

Urban retail market in Bratislava (Slovakia): Consumers perception and classification of shopping centres

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Abstract: The transformation of urban retail as well as the strong influence of globalization creates new sales formats, such as shopping centers. These represent a new form of contemporary retailing and have a significant impact on transformation and localization and also they influence the shopping behavior of consumers. The aim of this paper is to evaluate the retail industry in the city of Bratislava with a specific focus on shopping centers. The task of this paper is the identification of shopping centers in Bratislava, the spatial diversification and their classification by different aspects. For a more complete view of retailing in Bratislava the paper also focuses on the analysis of consumers' preferences.

Keywords: urban retailing, shopping centres, shopping preferences, Bratislava, GIS.

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Introduction

At the turn of the new millennium there is an increasing economists', geographers', sociologists' and also other specialists' interest in retailing issues which is not random but it is related to the development dynamics and spatial variety of the tertiary sector. Retail is classified into the services sector which is nowadays the most important and most dynamically growing sector in the world's economy (Birkin et al., 2002). Except for the quantitative increase of services, and thus retail, there are also dynamic qualitative changes. Processes linked with the transformation and globalization of the industry such as: liberalization, internationalization, concentration, cooperation, e-commerce, etc. are among those which most intensely shape retail in the world today. These general trends are more significant in post-communist countries after the transition to a free market economy (Frydman et al., 1994; Gielens and Dekimpe, 2007; Páll and Hunf, 2013; Ptáček and Szczyrba, 2007; Pommois, 2004;

Spilková, 2003). Taking Slovakia as an example the transition from a centrally planned economy to a free market, changes in ownership, entry of foreign investors, structure changes of the retail network in context of globalization, applying new information and communication technologies and on the other hand radical changes in customers' behavior resulted in the transformation of the urban retail market in Slovak cities.

Consumers' habits change with time. While in 1945 it was mainly about buying products and merchandise, during the 60's and 70's of the 20th century greater emphasis on service began to be take place. At the end of the 20th century shopping was about a thought of going outside and gain experience. Shopping is currently about transformation or collecting lifestyle elements or material goods that contribute to the well-being of consumers.

Progress in shopping includes opportunities for consumers to participate in social and cultural activities. Entertainment has become an integral part of shopping centres in the form of cinemas, gyms, bowling, casinos, water sports and others. The age structure of the consumers changes in the context of demographic processes and there are also changes in the behavior of consumers and their preferences (Kunc et al., 2013 Spilková, 2012a) and also changes in the consumer movement for services (Maryáš et al., 2014).

With the 21st century new challenges come into retail within the meaning of continuous creation of new types of shopping facilities. The original urban retail market concentrated in the city center is confronted with facilities combining traditional shopping with convenience and commercial activities and benefits in shopping centres. This creates a diverse set of urban shopping formats differing in functional characteristics as well as in the location in space. It can be noted that the new types of urban shopping formats that appear on the market in terms of transformation and diversification of shopping do not automatically replace the existing shopping formats (Coleman, 2012). The coexistence of various shopping formats is part of a diversified retail activity in the urban retail market.

This paper aims to evaluate selected issues of retail in the city Bratislava, in context of the spatial dimensions of the city. The task of this paper is the classification of the shopping centres in Bratislava in the context of the referred taxonomy and the analysis of consumer shopping preferences.

Methods and data

The methods applied in this paper can be divided into two groups. The first group of methods is related to evaluating the consumer perception and preferences. There are various approaches to identify consumer behavior: questionnaire survey (Kunc et al., 2012a), consumer diaries (Smith et al., 2003), or microanalysis of customers' movement in shopping center (Spilková and Hochel, 2009).

The most common and most widely used methods of qualitative shopping behavior research include questionnaire survey and interview (Kunc et al., 2012a). In this study we applied a questionnaire survey (n = 11 371). The presented sample can be considered as adequately representative for the purpose of this study (Table 1).

Table 1. Selected characteristics of respondents

Sex	[%]	Mean age	Education* of respondents [%]				
			A	B	C	D	E
Men	42.3	37.5	0.25	1.25	11.37	44.30	42.82
Women	57.7	36.3	0.15	1.22	10.17	49.55	38.91
Sum/Average	100.0	36.8	0.19	1.23	10.68	47.33	40.57

* A (uneducated), B (elementary), C (secondary without the GCE), D (secondary), E (university).

Source: Authors' own processing.

The second group of applied methods is related to classification of shopping centres in the city. Three commonly used taxonomy criteria were used in the study (Coleman, 2012, Guy 1998a, Kunc et al., 2013). Shopping centres in Bratislava were classified according to the following criteria: (i) localization, (ii) genesis, (iii) size determined by gross leasable area (GLA).

