urban periphery and attempts to

restructure the local economy (Wrigley, 1998:154). The size of the units were comparatively small and was built to accommodate an overflow of high street retail through the construction of small scale indoor malls, and pedestrianised high streets and public spaces (Tallon, 2008:131). These projects were initiated by the public sector and are most exemplified by the unattractive modernist concrete structures and decaying pedestrianised high streets seen in deprived cities.

However in the 1980's amidst liberal retail policies, the 'Store Wars' retail revolution occurred whereby a rush of private developers established a number of large shopping centres on the periphery of cities. Retail became increasingly concentrated in superstores, regional shopping centres and warehouses with extensive car parks drawing customers from increasing distances (Thomas and Bromely, 2002: 793; Wrigley, 1998: 154). This trend formed the prototype behind the current retail-led regeneration model in the UK. The strategy behind this model is to restructure physical buildings and locations to be appropriate for new kinds of economic activities in a post-Fordist service economy. Property development and private sector involvement is essential for the success of these initiatives (Healy, 1991: 99). Although retail-led regeneration initiatives were later restricted in out-of-town developments due to its cannibalistic nature, it has been deemed acceptable within cities due to policies favouring densification.

A number of causal factors contributed to the current retail-led regeneration practices. Foremost were the neo-liberalist trends in government urban policy. These included the liberalisation of planning controls, tightening of local government budgets, the policy of pursuing private leveraging of projects by government and the overt participation of the private sector in policy formulation and decision making (Griffiths, 1998: 55; Turok, 1992: 374). Environmental factors also contributed to the practice. The decline of British manufacturing due to post-Fordist pressures led to the shift from a production centred economy to a service centred economy. This led to the subsequent degeneration of city centre employment, urban flight to the service centred suburbs, and the development of toxic brownfield land uses in inner cities due to the loss of production capacity (Tallon, 2010:177; Carley, 1990:100; Healy,1991: 99; Loftman, 1995: 301). The model also developed as a result of social changes in public shopping patterns. The modern car-oriented shopping patterns favours pedestrianised and climate controlled shopping centres; cafe' cultures requires a controlled 24 hour shopping environment; and double income families requires

economies of scope, long opening hours and centrality (Pine and Gilmore, 1999:24; Zukin, 1998:831; Tallon, 2008:132).

By the late 1980's it was realized that shopping centres at the periphery of cities had a negative effect on traditional high street retail, particularly in inner cities. Whether the decline of traditional high street retail in inner cities was primarily due to the pressure of large out-of town shopping centres or whether it was due to wider social change is debatable. However government decided to implement a series of shopping centre containment policies leading an appeal success rate dropping to 25% from over 50% in the 1980's (Wrigley, 1998:154). This had an extremely negative effect on prospective shopping centre schemes in that only 8 of the 50 of the schemes proposed between 1987 and 1992 were built by 2006 (Tallon, 2010:177).

The first of these containment mechanisms was the so-called 'Gummer Effect' in which the UK central government started opposing large retail development appeals in principle (Wrigley, 1998:154; Bromley et al, 2004:649). This was followed by the 'sequential approach' to out-of-town developments implemented in the PPG6 and PPG13 policies. Within these policies all proposed shopping centre developments had to prove that there was a need for the retail development as well as prove that no alternative site was available within a town centre. Later a stricter 'class of goods test' was implemented in which it was additionally required to prove that the goods sold within the proposed centre cannot be sold from an alternative site within a town centre (Thomas and Bromely: 2002: 793; Lowe, 2005: 451).

Although the containment effect limited large store formats on the periphery of cities, the retail revolution continued quietly within cities. Developers adapted to the prevailing conditions in a spirit of 'enlightened self-interest'. By 2002 4.5 million square metres floorspace was proposed with 80% proposed in inner city locations (Lowe, 2005: 465). District centre sites were still regarded as suitable for large schemes according to containment policies, and therefore these sites were targeted. Large store retailers also started making use of previously marginal locations on brownfield sites. (Wrigley et al, 2002: 2102). Retailers circumvented containment policies by focusing on extensions of existing stores, and creating high street targeted 'metro' stores (Wrigley, 1998: 156). However most apparent was the regional shopping centers developed in the inner cities of large regional cities (Lowe, 2005:450). Some peripheral sites were still accessed on previously proclaimed

land. Other peripheral schemes were successfully motivated using employment concerns to define 'need' for retail development (Adlard, 2001, p. 533; Guy 2002: 327).

The economic principle behind the retail-regeneration model is to introduce a key anchor retailer with a large amount of additional floorspace for secondary retailers thereby creating the growth of an agglomeration economy at increasing rates of return (Ravenscroft, 2000:2535). The retailer-led regeneration process is also linked to the historical accident factor in which the location of a key retailer or shopping centre will spillover into the agglomeration of other retailers and related industries over time (Harvey, 1989: 8). In deprived inner cities it is argued that combining the scale of these retail-led regeneration projects with low land values could create new market conditions for recentralisation (Ravenscroft, 2000: 2535). Often these projects are also combined with mixed use schemes and infrastructure, streetscaping and transportation projects in order to broaden the perceived benefits of the scheme (Guy, 2008: 385). It is hoped that the restructuring of the city would also result in the spillover of upmarket residential development and high quality office space. There is an assumption that when the level of investment reaches a critical point, the total potential value of the well located yet undervalued property becomes greater than the negative externalities associated with urban decay and toxic brownfield land uses. This would theoretically trigger gentrification trends within the local property market. However the process is not uniform and the history of retail-led regeneration contain many hits and misses (Oc and Tiesdell, 1997:16).

Retail-led regeneration theory assumes a direct link between property development and local economic regeneration and wealth generation. This is based on the neo-classical assumption that free markets entail automatic efficient and effective service provision, completion and choice (Atkinson, 1999: 63). Retail-led regeneration, as other property led regeneration projects, therefore endeavour to provide the following benefits to the local economy:

- Increased employment and income from construction and commercial activities to uplift the local economy
- Local economic growth and improved social amenities due to infrastructure and property development
- Attracting capital investment and relocating firms into the region

- Restructuring the local economy to become more competitive regionally through redevelopment and economic diversification
- Neighbourhood revitalisation of deteriorated urban spaces creating a pleasant living and working environment and therefore higher property values
- Civic boosterism and city marketing, which results in positive public perceptions of the city (Turok 1992: 364; Loftman and Nevin, 1994: 308)

The marketing and repositioning of cities motive is often more important in retail-led regeneration programmes than the economic benefits. Many post-Fordist cities have acquired the negative stereotype of an industrial wasteland with little scope to offer potential investors. City branding is used as a tool used to refocus the public's core image of the city by creating a semiotic 'city myth', which is used to differentiate the city from other 'rust belt cities' (Harvey, 1989: 5; Hall, 2006: 86). These endeavors have proved successful in the case of Manchester, where a number of property-led regeneration projects, combined with cheap, well located brownfield sites and good infrastructure has revived the city with a net influx of investment and workers (Halfpenny, et al: 2004: 258). The necessity of repositioning cities in the globalist economy has become crucial for local economies that have been marginalised due to a global change in production. This includes the restructuring of industry from a manufacturing to smart industries and making cities attractive for mobile international capital.

