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SHOPPING CENTRES IN WARSAW AND BRATISLAVA: A COMPARATIVE ANALYSIS

Abstract: The aim of the paper is to summarise the development of shopping centres and their current locations, types and sizes in Warsaw and Bratislava using a comparative analysis method. Both cities are situated in post-communist countries where the transformation of the retail sector shows many similarities. Before the 1990s, globalisation processes could not be observed in the retail sector in either of these countries. After the 1990s, some new forms of retailing started to appear in both Warsaw and Bratislava. Supermarkets, hypermarkets and modern shopping centres came to existence as a new form of retailing which influenced other traditional forms of retailing in these cities.

Key words: shopping centre, retailing, globalisation, Warsaw, Bratislava.

INTRODUCTION

Retail is the object of retail geography studies which can be characterised as a quickly developing specialisation in geography and one of the most exciting fields in recent human geography (Wrigley and Lowe 1996, 2002, Lowe and Wrigley 2000).

Contemporary shopping centres (SCs) are complex and planned spaces whose purpose is to fulfil several varied functions. Modern SCs perform retail and entertainment functions, but more and more frequently they also serve entertainment, recreation, cultural, social, housing, administrative, educational and religious functions. In addition to that, retail and entertainment complexes become tourist attractions. SCs attract customers by their rich retail and catering offer, opportunities to spend leisure time, as well as by their sheer size (total area) and sophisticated architectural forms. Modern SCs accommodate cinemas, theatres, concert and exhibition halls, playgrounds, ice-skating rinks, bowling alleys, golf courses, ski lifts, artificial lakes, and huge oceanaria. Consumers spend more and more time in SCs. In addition to doing a lot shopping, they spend their leisure time here; SCs serve as oases of leisure and relaxation in the city area.

Contemporary SCs are located in various parts of the city, which mostly depends on their functions and the period of construction. Certain tendencies in the location of SCs can be distinguished. An interesting example is provided by Britain, where three approaches to the choice of location of large SCs can be observed (Lowe 2000). In the 1960s and 1970s, SCs were mainly built in city centres (e.g. Arndale Centre in Manchester; Eldon Square in Newcastle). In the 1980s, such facilities were built in the suburbs. At that time, large shopping and leisure centres modelled after American shopping malls were developed (e.g. Metrocentre in Gateshead; Meadowhall in Sheffield). Changes in the location of SCs in Britain occurred in 1990s, when SCs returned to the city centre and became part of regeneration plans for neglected downtown neighbourhoods (e.g. West Quay in Southampton).

The aim of the paper is to characterise and compare the shopping centres located in Warsaw (Poland) and Bratislava (Slovakia). The paper focuses on retail globalisation tendencies visible in both cities, and analyses the types, distribution and functions of shopping centres in Warsaw and Bratislava.

Shopping centre – definition and classification

As multi-functional facilities, shopping centres (SCs) are undoubtedly among the most modern forms of retail. However, the term itself related to various facilities, differentiated in terms of both their size and the variety of services provided. In the literature of the subject, we encounter various definitions of a SC. The most frequently cited definition, that by R. J. McKeever, states that a shopping centre is a group of shops planned, constructed, and managed as a single facility, connected by their location, size (total retail space) and the type of shops with the area of influence of the entire facility; with a car parking separated from the street and located on the same plot of land (Wilk, 2003). A very similar definition is one provided by the International Council of Shopping Centres (ICSC), which is more often used by researchers. This definition has been formulated on the basis of research conducted by ICSC in 2005 in several European countries. The formulation of the definition was intended to facilitate research involving comparison of these facilities internationally. According to ICSC, a European SC is a retail property that is planned, built and managed as a single entity, comprising units and "communal" areas, and having a minimum gross leasable area (GLA) of 5,000 m² (ICSC 2005). Various classifications of SCs can also be encountered in the literature, but most of them are based on the same criteria, which include: size (total area, retail area), number of shops, and ranges of influence of the complex.

In this paper, we use the classification created by ICSC, and based on an analysis of SCs in Europe. Ten international types of SCs have been proposed, grouped into two categories: traditional and specialised SCs (Fig. 1). The main difference between the specialised and traditional SCs consists in a specific lessee mix. While a traditional SC, regardless of its size, usually features a supermarket or hypermarket and a gallery of shops representing various industries, a retail park is mainly an array of medium-sized and large specialised shops; a factory outlet centre is a set of manufacturers' shops selling their own brands at a discount and, in a theme-oriented centre, retailers focus on a narrow category of goods sold (ICSC 2005).