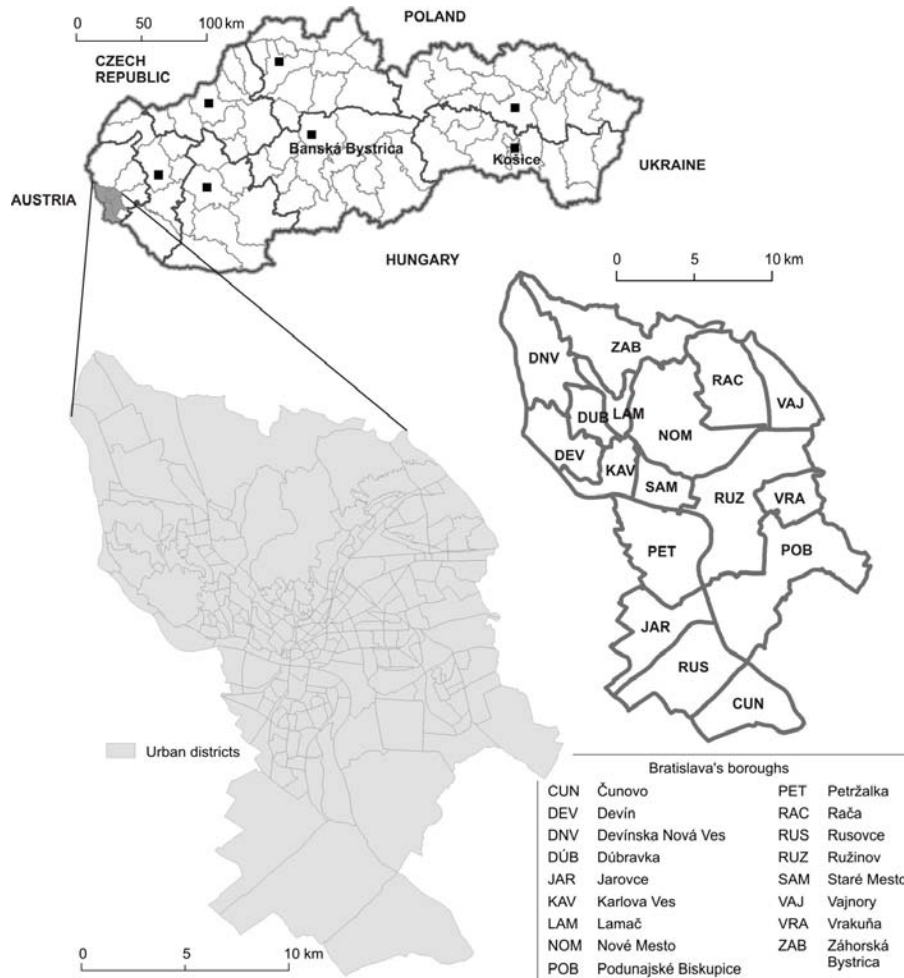
The applied questionnaire consisted of several questions targeting the customers' behavior although only a part of it is evaluated in this paper (cf. Kita, 2013). The questions were divided into two groups. The group of behavioral question provides information about consumers' shopping behavior. The group of subjective questions provides information about the consumers' preferences. A comparative analysis based on description was applied to evaluate consumers' preferences. This is one of the ways of solving issues that is often used in the spatial analysis of retail (Fertaľová, 2006; Kunc et al., 2012b; Mitríková 2008; Spilková, 2012b; Trembošová, 2010). Geographic information systems (GIS) were used as an interpretative tool.

Study area

The urban retail market was analyzed in the city of Bratislava which lies in the southwest of Slovakia. The research was conducted on a micro-regional level and urban districts (UD) were chosen as basic observational territorial units. Bratislava is divided into five counties (Bratislava I-V) and 17 boroughs which altogether form 263 urban districts (Figure 1). 46 UD are uninhabited and a representative respondent sample was not attained in 37 UD. 180 UD were analyzed (68.4% ratio of all UD) in which 99.6% of Bratislava inhabitants live.

During the past decades Bratislava has undergone significant changes (cf. Buček, 2006; Šuška, 2012). Intense suburbanization processes (Tóth, 2012; Šveda, 2011) are typical for Bratislava with manifestations of commercial suburbanization (Šveda and Križan, 2012).

Figure 1. Study area



Source: Authors' own processing.

Urban retail market in Bratislava

The current status and spatial distribution of retail is a result of long-term development. Social trends and their effects such as industrialization and urbanization which resulted in the concentration of the retail sector into the cities should be taken into account in this context. Cities in Slovakia represented in the pre-transformation period concentric zone of retailing (Očovský, 1976). However, these conditions have been progressively changing and in the Western European or North American cities the decentralization trend from the center to the suburban zone can be observed (Clapson, 2003). In recent years we can identify the dominance of businesses entities in the retail sector in the Slovak cities, the proportion of business entities in rural

municipalities were always less than one-third. On the other hand, there is more significant growth of business entities in rural areas which may indicate the progress of the decentralization process in the area of larger regional retail centers (Bilková and Križan, 2013). On the one hand, Bratislava is a typical example of spatial concentration of retail trade (cf. Szczyrba, 2005) and the decentralization of retail activities, on the other hand (Šveda and Križan, 2012).