Flagship developments, consisting of a large scale, high profile, self-contained shopping centre or store is the currently the preferred vehicle of retail-led regeneration activities (Loftman and Nevin, 1994: 306). Flagship development is a key element in marketing and city branding, because it creates a core image to link to the city myth which detracts attention from the city's historical legacy. Although only flagship developers profit directly from place marketing activities there are potential indirect spillovers to the local government and community in the form of outside capital investment due to greater publicity. However the spillovers to the local government and community are generally speculative and come at a high risk of failure, with little tangible results amidst significant local disinvestment (Harvey, 1989: 7).

The prestige model of flagship development has become the preferred method of delivering retail-led regeneration initiatives due to budget cuts made by central government

forcing local authorities to leverage regeneration with private investment. The effectiveness of flagship projects lies in the fact that these instruments are high profile and deliver tangible results. However flagship development invariably creates inequalities. Although flagship projects provides net improvements to certain locations within the urban area, these are usually choice locations, creating a structurally fragmented city, with wealthy upmarket residential developments located close to deprived neighbourhoods with little social cohesion. A further problem is that these efforts generally homogenise cities into clones of successful cities, mimicking the same developments and slogans (Griffiths, 1998:44; Tallon, 2010:123).

Lately there is a considerable doubt attached to the effectiveness and efficacy of property-led initiatives. This is partly due to the fact that the primary beneficiaries of retail-led projects are private sector business interests. There are numerous instances of property-led regeneration projects failing to provide the intended benefits to the most deprived areas at the cost of significant public disinvestment (Herbert, 2000: 204; Loftman, 1995: 311). The Ladywood ward in Birmingham declined to the third most deprived ward in the UK in terms of employment after the development of a number of property-led projects between 1988 and 1992 (Loftman and Nevin, 1994: 313). £380 million worth of leisure and cultural buildings were developed at the cost of disinvestment in local housing and education and at a council budget deficit of £120 million during the same period (Griffiths, 1998: 55). There is a valid argument voiced by many that retail-led regeneration initiatives often result in local disinvestment, and that distributive mechanisms would be preferable. However the counter argument is also strong. During the 1970's and 1990's the results of distributive mechanisms such as area based regeneration initiatives in which public funds were invested directly into deprived neighbourhoods showed no meaningful results despite the high public cost (Modarres, 2002:299; Turok, 1992: 374). It was rationalised that inner city problems are sociological in nature and are thus unsolvable (Loftman and Nevin, 1994: 309). Retail-led regeneration projects on the other hand usually deliver tangible results even if unsuccessful, which is politically more tenable than distributive instruments (Loftman, 1995: 301).

The success of retail-led regeneration initiatives are determined by economic factors that not controllable, nor predictable (Griffiths, 1998: 56). A causal link between retail-led regeneration and local economic competitiveness has not been established. There is no uniform methodology to predict the effectiveness of retail-led regeneration initiatives in developing economic competitiveness. Traditional floorspace modelling and cost/benefit

analysis does not capture the cumulative processes involved in redeveloping local economies (Begg 2002: 4; Cummins et al, 2005: 299). Research has also been hampered by a lack of statistical data of retail facilities in the UK, coupled with contradictory research findings (Thomas & Bromely: 2002: 794). However it is accepted that the successful local economies are those which raises the standard of living and real incomes of residents within the locality itself; is economically diverse creating goods and services which are regionally competitive; create a favourable balance of payments; and have a efficient internal circulation of disposable income locally (Boddy and Parkinson, 2004: 423). National/international retailers in retail-led regeneration initiatives leach local disposable incomes from local businesses to London or abroad and are generally poorly integrated into the local economy. This globalisation of local retail has often resulted in a lower balance of payments, increases in interest rates, poor economic opportunities and a decline in savings in local communities (Turok, 1992: 375).

A core weakness in the retail-led regeneration model is that property attributes of a particular location are supplementary to locational attributes such as human capital, innovative capacity, quality of life, labour costs, labour flexibility and physical and ICT infrastructure. This has proved true in areas experiencing natural growth such as the Southeast of England, Southern Germany, Southern Spain and Northern Italy where there are natural growth patterns of investment and capital. Areas that lack suitable locational attributes such as Northern England, Eastern Germany, Northern Spain and Southern Italy have struggled to attract new businesses using property-led regeneration initiatives other than from local business transfers within the region (Turok, 1992: 370). There has also been a natural movement of positive locational attributes to the periphery of post-Fordist cities as the change from secondary to tertiary economic activities has coincided with urban flight. Although retail-led regeneration projects have been widely implemented in the UK, especially in the Midlands, the rankings of the cities in the UK urban hierarchy have not changed. Only the shopping centre retail hierarchy of major post-Fordist cities in the UK involved in regeneration has changed, which put the effectiveness of retail-led regeneration initiative in doubt (Boddy and Parkinson, 2004: 411).

The employment motive in retail-led regeneration initiatives is also suspect. Retail employment has increasingly demanded lowly skilled, female only and temporary workers. These low quality employment opportunities favour migrant workers and commuters rather than real population movements (Dixon, 2003: 171; Dunham et al., 1994: 355). Employment

motives are only successful when full-time, permanent positions are created and investment is embedded in local supply chains. Large scale retail developments and national/international retailers create high local employment displacement effects of up to 50% of newly created jobs due to the marginalisation of high street retail. These retailers also make use of supply chains connected to head offices rather than local chains resulting in general job substitution and local economic disincentives (Robertson and Fennell, 2007:155).

The greatest morphological impact that large retail schemes in retail-led regeneration initiatives has had on the city is on traditional high street retail. Between 1945 and 2006 the number of independent retailers has declined by 94%. The use of traditional high street retail has also shifted to top-up purchases rather than main shopping expenditures, with those using high street retail limited to the elderly and those without private transport (Thomas and Bromely: 2002: 795). This has had a resulting decrease in high street retail revenue of up to 50%. It is generally accepted that peripheral retail development is the cause of pitch shifting, lower property values and disinvestment in high street retail, especially in inner cities (Dixon, 2005: 180).

