DEVELOPMENT AND CLASSIFICATION OF SHOPPING CENTERS IN CZECH AND SLOVAK REPUBLICS: A COMPARATIVE ANALYSIS

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ABSTRACT

Modern shopping centers of the "West-European" type have existed in the Czech and Slovak republics since 1997 and 2000, respectively, i.e. for less than two decades. Despite this rather short period they have become synonymous with the most significant transformations both in shopping behaviour and in the more generally understood patterns of social and cultural behavior of all population groups (entertainment and leisure time utilization). This article compares similarities and differences in the temporal, spatial and functional structures of shopping centers in two countries that had, until 1993, developed for seventy years as a single state, and which have demonstrated significant similarities in their economies, cultures and societies even after the separation.

Keywords: shopping centers, classification, similarities and differences, Czech Republic, Slovak Republic

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1. Introduction

The shopping-center phenomenon is probably the most significant manifestation of contemporary retail business activity in both the Czech and Slovak republics. Here we do not refer only to the physical appearance of shopping centers, but more importantly to their social and cultural impacts, one of which is the modification of long-established patterns of shopping behavior and shopping customs for most population groups (Kunc et al. 2013; Spilková 2012a; Timothy 2005).

The central role of retailing, i.e. the selling of goods and the provision of services to consumers, has been evolving into the contemporary format for several decades. Continually accelerating globalization and internationalization trends have manifested themselves in hasty and hectic ways of life, where we all seem to lack time (Giddens 2002). Large chain stores and shopping centers have not only drawn the attention of shoppers away from traditional forms of retail shopping (Szczyrba 2005); shopping centers have, to a large extent, replaced traditional public spaces and everything that belongs to them (Cooper 2007; Jackson et al. 2011; van Leeuwen and Rietveld 2011; Voyce 2006). Many commercial and non-commercial functions of individual municipal districts (catering, post offices, banks, medical offices, etc.) have been transferred gradually to shopping centers, as described by Spilková and Hocheľ (2009) and Pospěch (2010). Shopping centers in post-socialist countries have become one of the key signifiers of the modification of society's consumer behavior (cf. Pospěch 2017; Spilková 2003; Spilková and Radová 2011).

The possibility to shop, enjoy services, entertainment and relaxation "under a single roof" has offered a solution to the lack of time people currently experience. The shopping-center solution has its negative sides, though, which, over time, have become increasingly apparent. By this we mean the establishment of consumers society (Mansvelt 2005), where certain consumers spend entire days in shopping centers; the creation of an artificial social status dependent on being seen "out and about" in a shopping center – especially among members of the younger generation, the so-called *mall junkies* (Spilková 2012b; Underhill 2004); the frequently non-regulated construction of buildings in inappropriate locations due to political pressure from some public administration bodies and the developers themselves, etc. (England 2000; Spilková 2010). A visit to a shopping center has become an attraction, entertainment, a form of leisure and even a specific form of social event not only for young people but also, for example, for senior citizens. It is possible to assess shopping centers by their attractiveness in this context, depending on multiple factors, and express their ability to attract consumers (Kunc et al. 2016).

The aim of this paper is to present similarities and differences between shopping centers in the Czech and Slovak republics according to their temporal and spatial structures. We shall focus on the conditions preceding and accompanying their entry and establishment in both markets with the aim of describing the evolution and expansion of shopping centers in the Czech and Slovak republics from 1997 to 2015. Furthermore, we shall compare shopping centers from the perspective of space and location in relation firstly to genesis, and secondly to shopping area.

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2. Background

The term 'shopping center' has been evolving since the early 1950s. A range of definitions has been developed for shopping centers, often tending to reflect changes in the industry. In simple terms, a shopping center can be defined as a building that contains many shop units but is managed as a single property. Shopping centers today are increasingly complex in terms of size, type and characteristics, which has contributed to the confusion as to shopping centers' identities (Pitt and Musa 2009). A shopping center is a spatial pattern of homogeneous or heterogeneous retailers agglomerating in the same place. On the one hand, it is a highly organized commercial complex in a building or area that consists of a variety of retailers who together provide a comprehensive service to consumers. On the other hand, the shopping center is also a kind of commercial real estate that serves to integrate businesses and is usually a blend of retail, services, catering, leisure, entertainment and other composite forms (Shi et al. 2015). A general shopping center definition according to the International Council for Shopping Centers (ICSC) states that a shopping center is a set of retail and other business facilities, which has been planned, built, owned and managed as one entity, usually with proprietary parking available. The most common combination is a shopping gallery and an anchor tenant (magnet) in the form of a hypermarket or a larger supermarket (ICSC 2005).