Retailing in the capital experienced a significant spatiotemporal transformation (Kita and Grossmanová, 2014; Kita, 2013). In the city there were located 4089 retail stores in 2011 (Table 2). Their localization corresponds with the population concentration and daily activities of potential consumers. The increased concentration of retail stores is typical for the city center and the most densely populated part of the city. In contrast with it the peripheral parts of the city with rural character have less numerous retail stores despite the increased concentration of the population due to suburbanization processes (Šveda, 2011).

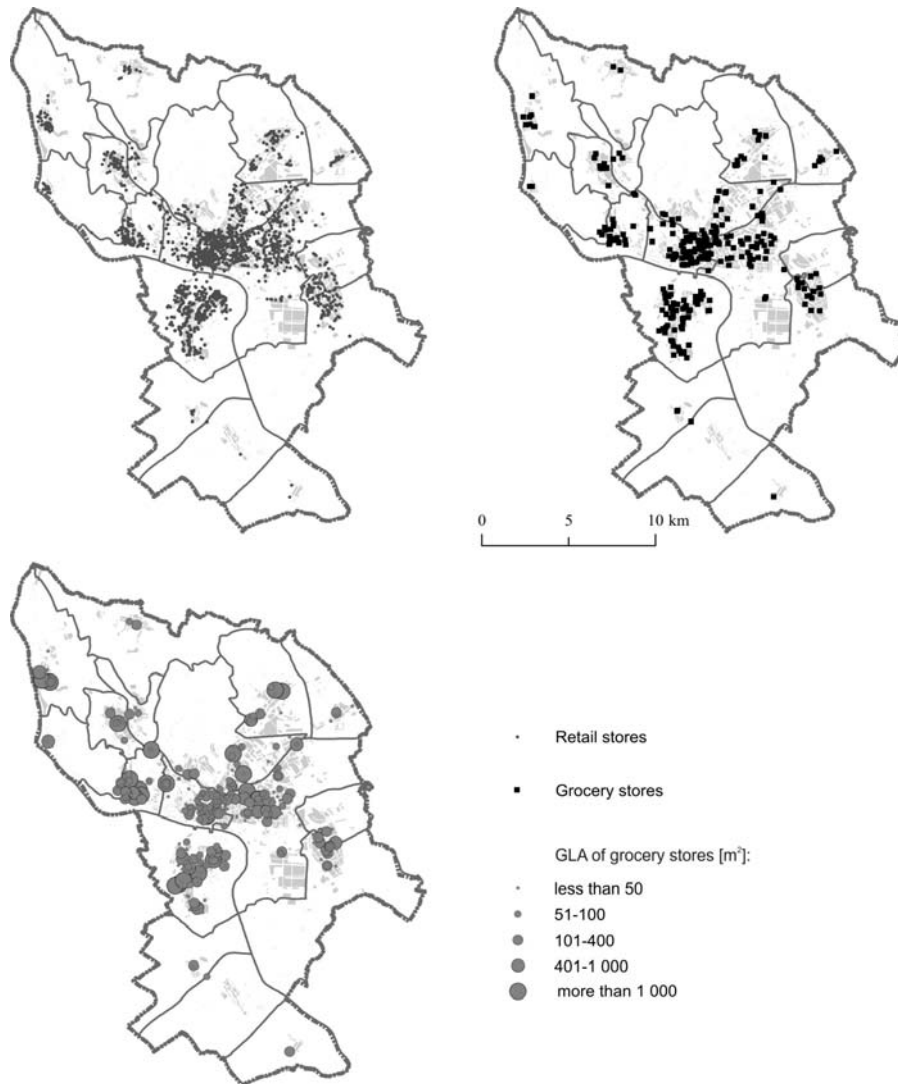
Food stores represent the specific categories of retail stores in the context of shopping behavior (cf. Kita, 2013). In Bratislava there were 361 food stores (Figure 2) with a total sales area of 111 634 m² (average area of 309 m² per store) which were heterogeneously distributed in the area of the city. Generally, it can be observed an increased value of GLA for retail stores in the city center and a decreased value of GLA in the peripheral suburban areas. The location of the retail facilities is in the central parts of the city in the context of daily activities of the population. On the other hand, GLA for food stores have different values in the spatial context which indicate that the location of food stores is a basic indicator of public facilities in urban areas. Disparities in the spatial distribution of urban retail emphasize the shopping centres in Bratislava.