Although retail-led regeneration initiatives have certainly contributed to the decline of retail, it is doubted whether it was the causative factor. Great social shifts have also occurred in the UK in which community and social life has shifted to a consumerist mall culture. Many large schemes function similar to mini-villages containing its own housing, land use mix, retail variety, transportation links, and social amenities within a safe, secure and controlled environment. This is in contrast to the local high street retail in which a distinctive community life has disappeared altogether (Simms et al, 2003: 54). Much high street retail currently consists of predominantly low quality retail such as fast food stores, cell phone shops, and charity shops and variety stores. This retail provision is generally unhygienic, has a poor retail selection, is inaccessible by car, and has poor social amenities within an often xenophobic, insecure and asocial environment (Evans, 1997: 15). High street retail has only managed to survive in culturally homogenous communities with closely knit community ties and protectionist policies. These conditions are rare in UK city centres but are found in the periphery of cities.

The historic high street retail stock is structurally inadequate to provide for the needs of modern retailers, lacking suitable public parking and often providing inadequate floorspace resulting in depressed rental rates and high vacancy rates. Small-scale retail prominent

during the post-war era has struggled to survive since the liberalism of planning enforcement in the 1980's (Guy 2007: 143). However strategies have been developed to combat high street retail decline. Foremost is the revitalization of environmental concerns in creating a safe, secure, hygienic and aesthetically pleasing design and maintenance of streetscaping and facilities using BID's. Efforts to provide parking for car users and public transportation accessibility have also been addressed by local authorities (Tallon, 2010; 184; Jones 1989: 43). Although effective, these measures have also been criticized as creating artificial commoditised public spaces, of being exclusionary to informal traders and the youth, and of displacing crime to residential areas (Symes and Steel, 2003: 312).

The Retail-Led Regeneration Efforts in Greater Birmingham

Birmingham and the Midlands region can be described as the neo-liberal heartlands of the UK. Almost every conceivable property-led regeneration strategy has been implemented in this area. Birmingham and the Midlands region formed the largest component of the UK manufacturing industry during the post-war era and many influential UK industries were located there (Carley, 1990: 100). Consequently the region suffered the most from Thatcher's 'Lame Duck' policy of ending British industry protectionism. Most industries in Birmingham downsized, moved abroad or closed cutting a quarter of a million jobs in the Midlands and tripling the unemployment rate (Pacione, 2005:178).

As the focus of the British economy shifted from manufacturing to smart/ service industries, the core areas of economic production shifted to cities such as London, Bristol, Edinburgh and to the periphery of large manufacturing cities (Boddy and Parkinson, 2004:411). With a high unemployment rate and the flight of the most productive segments of the community to the periphery, Birmingham was forced to adopt a strong entrepreneurial approach to restructure and diversify the city's core economy (Digaetana and Klemanski, 1992:16). The financing mechanisms of the state also forced the council to take an active role in development by leveraging regeneration initiatives with private investment (Griffiths, 1998: 55). This led both conservative and labour constituencies to foster strong ties with business interests through public-private partnerships (Loftman,

1995:305). Regeneration projects were centred almost exclusively on property-led regeneration projects, particularly flagship projects. The scope of these projects ranged from sporting and cultural facilities, business parks, convention centres, luxury residential development, skilled artisan districts to retail developments (Hall, 2006: 143; Bailey, 1995:87; Loftman and Nevin, 1994:311). However the success these initiatives achieved in regenerating economic growth, restructuring the local economy and revisioning the core image of the city as an attractive location for investment has been rather unsuccessful to date.



Figure 1: Locations of Regional Shopping centres in the Birmingham catchment area

The older retail-led developments in Birmingham fared especially poorly due to competition from other retail-led regeneration initiatives in the Midlands region. Due to the large number of regional shopping centres serving overlapping market areas, as is indicated in Figure 1, a strong inter-regional competition developed in the Midlands. The adjacent Merry Hill shopping centre developed by the 1990's, soaked up the majority of shopper footfalls regionally, but it functioned in a symbiotic relationship with the local high street retail in Brierley Hill (Lowe, 2000:268). Birmingham's shopping profile in the 1990's lacked the prime retail offering of its peripheral competitors, consisting of a number of older public-planned shopping centres and deteriorated high street retail. The drab 1960's modernist shopping centres such as the original Birmingham Bullring, Pallasades and Great Western

Arcade shopping centres (indicated in Figure 2) were unattractive and unsuitable for modern retail consumption.

A number of smaller retail-led regeneration projects were launched in reaction to the increasing regional competition. These included the Mailbox development, the Castle Vale estate development, and the failed Brindley Place festival market-place/waterfront scheme which was converted to office development (Wrigley *et al*, 2002: 2108). An attractive feature of the retail-led regeneration projects was that the public cost in supporting these regeneration projects was miniscule in comparison with the early sport or culture-based prestige projects in Birmingham (Turok, 1992: 374). However these schemes were relatively unsuccessful in attracting shopper footfalls back into the shopping centre.

