SHOPPING CENTRES AND SELECTED ASPECTS OF SHOPPING BEHAVIOUR (BRNO, THE CZECH REPUBLIC)

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ABSTRACT:
The economic and social changes in the Czech Republic after 1990 have reflected themselves also in the shopping habits of its inhabitants. Cultural habits have already changed profoundly with several generations. New shopping centres are far from being used solely for shopping as their character urges and motivates customers towards entertainment and spending leisure time. Thus, a whole-day visit to a shopping centre involving shopping for goods as well as consuming other services, such as visiting restaurants and entertainment facilities, is no exception. The Czech population has rapidly become accustomed to this shopping model, generating new shopping centres and retail parks even in smaller municipalities. It is the aim of this article to introduce and discuss selected results of our investigation into the shopping behaviour of the visitors to the shopping centres at the edge of Brno within the context of the recent development of shopping centres and retailing in the Czech Republic.

Key-words: *shopping centres and their development, shopping habits, commuting to retail shops, Brno agglomeration, the Czech Republic.*

1. INTRODUCTION

The concept of suburban shopping centres of the "contemporary type" has developed in the USA only after World War II. Northgate in Seattle, WA, one of the first post-war shopping centres, has become a pioneer in greenfield construction - it was opened in 1950. In the mid-1950s you could come across fully roofed-in/closed-in shopping centres, in contrast to the former open-air premises, and these have started to draw merchants and customers away from city centres (*Scott, 1970*). In the USA, the 1970s and the 1980s were characterized by attempts to limit the negative impacts of greenfield shopping centre constructions on the commercial functions of city centres. At the same time there appeared a new concept called *mega mall*, located at the city edges, close to large city agglomerations (*Buttler, 1991*).

Shopping centres appeared in Europe about 10 years later then in the USA. They were smaller; the greenfield constructions were not so large and didn't cause depopulation of city centres like in the USA. The 1960s in Western Europe saw the construction of greenfield shopping centres close to large motorway intersections; these were single-story buildings. Significant construction of shopping centres occurred also in Scandinavian countries, mostly in the form of roofless pedestrian streets between buildings and close to subway

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stations. Ground-floor parking lots were a matter of fact (*Scott, 1970; Szczyrba, 2005*). The greenfield constructions later moved to city urban areas and to satellite towns. Customers without cars were also given consideration. These were two-story centres with hotels, leisure time zones and other facilities inside, which could also be used for different purposes then only as sales units (*Guy, 1998b; Pražská and Jindra, 2002*).

The next stage of the 1980s and the 1990s preferred mostly mid-size centres with floorspace of 20 - 40 thousand sq m. The development continued in the 1990s mostly through modernization and expansion of the previously built centres. While in the economically developed countries you could see mostly filling in of gaps in the market and the emphasis was therefore not just on the mere growth of the lettable area, the transitional countries of Central and later Eastern Europe witnessed an almost uncontrollable boom. Over the last ten years, shopping centres have become a real phenomenon in the Czech Republic. They are no longer that unknown novelty of the late 1990s when the first of them started to emerge, and they seem to enjoy a great popularity today. As a symbol of globalisation of the current Czech retail business, they are owned and managed by multinational retail chains (*Szczyrba, 2005*).

In terms of successful operation, the combination of renters operating in the shopping centre is essential. Formerly, the shops selling food were the core of the shopping centres. However, the development of decentralised shopping centres encouraged a new trend and many shopping centres started to function as social and entertainment centres and also as places for meeting people. They started to offer many nonretail activities, such as recreational and entertainment facilities (multiplexes, various demonstrations and activities organised for customers as part of marketing strategies etc.) and sports facilities (e.g. fitness centres, swimming pools and ice rings).

To categorise shopping centres may appear rather difficult as there is no unanimous agreement on either classification criteria or categories. Yet, they can be classified according to several criteria, including their size or organisation, type of ownership and purpose of visits to the shopping centre, or according to the classification based on centrality within the service functions. The actual location of the shopping centre represents a very important classification feature; we can distinguish between the so called *edge-of-centre*, *out-of centre* and *out-of-town* shopping centres (*Guy, 1998a; England, 2000*).

