COMPETITION BETWEEN AUPARK SHOPPING CENTER AND AVION SHOPPING PARK

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ABSTRACT - This paper provides an overview of the establishment and historical development of shopping centres in Bratislava, Slovakia. In the framework of a case study we also describe the competition between Aupark and Avion Shopping Park, the two largest shopping centres in Slovakia. Our analysis is based on a field research and on a desk research as well. In the framework of the case study, 300 questionnaires were filled in, 150 in each centre.

Keywords: shopping centres, competitiveness, historical development, Bratislava

DEVELOPMENT OF SHOPPING CENTRES IN SLOVAKIA

Shopping centres in Slovakia have a short history. While their development in the neighbouring Hungary started already in 1976 by the opening of the Skála and Flórián in Budapest in 1976, the first shopping centre was established in Bratislava, Slovakia, only in 2000. The Prior department store chain can be considered as the predecessor of the present shopping centre network in Slovakia. Prior had stores almost in each bigger town. The philosophy of these stores was to provide everything in one place. The majority of Prior department stores have been wound up by now. Only a few have been transferred and are still open, such as the ones in Bratislava, Žilina and Komárno. Currently, there are 20 shopping centres run in Slovakia. One third of them can be found in the most developed region of the country, i.e. in Bratislava and in its direct attraction zone. The explanation for this phenomenon is that 34% of the country's GDP is generated here. What is more, 50% of the FDI arriving to Slovakia is concentrated in the same region. The first shopping centres in Bratislava (Danubia, Tatra Centrum and the Pólus City Center) were opened in 2000. In 2001, other towns also became homes to further centres, such as Košice (Cassovia and Optima) and Žilina (Dubeň). The following years saw the opening of even more shopping centres. At present there are shopping centres in the following Slovak towns: Bratislava, Košice, Banská Bystrica, Trenčín, Nitra, Trnava, Martin, Žilina and Poprad.

Spatial structure of Bratislava

The city of Bratislava has a long history. Following the establishment of the Hungarian state it was considered to be the gateway to western civilization. It belonged to different countries and its importance also changed throughout history. The fact that it is situated between Budapest and Vienna has largely influenced its development. Nowadays, as the capital of Slovakia, it has an important public-administration, economic and cultural role. Bratislava has the highest average wage in the country, and it is also the most densely populated area in Slovakia.

The most important units of spatial structure in the capital are the following:

- the historical town centre, the old town
- Obchodná Street (merchants' street)
- shopping centres situated around the old town
- the markets of the town

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The old town (Staré Mesto) is the most beautiful part of the capital. It is earmarked with beautiful buildings, which are signs of the city's rich history. A large number of catering and entertainment facilities are located there. The target segment of retail units in this part of the city is made up of foreign visitors and of Slovak customers requiring services of a high standard. There are a large number of designer stores in Obchodná Street; however, this high street lost its importance significantly after new shopping centres had appeared in Bratislava.

Shopping centres in Bratislava

The first shopping centres, namely Danubia, Tatra Centrum and Pólus City Center, opened in 2000. These were followed by Aupark opened in 2001, by Avion Shopping Park in 2002 and by Shopping Palace in 2004. The newest centres are Yosaria Plaza, River Park and Eurovea, which was opened in 2009. Danubia was the very first shopping and entertainment centre, which had its own hypermarket. It opened its gates in 2000.

Figure 1. *Danubia*
Source: www.oc-danubia.sk

Danubia is accessible by public transport or by car. More than 1,300 cars can be parked in its car park. The centre was built in an L shape and the parking lot is attached to it. It has a shop floor of 30,000 square metres with more than 40 different stores. There is a hypermarket, home furnishing stores, shops selling sports equipment, clothing, as well as a fitness centre, cafes, restaurants, etc. There are also service-based units such as hairdressers, shops of mobile providers and banks.