Since it is still difficult to find uniform criteria for shopping center classification (cf. Guy 1998), we shall use the European ICSC definition with the limiting value of 5,000 square meters of gross leasable area (Table 1). In the Czech Republic we will therefore work with a database of 83 shopping centers and in Slovak Republic with 47 (Kunc et al. 2016).

Globalization trends within the retail environment have been some of the most visible features of socio-economic transformation in both the Czech and Slovak republics since 1989. The shopping needs of Czech and Slovak consumers had been neglected during the period in which there was a centrally planned economy (Drtina 1995; Szczyrba 2005) and consequently there was a strong impetus to change this situation in the subsequent democratization period. Although the fastest establishment of the private retail sector was not recorded in the Czech-Slovak environment but in Hungary (Douglas 1995), the transformation in the Czech Republic's retail field was amongst the most decisive of the Central European post-socialist countries (cf. Kok 2007; Kunc et al. 2013). Slovak Republic went through the transformation of its retailing structures later and more slowly (Križan et al. 2016).

Two of the most important aspects to consider when planning shopping center building projects are spatial localization and accessibility within the municipal and suburban environments. The issue of localization is frequently discussed in the course of urban planning and must (should) be subject to regulations and comply with the requirements of environmental protection (England 2000; Koželouh 2010). It is, in principle, possible to distinguish three options for shopping center localization (Guy 1998): i) *edge-of-center*, ii) *out-of-center* and iii) *out-of-town*. All impacts of a building project on the surrounding territory must be taken into account during the building of a new shopping center. The greatest conflict for a newly built-up area is the replacement of the previous differently used land resources (Spilková and Šefrna 2010). It is also necessary to take into account interference with the municipal or suburban cultural landscape, which could cause negative attitudes in the affected population (Kok 2007; Kunc et al. 2012a).

The construction and subsequent expansion of shopping centers within inner city structures is always limited by the cultural-historical value of the original built-up territory. Inner-city shopping centers are typically multi-story buildings with smaller total leasable areas, where it is frequently impossible to locate a large-scale shop, such as a hypermarket, as a magnet. A multiplex cinema, for

Tab. 1 International standard for individual types of European shopping centers.

Format	Type of the Scheme		Gross Leasable Area (GLA)
Traditional	Very Large		80,000 m² and above
	Large		40,000–79,999 m²
	Medium		20,000–39,999 m²
	Small	Comparison-based	5,000–19,999 m²
		Convenience-based	5,000–19,999 m²
Specialized	Retail Park	Large	20,000 m² and above
		Medium	10,000–19,999 m²
		Small	5,000–19,999 m²
	Factory Outlet Center		5,000 m² and above
	Theme-oriented Center	Leisure-based	5,000 m² and above
		Non-leisure-based	5,000 m² and above

Source: ICSC (2005).

example, could become a magnet, which would, along with retailing and service units, contribute to the resurgence of a historic city core. Walking is the most common means of transport in city centers due to the limitations of other means of transport. A lack of parking spaces at the back of a shopping center – understandable within pedestrian zones in historical cores – could be considered a problem, but could be compensated for by the center's localization and walking distance to public transportation services or park & ride parking lots (Kunc et al. 2012a). In specific cases (Ostrava in the Czech Republic and Prešov in Slovak Republic, for example) cities can have sufficient surface area available for building in the city center or in its vicinity, to be able to construct large shopping centers in the so-called "*in-town*" or "*inner-city*" locations. Westquay Shopping Centre (75,000 m^2) in Southampton, England, is an example of such a location. The construction of the shopping center was an important part of the regeneration strategy of the city, which was, due to the decisive role of the shopping center, called a "retail-led urban regeneration" (Lowe 2005).

Revitalizing old industrial buildings (mostly on city edges or within the wider inner city) using the original, sometimes architecturally valuable, buildings is another means of building shopping centers that is becoming more common. These developments are not always in shopping or commercial areas, but, as noted by Kok (2007), retailing is a reliable source of income and therefore is often a key factor influencing the feasibility of the project. The scope of these construction projects is frequently constrained by the surrounding buildings or communication facilities and parking will most often be underground or rooftop.