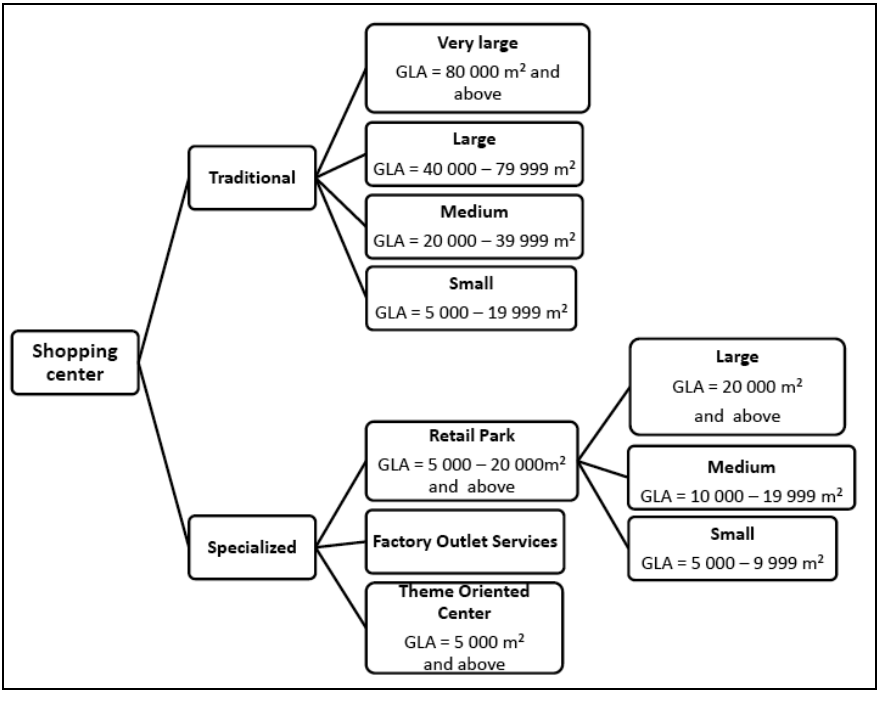

Fig. 1. Types of shopping centres (International Council of Shopping Centres 2005).

Shopping centres in Warsaw

SCs have existed in Polish cities since the mid-1990s, while in the USA they have operated since the 1950s, and in Western Europe - since the 1960s (Wilk 2003).

The first hypermarket in the Warsaw metropolitan area (WMA), and also in the entire Poland, was Auchan at Puławska Street in Piaseczno (opened in 1996). The first hypermarket in Warsaw was Hit at Górczewska Street, while the first SC was King Cross Praga (opened also in 1996). During the following decade, significant changes occurred in Warsaw as regards the size of the retail establishments, their architecture and also their function. A large part of retail spaces existing today in Warsaw was put into operation in a space of two years, that is, in 1998 and 1999. Shopping centres operating in Warsaw belong to various types. The largest group consists of traditional SCs, classified as medium-sized and small due to their area; but large and very large centres also exist in Warsaw. On the other hand, specialised centres are found much less frequently. There are three retail parks and one factory outlet centres in Warsaw, but there are no theme parks.

The first SCs built in Warsaw can be classified as first- and second-generation centres. In first-generation centres, a supermarket or a hypermarket was the most important shop (anchor), making up approx. 60-70% of the total area of the entire centre. This was supplemented by a medium-sized gallery. Such SCs built in the 1990s as Hit (Górczewska St. and KEN St.), Auchan (Modlińska St.), Leclerc (Ciszewski St.) belong to this type.

The next stage in the development of SCs was the introduction of large establishments, with the retail gallery making up approx. 70% of the total area. Such centres are called second-generation centres; for instance, Reduta, Klif and Wileńska Gallery belong to this category.

The last stage in the development of Warsaw's SCs was the construction of complexes with large malls whose area occupies approx. 70% of the total area, and offers a wide range of entertainment services. Visitors to such centres not only can do their basic shopping or use catering facilities – as in first- and second-generation centres – but spend their leisure time, too. Warsaw's third-generation centres include: Galeria Mokotów (the first third-generation centre in Warsaw, opened in 1999), Sadyba Best Mall, Arkadia, Blue City, Promenada, Targówek, Wola Park and Złote Tarasy. The last one, opened in 2007, on account of the location of office space within it, is classified as one of two fourth-generation complexes in Poland. The other fourth-generation centre in Poland is Manufaktura in Łódź.