Table 2. Retail stores in Bratislava in 2011

	Bratislava I	Bratislava II	Bratislava III	Bratislava IV	Bratislava V
Population	38 655	108 362	61 046	92 030	111 135
Number of stores	1 079	1 197	549	549	724
GLA [m ²]	100 973	145 803	111 637	53 578	131 525
Average GLA [m ²]	94	122	203	99	188
Number of food stores	88	93	49	63	71
Predajná plocha predajní potravín [m ²]	20 444	14 124	20 214	24 624	32 228
Average GLA of food stores [m ²]	232	152	412	391	474
GLA of retail stores per 1 000 inhabitants	2.61	1.35	1.83	0.58	1.18
GLA of food stores per 1 000 inhabitants	0.53	0.13	0.33	0.26	0.29

Source: Authors' own processing.

Figure 2. Selected spatial aspects of retail stores in Bratislava in 2011



Source: Authors' own processing.

Urban retail market in Bratislava: consumer perception

We can conclude that most common means of transportation for shopping is the automobile (41%) and the average travel time to the stores is 13.6 min. (Table 3). The second most frequent transportation means is public transportation (30.4% of consumers) and average travel time to the stores is 16.2 min (the highest value of all types of transportation). In contrast the shortest time (12.1 min) is shopping on foot. It relates to the fact that

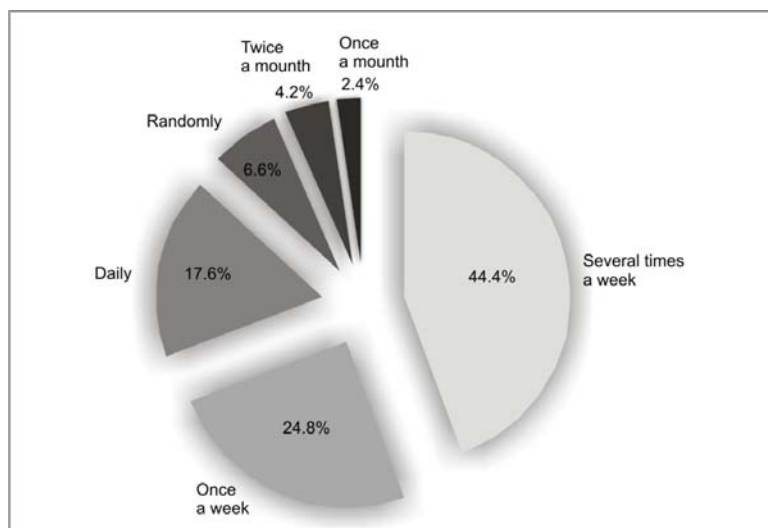
consumers selected the retail stores that are close to their residence. Average time spent shopping per week is higher for female (119.3 min) than for men consumer (95.5 min). The most common frequency of shopping (Figure 3) is several times a week (44.4%). Cumulative with consumers buying once per week represents 69.2% of consumers. Shopping once or twice a month is characteristic for 7% of consumers.

Table 3. Shopping transport means choice

Transport mode	Consumers [%]	Average time [min]
Automobile	41.0	13.6
Public transport	30.4	16.2
Foot and other	28.6	12.1
Sum	100.0	–

Source: Authors' own processing.

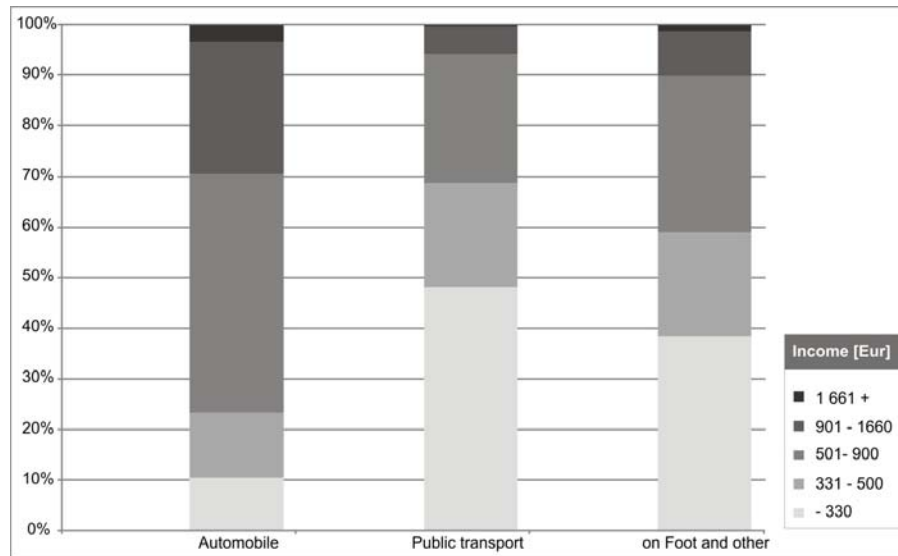
Figure 3. Frequency of shopping in Bratislava



Source: Authors' own processing.

