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Averting dead mall syndrome: De-malling and the future of the purpose-built shopping center in large UK cities

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ABSTRACT

As consumer habits evolve the role of purpose-built shopping centers is being severely tested. The phrase “dead mall syndrome” is now frequently used in North America and parts of Europe to describe shopping centers facing obsolescence. In this paper, we make purpose-built shopping centers in large UK cities our focus and consider the extent to which “dead mall syndrome” and “de-malling” are occurring on the UK’s city center high streets. Using a new dataset, we find that shopping centers are facing high levels of vacancy and can no longer rely on the rental income that used to flow from retailers. Tenancies are also more difficult to sustain in older enclosed shopping centers than in newer open-air shopping centers. This has forced some operators to adopt radical “de-malling” measures that focus on the redevelopment of former shopping center sites into mixed-use urban quarters. This approach has been aided by flexible UK planning policies that enable shop owners to convert redundant retail space into alternative new uses. We argue, however, that a more managed approach is necessary to ensure these urban transformations achieve a sustainable fix to the “crisis on the high street” in large UK city centers.

KEYWORDS

Shopping centers; shopping malls; city centers; retail; de-malling

Introduction

Purpose-built shopping centers as we understand them today emerged in North America during the mid-20th century and were “an altogether different proposition, not least in terms of scale” (Warnaby & Medway, 2018, p. 276) when compared to earlier retail development. Known as “shopping malls” in North America, they offered a wide array of shops in an enclosed space with attendant car parking. Most were built out-of-town to serve the needs of an expanding suburban middle class and their development helped precipitate the decline of large department stores and traditional “main street” shopping (V. Howard, 2015; Talen & Jeong, 2019).

North American retailing set the pace for changes elsewhere (Buckley, 2018), including in the UK, where purpose-built shopping center development began in the 1960s (Bunce, 1983). These were initially developed on the traditional “high street”—the close cousin of the North American “main street”—in large, medium, and small UK towns and cities and were less common on the urban edge (Buckley, 2018). A wave of out-of-town shopping center development did subsequently take place, however, during the 1980s and 1990s on the edge of large UK cities that could draw upon a regional consumer base, such as the Metro Center (1986) close to Newcastle-upon-Tyne, Meadowhall (1990) on the edge of Sheffield and Bluewater (1999) on the eastern fringes of London in the county of Kent

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(Crosby et al., 2005; E. Howard, 2007). Unlike in the U.S., UK national planning policies introduced in the latter half of the 1990s sought, albeit with limited success, to reestablish the primacy of city centers as part of a wider emphasis on sustainable development (Hillier Parker, 2004; Williams, 1999). As a result, shopping center development returned to city centers, especially in the UK's larger cities where it was often a component of complex urban renewal projects (Biddulph, 2011; Crosby et al., 2005; Dixon, 2005; Lowe, 2005). Development pressure and a paucity of in-town sites also provided justification for the parallel proliferation of retail park development—the closest equivalent to “big box” retailing in North America—in the suburbs of large, medium, and small towns and cities across the UK (Guy, 2010; Thomas & Bromley, 2003). This created particularly difficult trading conditions for medium and small town and city centers unable to rely on a regional consumer base (Dolega & Lord, 2020).

Shopping centers in large UK city centers enjoyed success in the early 21st century and the amenities provided alongside the shops—food courts and the like—enticed hedonistic shoppers to “make a day of it.” However, in the UK and elsewhere, the 2007–2008 Global Financial Crisis marked a turning point. In North America, shopping centers already struggling to compete with e-commerce and big-box retailing began to close and the phrase “dead mall syndrome” emerged to describe their rapid decline and abandonment (Dunham-Jones & Williamson, 2017; Scharoun, 2012). In the UK, consumer behavior also changed and never fully bounced back (CBRE, 2018). Retailers have since struggled to remain solvent and bankruptcies have been rife (Hughes & Jackson, 2015; Mumford et al., 2021).¹ Numerous department and variety stores that traditionally served as shopping center anchors in large, medium, and small towns and cities alike have collapsed, while a general contraction in fashion retailing has occurred. In addition, the continued growth of suburban retail parks, extensions to existing shopping centers and innovations in roadside retailing, has resulted in a surplus of retail space (Hughes & Jackson, 2015; Jones, 2010; Savills, 2019).

The lockdowns introduced during the 2020–2021 COVID-19 pandemic intensified a deep crisis. Mean footfall reduced by between 60% to as much as 75% when lockdowns were introduced (Enoch et al., 2022). As a result, online sales surged to 35% before settling at 27.5% in February 2022 (Office for National Statistics, 2022). A 2021 analysis found that at least 30 UK shopping centers had a vacancy rate of at least 50% (Nazir, 2021), while in June 2020, one of the UK's largest retail center investors/operators, Intu, fell into administration because of declining income and an inability to satisfy the covenant restrictions on their debts (Wood, 2020).

While shopping center operators and high street retailers in medium and small UK towns and city centers have experienced a precipitous decline in footfall over many years (Astbury & Thurstain-Goodwin, 2014; Powe & Oswell, 2022), it is only recently that this “existential crisis” (Carmona, 2021a, p. 1) has begun to impact purpose-built shopping centers in the UK's larger cities. Our aim was to explore this phenomenon by: (1) recording the challenges faced by shopping centers in large city centers during the early 21st century; (2) examining the resilience and adaptability of these shopping centers; and (3) reflecting on what the future holds for city center shopping centers, and whether large UK city centers can avert “dead mall syndrome.” We address these aims using qualitative and quantitative data from a longitudinal mixed-method dataset of land use change and adaptation conducted in five city centers that sit at the apex of the urban hierarchy and draw a regional consumer base: Edinburgh, Glasgow, Hull, Liverpool, and Nottingham.