Tatracentrum, opened in 2001, was also one of the first ones. It is a multifunctional strip mall, which has stores and offices as well. With its shop floor of 29,926 square metres, it is situated in the very centre of Bratislava, opposite the presidential palace. The centre's favourable location largely contributes to the number of customers who visit it. The ground space of the building is 3,647 square metres. The shops are located on the ground floor, and there is a three-storey car park in the basement. 320 cars can be parked in the 10,000-square-metre garage. This significantly contributes to the convenient shopping experience of customers. The most important tenant of the establishment is Tatra Banka, which occupies the remaining seven floors of the building. Among the 17 stores that are situated in the centre, there is a Drogerie Markt store, a Samsonite store, a Café Nescafé and a Delvita supermarket.

Figure 2. *Tatracentrum*
Source: www.tatracentrum.sk

Pólus City Center, which opened in November 2000, is one of the first shopping centres in Bratislava. This was the first modern shopping centre in the city to offer shopping and entertainment facilities in one place. It is situated in the eastern part of Bratislava, in a quarter called Nové Mesto. There are also other facilities in the vicinity of the shopping centre where further entertainment and recreational opportunities are offered, such as a football stadium, tennis courts, a spa and the Kuchajda lake. The old town is situated only three kilometres away. The total shop floor of this second-generation shopping centre is 40,278 square metres and 2,000 cars can be parked in its car park. The centre was built in such way, so that it can offer convenient shopping for those coming from the city and for those from its vicinities as well. It has some 170 stores and a large number of service-based units. The most important tenants are Kenvelo, Gameworld, Datart, Mango, Mexx, Sports 2000, Baťa, T-Mobile and the Panta Rhei bookstore. The food store of the shopping centre is a Carrefour hypermarket on 16,075 square metres.

Figure 3. *Pólus City Center*
Source: www.poluscitycentre.sk

One of the most visited shopping centres of Bratislava is situated near the right bank of the Danube, not far from Bratislava Castle and the Nový Most (New Bridge) over the Danube. The number of its visitors is boosted by the fact that Incheba, a large convention, trade fair and exposition centre is located nearby, which hosts 35 fairs and expositions annually with 4,000 exhibitors and more than 600,000 visitors. In the 19th century, the riverbed of the Danube on the territory of present-day Bratislava widened out and islands of small and medium size were formed in the river, which changed rather quickly. Consequently, the town lost some of its territories. In 1774, the town council had a public park built on the right bank of the river, which was one of the first public parks in Europe. It was in the ownership of the town, and numerous plants brought from other parts of the world could be seen there. The baroque park was destroyed at the beginning of the 19th century, since the trees were cut down and used for the construction of ramparts against Napoleon's army. Later, the park was rebuilt and named Au-Park (*die Au* - German word meaning *meadow or grazing ground*).

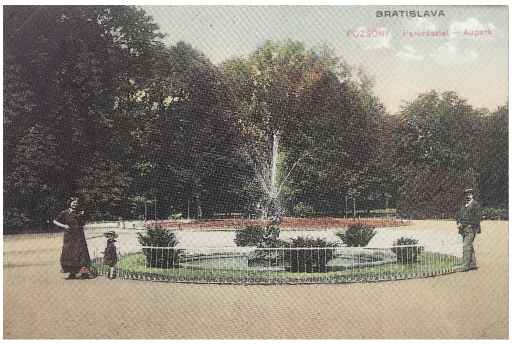

Figure 4. *Aupark in the olden days I.*
Source: Aulife, Bratislava 2008, p. 6

Figure 5. *The Frencziek Tower in the park*
Source: Aulife, Bratislava 2008, p. 7

Figure 6. *Aupark in the olden days II.*
Source: Aulife, Bratislava 2008, p. 7

Nowadays, Aupark Bratislava Shopping Center serves a similar purpose as the park used to: not only does it offer a shopping opportunity, but it also serves recreational and entertainment purposes. It serves not only Bratislava residents but customers from the capital's attraction zone as well. Aupark, opened in the autumn of 2001, lies on 11 hectares. It was expanded in 2002. A 12-room multiplex cinema and an 18-lane bowling alley were added to it. Statistics show that the turnover of the shopping centre increased by 15% after the cinema had been opened. Aupark is a 100,600-square-metre shopping centre, and it cost approximately 133 million euros. At the time of its construction return on investment was expected to take eight to ten years. Aupark is one of the biggest and most beautiful shopping centres in Slovakia. From morphological point of view, the shopping centre is a cluster centre; the shops and units are accessible from the connecting corridors.