The analysis of consumers income relation with shopping transportation mode shows that consumers with the lowest income used most frequently public transport (nearly 50%) and the second most common is by foot (nearly 40%). This is due to the higher transport costs of using an automobile or a means with a degree of motorization (Figure 4). With the increasing level of income the preferences of the consumers changed leading to an increasing proportion of transportation by automobile (as a more comfortable and faster but also more costly transportation means) and a decreasing proportion of public transport usage and transportation by foot.

Figure 4. *The relationship between transport means and income of consumers*

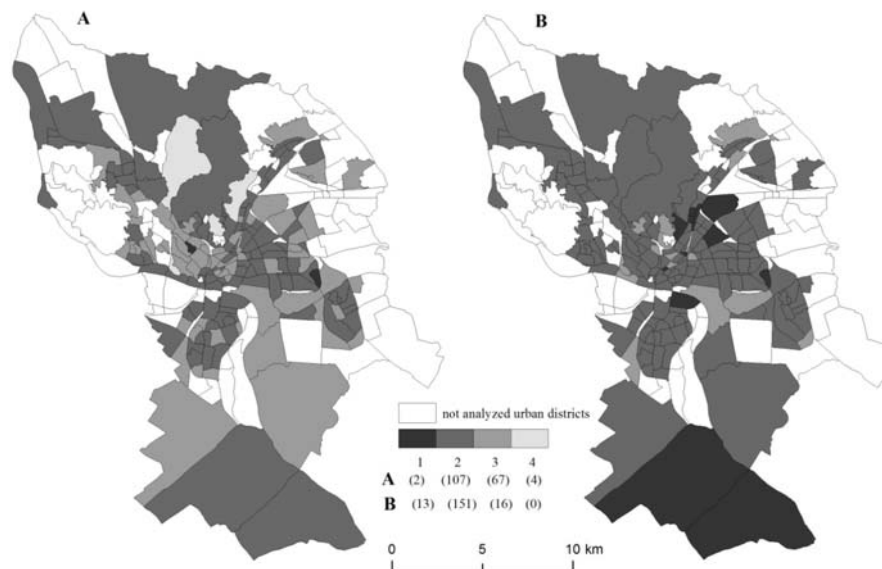


Source: *Authors' own processing.*

The next part of the questionnaire was focused on the classification of retailing in the area of consumer residence and the assessment of the accessibility of these retail stores. Consumers ranked food retailing (Figure 5A) very positively (average rank 2) in 59.4% of the analyzed urban districts (UD). These preferences are homogenously distributed in Bratislava. Relatively positive ranking (average rank 3) was perceived for food retail in UD located in the boroughs of Staré Mesto, Karlova Ves, Ružinov and Jarovce with small presence in other urban areas. The least positive ranks were given for the retail stores in UD localized in Nové Mesto. Rank 5 (least favorable) was not measured frequently in any of the analyzed UD.

Another analyzed part was the accessibility of food stores in the city (Figure 5B). The most frequent answer was the rank 2 (very favorable accessibility) which was identified in 83.9% of the analyzed UD. Dominant perceptions for the least favorable accessibility (reviewed by average rank 3) were identified in 8.9% UD. The worse score than dominant rank 3 did not occur in any UD.

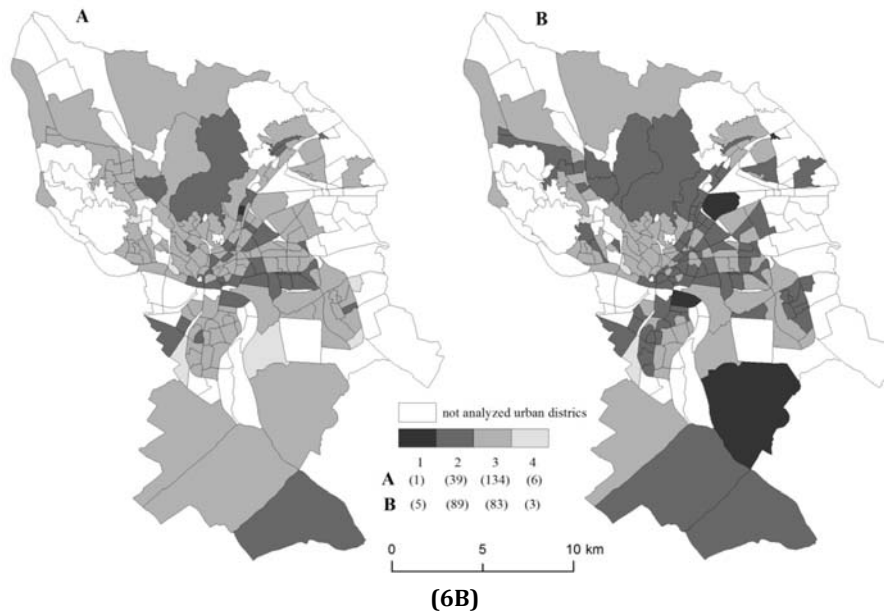
Figure 5. Classification of food retail (5A) and the assessment of its accessibility (5B)



Source: Authors' own processing.