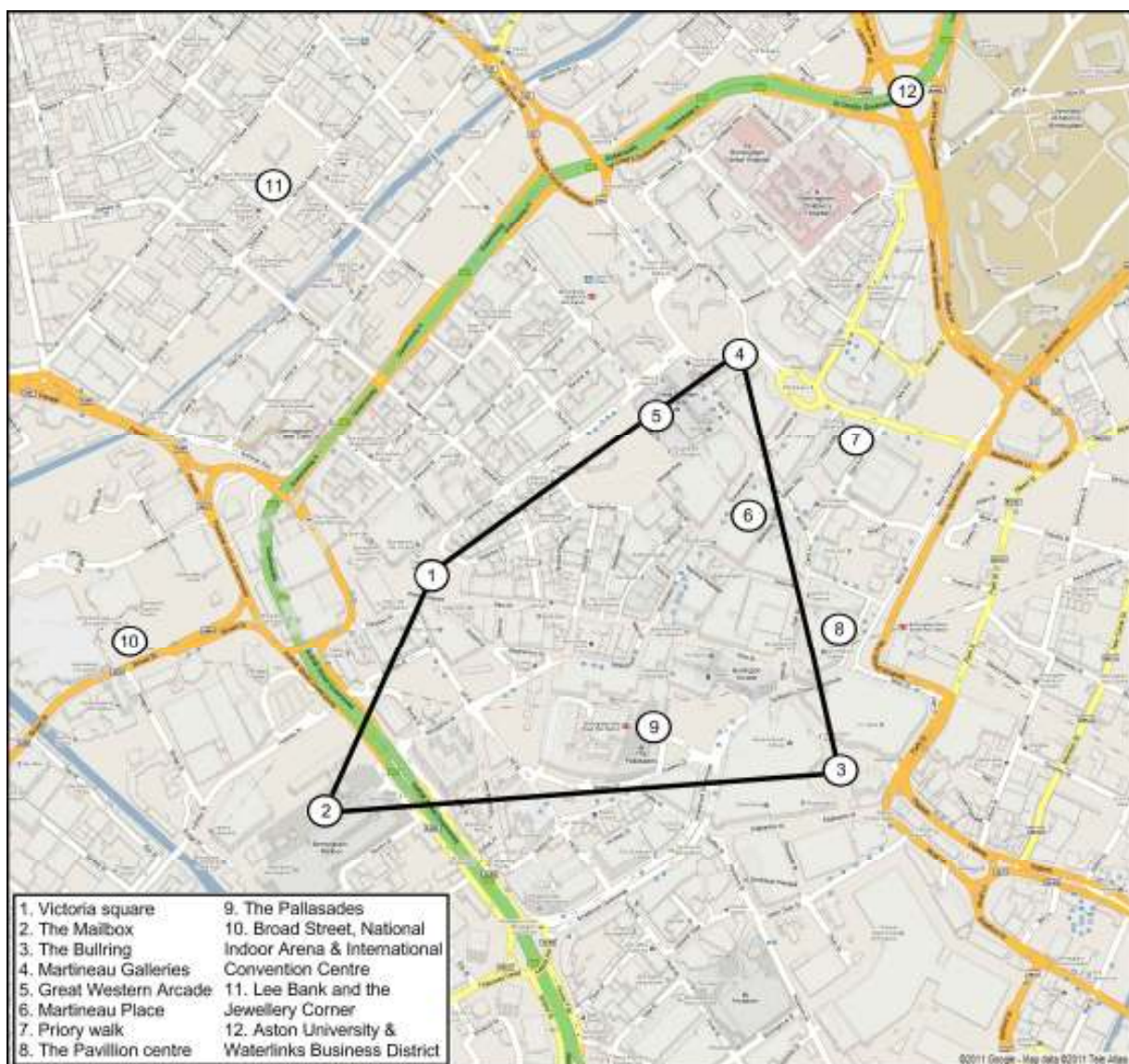


Figure 2: The layout of the retail-led regeneration strategy in Birmingham city

The Birmingham Bullring regeneration initiative was developed as a rival scheme to the Solihull regeneration initiative (DTZ: 2005:32; Lowe, 2005: 456). In a bold move the Birmingham City Council strong-armed competing rival developers to consolidate their respective developments into one major scheme in partnership with the Council, who assumed the planning and highway control responsibilities, and contributed prime land toward the scheme (Emery, 2006:122). Similar to the Solihull regeneration scheme the 110 000m² Birmingham Bullring regeneration initiative consisted of a number of shopping centres and upgraded high street retail linked in a triangular pattern to form a cohesive pedestrian corridor as indicated in Figure 2. The flagship scheme was the Birmingham Bullring shopping centre but the success of the scheme is undoubtedly due to the integration of the different retail offerings within a BID. The Birmingham Bullring regeneration initiative has an estimated footfall of 40 million p.a. and an annual turnover of £4.1 Billion (DTZ: 2005:32). Birmingham has catapulted to the position of third in the UK retail hierarchy in 2004, from a position of 14th it held just two years prior (Barkham, 2009). The goal of the Regeneration strategy was primarily to reposition the core image of the city from a post-industrial rustbelt city to a diverse secondary business destination (Hall, 2006: 143). The marketing was accomplished by Marketing Birmingham, a group dedicated to generate publicity for the scheme (Emery, 2006: 124; DTZ: 2005: 40). The scheme also has over 100 000m² of proposed retail floorspace in the pipeline for future extension (Emery, 2006:125).

Solihull was until recently a relatively unimportant satellite city on the periphery of Birmingham. Solihull was granted its own local borough and steadily grew as slum clearance in Birmingham added to the population of Solihull. In the late 1990's the 55 000m² Touchwood regional shopping centre was developed as a flagship regeneration scheme to establish Solihull as the prime retail destination in the Midlands (Lowe, 2005: 453). The Touchwood centre linked high street retail with the older Mel Square scheme to form an integrated urban corridor that was attractive to shoppers. The regeneration strategy intended to fill the market gap for a regional shopping centre between Birmingham, located 9 miles west from Solihull, and the West Orchards scheme in Coventry. The Solihull Touchwood scheme is technically a peripheral shopping centre due to Solihull's location at the urban edge of the Birmingham metropolis, but due to Solihull's status as a Borough the scheme was regarded as a city-centre development and escaped the sequential test. Solihull's Touchwood scheme secured the only John Lewis department store in the Midlands

and opened in 2001. The scheme has planned to be extended to 110 000m² by 2021 (Cross, 2010).

Statistically both regeneration initiatives have a great degree of exclusivity. The Birmingham city centre has the highest number of high profile retailers regionally with 42 out of 91 leading retailers whilst Solihull (at half the size of Birmingham) has 19 out of 91 leading retailers. Compared to Merry Hill's retail profile at 9 out of 91 leading retailers, this indicates that the level of integration between the retailers within the shopping centres and the local independent retail is limited. The retail provision in Birmingham has an upper 'fashion' ranking with 50% of the goods provided being within the luxury to upper middle fashion goods ranking (Birmingham City Council, 2009a:7). The retail provision in Solihull is also primarily centred on the provision of semi-durable and durables such as clothing and domestic goods, though there is a sufficient food and convenience goods provision in the city (DTZ, 2009: 49). The amount of convenience outlets in Birmingham as a percentage of the total retail space is low at 7.5% as compared to the UK average of 9%.

The exclusivity of the retail-led regeneration initiatives is apparent in the difference between prime to off-prime rents. In Birmingham zone A rents found within the retail-led regeneration area are currently approximately £3500/m², while zone B rents found outside the retail-led regeneration area averages only approximately £1700/m² or 48% of prime rents. In Solihull the rent relationship is healthier with zone A rents averaging £2250/m², while zone B rents average £1450/m² or 65% of prime rent. However Brierley Hill in which the Merry Hill Shopping centre is located has zone A rents of approximately £2500/m² and zone B rents of approximately £2000/m², i.e. a relationship between prime rents and off-prime rents of 80% (Own calculations based on Valuation Office Agency data, 2010). This indicates that the retail-led regeneration initiatives in Birmingham did not have the intended effect on property values beyond the retail-led regeneration area, while the results in Solihull are significantly better. The poor relationship between prime and off-prime rents is also an indication of pitch shifting and shopper cannibalisation as shopper footfalls are directed to the prime positions and diverted from other retail locations.