In a simplified manner, shopping centres can be divided into those operating in the inner structure of the cities, and centres located on the periphery or in the close proximity of the cities. The former group reflects the factor of location rent and input investments in their goods and services' offers and prices. These are more expensive inner city shopping centres constructed in the process of revitalisation of the abandoned or otherwise devastated areas of former factory and railway station premises. The main advantage of the peripheral shopping centres is enough space for the retail as well as nonretail areas including those relevant for the shopping centres' operation (transport infrastructure, parking lots) (*Moody, 1996; Guy, 1998a*). This article would like to discuss these peripheral centres.

The above stated information clearly implies that shopping centres are not only able to gravitate in a certain area, i.e. generate a broad outer and inner retail gravity model, but they are also able to stimulate increased tourism towards their locations because of the range of retail as well as nonretail functions they offer. Thus, shopping centres significantly contribute to the development of the new forms of city tourism and recreation and they are changing the existing view of the current city tourism, resp. commuting to cities for shopping (*Szczyrba. 2002, Dallen, 2005*).

Cities have always served as the natural centres of shopping tourism but until recently only with respect to their central locations, offering the tourists – customers a wide range of specialised shops. In the post-industrial phase, cities have undergone a spatial and functional transformation producing new city centres (*Matlovič, 2000; Sýkora, 2001; Węcławowicz, 2003; Dallen, 2005*). It should be noted that it was the emergence of shopping centres themselves that caused this transformation, changing the existing view of the monocentric functional organisation of the cities. What is more, this trend is accompanied by changes in the concept and content of city tourism, receiving a new impulse with the development of large shopping centres (*Spilková, 2003*). A number of scholars have noticed this phenomenon; however, their studies are limited either to declaring its existence (*Kowalczyk, 2005*), or to concrete cases in Canada and the USA (*Butler, 1991; Hahn, 1997*) or, possibly, in new federal states in Germany (*Jürgens, 1994*). On the contrary, there are many more studies dealing with the aspects of spatial locations and parametric representation of the retail potential of shopping centres for practical purposes of spatial planning (*Brandenburg, 1985; Brown, 1992; Guy, 1995, 1996, 2006; England, 2000; Spilková, 2010; Gibbs, 2012*).

Another equally important aspect related to the operation of shopping centres is the relation between the spatial structure of retail business and *consumer behaviour*, which is also the basis of the concept of behaviour geography. Originally, it was supposed that individuals preferred minimal shopping mobility and generally behaved very economically. Later, it became clear that a number of consumers chose their shopping place also according to different factors, e.g. the range of goods, quality personnel, services offered, size, attractiveness and the atmosphere in the shop. Practical experience seems to indicate that people do not respect the logic and behave irrationally (*Walmsley and Lewis, 1984*).

Generally, it is possible to claim that understanding the consumer behaviour patterns is a key question of retail business operations in the contemporary concept of retailing - this concerns not only location but also organization and operation of retail establishments of all sizes and operating levels. Every vendor needs to know his clients and therefore they purposefully exploit client data (data from customer cards, surveys at cash counters, consumer behaviour surveys performed by professional agencies, etc.) for further planning within the frame of company marketing and management. Customer monitoring is a subject of sophisticated behavioural surveys analyzing not only consumer shopping habits with the aim of creating a typology (according to gender, age or social status), but they also monitor shoppers' movements within the shopping centres (using camera systems). It turns out that these movements are not random but organized (*Spilková and Hochel´, 2009*). Large shopping centres are suitable areas for surveys aimed at more detailed understanding of consumer behaviour variants that continually develop due to the gradually transforming retail environment (*Kopalle, 2010; Trivedi, 2011*).