In the remainder of the paper, the definition and characteristics of purpose-built shopping centers are examined before the focus narrows to investigate dead mall syndrome as experienced in the U.S. and other countries. This establishes a framework of city center “de-malling” practices that is used to inform our investigation of the changing retail environment in large UK cities. The research methods employed in the collection and analysis of primary and secondary data are then explained before a series of thematic research findings are presented. These reveal that vacancy rates have risen within purpose-built shopping centers in the case study cities. And, in response to the challenges faced, operators are adapting purpose-built shopping centers into mixed-use developments with more hospitality, entertainment and leisure

uses, while also radically altering their design features—sometimes through comprehensive “de-malling.” The findings allow us to offer concluding insights into the measures being taken to reshape and redefine the purpose-built shopping center in large city centers to avoid “dead mall syndrome.”

Definitions and characteristics of purpose-built shopping centers

Until recently there has been no established UK classification of shopping centers although there is broad agreement that a purpose-built shopping center is a self-contained building, typically owned by one entity and housing commercial units of varying size. Most of the units have tended to be leased to retailers, with space also reserved for food and beverage operators—usually found in a food court.

Shopping centers come “in a variety of shapes and sizes” (Warnaby & Medway, 2018, p. 276) and, as a result, the International Council of Shopping Centers (ICSC) uses catchment size, mix of tenants, mix of uses and physical form to classify them (ICSC, 2010, 2017). This classification tends to be used in international comparison studies and by UK market advisers. Nevertheless, the classification is U.S.-centric and, as highlighted by Canada’s shopping center definitions, fails to identify downtown/city center mixed-use shopping malls which are more prominent in Canada and Europe (ICSC, 2010).

In the UK, this gap was recognized by Retail Evolution (REVO), a UK retail trade body, which defines purpose-built shopping centers as either “prime” or “town centre dominant,” depending on the size of the settlement they serve (REVO, 2018). “Prime” shopping centers tend to share characteristics with suburban regional centers in the U.S. and have the following characteristics:

- (1) *Strategic entry points*: Entry points positioned close to or in the core retail area that draw consumers inside, stimulate circulation and manipulate where they go (Brown, 1991).
- (2) *Anchor stores and tenant variety*: Larger “anchor store” units leased to department stores at either end of a “dumbbell” arrangement (Buckley, 2018; Fong, 2003). This produces “customer spill-over” effects in other parts of the shopping center (Damian et al., 2011, p. 457) and allows operators to charge higher rents for non-anchor units close by (Kirkup & Rafiq, 1994).
- (3) *Leisure and entertainment provision*: Non-retail leisure and entertainment uses, such as food courts and cinemas, that extend the “dwell time” of shoppers and increase the amount of money being spent (Brown, 1992; Damian et al., 2011; E. Howard, 2007).
- (4) *Car parking*: To allow automobile-dependent users seamless access into the center (Borgers & Vosters, 2011; Pitt & Musa, 2009) while generating an additional source of income for operators (Morgan & Walker, 1988).

These four characteristics ensure that purpose-built shopping centers are highly controlled environments (Darlow, 1972) that have created the conditions for “shopping as leisure” to flourish (E. Howard, 2007). Shopping center designers therefore focus on creating “comfortable space with attractive and appealing interiors” (Calvo-Porrall & Lévy-Mangín, 2018, p. 111) that encourage repeat visits and continued patronage.

Dead mall syndrome

The rise of e-retailing and the shocks of the Global Financial Crisis and the COVID-19 pandemic have placed considerable pressure on UK shopping centers large and small (CBRE, 2018; Enoch et al., 2022; Hughes & Jackson, 2015; Office for National Statistics, 2022). For many older shopping centers in North America, where shopping habits changed earlier than in the UK and big-box retailing has come to dominate alongside e-retailing, time has already run out and the phrase “dead mall syndrome” is now commonly used to describe unviable centers that have a vacancy rate of more than 70% or have ceased trading entirely (Ferreira & Paiva, 2017; Scharoun, 2012). Other endogenous factors such as the age, the size

of the mall relative to the local area it serves, retail mix, the success of anchor retailers, and how recently it was renovated, also contribute to the failure of a purpose-built shopping center (Tokosh, 2018).

The vast majority of these “dead malls” are in suburban areas which serve less affluent smaller markets (Tokosh, 2018) and, as well as shops, often provided vital local services (Dunham-Jones & Williamson, 2017).² Dunham-Jones and Williamson (2017) record that approximately one third of purpose-built shopping centers in the U.S. have permanently closed. Typically, their size, location, and spatial characteristics—most are enclosed malls—make them very difficult to repurpose for other uses and, as a result, they often remain derelict after closure (Ferreira & Paiva, 2017). Burayidi and Yoo (2021, p. 78) note that “[t]hose malls that survive will need to be retooled for the 21st century retail landscape” particularly via the introduction of new or different services and through the creation of novel experiences. Innovative examples of this transition are as unusual as they are varied. Dunham-Jones and Williamson (2017, p. 86) note, for example, that:

[c]reative entrepreneurs have embraced the “undead” post-apocalyptic ambiance of vacant malls and converted them into profitable sites where patrons play zombie paintball or engage in drone racing. Others have made use of their lack of inhabitants to serve “the Cloud” as data centers or solar farms, as at the former Eastgate Mall in Indianapolis.

The decline and redevelopment of purpose-built shopping centers is termed “de-malling” by Guimarães (2019) who argues that “functional re-qualification”—redevelopment into mixed or an alternative use—is the most common de-malling practice in the U.S., while “moving out”—transforming an internalized, enclosed mall into external facing retail units—is the second most common approach. Scharoun (2012) also found, perhaps counterintuitively, that enlarging a failing purpose-built shopping center into a much larger super-regional mall or redeveloping the mall into a single large supermarket or a cluster of big-box stores is also common practice.³ However, for many shopping center operators, the costs associated with such approaches are simply too high, yet the cost of knocking a mall down is also prohibitive and, as a result, many lay empty or abandoned (Dunham-Jones & Williamson, 2017; Ferreira & Paiva, 2017).