The unit vacancy rate in Birmingham city centre is 17% compared to the UK average of 11% and the total floorspace vacancy in Birmingham city centre is 15% compared to the UK average of 9% (Birmingham City Council, 2009a:13). These vacant units are primarily located along off-prime locations. The Touchwood and Mel Square shopping centres in Solihull also

have a number of unit vacancies, however the vacancies are distributed equally amongst prime locations and off prime locations. This indicates that the vacancies in Birmingham are structural in origin as an result of an oversupply of floorspace and an overconcentration of footfall to the regeneration area. Birmingham has higher prime yields (i.e. lower rental growth investor confidence) in retail rents than other post-Fordist industrial cities such as Nottingham, Glasgow, Manchester and Leeds (Birmingham City Council, 2009b:37).

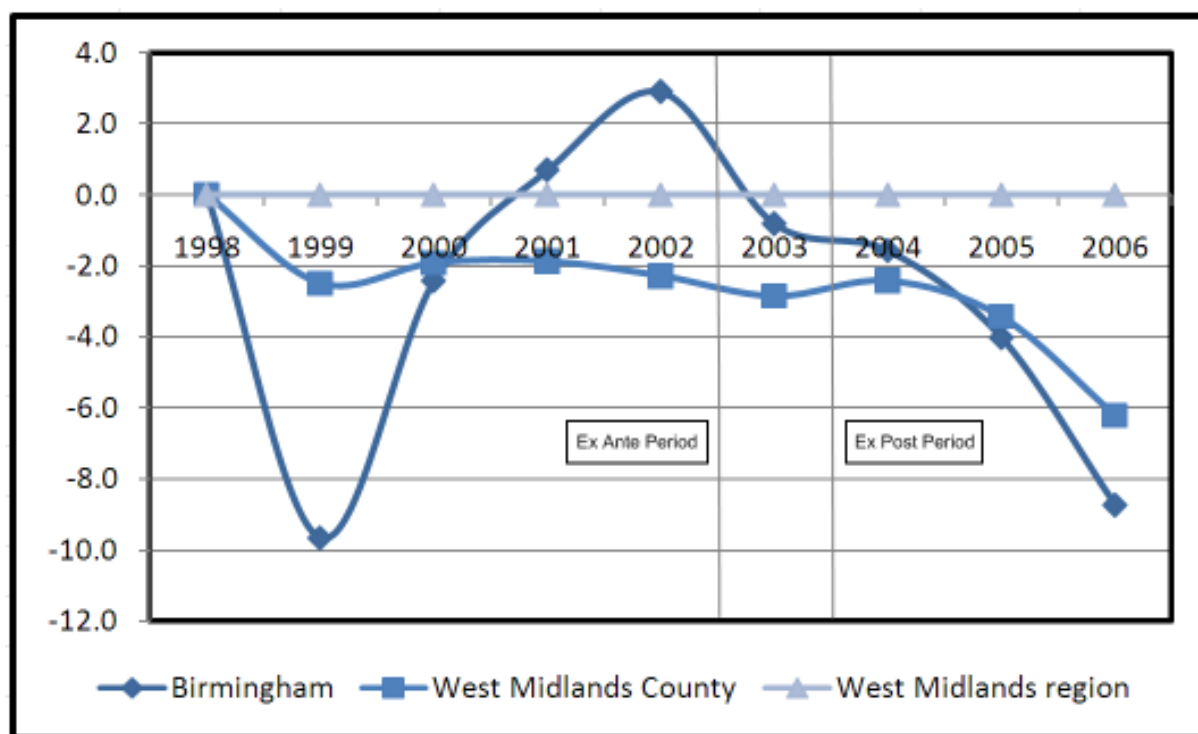


Figure 3: Percentage standard retail rental value above base values in Birmingham, 1998-2006 (Own calculations based on IPD standard retail rental value growth data)

The rental value growth in Birmingham is illustrated in Figure 3. The data indicates a large increase of rental value year on year preceding the opening of the mega-scheme as investor confidence soars. After the opening of the Bullring mega-scheme retail rental values in Birmingham decreased considerably indicating a drop in demand due to overavailability of retail floorspace. It is also noticeable that the Bullring has a negative effect on rental values in the rest of the West Midlands County which includes the Touchwood and Merry Hill shopping centres.

Figure 4 shows the year on year growth of retail rental values. The steady decline of rental value growth is immediately apparent. The annualised rental value increases by an average 4% annually during the ex ante period and experiences an average -7% decline in

rental value growth annually during the ex post period. This emphasizes the lower rental growth investor confidence in city centre retail floorspace within Birmingham.

The rental value growth in Solihull is illustrated in Figure 5. The data indicates a strong growth in rental value both ex ante and ex post periods with increasing marginal rents growing up to 80% above base regional market rates over a 10 year period. This trend is sustained throughout the analysis period despite the decline in rental value growth in the rest of West Midlands County. These trends indicated that the development of the Touchwood shopping centre created a strong investor confidence and positive growth in the local economy.