There are more options for spatial expansion for shopping center developments situated beyond the city centers and their close surroundings. Here shopping centers can be reconstructed from former communal facility buildings, newly built in empty spaces within housing development complexes or as redevelopments of manufacturing premises. These shopping centers usually include a hypermarket, a hobby market, restaurants and service facilities. Building shopping centers within large housing-development complexes is to be assessed positively since these complexes have customarily been underdeveloped from the retailing point of view (Mulíček 2007; Szczyrba 2005). Shopping arcades, service and entertainment facilities, promenades and spaces available for leisure tend to become new natural places for people to meet; these can become the new centers of municipal districts or of heavily urbanized territories (Kunc et al. 2012a, 2012b).

Large projects with large-surface-area buildings and open-air single-level parking lots for thousands of vehicles are found in the suburbs, beyond the city itself. The magnet could be a hypermarket with groceries and related goods or some other kind of large store with a non-grocery assortment of goods. Inside these shopping centers you can find multiplex cinemas, restaurants, fast-food restaurants, various sports facilities, leisure time facilities and other facilities; these are frequently accompanied by hobby markets and the so-called 'DIY' (do it yourself) shops.

It is necessary to note, however, that the construction of a large shopping center in the vicinity of a historic city core could be a serious threat to existing commercial and service functions in the city core and entail a decrease in the number of city core visitors (Crosby et al. 2005).

3. Methods and Data

The methodology used for this article can be divided into two groups. The first group focusses on the description of temporal and spatial aspects of the shopping centers development in both countries. This is a comparative analysis of the analyzed shopping format time series within a spatial context (Erkip and Ozuduru 2015; Fertaľová 2005; Graff 2006; Kunc et al. 2013; Mitríková 2008; Szczyrba 2010; Trembošová 2012).

The second group focusses on the classification of shopping centers in Czech and Slovak cities. The classifications, based on the typical methods of shopping center assessment, are according to the following criteria: (i) genesis, (ii) location, (iii) size of the gross leasable area (Coleman 2012; Guy 1998; Križan et al. 2015; Kunc et al. 2013).

The data can be divided into four groups. The first group includes data from the authors' internal databases i.e. data relating to retail field development and transformation collected within the Czech and Slovak republics. The second group includes data from the internal databases of individual shopping centers, and focusses on their internal structures and retailing facilities. The third group includes data from the internal databases of the INCOMA and GfK survey agencies. The fourth data group is based on field research. This data is the foundation for an empirical approach to this issue.

4. Shopping centers in the Czech and Slovak republics: Development

The origins and the development of the shopping centers have been well discussed (Coleman 2012). In post-communist countries, such as the Czech and Slovak republics, retailing developed after WWII in a relatively isolated way, without the influence of retailing globalization trends (Earle et al. 1994; Krásný 1992; Maryáš et al. 2014; Očovský 1974). The political transformation in December 1989 had a great impact on retail development (Kok 2007). The beginning of the 1990s saw a process of atomization in retailing, followed by a process of internationalization (Fertaľová 2005; Kita 2008; Pulpitlová 2003; Simová 2010; Szczyrba 2005). Central European markets became prime targets for expanding retail corporations

(Kok 2007). It was at this stage that the shopping center phenomenon occurred. It is possible to distinguish three stages in the development of the shopping centers in the Czech Republic and in Slovak Republic. The first stage (1997–2003) saw the appearance of the first shopping centers. The first shopping center opened in the Czech Republic in 1997, and in Slovak Republic three years later (Fig. 1). The first stage of shopping centers building was more profound for the Czech Republic since 36.1% of current shopping centers within the country were built before 2003, while in Slovak Republic, just 14.9% were built.

The second stage of shopping centers development (2003–2009) witnessed a peak in new shopping centers building before 2008 and then a gradual decline to 2009. 49.4% of the current shopping centers were built in the Czech Republic during this stage. The development in Slovak Republic was more intense, as approximately 28 shopping centers were opened there between 2004 and 2009: 59.6% of all shopping centers in Slovak Republic.