Specialised shopping centres started to be built in Warsaw much later. Retail parks were built along the thoroughfares leading out of Warsaw. Inter Ikea opened the first retail park in the Targówek district in 2006. The next centre of this type — in the vicinity of the Okęcie Airport — was built in 2002 and expanded during the next three years. The most recently built retail park in Warsaw is Zielony Park Handlowy located in the neighbourhood of Targówek Shopping Centre.

Similarly, outlet centres are located outside the city centre. The first such complex, Factory Outlet, opened in 2002, is located in a post-industrial district of the Ursus suburb.

An analysis of the distribution of shopping centres in Warsaw shows that large SCs are present in various places in Warsaw (Fig. 2). The vast majority of them have been built in the parts of Warsaw situated on the left bank of the Vistula River. Most of traditional SCs and retail parks, as well as all the outlet centres, are present here. The vast majority of the SC types described above are located in Warsaw. First- and second-generation SCs have a relatively small zone of influence as most of them are small- and medium centres. They are classified as focus centres and are built outside the city centre. In four city districts, however, no shopping centre has been built (Rembertów, Wawer, Wilanów and Wesoła).

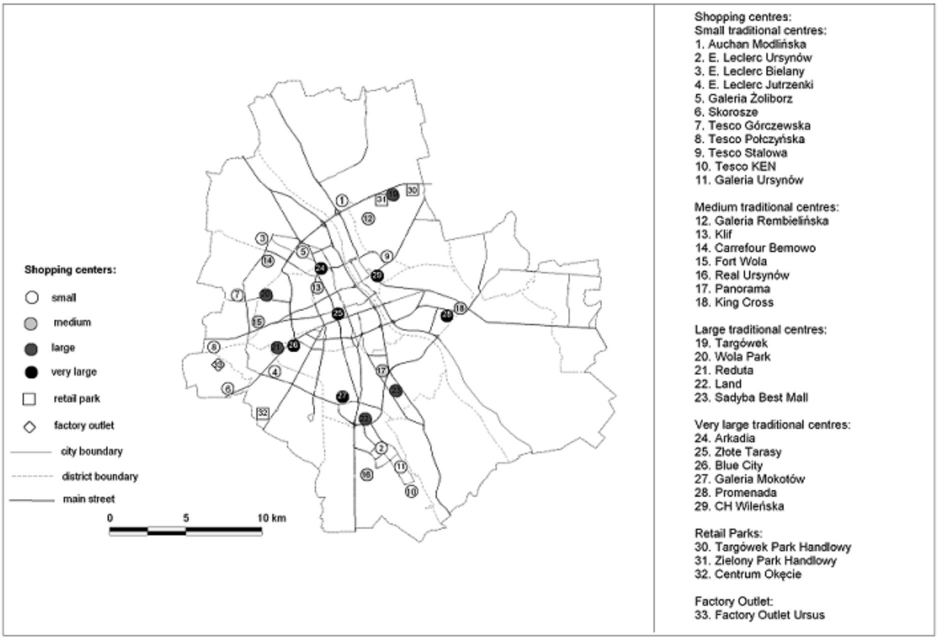

Fig. 2. Shopping centres in Warsaw

Third- and fourth-generation SCs are present in various parts of the city. Most of them have regional or even larger zones of influence and are easily accessible by various modes of transport. They are located in the city centre or close to the main thoroughfares. Two of Warsaw SCs are situated in the vicinity of railway stations (Złote Tarasy, Arkadia).

In 2008, 33 modern SCs were in operation in Warsaw, with the total leasable area of 1,046,000 m² (Jones Lang LaSalle 2008). This meant that the penetration rate reached 496 m² per 1,000 inhabitants, putting Warsaw at the third place among the eight largest agglomerations in Poland.

Shopping centres in Bratislava

In the first decade, significant retail changes also took place in Bratislava. The large retail units in the form of SCs became the standard retail element in the city. In 2008, there were 60 supermarkets and hypermarkets in the

Bratislava metropolitan area (Bratislava). The spatial position of these stores points to a decreasing concentration around the city centre and an increasing concentration in the periphery of the city (south, south-east), notably in Petržalka, Podunajské Biskupice, Ružinov, Dúbravka and Karlová Ves. The first hypermarket in Slovakia was not opened in the capital but in Nitra in June 1999 (Tesco). The first hypermarket in Bratislava was built in the same year; it was Danubia, opened in June 2000. In November 2000, the first shopping and leisure centre in Slovakia was opened in Bratislava, named Polus City Centre. Today there are 13 shopping centres in Bratislava (Fig. 3).