Figure 7. *Aupark nowadays*
Source: own photo

Avion Shopping Park was opened in April 2002 as the fifth shopping centre in the capital. It is situated near the D1 motorway, only 2 kilometres from Bratislava airport. This centre also belongs to the category of regional centres. There is an Ikea store and a McDonald's very close to it. The building of a children's playground was considered to be of high importance during the planning of Avion. This playground is very popular with families that do their shopping there. The centre offers opportunities for playing for all age groups of children. Small children can play in a playground, which is very modern even in European measures. The children's corners next to the cafes are constructed of soft materials; thus, parents can enjoy their cup of coffee after shopping while their children play safely in one of the corners. Older children can play with remote control cars on the car track, or can play chess on the huge chess board. There is also an ice skating rink there. Besides a traditional cinema there is also an IMAX 3D cinema, which provides truly authentic pictures of life in the sea and life in the savannah. There is also a special cinema for children, where they can enjoy cartoons in a colourful environment free of charge. The shopping centre was expanded by 12,000 square metres in 2008, which cost 24.9 million euros. The total size of Avion Shopping Park together with the IKEA store reaches 84,000 square metres and its car park can receive 3,000 vehicles.

Figure 8. *Shops in Avion Shopping Park*
Source: www.avion.sk/shops

Shopping Palace was opened in 2004. The establishment that has unique architectural features has been built in modern style and looks modern from outside and inside as well. During the design process special attention was given to young generations. This centre differs from its competitors in the design of its corridor that connects the shops to each other. It successfully combines the characteristic features and atmosphere of old palaces with modern architectural solutions. Shopping Palace is situated in one of the most popular areas of the city, near a recreational district called Zlaté Piesky. With its 55,000 square metres of shop floor it is also a regional shopping centre. 3,000 cars can be parked in its car park. Brands like New Yorker, Humanic and Deichman are sold in its retail units. There are more than 100 stores in it. The so called *magnet* tenant of the centre is a Tesco hypermarket, which is open non-stop.

Figure 9. *Shopping Palace*
Source: www.shoppingpalace.sk/sk/o-nas/gallery

Location of shopping centres

The D1 motorway is of major importance in Bratislava's road network. It joins Budapest with Prague. The two most important shopping centres of the city, namely Aupark and Avion, can be found right next to this motorway. Both are situated in the traditional retail zone of the capital (Figure 10). Yosaria Plaza, Eurovea and the already functioning Apollo Business Centre are more similar to department stores than to shopping centres. Figure 10 shows shat the one-kilometre attraction zones of the shopping centres do not cover each other. The three-kilometre attraction zones, however, cover each other to a large extent. There is fierce competition for customers between the zones.