New shopping centers development in the third stage (2009–present) shows further differences between the Czech Republic and in Slovak Republic. The Czech Republic saw gradual decline in new shopping centers building before 2010 with an increase in development starting again in 2012. In Slovak Republic, a decline in new shopping centers construction can be observed (probably due to a delayed response to the global economic crisis, only seen in 2011). Several projects were suspended, owners were changed, or changes were made to the size or character of the builds. Not one shopping center was built in Slovak Republic in 2013. There was a recovery in 2014, and by 2015 Slovak Republic and the Czech Republic switched their positions with Slovak Republic building more than the Czech Republic. 13.1% of the current shopping centers in the Czech Republic were opened during the last 5 years, while Slovak Republic witnessed no such decline (almost one fifth of the current shopping centers were opened in this last stage of development).

In general, you can observe similar trends in shopping centers development in the Czech Republic and in Slovak Republic with a delay of 2 to 4 years in the latter country. This time-space shift in the West-East direction, called wave diffusion, is visible in retailing in both countries (Szczyrba 2005; Križan and Lauko 2014).

5. Shopping centers in the Czech and Slovak republics: Classification

It is possible to classify shopping centers according to various criteria (Križan et al. 2014; Kunc et al. 2012). Three criteria have been used in this article: (i) genesis, (ii) location, (iii) gross leasable area.

In terms of their genesis, shopping centers can be divided between those built on greenfield and those built on brownfield sites (previously developed area; for the purpose of this article we are going to use more common term "brownfield"). Shopping centers built on brownfield sites slightly prevail in the Czech Republic (50.6%). Conversely, shopping centers built on greenfield sites prevail in Slovak Republic (54.3%). Even larger differences can be observed when comparing the graph (Fig. 2). The construction of greenfield shopping centers prevailed in the Czech Republic during the period of analysis (1997–2015) for a total of 9 years. Conversely, the construction of brownfield shopping centers prevailed for 8 years. The situation is similar in the territory of the Slovak Republic. The ratio between the numbers of years with the prevalence of greenfield shopping centers building to brownfield is 6 : 6 (Fig. 2). In contrast to Slovak Republic, not a single shopping center was built on a greenfield site in the Czech Republic after 2009, which is a positive development.

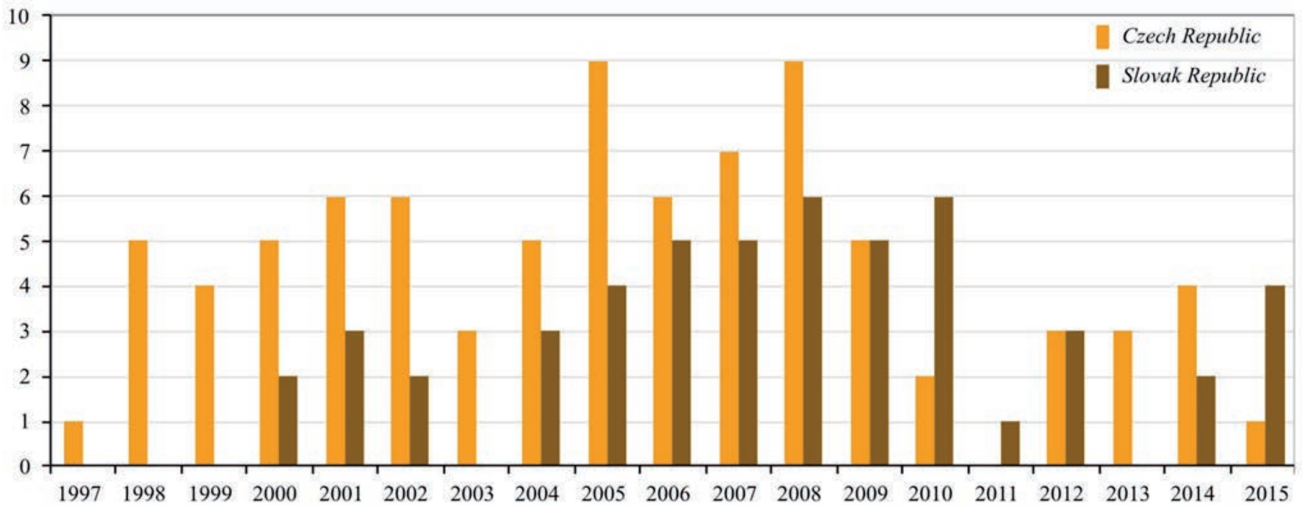

Fig. 1 Newly opened shopping centers in the Czech Republic and Slovak Republic between 1997 and 2015.
Source: Our own survey