2. SHOPPING CENTRES IN THE CZECH REPUBLIC

At this place we would like to briefly introduce the situation concerning shopping centres in the Czech Republic, in the European context. The number of European shopping centres (about 6500) increased by 71 in the first half of 2011 - this introduced additional 2.1 million sq m of Gross Lettable Area (GLA) of the shopping centres. The area is estimated to reach 6.8 million sq m by the end of 2011 and the second half of the year will be more pronounced just like in the previous years. This is a predicted growth by one quarter in comparison to 2010. 2010 was also probably the year that saw the end to the shopping centre GLA decline related to the worldwide economic crisis and the preceding long period of growth (maximum in 2008 - 9.5 million sq m). As of mid-2011 the total GLA in European shopping centres reached 135 million sq m (*Cushman & Wakefield, 2011*).

About 90% of shopping centre capacities are localized in Western Europe, the remaining 10% is localized in Central and Easter Europe. This situation will gradually level out, though, in association with the transfer of the construction boom eastwards. Just Russia and Turkey will account for 41% of the European new shopping centre area growth in the second half of 2011 and in 2012, according to Cushman & Wakefield, while the market is far from saturated in Ukraine, Poland, Romania, Bulgaria and most countries of former Yugoslavia.

The Czech Republic is probably beyond the zenith of the new shopping centre construction boom and, just like in many other European countries, it will search for other solutions (expansion and modernization of the current centres) or concepts (retail parks, smaller hypermarkets and supermarkets). Only one shopping centre was opened in the Czech Republic in 2011 and there has continued the decline of new constructions started in 2008. In the European context the Czech Republic is still under the EU average of almost 200 sq m of GLA per 1000 inhabitants (see **Fig. 1**). This fact implies that there is still room for doing business in the retailing field.

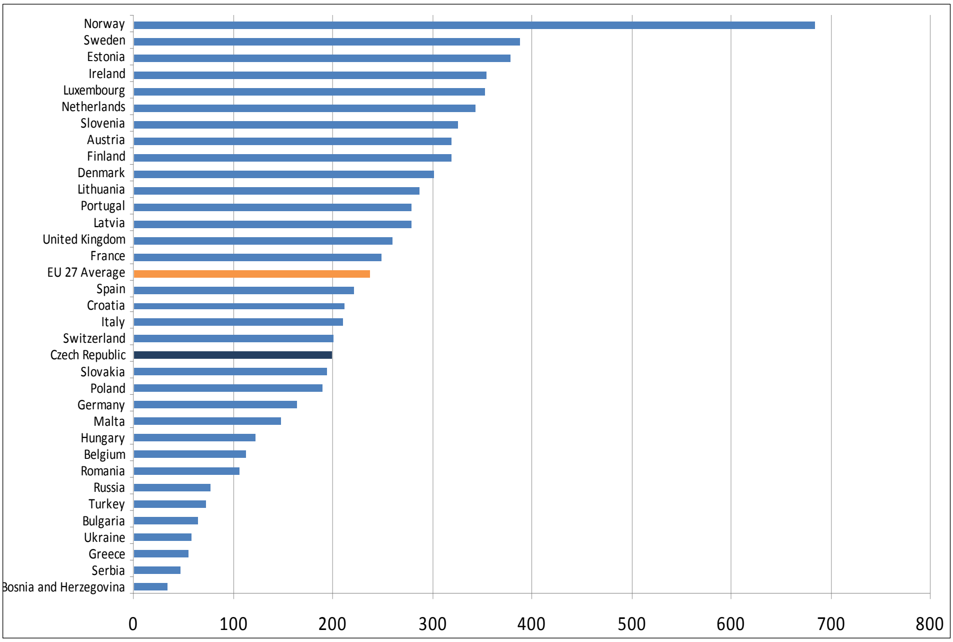

Fig. 1 Gross Lettable Area of shopping centres in sq m per 1000 inhabitants in European countries. *(Source: Cushman & Wakefield, 2011; Our own modifications)*

Since the classification of shopping centres is rather a complicated and ambiguous matter (*Guy, 1998*), we will use, for the purpose of defining the shopping centres, the methodology of the International Council for Shopping Centres (ICSC), or rather of Cushman & Wakefield, that defines a shopping centre as *a centrally managed, purpose-built retail facility, comprising units and communal areas, with Gross Lettable Area of over*

5000 sq m. Factory Outlets and Retail Parks are excluded (*ICSC, 2012; Cushman & Wakefield, 2011*). According to this definition there are 71 shopping centres (see **Fig. 2**) in the Czech Republic; this number excludes centres with GLA smaller than 5000 sq m, classic department stores built before 1990, large hypermarkets with arcades and outlets.