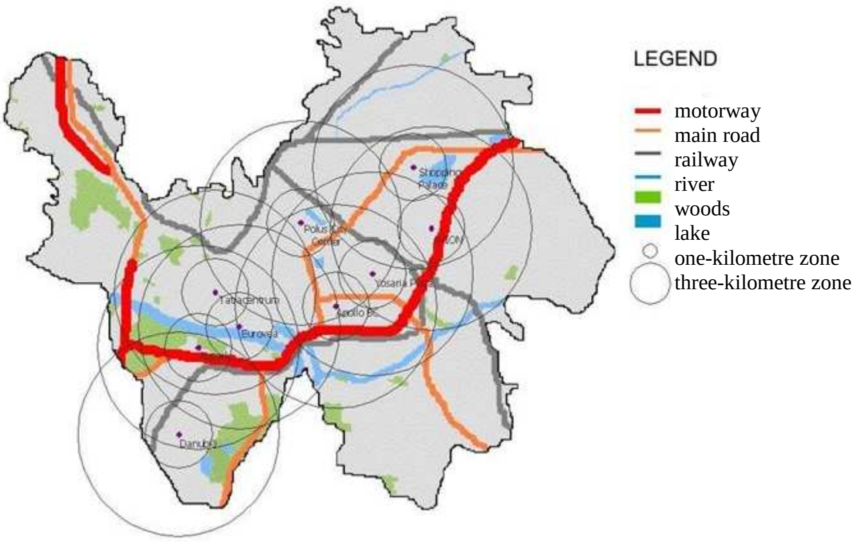

Figure 10. *Location and attraction zone of shopping centres in Bratislava*
Source: author's elaboration

In the following we will provide a detailed analysis of the two main shopping centres of the capital and analyse their competitive position.

COMPARATIVE ANALYSIS OF AUPARK AND AVION SHOPPING PARK

In order to analyse their competitive position we conducted field research both in Aupark and in Avion Shopping Park. 150 respondents were asked about their shopping habits in each one. Respondents were chosen randomly in each centre; thus, the research sample is random, however not representative.

As a result of this, conclusions drawn after the analysis of responses do not apply generally to the centres. The proportion of male and female respondents in the research sample was the following: 59% female and 41% male respondents in Aupark, 48% female and 52% male respondents in Avion. The latter values can be considered equal. Avion is mainly visited by families, since there are a lot more playing facilities for children, and the ice skating rink is also suitable for families who want to spend time together.

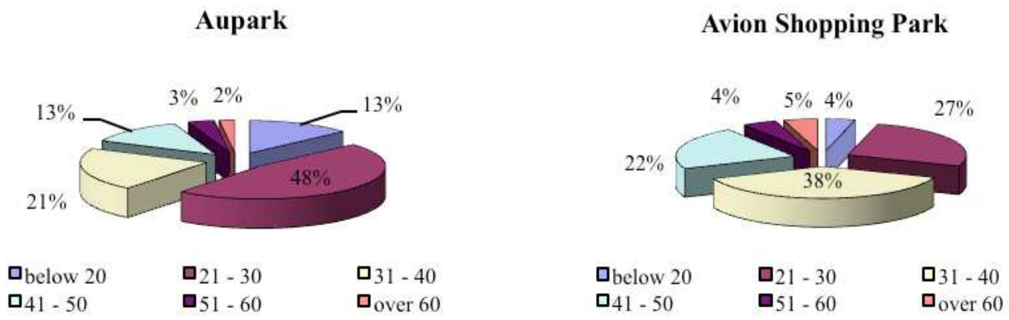

Figure 11. *Age distribution*
Source: author's survey

The age distribution of the research sample was the following (Figure 11): the proportion of young people in Aupark is much larger than the one in Avion Shopping Park, the proportion of under-thirties in Aupark was 61%, while the corresponding number in Avion Shopping Park was 31%.

It must be noted, however, that when the survey was conducted, in the early afternoon, mainly young people visit the centre, i.e. primary-school and secondary-school students. Many of them use the services of fast food restaurants and go to the cinema. Furthermore, some of them come to the centre without a special aim. The reason for this is that shopping centres nowadays also serve as meeting places for people. The Petržalka housing estate is situated in the vicinity of Aupark, so from the blocks of flats it can be reached on foot. The second largest group of respondents in the sample is the one of those between 31 and 40. Due to their income level they are considered to be an important group of customers. 13% of respondents are between 41 and 50, and the proportion of 50 plus respondents was only 5%. This age group is less targeted by shopping centres. The proportion of under twenties in Avion Shopping Park is considerably lower; only 4%. Avion targets mainly families. This is supported by the high proportion of shoppers between the age of 21 and 40, as well as by the fact that 27% of the shoppers are between 21 and 30, and 37% of them are between 31 and 40.