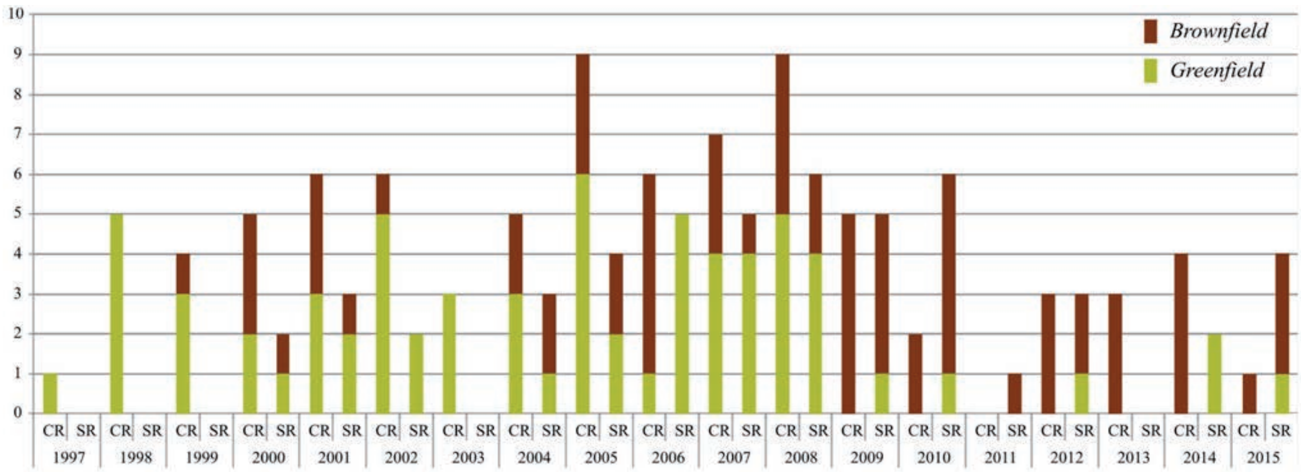

Fig. 2 Newly opened shopping centers in the Czech Republic (CR) and Slovak Republic (SR) according to their division into greenfield and brownfield sites.
Source: Our own survey

Shopping center localization within basic morphogenetic city zones is the second assessment criterion (Guy 1998; Križan et al. 2014). Shopping centers in the "out of center" group are the most frequent in the Czech Republic (44.0%), while shopping centers in the "edge of center" group are the least frequent (16.7%). The "out of town" group includes over half of all shopping centers in Slovak Republic (54.9%) while the "edge of center" group is also the least frequent (15.7%). When analyzing shopping center building according to locality in the period between 1997 and 2015 (Fig. 3), you can see a general trend from a prevalence of out of town shopping center building in the first stage (1997–2003) to an increasing frequency of out of center and edge of center building in the second and third stages (2003–present). This trend is more overt in the case of the Czech Republic. The "out of town" type of shopping center building period has still prevailed both in the Czech and Slovak republics (6 years).

The size of the Gross Leasable Area (GLA) is the third criterion of shopping center classification (ICSC 2005) in both countries. The fact that in the period between 1997 and 2015 small shopping centers were built most frequently in both countries, while large and very large shopping centers were built only rarely is a common characteristic of shopping center development in both countries (Fig. 4). A decrease in the GLA of newly opened shopping centers is a trend in both countries. Over one half of