While suburbanization has dramatically reshaped the urban morphology and retailing environment of North America, the expansion and decentralization of retail was less dramatic in Western Europe due to tighter planning controls (Bourne, 1996; Guimarães, 2019). As a result, the failure of purpose-built shopping centers is occurring more slowly. For example, Cavoto and Limonta (2013) identify signs of mall decline in Italy, Tamini (2018) has noted rising vacancies in shopping centers in France, Spain, Germany and UK, and Guimarães (2019) has evidenced de-malling in Lisbon. Yet, the continued concentration of retail development in European urban centers means failing purpose-built shopping centers are more likely to be found in town and city center locations rather than the suburbs.

The Local Data Company (2022) report that, in the UK, out-of-town regional shopping centers and suburban retail parks have typically fared better against e-retailing than their in-town counterparts. This means that the bulk of redundant retail space is concentrated in town and city centers, both within purpose-built shopping centers and on the shopping streets they co-exist alongside (Ozuduru et al., 2014). The rise in vacant retail space has recently caught the attention of UK policymakers concerned by the negative economic and social externalities on local communities (Wu & Lo, 2018), as well as the wider urban economy. Town and city center policymakers are particularly keen to avoid the “hollowing out” effects that Parlette and Cowen (2011) argue “dead mall syndrome” has created in Canadian suburban communities.

While “dead mall syndrome” has received research attention in the suburban North American context, much less is known about the state of purpose-built shopping centers elsewhere, their potential to adapt and de-mall, and thus the future of shopping centers in town or city centers. There is, as Rao and Dovey (2021, p. 14) argue, a need to focus on the “adaptive capacities of existing morphologies” and, in so doing, to explore how the streets and spaces of privately-owned shopping centers can be “morphologically and socially integrated into the city” (Rao & Dovey, 2021). Taking a UK perspective, our objective in this paper is to begin addressing this research gap with a particular focus on purpose-built shopping centers in larger UK city centers.

Research methods

Our research was conducted as part of a multiple case study analysis of UK city centers between 2019 and 2021 that sought to understand changing patterns of land use and approaches to adaptation and innovation in the city center retailing sector. As mentioned previously, our research focused on five regionally significant UK cities at the apex of the retailing hierarchy: Edinburgh, Glasgow, Hull, Liverpool, and Nottingham. Some are defined as large core cities (Glasgow, Liverpool and Nottingham) and others are more compact (Edinburgh and Hull). This permitted comparison of the varying effects of the changing retail environment at different city scales. While selected for their geographic diversity, however, we intentionally excluded cities in the Southeast of England to avoid the added complexity of the economic, social, and political north-south divide which, as others have noted, complicates comparison due to distinct differences in market operation and resilience (Hoesli & MacGregor, 1995; Jackson, 2001; Wrigley & Dolega, 2011).

A further consideration in our research design was that the five cities have undergone different degrees of urban regeneration over the study period. Two—Glasgow and Nottingham—have seen minimal change, while Edinburgh, Hull and Liverpool have experienced a significant amount of retail-focused development. Moreover, all five cities had more than one purpose-built shopping center within their main shopping area (as defined by local planning policy). Our research exclusively focused on these main shopping areas.

We adopted a mixed methodology to ensure that we: (1) recorded the underlying trends in the retail landscape; and, (2) identified the ways in which those changes have impacted the design and operation of shopping centers. The quantitative phase of our research focused on creating a large database containing the land use and occupier details of all the properties in our five-city sample between 2000 and 2017. It comprises data from existing administrative and commercial datasets, including the Non-Domestic Rating Valuation List (England), the Valuation Roll (Scotland), HM Land Registry data on commercial, corporate, and overseas ownership, local authority data on empty properties, and commercial data published by Experian and others. For the purposes of this paper, we used the database to explore how the types of occupiers and uses have changed within the various shopping centers in each city.

The qualitative phase of our research was interview-based and comprised a total of 70 semi-structured interviews with 75 participants (some were interviewed together). In each city we conducted approximately 15 interviews. We purposefully sampled participants in the public and private sector engaged in city center real estate development, leasing, operation, planning, and regulation. This included participants who played a direct role in designing, managing, or leasing space in shopping centers. The COVID-19 pandemic led to a pause in our data collection. As a result, we conducted half of the interviews during 2019 and in early 2020, before the pandemic struck, and the remaining half in early- and mid-2021 after the initial lockdowns had passed. Although we did not plan the data collection this way, the break allowed us to ask participants to reflect on the initial impacts of the pandemic.

All the interviews were transcribed professionally before each transcript was checked for accuracy. The raw data were then analyzed using a combination of deductive and inductive coding. First, we applied preestablished codes to the data to organize it into a series of overarching themes drawn from our research aims (deductive coding). We then undertook a further analysis of the data to identify additional themes that were not revealed during the first stage (inductive coding). This two-stage process was undertaken independently and in parallel by two researchers before being compared, refined, and finalized. When referring to the interview transcripts in this paper we follow the convention “Local Authority 1 Edinburgh, Pre-C19,” “Retailer 1 Glasgow Post-C19,” etc. This allows the anonymity of our research participants to be protected while also ensuring that the reader is aware of participant expertise. The “Pre-C19” and “Post-C19” suffix identifies whether the interview data was collected pre- or post-pandemic.