Shoppers between the age of 21 and 50 represent the most significant purchasing power in Avion. The proportion of 50 plus shoppers in Avion is only 5%. This age group do their shopping somewhere else. They do not tend to accept shopping centres as such easily. There are a dominantly high proportion of Bratislava residents in both shopping centres (Figure 12). The proportion of Bratislava residents in Aupark accounted for 83% and in Avion it amounted to 77%. A small proportion of shoppers in Aupark came from Košice and Žilina, while in the case of Avion there were shoppers from the attraction zone of Bratislava (Nitra, Trnava, Dunajská Streda, Senec, etc.)

Figure 12. *Distribution of visitors according to permanent residence*
Source: author’s survey

When comparing the occupational structure of respondents in the two shopping centres, the following were found out (Figure 13): the biggest discrepancy has been noted in the proportion of respondents with a university degree. They make up 12% of respondents in Aupark. The proportion of Aupark respondents with other white-collar jobs is 15%, while entrepreneurs were represented with 12%. The proportion of skilled workers was not much lower either. It accounted for 10%. The share of people with other occupation (homemakers, currently on maternity leave, etc.) was 10%. Retired people accounted only for 2% of the research sample. The remaining 39% is made up of students. The group of students under the age of 20 is made up of secondary-school students. In addition to this group there are the university students who belong to the group of respondents between 21 and 30. On the basis of data collected in Avion Shopping Park it can be concluded that people view this centre in a different way than Aupark. Aupark focuses on the young, while the target segment of Avion is the one of families and of middle-aged people.

The largest group of shoppers in Avion is the one of respondents with a university degree. The make up 26%. This is followed by the group of skilled workers, amounting to 20%. The third biggest group is the one of students with 17%. The proportion of other white-collar workers is 14%. Entrepreneurs account for 11%, and shoppers with other occupation make up 7%. The proportion of retired people is also low in Avion, accounting only for 5%. The location of the shopping centres in question also influences the age and occupational distribution of their visitors and shoppers. As it has already been pointed out the majority of shoppers in Aupark are young, since there are housing estates in its vicinity and the city centre is also not far from it. Avion is situated on the edge of the town. This is partly the reason for the fact that the majority of its shoppers are middle-aged (income level, own car, etc.). The two questionnaire surveys in the two centres were conducted at different times. The questionnaires in Avion were filled in in December, before the Christmas shopping season started. The survey in Aupark was conducted in March.

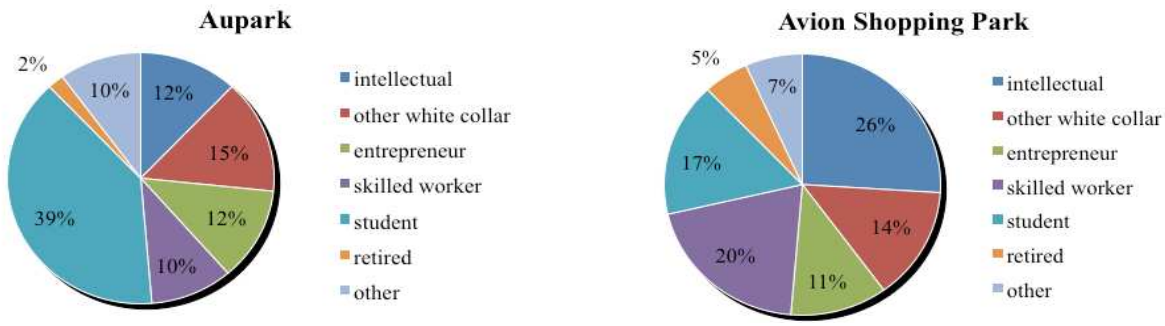

Figure 13. *Occupational structure of shoppers*
Source: author's survey

In the next part of the survey we looked at respondents' aim of shopping. As it can be seen in Figure 14, the biggest difference between the two centres is in food shopping with 31% of respondents in Aupark and only 19% in Avion. The reason for this might have to do with the so called *magnet* tenants of each centre: the food retailer in Aupark is Billa offering favourable price levels, and the one in Avion is Hypernova with a lower choice of goods than Billa. Hypernova has also been said to withdraw from the Slovak market; thus, this might also result in a lower level of services. Due to differences in the mix of clothes shops, clothing items make up a larger proportion of total turnover in Aupark than in Avion. They make up 29 and 23%, respectively.