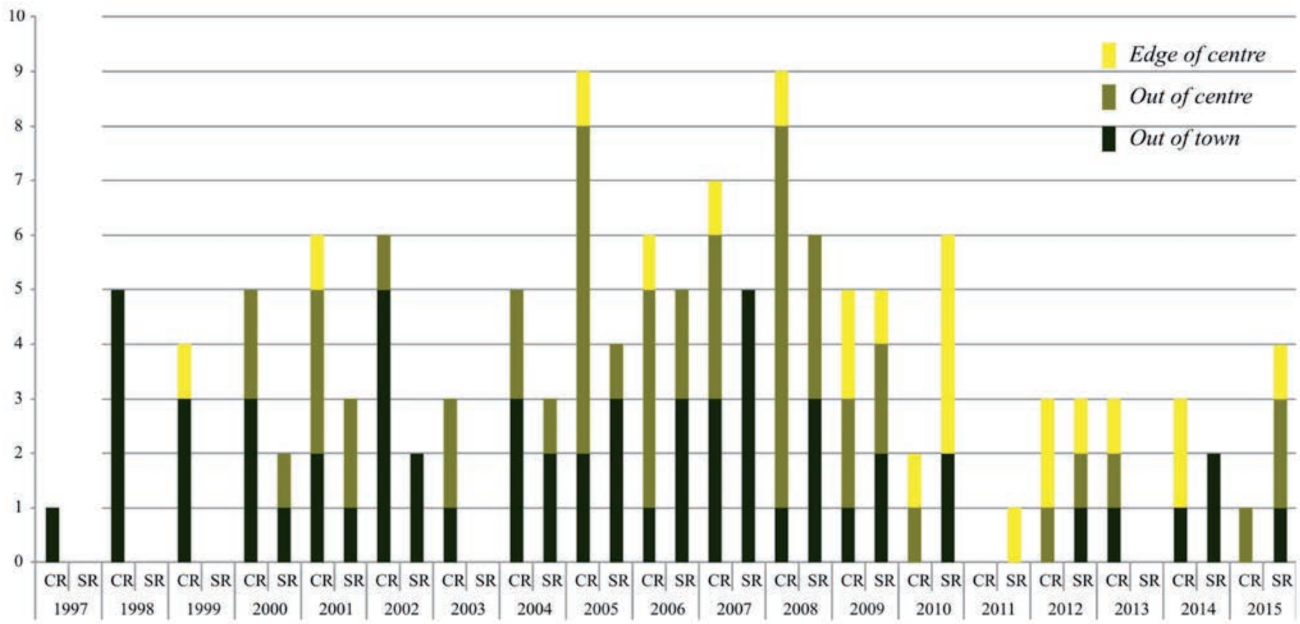

Fig. 3 Newly opened shopping centers in the Czech Republic (CR) and Slovak Republic (SR) according to their localization within basic morphogenetic city zones.
Source: Our own survey

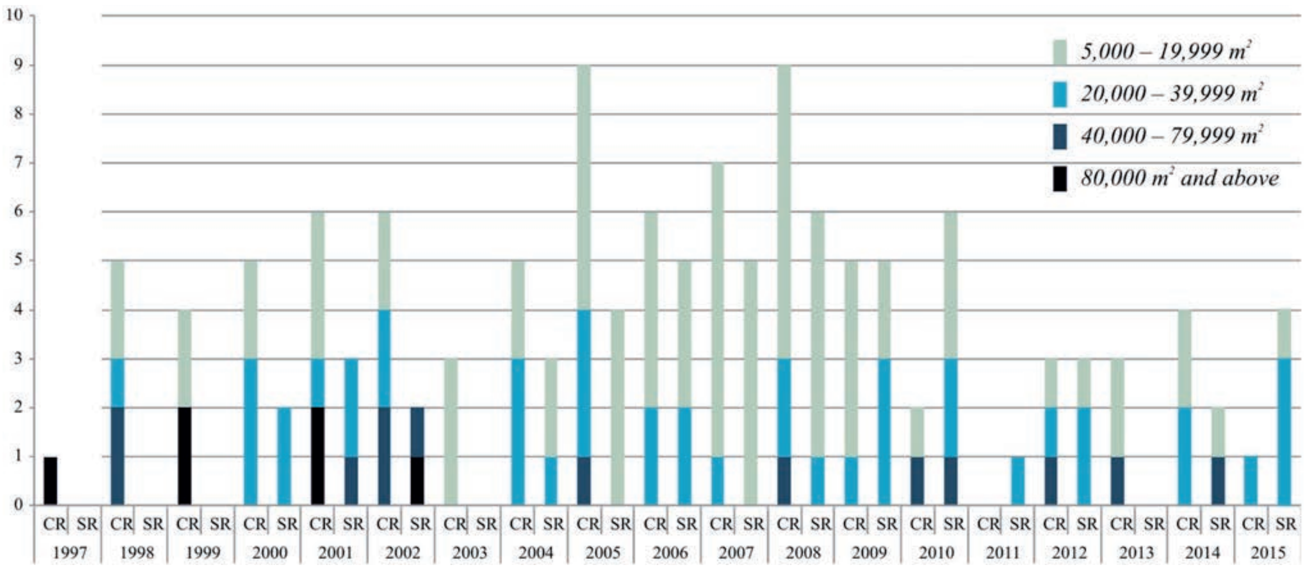

Fig. 4. Newly opened shopping centers in the Czech Republic (CR) and Slovak Republic (SR) according to the size of the gross leasable area
Source: Our own survey