Their spatial distribution rather clearly reflects the position of the individual cities in the residential system hierarchy of the Czech Republic (clear dominance of Prague, followed by Brno, Ostrava and other large cities, while a minimum of shopping centres are located beyond regional capitals) and the purchasing power of the inhabitants living in the particular regions (e.g. the centres in Liberec and in Cheb are located in close vicinity to the customers from Germany).

Especially at the beginning the developers preferred the simpler way - greenfield constructions - 41 out of the 71 Czech shopping centres were built in this way, thereof 31 were built before 2005, mostly in suburban locations. Only then the attention of the developers focused also on the inner city locations and about 2/3 of the new shopping centres have been opened at formerly built-up locations since 2006. Nevertheless, the greenfield centres have remained more significant considering the offered space (65% of the total lettable area), especially those, that are located in the suburban zones (46%) (see **Fig. 2**).

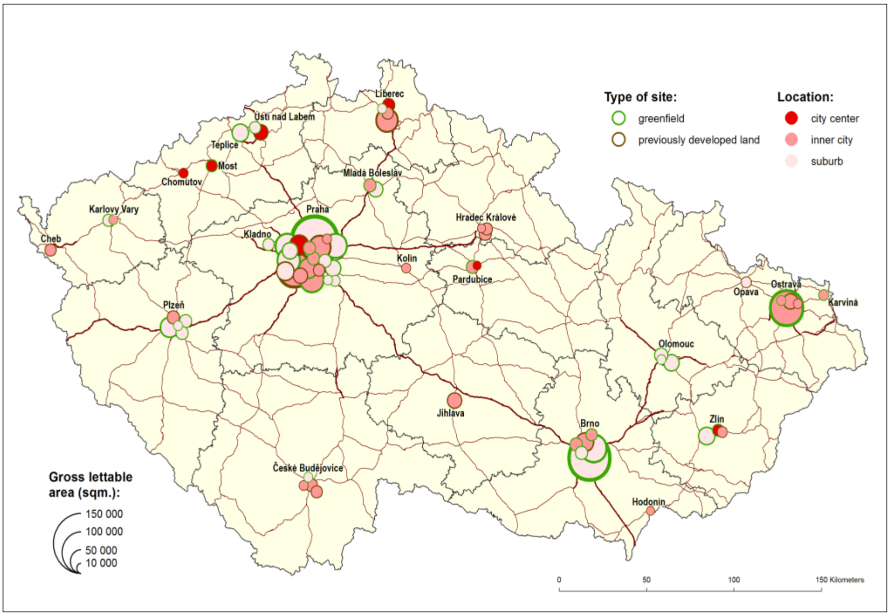

Fig. 2 Shopping centres in the Czech Republic (2011).
(Source: Centres DATA, 2010; our own surve)

3. SELECTED SURVEY RESULTS - SHOPPING CENTRES

The following text is related to the selected results of the retail commuting, retail gravity model and shopping behaviour survey of the Brno agglomeration inhabitants introduced in the article Commuting for Retail Shopping as a Part of the Daily Urban System (Brno, the Czech Republic), published in Geographia Technica No. 1, 2012 (*Kunc* *et al., 2012*), where we discussed especially the daily rhythm of the inhabitants commuting for foodstuffs. In this second article we focus on the shopping centres, where you won't find just the typical regular (daily) commuting rhythm and prevailing demand for food products. Shopping centres are not only in the position of facilities designated for shopping; their function has been gradually moving towards satisfying human needs related to entertainment and leisure time spending.