Findings

There were 23 purpose-built shopping centers across our sample and all five cities had at least three established centers of varying age and size in their main shopping area (see Table 1). Three cities also saw the development of a new shopping center during our research timeframe: Hull's St. Stephen's Center (opened 2007), Edinburgh's Multrees Walk (opened 2003), and Liverpool's Metquarter (opened 2006) and Liverpool ONE (opened 2008). No shopping centers opened during our quantitative study period after the 2007–2008 Global Financial Crisis, however, two major shopping center redevelopments took place during the qualitative study period that followed. In Edinburgh, a major new shopping center called the St. James Quarter was developed and opened 2021, replacing the aging St James Center which closed in 2016. In Nottingham, the redevelopment of the city's 1970s-era Broadmarsh Center also commenced after a master-planning process that dated back to the early 2000s (Heath, 2010). Demolition and construction work began in 2019 but was paused in March 2020 because of the pandemic. In July 2020 work ceased entirely because the center's owners, Intu, fell into administration and the partly demolished complex was subsequently returned to the freehold owner, Nottingham City Council (Butler, 2021).

We begin the presentation of our findings with a focus on our first research aim, which sought to identify the challenges facing shopping centers since the early 2000s. Our findings coalesce around the following six themes: (1) vacancy levels; (2) locational factors; (3) the “knock on” effects of new shopping center development; (4) specialization and bespoke experiences; (5) active management versus inactive management; and, (6) the evolution of purpose-built shopping center design characteristics. We describe these findings in more detail below, before turning to our second and third aims where we discuss how changing consumer preferences and more than a decade of market turbulence is fundamentally reshaping the design, adaptability, and future viability of shopping centers on the UK high street.

Table 1. Estimated vacancy rate of units in purpose-built shopping centers sampled.

City	Shopping Center	Opening Date	Closure Date	Size (m ²)	Vacancy Rate (as % of units)			
					2000	2005	2010	2017
Edinburgh	Multrees Walk	2003	—	18,500 m ²	—	12.5%	11.9%	4.8%
	St. James Center	1970	2016	42,000 m ²	1.7%	12.3%	30.1%	—
	St. James Quarter ^a	2021	—	78,968 m ²	—	—	—	—
	Waverley Mall	1984	—	8,000 m ²	8.2%	9.1%	10.4%	8.3%
Hull	Hepworth Arcade	1890	—	3,000 m ²	0.0%	0.0%	20.0%	0.0%
	Paragon Arcade	1896	—	750 m ²	28.6%	16.7%	14.3%	28.6%
	Princes Quay	1991	—	42,000 m ²	4.1%	2.7%	16.3%	45.6%
	Prospect Center	1979	—	27,000 m ²	0.0%	10.4%	25.0%	12.3%
	St. Stephen's	2007	—	52,000 m ²	—	—	12.3%	10.0%
Nottingham	Broadmarsh Center	1972	2020	45,000 m ²	4.9%	7.1%	30.3%	45.2%
	Exchange Arcade	1929	—	5,800 m ²	4.5%	0.0%	17.2%	22.2%
	Flying Horse Arcade	1988	—	3,800 m ²	13.3%	6.7%	20.0%	6.3%
	Victoria Center	1972	—	92,000 m ²	8.5%	2.0%	14.0%	12.5%
	West End Arcade	1965	—	300 m ²	10.7%	13.3%	19.1%	26.1%
Glasgow	Buchanan Galleries	1999	—	55,000 m ²	0.0%	1.7%	7.0%	10.8%
	Princes Square	1988	—	12,000 m ²	6.5%	4.5%	1.1%	18.8%
	Savoy Center	1979	—	5,000 m ²	2.1%	3.5%	4.9%	25.3%
	St. Enoch	1989	—	70,000 m ²	0.8%	18.3%	8.3%	22.0%
Liverpool	Cavern Walks Center	1984	2019	10,219 m ²	6.7%	0.0%	16.7%	11.8%
	Central Shopping Center	1973	—	4,180 m ²	13.3%	0.0%	18.8%	0.0%
	Clayton Shopping Center	1989	—	17,500 m ²	3.8%	3.7%	12.2%	30.0%
	Liverpool ONE	2008	—	154,000 m ²	—	—	14.1%	4.4%
	Metquarter	2006	—	15,000 m ²	—	—	22.7%	43.2%
	St. John's	1969	—	33,500 m ²	0.0%	2.2%	3.4%	37.2%

^aThe vacancy rate for the St. James Quarter is not included because the center opened after the quantitative phase of the research concluded. The size refers to the retail floorspace in this mixed-use development.

Vacancy levels

In most of the shopping centers we studied, the number of vacant retail units increased—in some case dramatically (see [Table 1](#)) although not to the extreme levels experienced in dead suburban malls in North America. In Hull, for example, the percentage of vacant units in the Princes Quay Shopping Center rose from 4.1% in 2000 to 45.6% in 2017, with a particularly big jump from 2.7% in 2005 to 16.3% in 2010 that was influenced by the opening of the St. Stephen's Shopping Center in 2007 (Property Manager 5, Hull, post-C19). Similar trends were also recorded in some of the shopping centers in Glasgow and Liverpool.

The picture was slightly less clear in Nottingham and Edinburgh. In Nottingham, the vacancy rate in the Broadmarsh Center rose from 4.9% in 2000 to 45.2% in 2017, but extenuating circumstances related to the emerging redevelopment plans for the center likely influenced the extent of this change as, in the short-term, retailers were to suffer from the negative externalities of a construction project. Except the Flying Horse Arcade, which saw its vacancy rate drop over the study period, the vacancy rates in Nottingham's other shopping centers did increase, but to a lesser extent. In Edinburgh, the vacancy rate in Waverley Mall, which is located close to the city's busy railway station and therefore services commuters and Edinburgh's large tourist economy as well as local shoppers, barely increased across the study period. The data we collected on unit vacancies in Edinburgh's old St. James Center is unreliable because it was slowly wound down during our study period to allow for the development of the new St. James Quarter.