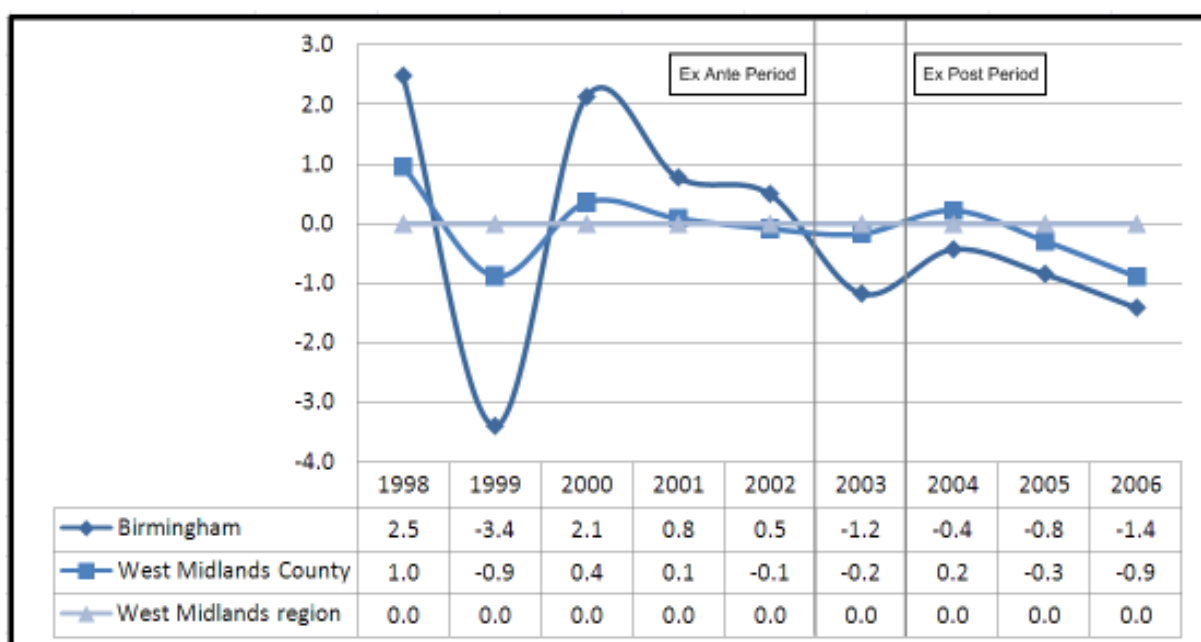


Figure 4: Year on year percentage rental value growth in Birmingham, 1998-2006 (Own calculations based on IPD standard retail rental value growth data)

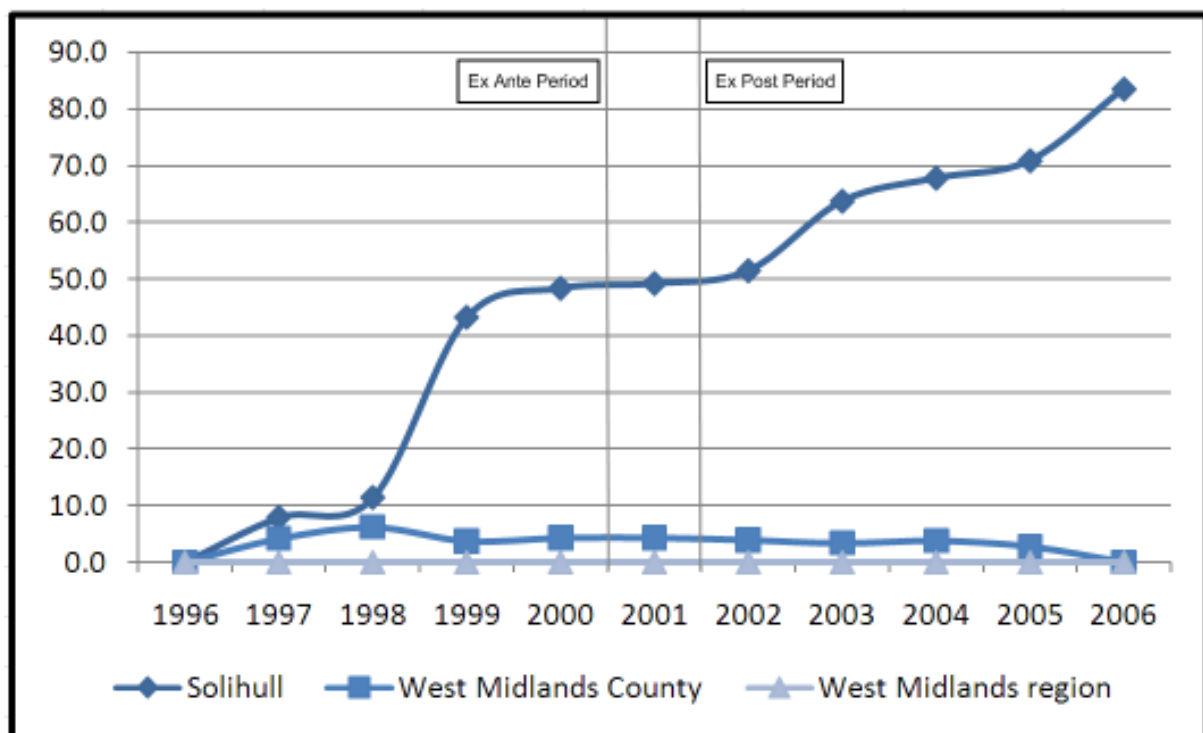


Figure 5: Percentage standard retail rental value above base values in Solihull, 1996-2006 (Own calculations based on IPD standard retail rental value growth data)

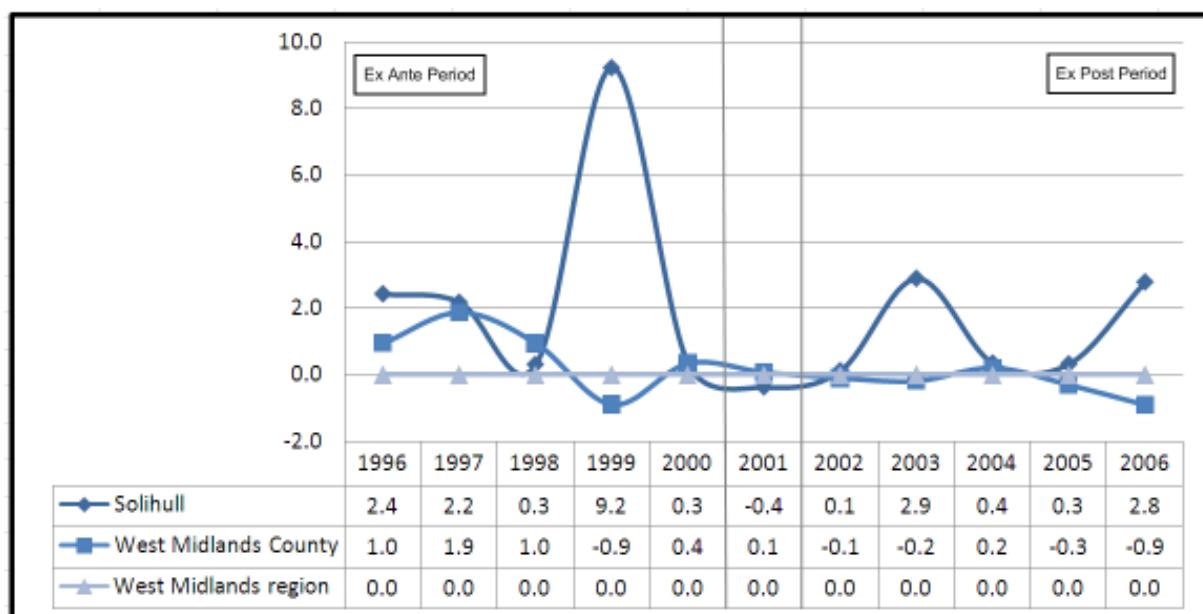


Figure 6: Year on year percentage rental value growth in Solihull, 1996-2006 (Own calculations based on IPD standard retail rental value growth data)

The annualised the rental value growth, illustrated in Figure 6, shows a predictable cyclical rate with increases of an average 2.9% annually during the ex ante period and an average 1.3% increase in rental value growth annually during the ex post period. These growth rates indicate that the development of the Touchwood shopping centre did not replace existing retail but rather fulfilled demand for retail in peripheral locations.