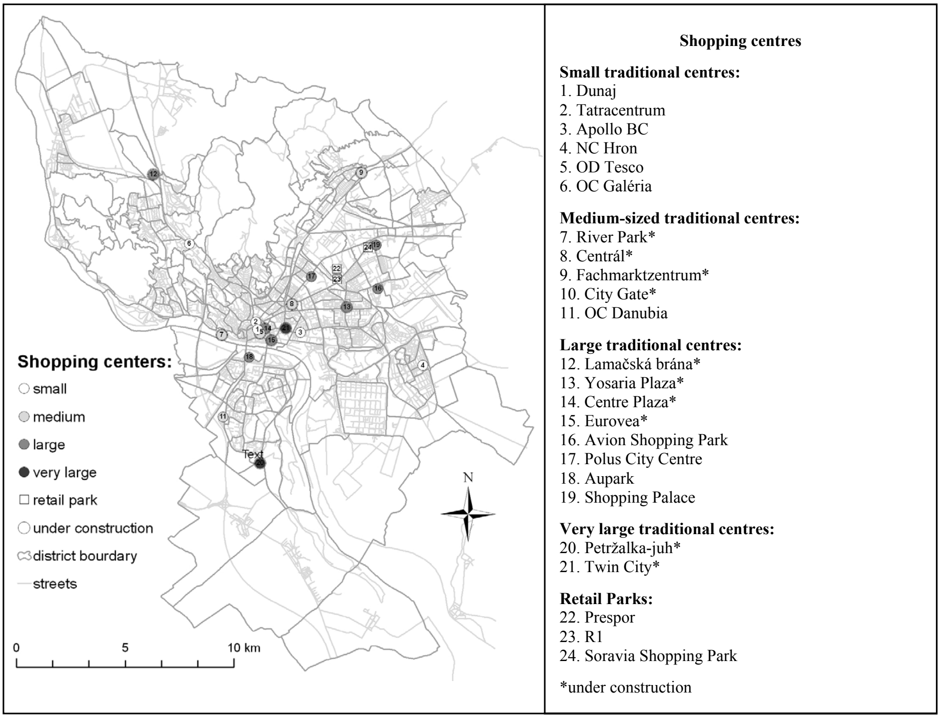

Fig. 3. Shopping centres in Bratislava

Shopping centres in Bratislava come under various types. Most of them are small and medium-sized SCs, with a lesser number of specialised SCs. In Bratislava, there are three theme parks and no factory outlet centres. First-generation SCs are located in the city centre. There is just only one shopping centre of this type (OD Tesco).

Many SCs belong to the second-generation category (e.g. OC Danubia, OC Galéria). There are four third-generation SCs where consumers also spend their leisure time: Polus City Centre (the first third-generation centre in Bratislava, opened in 2000), Aupark, Avion Shopping Centre, and Shopping Palace. Some of them can be classified as fourth-generation SCs. The largest office space can be found in the Polus City Centre and the Aupark Shopping Centre. Ten new fourth-generation SCs are planned in Bratislava, which will significantly increase the sale area.

In the case of specialised SCs, some similarities with Warsaw can be observed. They opened later than “classic” SCs and are located in the periphery of the city. Two of them (R1, Prespor) sell building materials (exterior, interior, garden), and the third is a furniture centre (Soravia Shopping Park). All of them are located in the eastern part of the city near the main streets.

The location of SCs in Bratislava shows different trends than in Warsaw. Many SCs are located near the city centre. Very large centres are planned close to the central business district (CBD) and also in the suburbs. The majority of SCs in Bratislava are located in the eastern part of the city, which in the west is bounded by the mountains and small-population districts.

In 2008, there were 11 SCs (except retail parks) in Bratislava. The sale area approximately totals 260,000 m^2. The density ratio of in Bratislava’s SCs is 610 m^2 of floor space per 1,000 inhabitants.

Functions of selected Warsaw and Bratislava shopping centres

Contemporary SCs have more and more functions. They are called centres (retail and service centres, retail and entertainment centres) for a good reason, since they are places of exchange of goods and services, just as traditional city centres were in the past. Often, spending leisure time in modern commercial spaces is much more attractive for people than in the public space of a city.