Figure 14. *Aim of shopping*
Source: author's survey

On the other hand, in terms of services Avion performs better than Aupark. While as much as 19% of respondents use services in Avion (bank, post office, cinema, cafe, restaurant, fast food, travel agencies, shops of mobile service providers), their share in Aupark is 11%. The smallest group of respondents in Aupark (in March) was the one of those looking for electrical goods. They made up only 6%. 26% of visitors to Avion Shopping Park went there to use some kind of service. This is not surprising, since services in Avion are of high standard and therefore frequently used by respondents. In accordance with this, several respondents made comments that Avion is a good place for going to a cafe or for meeting friends. A significant proportion of middle-aged respondents claimed this.

The most popular service of all with the young is the cinema. Besides a traditional cinema there is also an Orange Imax 3D cinema in Avion Shopping Park. It is mostly small children who attend its afternoon projections. Both shopping centres have a considerable proportion of visitors arriving there without any special aim. It hovers between 10 and 15%.

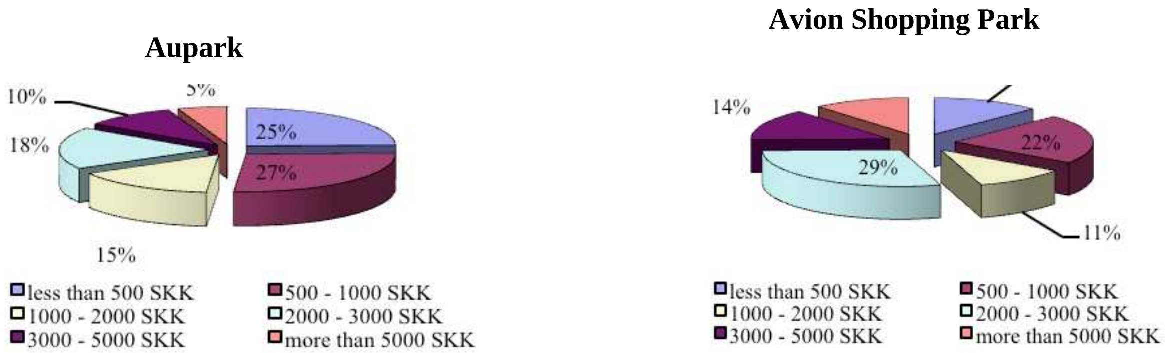

Figure 15. *Value of spending per visit*
Source: author's survey

There are large differences in the values of spending per visit between the two centres (Figure 15). 27% of shoppers in Aupark spend between 500 and 1,000 Slovak crowns (hereinafter referred to as SKK[2]) on goods and services per visit. It must be noted that half of those belonging to this group are students. The number of respondents spending less than 500 SKK is also considerable. The above mentioned two groups make up half of all respondents. Young people mostly use the services of the cinema and of fast food restaurants. In the afternoons on weekdays at around 4 and 5pm, young people are replaced by people who are mostly over the age of 25 and have just finished work. They come to the centre to do their daily food shopping. Spending less than 500 SKK per visit is typical for those under the age of 30. Those spending between 1,000 and 2,000 SKK make up 15% of respondents, who mostly belong to the age group of 31-40. They predominantly buy food, clothing and use services. While, most women in this category buy mainly clothing and food, the majority of men tend to use some kind of service. Those spending between 2,000 and 3,000 SKK per visit are at 50-50 parity regarding gender. The age distribution of male respondents in the category of those between the age of 20 and 60 is equal. Two thirds of women in the same category are between 21 and 30, and the remaining one third is between 41 and 50. The majority of respondents in their twenties purchase clothing. More than half of women in their forties are white collar workers. They mostly shop for clothing, food, electrical goods and they also use services. Those who spend between 3,000 and 5,000 SKK per visit account for 10% of respondents, and they are mostly women. Those spending more than 5,000 SKK make up 5% of the research sample. They mainly belong to the age group between 30 and 50 and are mostly entrepreneurs shopping for clothing.