Methodologically this is the same approach - short, controlled interviews with municipality inhabitants over 15 years of age from the hinterlands of the Brno agglomeration. In total 6300 questionnaires were obtained (from the methodical viewpoint this is a quota-based selection - a purposefully comprehensive survey at the municipality level), the respondent structure was adjusted by sex and age to the average of the South-Moravian region. The survey focused especially on young people of 25 and 35 years of age, respectively, middle generation and people in post-productive age (over 60 and 65 years of age, respectively).

Within the Czech Republic Brno belongs among the cities where shopping centres had been built relatively early, taking into account the character of the Czech retail business transformation and where the first large hypermarket in the country was opened for the public at the end of 1996 (Globus). It could be said that Brno became the place for testing shopping behaviour and the results of many questionnaire surveys that had preceded the construction of the first large-area stores were used for the further specification of large-area retail store expansion in the Czech Republic. As you can see in the following **Table no. 1**, the willingness of customers in Brno and its wider surroundings to change their shopping habits quickly enticed foreign developers to the city to build their hypermarkets and shopping centres.

Table no. 1 ***The largest shopping centres within the functional structure of the retail shopping network in Brno.***

Name	Year of opening	Location	Floor space [m^2]	Number of units	Number of parking places
Globus Hypermarket*	1996	Periphery	13,500	15	1,100
Avion Shopping Park	1998	Periphery	60,000	58	2,550
Olympia	1999	Neighbouring municipality	111,000	220	4,030
Velký Špalíček	2001	Historical centre	5,800	35	80
Futurum	2001	Periphery	19,500	70	1,500
Královo Pole	2004	Wider inner city	17,000	68	860
Vaňkovka Gallery	2005	Inner city	37,000	130	1,000
Omega	2006	Historical centre	3,500	30	0
Campus Square	2008	Housing developments	13,000	52	620

*Note: The Globus Hypermarket is not a typical shopping centre according to standard international definitions. The Globus premises include the Baumarkt hobby market and in the close vicinity you can also find the newly-constructed Bauhaus hobby market. Due to local specifics (Globus is the only large-format facility with very large retail gravity at the northern periphery of Brno) this centre was also included into the survey and into the presented results.

Note 2: The table includes also shopping centres located in the inner city, which were not included in the survey at this stage (localization: Historical centre, Inner city, Wider inner city). Source: Websites of the shopping centres; Centres DATA (2010); own survey.

Shopping centres on the edge of the city feature much larger attraction for the inhabitants of municipalities of the Brno agglomeration than just for basic foodstuffs shopping. Less than a half of the inhabitants of the studied territory (45%) perform a majority of their shopping for foodstuffs here, in comparison to other retail shopping concepts, and this is not everyday shopping but an event frequently connected with other activities (entertainment, leisure). At least one half of respondents commute from the surveyed municipalities to the shopping centres for any form of shopping, service consumption or entertainment (this share grows with shortening travel time from Brno) and therefore let's take a more detailed look at the shopping habits of the Brno hinterlands' inhabitants connected with shopping centres.

A full two-thirds of respondents (67%) replied that they visited large shopping centres at the Brno periphery. Relative frequency of visits declines, as could be expected, with the growing age of respondents; up to 85% of people younger than 35 years visit the shopping centres while only 30% of seniors over 65 years go there. It is quite surprising that the frequency of visits grows with the growing education level of the respondents - almost 90% of the interviewed university graduates visit the shopping centres, while less than one half of the people with primary education does so too. Municipality size has no decisive influence on the decision whether to visit a shopping centre or not; inhabitants of the nearest hinterlands of Brno (within 15 km) go there slightly more often.