In addition to food retailing, the research was also focused on other retail (excluding food) in locations near the consumers' residence (Figure 6A). In this case, significant deterioration of consumer perception of quality of selected retail stores can be identified in comparison with food stores. The most numerous were those of the average retail mark 3 (74.4% of analyzed UD) and a significantly reduced proportion of preferences with ranking 2 (21.7% UD). In the case of the accessibility of no food stores there are more positive consumer perceptions (Figure 6B) than in the case of food stores. Accessibility of non-food stores was the most frequently classified by average rank 2 and 3 (cumulatively more than 95% of all evaluated UD).

Figure 6. Classification of other retail (6A) and the assessment of their accessibility



Source: Authors' own processing.

Urban retail market in Bratislava: shopping centres classification

Shopping centres can be classified according to various criteria (Coleman, 2012; Dabija and Pop, 2008; Guy, 1998a; ICSC, 2012). As noted in Lambert (2006), an international classification framework was created for the purpose of facilitating international comparison, not to replace national definition and classification of shopping centres.

For the purposes of this analysis it is necessary to define the term shopping centre and its parameters because there are variations in the literature. A shopping centre is a concentrated group of retail units in a conceptually closed building with a GLA of more than 5 000 m² with tenant (magnet) in the form of a supermarket or hypermarket. According to this definition there were 12 shopping centres in Bratislava in 2011 (Table 4). It represents almost one quarter of all the shopping centres in Slovakia. Bratislava is an example of the most intense competition of shopping centres in Slovakia and its commercial impact can be considered as supraregional and even national. The GLA of all the shopping centres in Bratislava is 352 550 m². More than a quarter of them are concentrated mainly in the district of Bratislava II in Ružinov.

In this paper, three classification criteria of shopping centres are applied. The first is a functional classification based on the size of the GLA (Lambert, 2006). The second criterion is based on the spatial classification of shopping centres in relation to their localization (Guy, 1998a) and the third criterion is based on the genesis of the shopping centres (Kunc et al., 2013).

In Bratislava, there is only one shopping center which by GLA may be classified in the category of very large shopping centers (Avion Shopping Park) and it is also the largest shopping center in Slovakia. Given the location criteria it is a shopping center located on the edge of the centre. Large shopping centres in Bratislava share 23.1% of the GLA. Medium-sized shopping centres are represented by Shopping Palace Zlaté Piesky and OC Danubia in Petržalka. The most numerous group of shopping centres in the city of Bratislava falls into the category of small shopping centres with a share of 53.9% (Figure 7).

Table 4. *Shopping centres in Bratislava in 2011*

	Shopping centres	Opened	GLA [m ²]	Number of stores
1	Avion Shopping Park	2002	84 000	160
2	Galéria Eurovea	2010	56 000	130
3	Aupark	2001	43 000	268
4	Polus City Center	2000	40 100	170
5	Shopping Palace Zlaté Piesky	2004	35 500	109
6	OC Danubia	2000	26 000	46
7	OC Galéria	2008	18 500	44
8	OC Hron	2008	9 400	29
9	OC Glavica	2011	8 000	30
10	Galéria Cubicon	2010	7 250	42
11	Apollo Business Center	2005	5 700	70
12	OD Saratov	2008	5 200	42

Source: *Authors' own processing.*

As noted by Guy (1998a, p. 262), the location of a specific retail development implies a unique relationship with the local residential population, and a competitive stance relative to other retailers in the area. The locational context for retail development has particular significance for land use planning, where the supposed problems of 'out-of-town' or 'off-centre' development are constantly debated (Guy 1998b). In this context, the UK government has adopted the following classification of retail locations within urban areas (Guy, 1998a):