Modern shopping complexes in Warsaw and Bratislava can be divided into two basic groups: retail and service centres (SCs of first- and second-generations) and retail and entertainment centres (SCs of third- and fourth-generations).

The facilities of retail and entertainment centres are characterised by an entertainment component, playing the role of an anchor and attracting visitors who want to spend their leisure time in the centre; in addition, there are also retail and service facilities and a food court.

Retail trade is undoubtedly the most important function of the retail and entertainment centres. In the modern SCs of Warsaw and Bratislava, there are very many shops with all kinds of goods (Fig. 4). The largest group of shops – prevalent in all the centres – consists of clothing and footwear shops. An accumulation of fashionable shops and brand shops makes them places where people come to find out the fashion for a given season. Every shopping centre also has food shops, sports shops, consumer electronic shops, perfume shops and bookshops. An interesting example here is Blue City (Warsaw), which houses several furniture shops. For this type of merchandise, a separate floor of the gallery is devoted, called the Home City. Another interesting example is Polus City Centre (Bratislava), with a large number of food shops.

An analysis of the types of shops also shows that in the shopping centres of Bratislava there are many more electronic shops than in Warsaw's SCs.

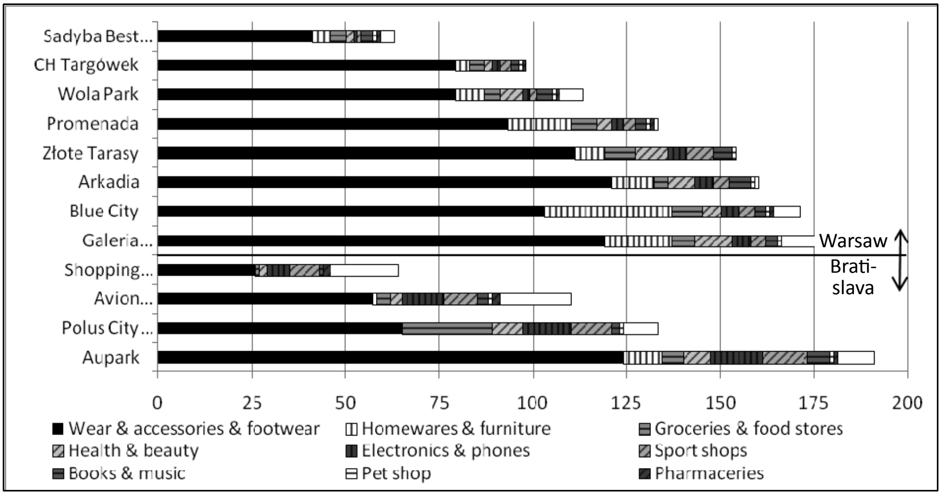

Fig. 4. Retail facilities in Warsaw and Bratislava retail and entertainment centres

The retail and entertainment centres described here also accommodate a wide range of service and catering facilities. Most of them are restaurants, cafés and bars, in all the shopping centres in both cities. Everywhere, there are also hairdressers, banks, photo services, travel agencies, dry-cleaning services, key duplication services, and flower shops. Worth noting is also the presence of hospitals – Enel Med in Blue City and in Arkadia (Warsaw).

Another function of the retail and entertainment centres in Warsaw and Bratislava is entertainment. There are few entertainment facilities in the shopping centres, although the existing ones have a large share in the total area of the entire centre. The largest number of entertainment facilities are found in Blue City (Warsaw) and Aupark (Bratislava). In all the other centres, multiplex cinemas perform an entertainment function.

Some of the centres also have a recreational function. In Blue City (Warsaw), consumers can use a go-cart track and a skate park; in Wola Park (Warsaw), they can use a "sports park" (volleyball and basketball courts, ice-skating rink), and a fitness club - which are the most frequently found recreational services in Bratislava's SCs. One of the most important attractions of Promenada (Warsaw) and Avion Shopping Park (Bratislava) is an indoor ice-skating rink, whereas Galeria Mokotów and Sadyba Best Mall in Warsaw, and Aupark in Bratislava have bowling alleys. The recreational facilities are among the most important places that attract visitors to shopping centres, which could be a result of the scarcity of this type of amenities in the city.

Retail and entertainment centres are also cultural centres: exhibitions, shows, concerts, and meetings with artists are organised there.