On site it was evident that the Birmingham retail-led regeneration initiative created an economically divided city. There was a marked difference between the quality urban space within the regeneration area, indicated in the box in Figure 2, to the area outside. The retail-led regeneration area, a roughly triangular sized area located between the Bullring, Mailbox, and Martineau Galleries shopping centres, consists of a well integrated commercial district with pedestrianised high street shopping linking the major shopping centres. The entire regeneration area forms an urban corridor for the high volume of pedestrian traffic in a well developed and maintained streetscene. Retail within the scheme consists of mostly national/international retailers offering high quality luxury goods forming what has been termed 'clone' retail, mimicking high end retail in West London. Toxic independent retail such as convenience stores, charity stores and variety stores are noticeably absent, yet so too are local enterprises such as local restaurants, butcheries, bakeries, and other land uses linked to a local community.

The retail space outside the retail regeneration area has deteriorated significantly, even within a few metres of shopping centres. The retail provision also consists of almost solely of local independent retailers providing low quality consumer goods. Vacancies have also concentrated just outside the retail-regeneration area as the retail space struggles to attract visitors. There is an overprovision of retail space and the excess retail outside the regeneration area has a high vacancy rate. Some peripheral shopping centres outside the regeneration area such as the Priory Walk centre are successful, yet others adjacent to shopping centres such as the Bullring have long term vacancies. These tenants cite the Bullring effect as drawing customers away from the smaller local convenience shops.

The local council supported the Bullring as a successful marketing and repositioning exercise. They therefore were willing to tolerate pitch shifting and retail decline in certain sections of Birmingham. Despite continued urban deprivation and retail deterioration in the inner city suburbs of Digbeth and Ladywood, certain sections of Birmingham has gentrified into high income residential areas, though the necessary middle income residential growth is lacking. It is believed that the Birmingham retail-led regeneration was successful in supplementing and integrating the existing retail into a regionally competitive offering that could compete with peripheral competitors especially Solihull and Brierley Hill.

The Solihull retail-led regeneration initiative followed a similar concept to the Birmingham regeneration initiative, with two anchor shopping centres developed to

supplement improved pedestrianised high street shopping. On site it is apparent that the Solihull retail-led regeneration initiative has proved to be successful in establishing Solihull as a major economic centre in direct competition with Birmingham and Coventry. Solihull retail-led regeneration has created a local agglomeration economy with spillover growth in the office and residential development. Demand for office and residential development is struggling to be met by development (DTZ, 2009:45). This follows the population movement to peripheral locations. Vacancies in both shopping centres and high street retail indicate an economic cause rather than a structural cause of oversupply and pitch shifting.

It is also apparent that the retail development in Solihull is not as exclusive as it is in Birmingham. Although national/international retailers concentrate in the shopping centres there is a strong presence of local and independent retailers within high street facilities and even in the shopping centres. Solihull has a high density of large warehouse retailers, but this does not appear to affect the presence of smaller independent retailers negatively. Poor quality local retailing such as charity shops, variety shops and independent cell phone retailers are also noticeably absent within the city.

The lessons learnt from containment and retail-regeneration on urban form

Retail-led regeneration has become an essential function in modern urban economies. The liberalisation of peripheral shopping centres in the 1980's and the subsequent 'store wars' has forced nearby city centres to compete with similar retail regeneration strategies or die. Retail-led regeneration has become so universally that the question is not whether retail-led regeneration is acceptable or not but rather how it should be implemented. The development of the Merry Hill shopping centre forced the Birmingham and Solihull local authorities to develop large retail-led regeneration initiatives of their own to keep their retail functions viable in the regional economy. Large anchor stores have become the epitome of retail led regeneration developments (Wrigley et al, 2002: 2102). Birmingham has managed to reclaim a large portion of its retail functions by recapturing a significant market leakage to peripheral centres, while Solihull has established itself as the premier retail destination in a significant market gap between Birmingham and Coventry.

The results of retail-led regeneration can be mixed. Birmingham struggled numerous times and only partially succeeded in regenerating the retail provision by linking a number of

schemes into a overarching strategy. Birmingham managed to salvage a portion of toxic inner city land use by reconciling a number of retail and office schemes, though at the cost of the loss of significant local independent retail functions. The Solihull initiative was a textbook case for retail-led regeneration, managing to create a growing local agglomeration economy through retail-led regeneration. It is apparent that retail-led regeneration is not the panacea to urban deprivation, and its success is strongly linked to natural locational attributes such as human capital, quality of life, and ICT infrastructure (Tallon, 2010: 185). Retail-led regeneration initiatives usually follow natural population and capital movements (Meen and Andrew, 2004: 209). The historical accident factor is a natural progression and cannot be replicated without favourable locational attributes (Guy, 2008: 385).

Because of the historical accident factor in retail-led regeneration, many developmental trends are reinforced that are contrary to popular planning ethos. Urban phenomena such as urban flight to the periphery, gentrification of key inner city locations, the development of dual economies and migrant employment are reinforced by retail-led regeneration initiatives (Smith, 2002:446). Birmingham in particular has experienced the effects of inner city gentrification and the development of dual economies. Certain key locations in Birmingham gentrified, forming economic links with the exclusive retail provision in the inner city, whilst the vast majority of the city is marginalised economically with deteriorating and toxic land uses.

Although containment policies have been enforced for almost two decades, the effectiveness of these policies has been limited. Smaller district shopping centres and large warehouse schemes are still developed in peripheral locations, reinforcing urban flight movements. Furthermore the scale and scope of the inner city schemes are developed to serve the needs of an ex-urban population who prefer travelling far distances to purchase luxury goods, semi-durable, durable and bulky goods in the city centre. The inner city regeneration initiative in Birmingham did not provide suitable convenience and non-durable goods required by a local community, nor a sense of place due to the exclusivity and surrealness of the 'clone' city. Therefore there is little incentive for the movement of the entrepreneurial middle class back to the city (Halfpenny, et al: 2004: 263). Solihull's regeneration initiative reinforced the movement of service and smart industries to the suburbs, affirming urban flight trends from Birmingham. The prominence of essential services, convenience stores and non-durable and food retailers has helped Solihull to create a sense of place and consequently growth in the local economy.