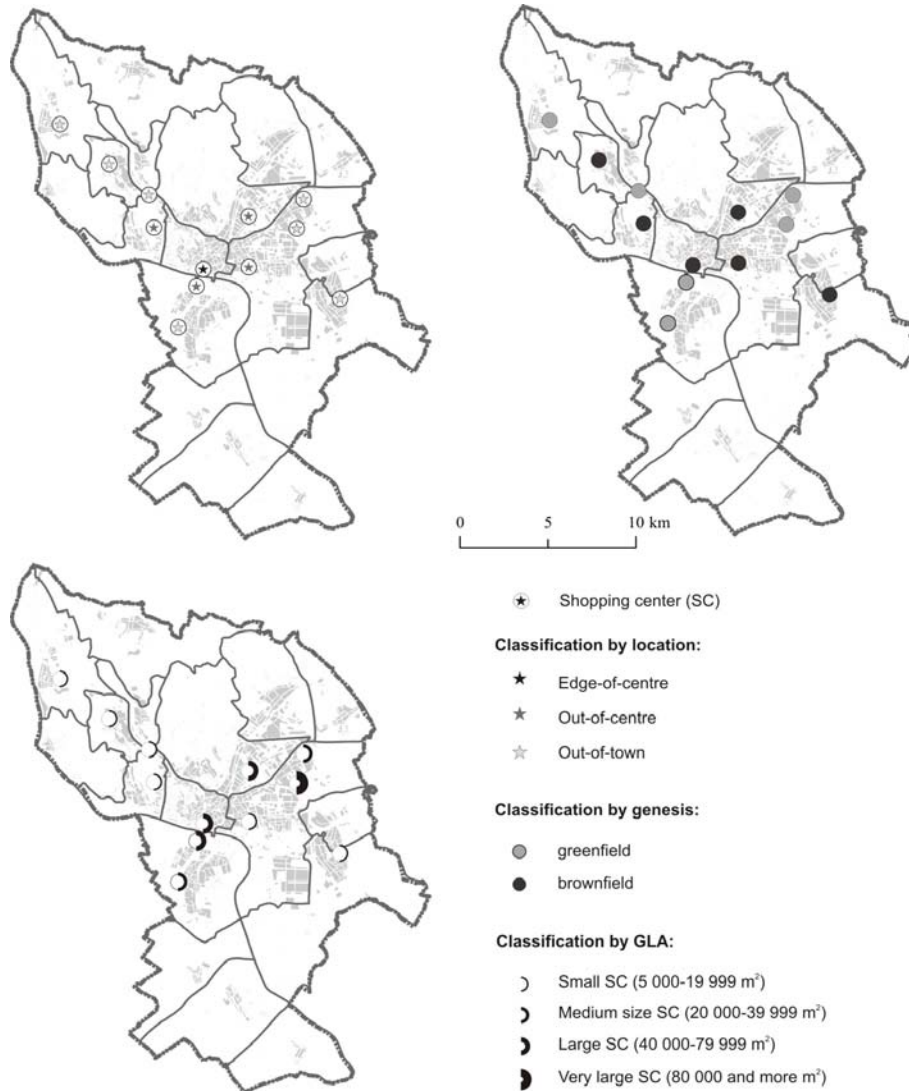
(i) Edge-of-centre: 'For shopping purposes, a location within easy walking distance (ie. 200–300 m) of the primary shopping area ...'

(ii) Out-of-centre: 'A location that is clearly separate from a town centre, but not necessarily outside the urban area'

(iii) Out-of-town: 'An out-of-centre development on a greenfield site, or on land not clearly within the current urban boundary'.

Shopping centres located out-of-centre (56.8%) are frequent in Slovakia. These shopping centres have the largest share (53.5%) of the GLA, but the average GLA center is the lowest (19 714 m²). The second largest group of shopping centres is represented by centers located out-of-town (29.5%) with one-third share of the GLA in Slovakia. These shopping centres achieved the highest average GLA per center in Slovakia (23 492 m²). Shopping centers located in edge-of-centre are the least numerous group in Slovakia (13.6%) with the lowest share of GLA (13.4%). The average size GLA per centre is 20 617 m² (Križan and Bilková, 2014).

Figure 7. Classification of shopping centres in Bratislava



Source: Authors' own processing.

Table 5. Classification of shopping centres in Bratislava by selected criteria

Location	Brown/ Greenfield	GLA [m ²]	Parking places	Number of stores
Edge-of-centre	1/0	56 000	1 700	130
Out-of-centre	4/1	109 950	5 460	640
Out-of-town	2/5	186 600	7 770	460

Source: own processing.

All shopping centres localized at the edge-of-the-centre in Slovak cities belong to the group of brownfield shopping centres. Slovak shopping centres built as brownfields dominate even in the category of out-of-center (84%). In contrast the out-of-town category of shopping centres was built as greenfield (77%). Overall there are predominantly greenfield shopping centers (54.5%) in Slovakia (Križan and Bilková, 2014). Brownfield shopping centers dominate Bratislava (53.8%) (Figure 7) contrasting with the situation in other Slovak cities.