Locational factors

The shopping centers in our sample located closest to the center of the main shopping area and with direct access onto the “prime pitch”—the most sought-after retail units that command the highest rents and investment values—tended to have fewer unit vacancies than those located further away. In some of our sample of cities, this trend became more pronounced in the later years of the study period as the number of shops fell and the “prime pitch” shrank in size. For example, in Glasgow, the two shopping centers located closest to the center of the main shopping area on Buchanan Street, Buchanan Galleries and the smaller Princes Square, retained lower vacancy rates than St. Enoch on Argyle Street and the Savoy Center on Sauchiehall Street, both of which became more peripheral as Glasgow's “prime pitch” retracted.

The contraction of the retail footprint in the city center also reshaped the “prime pitch” in Nottingham. The Victoria Center, which is located on the northern boundary of the city's relatively dispersed shopping area, had a lower vacancy rate—12.5% in 2017—than the Broadmarsh Center. An asset manager that we interviewed in Nottingham reflected that the Victoria Center and Broadmarsh Center operated like “anchor store dumbbells” at either end of the main shopping area (Asset Manager 3, Nottingham, post-C19) but the closure of the Broadmarsh Center, initially for refurbishment and then permanently after Intu's collapse, upset this balance (Property Professional 13, Nottingham, post-C19).

The “knock on” effects of new shopping center development

Retail concentration and retraction were also recorded in Edinburgh, Hull, and Liverpool. However, in these cities, major new shopping center developments also appeared to impact the vacancy levels in existing purpose-built centers. In all three cities, the development of new purpose-built shopping centers shifted the location of the “prime pitch” and created new peripheral locations within the main shopping area.

In Hull, the “prime pitch” coalesced in the vicinity of the St. Stephen's Shopping Center soon after it opened in 2007. The opening of St. Stephen's also altered the flow of shoppers into and through the nearby Prospect Center, an aging purpose-built shopping center dating back to 1975, because it had

the effect of reorienting one of the secondary entrances into the center, located close to St. Stephen's, into its main entrance (Property Manager 4, Hull, post-C19). A property manager we spoke to identified a synergy in the customer base of the two centers as customers tended to visit St. Stephen's for its big-name brands and an adjoining Tesco Extra superstore, and the Prospect Center for the city centre Post Office and its range of value-orientated retailers (Property Manager 5, Hull, post-C19). In contrast, Princes Quay, which had tended to focus more exclusively on fashion brands, saw vacancies rise because visits to the center tended to be leisure-orientated rather than a necessity (*ibid.*). Furthermore, Princes Quay and nearby Whitefriargate also suffered from the large size of Hull's PSA which, like Nottingham, is quite dispersed (Property Manager 4, Hull, post-C19).

Turning to Liverpool, the opening of the vast Liverpool ONE shopping center in 2008 redrew the boundaries of the "prime pitch" by shifting city center retail activity away from the city's other purpose-built shopping centers—four of which saw their vacancy levels increase over the study period. One of these centers, Cavern Walks, subsequently closed in 2019 and plans for its redevelopment as a hotel followed (Signature Living, 2019). In another example, the city's Metquarter shopping center, which opened just two years before Liverpool ONE, never reached full occupancy and saw its vacancy rate increase over the study period. In Edinburgh, the new St. James Quarter has also impacted the size of the city's main shopping area by drawing retail activity away from Edinburgh's traditional shopping street, Princes Street, but not necessarily from the smaller Waverley Mall and Multrees Walk shopping centers—both of which are situated close to the St. James Quarter.

Specialization and bespoke experiences

Purpose-built shopping centers, especially the larger ones in our sample, have struggled to meet consumers' growing demand for a "bespoke" shopping experience (Smith & Sparks, 2000; Soars, 2009). This is reflected in the fact that vacancy levels in the smaller purpose-built shopping centers in our sample, many of which lease space to independent retailers and luxury brands, did not experience a marked increase in unit vacancy.⁴ This finding is also supported by one of the wider findings of our research, which showed an overall rise in the number of independent retailers operating in the main shopping areas of the five city centers (Orr et al., 2022).

Even in Hull, where the wider data paints a bleak picture of the retailing landscape, the Hepworth Arcade and Paragon Arcade, both of which focus on leasing space to local independent businesses, saw no change in their vacancy levels during the study period. One of the asset managers we interviewed noted that this reflected the fact that consumers are looking for something more specialized (Asset Manager 5, Hull, post-C19). Similarly in Nottingham, the independent-focused Flying Horse Walk, saw vacancy levels drop, while the luxury-orientated Multrees Walk in Edinburgh had a vacancy rate of only 4.8% in 2017.

Our study found that specialization was not only limited to the more exclusive end of the city center retailing environment. The St. John's Shopping Center in Liverpool, which opened in 1969 and is relatively old by UK purpose-built shopping center standards, saw its vacancy rate rise from 3.4% in 2010 to 37.2% in 2017 as it faced off competition from newer centers, including Liverpool ONE. However, a property manager we interviewed argued that the rise in vacancies it experienced might well have been higher had it not been for the operator's focus on providing space for value retailers. This was initially unplanned but since became the operator's concerted strategy (Property Manager 3, Liverpool, post-C19).

Parallels can be drawn here with the Prospect Center in Hull which, as we mentioned earlier, increasingly focused on value brands after the opening of the St. Stephen's Shopping Center (Property Manager 5, Hull, post-C19). The approach taken by St. John's and the Prospect Center is reflective of a wider trend in the retailing landscape, where value brands and so-called "discounters," such as the German supermarket brands LIDL and ALDI, have gained and sustained UK market share in the years since the 2007–2008 Global Financial Crisis (Lamey, 2014).