all shopping centers in the Czech Republic (56.0%) and in Slovak Republic (52.9%) are small shopping centers. Shopping centers with a GLA smaller than 40,000 m^2 represent a share of over 80% and in Slovak Republic this share exceeds 90%. While only one shopping center in Slovak Republic belongs among the very large shopping centers, there are five such shopping centers in the Czech Republic. You can also see a decline in shopping center numbers correlated with the growth of their GLA. The average GLA for a Czech shopping center is 26,800 m^2, while in Slovak Republic it is 22,100 m^2.

6. Discussion and Conclusions

The main aim of this paper is to introduce, compare, and interpret similarities and differences between shopping centers in the Czech and Slovak republics. The criteria used for analysis are development (temporal shift), genesis (building on brownfield or greenfield sites), localization in urban and suburban environments and the size of the gross leasable area. These criteria have been chosen for their simplicity and availability in both countries. The results of the analysis can be summarized as follows:

(i) Shopping centers development in Slovak Republic is two to four years behind the Czech Republic. This delay is caused by the long-term economic underdevelopment of Slovak Republic in comparison to the Czech Republic, which began long before the creation of a common state – this is known as an east-west gradient (the west is more developed than the east). After the decline of the planned economies at the end of the 1980s, socioeconomic regional differences have occurred in how far the innovations, and patterns of behavior of citizens of developed market economies – well linked to shopping centers and shopping in general – have been accepted (this can be considered a form of wave diffusion). Generally, the trend in post-communistic countries is a delay in the commercialization or decentralization of retail when compared to more developed European countries.

(ii) Brownfield sites have been the prevailing choice for the construction of new shopping centers for 8 years in the Czech Republic and for 6 years in Slovak Republic. Although the same cannot be said for Slovak Republic, not a single greenfield shopping center has been built in the Czech Republic since 2009. The move away from building shopping centers on greenfield sites is perceived mainly positively by both the professional and non-professional public. Property development agencies have realised the importance of historical areas and the inner centers of cities as places where there is a traditional concentration of customers. The earlier preference for building huge shopping centers on peripheries has declined and there has been a clear shift towards the development of brownfield sites rather than greenfield sites. There are two types of post-socialist countries (Maksić 2016). The first type is similar to developed European countries, where there have been attempts made to include large-scale retail building regulations into their legislation (Hungary and Poland). The second group includes countries that have still not adopted regulations in this area (Albania). Even though there has been no retail impact assessment regarding the building of shopping centers in the Czech Republic, or in Slovak Republic, in recent years the Czech Republic can be perceived as an example (building of shopping centers on brownfields). In the context of a lasting building boom, Slovak Republic still hasn't reduced its greenfield building, despite the fact that the existing trend leans toward building on brownfield sites.

(iii) In the period between 1997 and 2015, you can see a general trend from a prevalence of out of town shopping center building in the first stage (1997–2003) to an increasing frequency of out of center and edge of center building in the second and third stages (2003–present). This trend is more overt in the case of the Czech Republic and it is closely correlated to the preferred development of previously used areas, i.e. brownfields sites. However, peripheries are still attractive for shopping center localization (Nagy 2001).

(iv) Small shopping centers are the most frequent type in both countries. Shopping centers with a GLA smaller than 40,000 m^2 represent a share of over 80% in the Czech Republic while this share exceeds 90% in Slovak Republic. The creation of very large shopping centers (80,000 m^2 and more) is a phenomenon of the beginning of this century and is likely not to be repeated. The market is saturated to a certain extent and trends in recent years show the consolidation of already established (trans)regional centers, their remodelling, modernization or expansion, or alternatively the filling of those gaps that do exist in the market with smaller centers. In line with the comparative economic development of both countries during the last decade, we can expect the differences to equalise in the near future. The area of the GLA may become more highly regulated by local municipalities, which could deter retailers and developers. On the other hand, the area of shopping centers is a fundamental element determining attractiveness (Kunc et al. 2016).