Discussions and conclusions

The consumer shopping behavior can be described as mysterious (Jones and Simmons, 1990, pp. 100-135). It is called mysterious because the consumer behavior is not necessarily logical or predictable. Shopping is not just only about acquiring goods, it is also about shopping for an identity (Clammer, 1992, p. 197). This argument can be generalized to all cultures, wherever the process of shopping and consumption reflects the image of the individual as well as social differences. Consumers often do not behave rationally according to model patterns, but according to their choices and behavior which are influenced by different subjective variables. In some cases (Gilboa and Rafaeli, 2003) the subjective variables such as the image of the shops, helpful shop assistants etc. have higher weight in the decision making process than objective variables (price, accessibility etc.). In this context, the rapid rise of the direction in geography is geodemography built at the edge of human geography trying to involve problem areas and processes such as representation, quantification, experience, generalization, induction and deduction, commercialization and social discrimination. As claimed by Gregory et al. (2009, p. 277), "geodemographics can also identify areas of social or material need, offering opportunity to better target the resources available to those places".

With the increasing number of retail network options the consumer has more choices between different shopping alternatives for the same types of goods, thus the possibility of increasingly favoring the qualitative aspects of their decision before quantitative ones. From the results of the questionnaire it can be concluded that the category frequency of shopping purchases "several times a week" was the most common. The most preferred means of transportation was the automobile for shopping in large sized stores. An important factor influencing the choice of transportation means for shopping was income. With the growth of the income there was an increase in the propensity to use the automobile as the transportation means. Other factors may include, for example, the necessary time to transport or, in the case of public transport, its frequency.

From the analysis of the changes in quality of shopping, the consumers most often agreed to an answer that some improvements in the quality of shopping were made. Consumers' preferences show that urban retail in Bratislava is on a

relatively high level. More positive results are characteristic for the food retailing. Similarly, it was also in the case of the assessment of the accessibility of retail stores in the area of respondents' residence which was evaluated more positively than the urban retail in the city.

Many studies evaluating consumer behavior focus on shopping centres. Shopping centres are in post-communist countries a new form of retailing and they displace traditional forms of shopping. Shopping centres are reshaping the shopping behavior of the new generations of consumers. Shopping centers are becoming not only the places of shopping, but also provide a variety of services and other cultural attractions. Visiting the shopping centres becomes an attraction and a place of leisure and opportunity for social events. Shopping centres are also destinations for tourism. Attractions and services create a potential for development of modern urban tourism (Timothy, 2005).

There were 12 shopping centres in Bratislava (according to accepted criteria) in 2011 heterogeneously distributed throughout the city. According to the location of the shopping centres they are mostly located out of the Bratislava city center. Numerous groups of shopping centres are located at the edge of the city center. According to the genesis of shopping centres, brownfield centres dominated the city. Taking into account the size criteria, the largest group of shopping centres are small shopping centers up to 20 000 m². The largest shopping center in Slovakia is located in Bratislava (Avion Shopping Park) as well as other large shopping centres (Galéria Eurovea, Aupark, Polus City Center) which means that the average GLA for a shopping center in Bratislava is 27 119 m².

On the one hand, the consumer preferences show the minimum consumer loyalty to shopping centres (Križan et al., 2014), but, on the other hand, there is a significant heterogeneity of preferences among the shopping centres as the places where consumers regularly shop. The three most visited shopping centres in Bratislava (Aupark, Galéria Eurove and Avion Shopping Park) are preferred by 56.9% of the consumers in the city. Many of the shopping centres do not even reach 5% of consumer preferences. Given the new projects of shopping centers as well as planned projects it can be assumed that consumer preference of less attractive shopping centres will decline further. Considering the relative saturation of the urban retail market in the capital it may mean the closing of some of the shopping centres. Therefore the analysis of consumers preferences is useful in planning in order to search for new locations for further shopping centres respectively the analysis of the reason for lower levels of consumers' preferences and the promotion of a competitive urban retail market. An analysis of consumer preferences for all shopping centers in Bratislava shows that the most important factors affecting the choice of point of shopping are three key factors: (i) marketing mix, (ii) location (accessibility), (iii) rich retail built environment (cf. Spilková and Radová, 2011). At the urban

level, these factors play an important role in deciding when choosing a shopping center located in other parts of the city than the consumers' residence. At the micro level (urban districts), there is an important factor like the habit of shopping in the specific shopping center. The loyalty to the shopping center does not play in this case an important factor in the selection of the shopping center.

In addition to shopping centres there is increasing concentration of urban retail on shopping streets (high street) where there are shopping stores and everyday services naturally concentrated (cf. Goodman and Coiacetto, 2012). They do not represent uniformly organized and architecturally designed projects, but rather chaotically organized retail stores without a major magnet. The most prominent is the example of Slovakia's Commercial Street in Bratislava. In the pre-transformation period this was the type of shopping characteristic for the Slovak urban retail market.

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