Whether shoppers are seeking out independent retailers, luxury or value brands, the overall impression is of a more “discerning” public. This was summed up well by a property professional we interviewed in Nottingham, who argued that many purpose-built shopping centers offer consumers too much of the same thing in a “sterile” environment that lacks personality and uniqueness (Property Professional 8, Nottingham, post-C19).

Active management versus inactive management

The success of Liverpool ONE and the specific focus on value by both St. John’s and the Prospect Center highlights the role that active management and a “tailored offering” increasingly plays in ensuring the long-term health of shopping centers. Since Liverpool ONE opened in 2008, a full-time asset management team has been based at the shopping center’s offices in Liverpool. A development project manager we interviewed suggested this approach is contrary to the norm, explaining that it is more typical for shopping center management to be subcontracted to an asset management company which, more often than not, is based in London (Project Manager 1, Liverpool, post-C19). The project manager argued that an asset management team with local knowledge can make a big difference to the health of the tenant mix, and that this partly explained Liverpool ONE’s success:

[a local-based asset management team] know first-hand and experience first-hand the challenges locally These people are Northwest, if not Liverpool born and bred, asset managers that understand the market. They understand that if you put a Lacoste shop in Liverpool, you won’t sell anything from Lacoste. But they also understand that if you put Radley in, it will sell handbags all day long at the top end and you can put it right next to Primark and it will go down a storm. (Project Manager 1, Liverpool, post-C19)

The positive impact of active management was also recorded elsewhere in our sample. A retail operator we interviewed in Nottingham, for example, made a similar point with respect to the Flying Horse Walk Arcade and described how a change in ownership from a national pension fund to an active local owner significantly improved the fortunes of the arcade (Operator 2, Nottingham, pre-C19). The most recent owner, a local authority, continued to manage the center actively (Property Agent 1, Nottingham, pre-C19) and, correspondingly, Flying Horse Walk had a relatively low vacancy rate of 6.3% in 2017.

The evolution of purpose-built shopping center design characteristics

Our research found evidence that the design characteristics of shopping centers have evolved to cater for new demands and preferences in the early 21st century. In so doing, we consider the extent to which the wider “existential crisis” (Carmona, 2021a) on the UK high street has led operators to de-mall and their designers to re-think the well-established design characteristics of shopping centers that have guided their form and arrangement for more than six decades—strategic entry points, anchor store and tenant variety, leisure and entertainment provision, and car parking.

Our data clearly demonstrates that the principles guiding shopping center design are, indeed, evolving. Notably, operators are thinking differently about how they design the strategic entry points into shopping centers. Whereas in the past most shopping centers—including many in our sample—followed an enclosed design formula, with doorways marking a distinct boundary between the street and the shopping center within, newer purpose-built centers are increasingly designed with open air or canopied pedestrian “streets” (Abbasalipour & Judd, 2011; Warnaby & Medway, 2018), termed “moving out” by Guimarães (2019): the aim being to create a seamless sense of interconnection between the high street shopping area and the shopping center. In our sample, the two most recently developed centers, Liverpool ONE (2008) and the St. James Quarter in Edinburgh (2021), follow this formula. A similar moving out approach was also envisaged for the canceled redevelopment of the Broadmarsh Center in Nottingham (BBC News, 2011), whereas adding street level shop frontages, for example, at Princes Square in Glasgow, was a minor “moving out” measure employed on a previously inward-looking enclosed shopping center.

In his 2011 study of Liverpool's post-millennium regeneration, Biddulph finds that the open-air design of Liverpool ONE was adopted for a series of reasons, including future proofing the development, allowing it to be opened in phases, and reducing its reliance on anchor stores to drive trade—a challenge that some of the centers in our sample, such as Glasgow's St. Enoch, have since faced as larger department store anchors have gone bankrupt. Biddulph also notes that the center's designers felt that middle class shoppers were increasingly put off by the “contrived and controlled nature of mall type schemes” (Biddulph, 2011, pp. 88–89). A property professional that we interviewed in Liverpool reflected that the open-air design of Liverpool ONE reduced the maintenance costs of the asset over the long term because the center is “effectively a high street” (Property Professional 14, Liverpool, post-C19). This means that the operator incurs cheaper heating and cooling costs and fewer maintenance bills for roof and flooring repairs than might be expected in an enclosed shopping center.

Our data showed that such maintenance costs were proving especially challenging in older, enclosed shopping centers where rising unit vacancies have reduced operators' income but not the amount of floorspace they must manage and maintain. Some operators have raised their service charges to cover their bills. However, this approach runs the risk of precipitating higher unit vacancies as many retailers do not have the necessary cash flow to pay higher costs and may simply end their tenancy (Property Manager 1, Glasgow, pre-C19; Property Manager 2, Glasgow, pre-C19; Property Professional 14, Liverpool, post-C19). The fear is that purpose-built shopping centers in the UK may fall victim to “dead mall syndrome.” A property manager we interviewed in Glasgow stated, for example, that some shopping centers are “going to become functionally obsolete” as they generate “a fraction of the rent” they once attracted (Property Manager 1, Glasgow, pre-C19), while a property manager in Hull, commenting on the Prince's Quay Shopping Center, noted that “we could well see an empty shopping center sat there very soon, which is really sad.” (Property Manager 4, Hull, pre-C19).

The challenge for the operators of older enclosed shopping centers in our sample, especially those that sit near the periphery of the main shopping area, is *how* to adapt and remain viable. For the operators of St. Enoch and Prince's Quay, both of which have become peripheral as the market has contracted, the approach has been to focus on the so-called “experience economy” (Pine & Gilmore, 1999) returning to one of the core characteristics shopping center design. This has seen the increased use of functional requalification of retail space into leisure and entertainment use to increase the “dwell time” of shoppers (Brown, 1992; Damian et al., 2011; E. Howard, 2007; White et al., 2023).