Respondents' spending per visit among the different spending categories is more evenly distributed in Avion Shopping Park. Those spending less than 500 SKK per visit are at 50-50 parity regarding gender. All age groups are represented in this spending category, though the majority of them are under 30 or over 60. White collar workers, intellectuals and entrepreneurs are not represented in this spending category. They are rather skilled workers, students, retired or have *other* occupation. They mainly do food shopping. A considerable proportion of respondents visit Avion without a special aim. 22% of all respondents spend between 500 and 1,000 SKK per visit. Most of them are between 21 and 30 and are university students. This group mainly uses some of the services offered in the centre. Those who spend between 1,000 and 2,000 SKK per visit account for 11% of respondents. They are mostly intellectuals, white collar workers shopping for electrical goods.

The largest group of female shoppers are women in their twenties. As regards their occupation, white collar workers and students dominate this group. They buy mainly food and clothing. The largest group according to spending per visit is the one of those spending between 2,000

[2] 1 EUR=30.12 SKK

and 3,000 SKK. Their proportion is 29%. This group is also dominated by white collar workers and intellectuals purchasing mainly electrical goods and using services. None of the respondents in this category indicated that they had come to the centre to buy food. Most female respondents are in their thirties and regarding their occupation most of them have white collar jobs. Purchases between the value of 3,000 and 5,000 SKK make up 14% of all. Visitors spending the above amount are in their thirties shopping mainly for clothing. Purchases over 5,000 SKK account for 11% of all purchases. This group of shoppers is made up of mainly male visitors. Most of them are intellectuals, white collar workers and some of them are entrepreneurs.

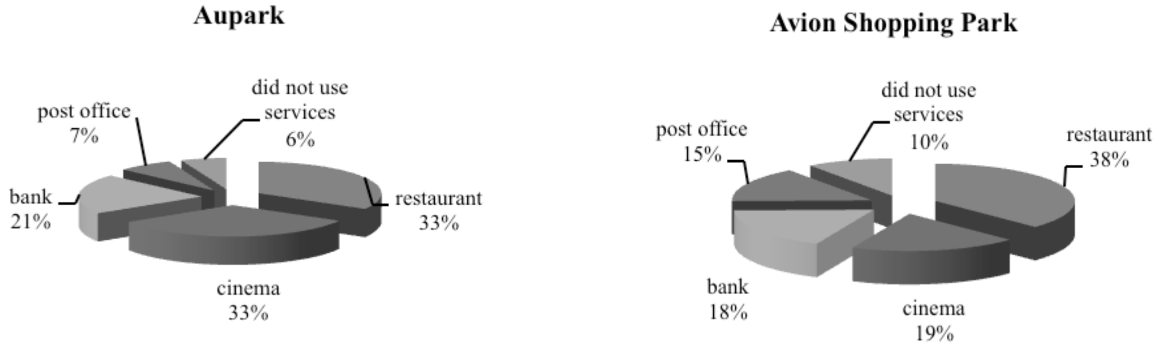

Figure 16. *Distribution of services used*
Source: author's survey

The distribution of used services is similar in the two centres. Although there are minor discrepancies, these cannot be considered significant. The age of restaurant goers in the age group between 20 and 40 is distributed evenly.

There are significant differences in the frequency of visits into the two centres (Figure 17). Nearly half of respondents, i.e. 48%, visit Aupark once a week. They mostly do food shopping there, use catering services and they go to the cinema. The average spending of visitors does not exceed 3,000 SKK. The majority of women in their twenties visit the centre every week. They are mainly students shopping for clothing as well as going to the cinema or using one of the catering facilities.