In the context of planning it is necessary to define and adopt measures for the development of shopping centers in both countries. There is no unifying classification involving planning in either of these countries, nor is there any definition of the standards or regulations of their construction (Koželouh 2010). Nevertheless, the building of shopping centers is not just about seizing quality land (Spilková and Šefrna 2010) but about the impact on local retailers. It is this aspect of the regulations coming from local administrations that should be part of city planning and development.

Erkip and Ozuduru (2015) have noted the impacts of shopping center development within an urban policy perspective. The impacts of shopping centers on (1) public spaces, (2) urban sprawl, (3) sustainability and (4) traffic-induced environmental problems are among the major issues we need to consider. These ideas show the possible course of shopping centers research in post-communistic countries. We presume that the development of shopping centers is not finished. Another point to consider is that alternative retail is typical for both countries, as we can see, for example, in the case of farmer's markets (Spilková et al. 2013).

It is possible to extrapolate, from the outcomes of this comparative study, shopping centers development for some of the other post-socialist countries in central and eastern Europe. The Polish market is still dynamic in central Europe and along with the Turkish and Russian markets has become the European leader in building new shopping centers. The rest of the former Eastern Bloc has gradually stabilized (in particular Romania and Bulgaria in recent years), whereas the countries of former Yugoslavia (e.g. Serbia, Croatia) have their building boom yet to come (European Shopping Centre Development Report; April 2016). However, in a non-regulated market we have to take into consideration a certain number of exceptions and the idiosyncratic tendencies of developers that can always be found in every region.

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RESUMÉ

Vývoj a klasifikace nákupních center v České a Slovenské republice: komparativní analýza

Příspěvek se zaměřuje na analýzu, komparaci a interpretaci podobností a rozdílů mezi nákupními centry v České a Slovenské republice v časové, prostorové a funkční struktuře, na podmínky jejich vstupu a etablování se na obou trzích. Na základě dat za nákupní centra v období let 1997–2015 bylo provedeno jednak hodnocení vývoje výstavby nákupních center s ohledem na typické etapy a dále klasifikace center podle tří základních kritérií: i) geneze, ii) lokalizace a iii) velikost pronajímatelné plochy. Komparace a interpretace přinesly následující základní zjištění: (i) S ohledem na výstavbu nákupních center je možné pozorovat obdobné trendy ve vývoji nákupních center v České a Slovenské republice s určitým fázovým zpožděním Slovenské republiky v rozmezí dvou až čtyř let (vlnová difúze Z–V). (ii) Výstavba nákupních center na dříve využívaných územích (brownfields) převládá v obou zemích již osm let. Na rozdíl od Slovenské republiky však v České republice nevzniklo od roku 2009 jediné nákupní centrum na zelené louce, což je možné akceptovat pozitivně. (iii) V období let 1997–2015 je možné prokázat všeobecný trend ve smyslu iniciační výstavby nákupních center na předměstích a následný přesun na okraj centra města (vnitřní město), resp. k centru města. Této skutečnosti pomohl nejen tlak ze strany politiků a veřejnosti nezabírat další kvalitní zemědělskou půdu, ale developeři si také uvědomili přirozenou zákaznickou sílu městských center a nejbližšího okolí. Tento trend opět je zřetelnější v případě České republiky. (iv) Ve sledovaném období se nejčasteji stavěla malá nákupní centra, zřídka velká nebo velmi velká nákupní centra. Trendem v obou zemích je snižování velikosti pronajímatelné plochy pro nově otevřená centra, zřejmý je také pokles počtu nově otevíraných nákupních center související s nárůstem průměrné prodejní prodejní/pronajímatelné plochy. Převládá spíše remodelace, modernizace či výstavba menších center, které vyplňují případné mezery na již poměrně nasyceném trhu. Se srovnáváním ekonomické vyspělosti v posledním desetiletí lze do blízké budoucnosti očekávat i vyrovnávání uvedených rozdílů v obou zemích, jež patří v prostoru postsocialistické střední a východní Evropy k maloobchodně nejstabilnějším.

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