The operators of St. Enoch adopted this strategy in response to the 2016 bankruptcy of British Home Stores, which for a long time was one of the center's anchor stores. In 2021, it began leasing the large space vacated by the department store to the cinema chain “Vue” and, at the same time, started to encourage other leisure and entertainment operators, such as coffee shops and bars, to lease the growing number of other vacant units in the center that were once reserved exclusively for retailers (Property Professional 4, Glasgow, pre-C19). An architect we interviewed noted that the pivot to leisure and entertainment was combined with a general refurbishment of the space and that, together, this aims at “making the whole experience more attractive and comfortable, and linked into the rest of the city center” (Architect 2, Glasgow, post-C19). The remodeling of the shopping center to accommodate the new cinema provided evening access and an interface to the nighttime economy for the shopping center.

The operators of Princes Quay in Hull have also done “more with leisure” (Property Professional 6, Hull, pre-C19) by leasing space to the same cinema operator, Vue, as far back as 2007 and, in 2016, signing a deal with a bowling alley, soft play and laser tag operator—a first for a UK shopping center (Hull Bid, 2015). Other centers in our sample have also introduced cinemas to their tenant list to functionally requalify surplus retail space, notably Metquarter in Liverpool and Princes Square in Glasgow. Both shopping centers focus on luxury brands and have leased spaces to an expanding “boutique” cinema operator in the UK called Everyman (Property Professional 7, Liverpool, pre-C19; Property Agent 1, Glasgow, pre-C19).

The two open-air shopping centers developed during our study period in the five cities, the St. James Quarter in Edinburgh and Liverpool ONE, were designed with a wide-ranging focus on

leisure and entertainment right from the start (Estate Director 1, Liverpool, post-C19; Property Professional 5, Edinburgh, pre-C19). In the case of the St. James Quarter, a property professional we interviewed jokingly remarked that “we’re not allowed to call [the St. James Quarter] a shopping center!” (Property Professional 5, Edinburgh, pre-C19) because it includes a 5* W Hotel, its own Everyman cinema, various cafes, bars and restaurants and a complex of high-end residential apartments. This approach seeks to future proof the St. James Quarter by reducing its reliance on “prime pitch” retail tenants. An asset manager we interviewed in Edinburgh argued that the mixed-use strategy also sought to balance the creation of a “sense of place” with a flexible asset management plan to ensure that floorspace can be rapidly adapted to cater for the dynamic needs of retail, leisure, and entertainment operators (Asset Manager 1, Edinburgh, pre-C19).

Discussion: De-malling and the future of purpose-built shopping centers in large UK city centers

Local Data Company (2022) have evidenced the disproportionate effect that the contraction in mid-market fashion and comparison retailing has had on purpose-built shopping centers in the UK, while our data revealed that vacancy rates in the large UK cities we examined are higher in shopping centers on the periphery of the prime retail area and which have failed to specialize in value, luxury or independent retailing. Yet, the level of vacancy has not reached the levels experienced in some North American suburban malls. This is largely because shopping center managers have responded by converting redundant retail space, typically large spaces emerging from the wave of department store closures, into hospitality, leisure and entertainment uses.

In older, enclosed shopping centers this approach to de-malling has focused on recreating shopping centers into experiential destinations through the functional requalification of retail space into alternative uses that complement the remaining retail mix. More broadly, the newer mixed-use, open-air design adopted by the developers of Liverpool ONE and the St. James Quarter stand in stark contrast to the heavily retail-orientated model of enclosed shopping centers in the past and demonstrate how the design principles of purpose-built shopping centers in the UK are evolving. This evolution is a direct response to the turbulence experienced in the retailing sector but is also being driven by a “walkable urbanism” renaissance and increasing support for so-called “15-minute” cities (Moreno et al., 2021) and “20-minute” neighborhoods (Scottish Government, 2023). Indeed, as retail continues its retreat from the high street, some local authorities in our sample have started to recognize that city centers are blessed with many of the features that urban designers argue make a successful mixed-use neighborhood—walkable streets, good public transport, adaptable building typologies and alike (e.g., Carmona, 2021b). Yet, because of a decades-long policy focus on retail, UK city centers experienced very little residential development, beyond small pockets of exclusive apartments, serviced apartments, and student accommodation.

Glasgow is one such example. In 2021, Glasgow City Council adopted a *City Center Strategic Development Framework* (Glasgow City Council, 2021) that encourages significant housing development in the city center and a renewed focus on the development of pedestrian friendly streets and neighborhood shops and services to support city center living. Within this emerging policy context, the owners of Glasgow’s two largest purpose-built (and enclosed) shopping centers, St. Enoch and Buchanan Galleries, have each developed separate masterplans that would see their centers demolished and replaced with new mixed use urban quarters containing homes, hotel, office and leisure and entertainment facilities (Buchanan Galleries, 2022; St. Enoch, 2022). The emergence of major redevelopment plans for Buchanan Galleries is particularly surprising because, while St. Enoch has lost its two anchor department stores and become increasingly peripheral in the city center, Buchanan Galleries sits right at the heart of Glasgow’s shrunken “prime pitch” and, as a result, has not faced quite the same high levels of unit vacancy. The proposed redevelopment is thus a clear indication of the owner’s pessimism about its longer-term future. In both cases, the redevelopment plans represent major functional requalification that will see the shopping center buildings demolished, the creation of

more diverse land use mixes and the sub-division of the shopping center sites into smaller land parcels. This gives both owners maximum flexibility to phase or sell off chunks of their site during or after redevelopment—something that would be much harder to achieve if the enclosed shopping center superstructures remained.