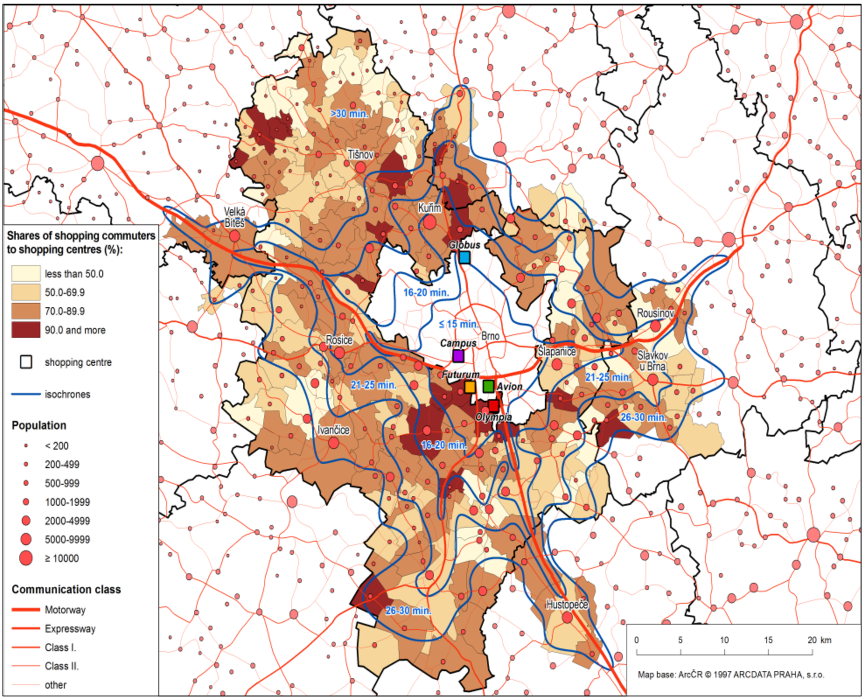

Fig. 3 Intensity of commuting to shopping centres at the edge of Brno.
(Source: Own survey and processing)

If the respondents work directly in Brno or if they are students then the frequency of shopping centre visits reaches 90% of the surveyed sample (see also **Fig. 4**). Respondents working in a municipality or in the close surroundings of a municipality lower the frequency of shopping centre visits to about 2/3. Only less than a half of retirees and mothers on maternity leave, i.e. mostly less mobile and less financially independent people, visit the shopping centres at the edge of Brno.

Fig. 4 The two most significant shopping centres at the edge of Brno - Globus (North) and Olympia (South)
(Source: http://commons.wikimedia.org/wiki/File:Brno-Ivanovice_-_Globus.jpg; http://www.trimo.eu/references/olympia-brno-shopping-centre/)

*Note: Overflowing parking lots and shopping centres at the time of the first significant retail discounts after Christmas are a typical feature of the retail behaviour of (not only) the Czech population.

Photo: Josef Kunc (December 30, 2011).

Almost one-third of respondents declared a frequency of visits to shopping centres at once or more times a month, only one percent admitted daily visits. People under 35 go there the most frequently, while seniors the least frequently. The size of the municipality is not a decisive factor; the closer the municipality to Brno the more often its inhabitants shop in a shopping centre. The course of the week has no decisive influence on the shopping centre visits; people visit the centres slightly more during weekends (39%) than during working days or when needed. Younger respondents visit the shopping centres more often (up to a half of answers) than other population segments - this confirms the fact that the shopping centres are used for spending leisure time and for entertainment at weekends. Inhabitant education, municipality size or travel time from Brno do not play any significant role when deciding about a visit to a shopping centre.

What is the most frequent side event accompanying shopping or a visit to a shopping centre? No connection with working activities or the place of employment has been demonstrated here, as expected, in contrast to shopping for basic foodstuffs. Only 15% of respondents connect their work with subsequent shopping in a shopping centre, a quarter with another activity (most frequently with entertainment and leisure time but also with service consumption) and over 3/5 of inhabitants visit shopping centres with the sole purpose of purchasing a wider assortment of goods. The middle generation, mostly the economically active between 35 and 60 years of age, more frequently connect shopping with a trip from (or possibly to) work than people younger than 35 years, who prefer to combine shopping with the spending of leisure time. Retired people most frequently visit the shopping centres with the sole purpose of shopping. The education of inhabitants, municipality size or travel time from Brno do not play any significant role.