Urban flight trends are compounded by the loss of permanent employment in the inner cities (Dixon, 2003: 169). Birmingham's retail offering has displaced most of the local and independent retailers in favour of exclusive national/international retailers, which contributed to the high percentage of migratory labourers who are unwilling to relocate in favour of insecure employment opportunities. The loss of local and independent retailers, who traditionally are self-employed and provide higher levels of permanent employment add to this problem. Solihull does not appear to have this problem as the retail offering is varied with numerous local and independent retailers.

There is a tolerance for the perceived negative aspects to retail-led regeneration because the economic and employment incentives of regeneration have become secondary to the repositioning and marketing priorities of the city. It has become so essential to change its perception as a post-Fordist industrial city that Birmingham has risked the marginalization of a large portion of the city, particularly the deprived Digbeth and Ladywood areas from the economic core of the city. The retail-led regeneration initiative only directly benefits a small group of absentee high income property owners and retailers, not the local community (Monbiot, 2000: 4). The long term benefits are expected to spillover to the local community as a result of changed perceptions to investing in the city. There is a sense of nihilism that it is better to divide the city economically and save the inner core from toxic land uses than to let the entire city deteriorate with the inner cities.

The need to restructure post-Fordist cities has become a priority. Competition between the inner city and the periphery has become greater than the competition between cities. Cities such as Birmingham, Leeds, Manchester and Liverpool are not in competition with each other but rather with their own peripheral satellite cities (Harvey, 1989: 10). Birmingham and Solihull are in direct competition with each other, and the retail-led regeneration initiatives have been created to cannibalise footfall of consumers their neighbouring regions (Cummins et al, 2005: 295). Birmingham's regeneration was intended to restructure the city's economy to compete in a post-Fordist service economy, while Solihull intended to compete on equal footing between rival giants Birmingham and Coventry.

A consequence of the liberalization of retail has been the decline of local retail, especially traditional high street retail. The decline of high street retail in inner cities is in part due to the social changes that have taken place in modern culture. Birmingham retail has become

an ideal venue to visit infrequently for purchases of luxury goods, bulky items and semi-durable and durable goods. However inner city retail will not be able to challenge the convenience and food retailing in district centres and peripheral shopping centres in terms of car accessibility, variety, price and environmental aspects (Ravenscroft, 2000: 2535; Wrigley et al, 2002: 2108). Solihull's retail offering has assumed the format of a mini-village with high accessibility, variety, long opening hours and a favourable nightlife.

Saving high street retail is the motivation behind the implementation of containment policies. The integration of pedestrianised high streets with shopping centres in retail-led regeneration initiatives was implemented to minimise the effect of retail liberalization on high street retail. This included the integration of high streets into BID's in order to manage the environmental concerns such as crime, hygiene and streetscaping (Thomas and, Bromely, 2002: 793). However in Birmingham the integration of high street retail was futile in preserving local retail from competition by large schemes and national/international retailers (Guy 2002: 321). The retail-led regeneration initiative in essence undermined the last traditional high street retail in Birmingham and its links with the local community. Conversely the high street retail in Solihull did not appear to suffer negative effects from the retail-led regeneration initiative there. This emphasizes the importance of considering the implementation of the class of goods test to large inner city and district level schemes as well (Wrigley et al, 2002: 2110).

Conclusion

Retail-led regeneration has become a permanent feature in cities competing against each other in the global marketplace. Retail-led regeneration has become predatory with secondary cities no longer competing in a world city hierarchy with other secondary cities but rather with their periphery. The level of competition between cities whose retail schemes have overlapping catchments indicate that local economic growth is dependent on the region's competitiveness. Birmingham and Solihull both developed rival schemes to maintain regional competitiveness and to increase market share between each other.

The Birmingham retail-led regeneration initiative is a typical inner city retail strategy. This initiative managed to reconcile various shopping centres and high street retail with a flagship

scheme into a cohesive urban corridor. It was implemented to restructure the post-Fordist industrial city to become more competitive economically in a service economy. The retail-led regeneration initiative has had mixed results, on the one hand creating a popular regional shopping destination which has revolutionised the image and vitality of the city, but at the loss of vital community retail functions. Birmingham retail has served the purpose of as a luxury and bulky goods destination but has lost the local food and convenience functions, dividing the city into a 'clone town' emulating London west end shopping. In the process it has marginalised the local economies of deprived inner city communities. However Birmingham recognised that this was necessary to save a portion of the city from the leakage of retail to cities on the periphery such as Brierley Hill and Solihull. The retail-led regeneration initiative in Birmingham was considered successful as a city marketing and rebranding exercise.

The Solihull retail-led regeneration initiative was technically a peripheral retail development, contrary to UK containment policy. Solihull is a satellite city located on the outskirts of Birmingham and therefore any retail development in Solihull directly affects retail in Birmingham. Solihull developed an identical retail-led regeneration strategy to Birmingham but achieved far different results. The regeneration initiative successfully integrated the local economy with regional retail functions, enabling local and independent retailer to be established amidst national/international retailers. The regeneration has had economic spillovers resulting in a diversifying agglomeration economy which has supplemented significant suburban migration and employment movements to Solihull, creating a healthy local economy. Solihull retail has created a mini-village with strong ties to local community in which modern shopping culture has merged with traditional high street retail created a sense of place not found in Birmingham. This has led to the establishment of Solihull as a major retail destination in the Midlands and a serious threat to the vitality of Birmingham's economy.

The comparative success of the Solihull retail-led regeneration initiative over the Birmingham initiative is attributed to favourable locational attributes. It is apparent that retail-led economic growth does not happen in an economic vacuum and will only be successful if the environmental conditions are conducive to investment and development. This puts the effectiveness of retail containment policy to question. Retail-led regeneration strategies should be re-evaluated in terms of their impact on the local communities they intend to serve, not on densification ideals. Should the locational attributes of a prospective

retail-led regeneration site not be conducive to natural economic growth, such as in post-Fordist cities, the retail-led regeneration could prove to be harmful to the local economy. This includes reinforcing urban flight, migratory labour, marginalising local enterprises, and the creation of a dual economy amid continued urban deprivation. The Birmingham retail-led regeneration generally only served to monopolise retail in the hands of national/international retailers contributing to a leakage of local disposable income and a lower balance of payments whereas the peripheral initiative in Solihull was conducive to local economic growth.

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