A *tabula rasa* approach is also on the cards in Nottingham for the troubled Broadmarsh Center. The creation of a new public space amidst the partially-demolished ruins of the Broadmarsh Center is proposed as well as the development of 750 homes, a hotel, office space and a conference facility (Waite, 2021). At the time of writing, all three proposals were in the conceptual stages of development, and will undoubtedly be subject to lengthy public consultation, negotiation and phasing in the years to come. Nevertheless, they provide a glimpse into a very different future where enclosed purpose-built shopping centers on the UK high street might be obsolete but, rather than see these centers succumb to “dead mall syndrome,” shopping center owners appear prepared to invest in major de-malling initiatives to repurpose surplus retail space.

This radical approach is made possible because of the high land values and attendant development viability resulting from their location within the large city centers we studied. It is less likely that wholesale repurposing will be quite so economically viable in small- and medium-sized towns and cities where, generally speaking, the catchment area is more restricted and land values are lower. That being said, recent repurposing examples have begun to emerge in some medium-sized UK towns, for example, the partial demolition of a purpose-built shopping center to make way for a new public park in Southend-On-Sea in Essex (Berrill, 2022) and the proposed conversion of the upper floors of the Sailmaker Mall in Ipswich, Suffolk into residential apartments (Warnes, 2023).

Conclusions

In this paper we have sought to understand how the “existential crisis” (Carmona, 2021a, p. 1) on the UK high street is impacting purpose-built shopping centers in large UK cities, and whether these centers can avert the “dead mall syndrome” experienced in North American urban areas. The evidence showed that purpose-built shopping centers on the UK high street experienced significant challenges during our study period; difficulties that have evolved more slowly than in North America largely due to tighter controls on shopping center development. Yet, the combined effects of the 2007–2008 Global Financial Crisis and the COVID-19 pandemic have helped accelerate the move to online shopping, and the resulting closure of many national retailing chains and department stores has created an over-supply of retail space. While this problem was initially felt acutely in medium and small town and city centers, it has since spread to large city centers too. The shopping districts in our five city centers have therefore shrunk as the number of vacant units on the high street and in purpose-built shopping centers has risen. This has meant that some of the shopping centers in our sample have become increasingly peripheral, lost their anchor tenants, and struggled to fill vacant units. Despite this, the data also revealed that the shopping centers in our sample with a well-developed specialization, active management or that are simply newer than their rivals have proved to be the most resilient to dead mall syndrome.

Our analysis further found that purpose-built shopping centers developed with an open-air design language are faring better than enclosed shopping centers. To some extent, this is the result of their relative “newness,” as we noted above, however, our data analysis did also find that open-air centers can operate more flexibly because their openness allows them to readily adapt and support land use changes. While the enclosed design of the city center shopping center was once their selling point—an escape, perhaps, from the British weather—cleverly designed glass canopies readily address this challenge while, at the same time, more seamlessly integrating the shopping centers into the existing urban morphology.

It is therefore older, enclosed shopping centers that are facing the most significant challenges in large UK city centers. The short-term evidence shows that some operators have made a decisive shift toward leisure and entertainment uses to functionally requalify space left by the departure of many well-known high street retailers and employed minor “moving out”

measures to reconnect the interior of their enclosed space to the city streetscape. Shopping center managers have deployed more active management approaches that have kept centers afloat, but their future nevertheless remains on a knife edge. Indeed, the decision by the owners of the two largest shopping centers in Glasgow to rip up the principles of purpose-built shopping center design entirely and de-mall their centers into mixed-use neighborhoods starkly demonstrates the depth of the crisis facing shopping center owners, the significant fall in retail property values, and the dramatic steps being taken to avert “dead mall syndrome”—an approach that will be harder to replicate in UK towns and cities that sit below Glasgow and the other cities in our sample in the retail hierarchy.

Planners and city center policymakers increasingly accept that there is a surplus of redundant retail space in purpose-built shopping centers, and recognize that they need to be flexible, especially in terms of land use, if they are to avert the blight associated with “dead mall syndrome.” While our research demonstrates in stark terms the challenges large UK city centers face, the fact is that many of the aging shopping centers are in locations where the physical urban infrastructure is strong and the rationale for redevelopment, whether economic or otherwise, is likely much stronger than it is in more suburban locations or in medium and small towns and cities where land values tend to be lower. Yet, major city center de-malling developments, such as those being explored in Glasgow and Nottingham, should not happen in isolation from the other myriad changes occurring on the high street as town and city centers become less dominated by retail. These major urban transformations need to be part of a managed, joined up process that optimizes the benefits to existing and future city center communities. Planners and city center policymakers thus have a key role to play in leading these transformations by establishing holistic visions and masterplans for their city centers which not only anticipate ambitious mixed use de-malling redevelopments, but also adequately plan for the co-location of residential, day-time and night-time activities. Only by guiding the design characteristics of these proposals and ensuring the adequate provision of social and community infrastructure and public space can the nascent “tear down and replace” model be successful.

Notes

1. This situation was exacerbated by the 2017 revaluation of local business rates (property taxes) that disproportionately pushed up occupation costs in city centers.
2. Super-regional malls, due to the greater number and variety of retailing options offered to shoppers, have been more successful against competition from big-box retailing and e-retailing (Scharoun, 2012).
3. Low density retail formats, such as these, are typically deemed by UK urban planners as unsuitable for high density city centers and would not get planning permission (Thomas & Bromley, 2003).
4. Mid-market fashion and comparison chain retailing have contracted the most in the UK (Centre for Retail Research, 2023). Shopping centers that targeted the broad mid-market segment or failed to find a way to differentiate themselves from competing purpose-built shopping centers in city centers tended to have higher vacancy rates.

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