The vast majority of people go to the shopping centres by car (87%); these are mostly people of the middle generation with higher education, regular work habits and adequate financial standing. Younger respondents and seniors also use public transport to a large degree. The smaller the municipality and the farther it is located from Brno, the more frequently the local inhabitants use cars. Younger and middle generations spend more time in the shopping centres; people at a productive age spend the most, as expected. Inhabitant education, municipality size or travel time from Brno do not play any significant role in the classification. The largest motivational factors for a visit to a shopping centre include: wider assortment of goods and wider choice (51% of answers) and money savings (30%), while time savings and activities connected with shopping (e.g. entertainment) surprisingly prevail in only about 10% of respondents.

Fig. 5 introduces the areas of the two most significant retail facilities, from the retail gravity viewpoint, of the Brno agglomeration, where the inhabitants shop and spend their leisure time - Commercial Centre Olympia Brno in the southern (formally beyond the administrative boundary of the city) and Hypermarket Globus in the northern part of the city region. For a community to be included at the map, at least 25% of the respondents in the particular community had to provide positive answers. It is necessary to note that Globus, which is the only such facility at the northern edge of the city, despite its much narrower focus especially on foodstuffs (or due to it), attracts also inhabitants of communities from additional districts located north of Brno and its commuting distance exceeds 60 minutes. Besides good transportation accessibility and missing competition from any other large shopping centre, the shoppers appreciate also a wide assortment and quality of the food products. Olympia attracts, beyond the dominant south and south-west, also communities from the eastern areas of the agglomeration where no shopping centre or any other dominant large-area shop is located. Olympia and Globus therefore fight for customers at the areas north-eastwards from Brno, where the answers of respondents, i.e. the actual decisions of the inhabitants "where to do the weekend shopping" overlap.

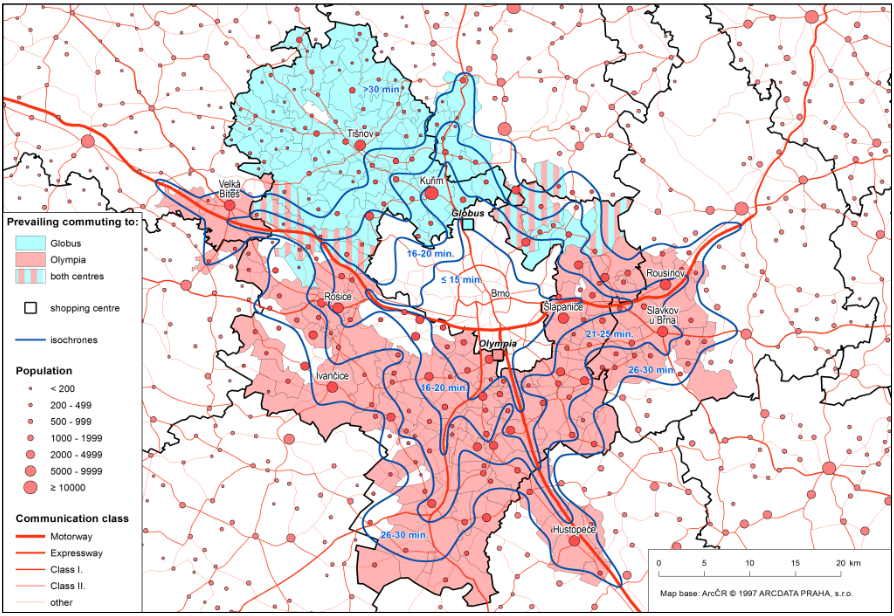

Fig. 5 Prevailing commuting to the two most significant retail facilities at the edges of Brno - Olympia and Globus. (*Source: Own survey and processing)*