One should not forget the integration function of SCs. The restaurants and cafés in the centres are places used for meetings. The nature of these facilities does not differ from that of catering facilities outside the shopping centres. Another important place in every modern shopping centre is the central plaza, whose function is similar to that of the town square.

CONCLUSIONS

One of the challenges facing retail theorists is how to account for and predict retail change. In a "idealised" world, this is possible. When the "real" world intervenes, however, theories can sometimes be less than useful (Findlay and Sparks 2002, p. 3). Therefore, an analysis of the retail processes and their mutual comparison can bring new pieces of information and help better understand this issue.

In Poland and also in Slovakia, intensive globalisation trends could be noticed since the 1990s. Globalisation processes have brought essential changes to the Polish and Slovak markets, and shopping centres have become an inseparable element of the retail sector.

Both Warsaw and Bratislava are cities with many diverse retail establishments. In a period of over 15 years, more than 30 SCs of various types were built in Warsaw. In Bratislava, the number of shopping centres is approximately three times smaller than in Warsaw. One of the reasons for this is the smaller population of Bratislava. Other reasons include dissimilar retail trends in Poland and Slovakia, diverse consumer behaviours and their purchases starting from the end of the 1990s and, last but not least, different political interests and directions in both cities, with a special emphasis on foreign investments.

In Warsaw, we have specialised centres – retail parks, where furniture stores dominate, and outlet centres which offer clothing of famous brands. There are also small and medium-sized SCs which attract customers mostly with their super- or hypermarkets, as well as large and very large centres, which attract people from the entire region. In Bratislava, there are few specialised centres. Specialised shops (e.g. outlet shops) are not found in SCs, but are scattered across the city.

The distribution of such places in Warsaw and also in Bratislava is not uniform and there are many similarities between the two cities. Neighbourhood SCs are located mostly on the outskirts of both cities. Large third- and fourth-generation SCs exist both in the city centre and along the thoroughfares leading out of Warsaw and Bratislava. Retail parks and outlet centres are located at the outskirts of the city or outside the city boundaries.

The vast majority of SCs in Warsaw are located in the districts on the left bank of the Vistula River. Four Warsaw districts still have no SCs. The majority of SCs in Bratislava are located in the eastern part of the city. In the west, there are mountains and small population districts. Many consumers (workers, visitors) come to the city from the east. This is the reason why nine districts have no SCs and none are planned in the nearest future.The shopping centre market in Warsaw certainly underwent a transformation in the recent years. It seems that it has already become saturated with large and very large traditional shopping facilities, including retail and entertainment centres. In the recent years, a dynamic growth is manifested by retail parks owing to their constant expansion. Smaller (district) SCs are being created, often as parts of housing complexes. Also, the saturation with modern retail space in various city districts and in the vicinity of Warsaw is strongly differentiated. Retail space market analysts foresee an inflow of investments to two dynamically growing Warsaw districts: Białołęka and Wilanów. The situation on the SC market in Warsaw can also be changed by the financial crisis which first affected Poland in 2008. This can influence the tenant mix, as well as the profitability of SCs themselves.

In Bratislava, diverse trends can be observed. The trade is not saturated yet. Many new SCs are planned, classified as very large SCs, as a result of which the sale area will be doubled during the next few years. Plans are now suspended because of the global economic crisis, similarly to Warsaw. It can be said that no SCs in both cities have gone bankrupt despite the world crisis. Smaller SCs and transitory SCs between the hypermarket and the supermarket format are also being built in many districts of Bratislava. They can be characterised as new retail trends in both cities, which are also visible in other European cities (cf. Wrigley, 1998).

SCs in both cities fulfil many functions: they are places for an exchange of goods and services, but also serve as venues for meetings. Polish and Slovak consumers visit them frequently. This can be a result of such factors as their broad offer, easy access by various modes of transport, no dependence on weather conditions, convenient opening hours, attractive interiors and safety provided by the security personnel. One can say therefore that as regards their functions, Warsaw's and Bratislava's retail and entertainment centres are retail complexes of the newest generation, which can compete with traditional city centres.

SCs imitate city centres not only in their spatial layout and interior furnishings, but also in their functions. Shopping centres make a tangible change in the spatial structure of the analysed cities, which is clearly seen in their physical (morphological) and functional structures.

According to N. Wrigley (2002, p. 311), the rapid development of transnational corporations during the 1990s is an issue that has not been given sufficient attention to in economic geography. Therefore, an analysis of these processes and their mutual comparison in time and space can provide us with new knowledge on this topic.

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