4. DISCUSSION AND CONCLUSION

The results of the survey imply, among other things, that shopping centres at the edge of the city feature much larger attraction for the inhabitants of municipalities in the hinterland than just for basic foodstuffs shopping. In most surveyed municipalities about one half of inhabitants (respondents) commute to shopping centres for shopping (not only foodstuffs), services and entertainment. Municipality size has demonstrably no decisive influence over the consumers' decisions to visit shopping centres. Under the Brno conditions, customers from the nearest hinterland of Brno (within 15 km) commute slightly more. Younger customers, up to 35 years old, commute most frequently, especially on weekends, seniors commute the least and they are typical by performing "pure" shopping, without using any additional services. This is nothing surprising from the basic knowledge standpoint since increased consumption is connected with increased social status. The analyses further imply that the closer the municipality is to Brno the more often its inhabitants go to shop in the shopping centres in the city. The connection between the place of employment and visits to shopping centres is rather small when compared to shopping for basic foodstuffs.

Most respondents drive to the shopping centres in their cars, especially the middle generation. The smaller the municipality and the farther it is located from Brno, the more frequently the local inhabitants use cars. This is a logical implication yet it is necessary to note that the character of the shopping centres does not allow almost any other choice. They have been built mostly as shopping places for motorized customers, which confirm some researches (*Brown 1991; Kulke, 1992; Marjanen, 1995; Wagner and Rudolph 2010*). Younger and middle generation customers spend more time in the shopping centres since for them these modern shopping centres with a wide range of commercial lures are very attractive places (also *Teller 2008*). Some young people, called *"mall junkies"*, are getting to stay in the shopping centre directly dependent (also *Underhill, 2004*). When considering additional data, you can see that people in the productive age feature highest spending and that education, municipality size or travel time from Brno do not play any significant roles. A wider assortment of goods and therefore wider choice and seemingly also money savings (only when converted to a specific quantity unit, though, because in reality the customers purchase more goods than they originally intended) are the greatest motivational factors for visiting a shopping centre.

The presented results are, together with the results of the survey presented in the above-mentioned article (*Kunc et al., 2012*), that had preceded this one, a complex output from large-scale surveys of commuting, retail gradients and shopping habits, or rather of commuting for retail shopping in the municipalities of the loosely defined Brno agglomeration, which has in reality a significant influence on the shaping of the daily urban system of the city. The results have to be approached critically and with respect but also with a certain amount of tolerance when making assessments and interpretations. Comparison with other territories could be performed only if a practical survey was to be performed.

In the context of the worldwide economic crisis and the retailing development of the past years it is rather difficult to predict the direction the European retailing market will take, whether it will grow again, stagnate or keep declining. Important figures at the retailing market, no matter whether these are the retailers themselves, developers focused on retailing or banks and investors, rather agree over the perspective for the coming years. Real boom will mostly apply to the countries of Eastern Europe, since the retailers and developers in Western Europe and partially also in Central Europe (including the Czech Republic) will consider remodelling their commercial centres to succeed in the ever harsher competition (*Cushman & Wakefield, September 2011*).

The past three years certainly were not dizzying when considering the performance development of the Czech retailing market. Construction of new shopping centres was in significant decline, several brand names left the market or reduced the numbers of their shops and there also grew the differences between the successful and the unsuccessful shopping centres. Retailers also had to react more flexibly to the changes in consumer behaviour, which are essentially based on the planned or realized measures at the level of public budgets, which already have had and will have both direct and indirect impacts on family budgets and consequently on the demand of the end consumers. This situation applies not only to the Czech Republic but also to other European countries. Apart from the economic crisis the retailers have to face the rapid entry of the Internet into the retailing business but this phenomenon would have appeared even without any economic crisis.

Despite all signals and manifestations of the crisis, the Czech shopping centres, and the retailing field in general, haven't been significantly affected. The market cleared up, the shopping centres proved to be economically flexible institutions, which, under good asset management, provide very good investment appreciation for both their owners and investors. Moreover, the Gross Lettable Area per the number of inhabitants, when compared to the developed parts of Europe, indicates future possibilities. Coming years will show whether the position of retailing in the globalized economy is really as strong as it currently appears to be.

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