Figure 17. *Frequency of visits*
Source: author's survey

The most significant difference between the two centres is in the number of daily visitors. While daily visitors to Aupark make up 35% of all respondents, the corresponding proportion in Avion is only 5%. The higher proportion in the case of Aupark might be due to the fact that it is situated closer to the traditional retail centre of the city. Furthermore, it has a large number of restaurants that offer a high standard of services. The cinema also attracts a large number of visitors. On the contrary, Avion Shopping Park is predominantly visited for the reason of food shopping. A higher frequency of visits into Aupark is also due to the fact that it is easily accessible by several means of transport. In contrast, 60% of visitors to Avion can reach the centre only by car (Figure 18).

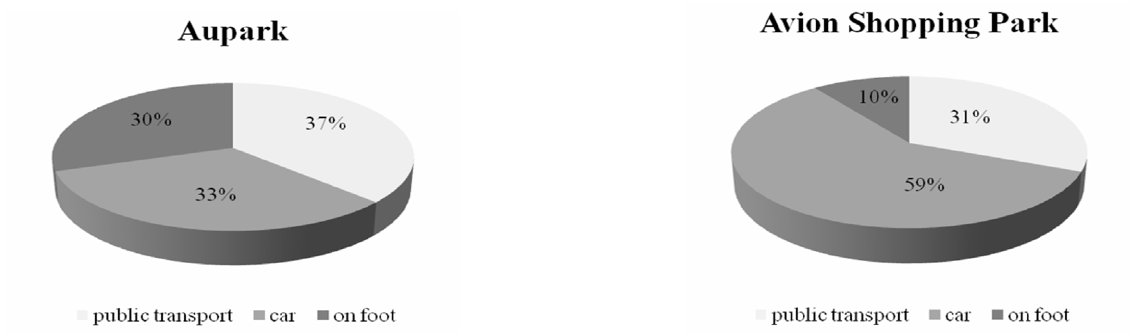

Figure 18. *Means of transport used to reach the centres*
Source: author's survey

The majority of respondents in Aupark stated that Aupark is their favourite shopping centre. Avion's popularity is a little lower; however, its popularity with its own visitors is similarly high. A certain number of shoppers at Avion also visit Aupark as well. This does not apply in the case of visitors to Aupark (Figure 19).

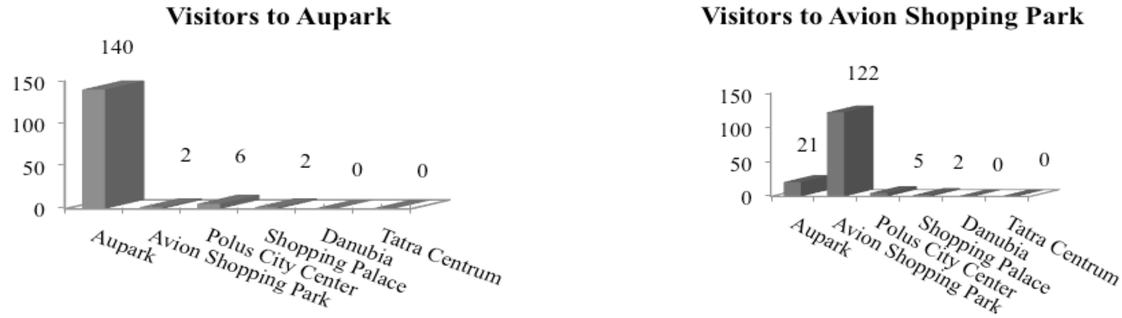

Figure 19. *Favourite shopping centres*
Source: author's survey

Shop mix

The shop mixes of centres prove to be useful during the comparison aimed at finding out which centre is more successful. There are 268 shops in Aupark, and the number of retail units in Avion Shopping Park is 152. The significantly larger shop selection of Aupark puts it into a favourable position in all categories. Therefore, it results in a larger turnover as well. This larger turnover also lies in the fact that shops in Aupark have chosen a good location for their units. Their easy accessibility made both centres popular (Figure 20).

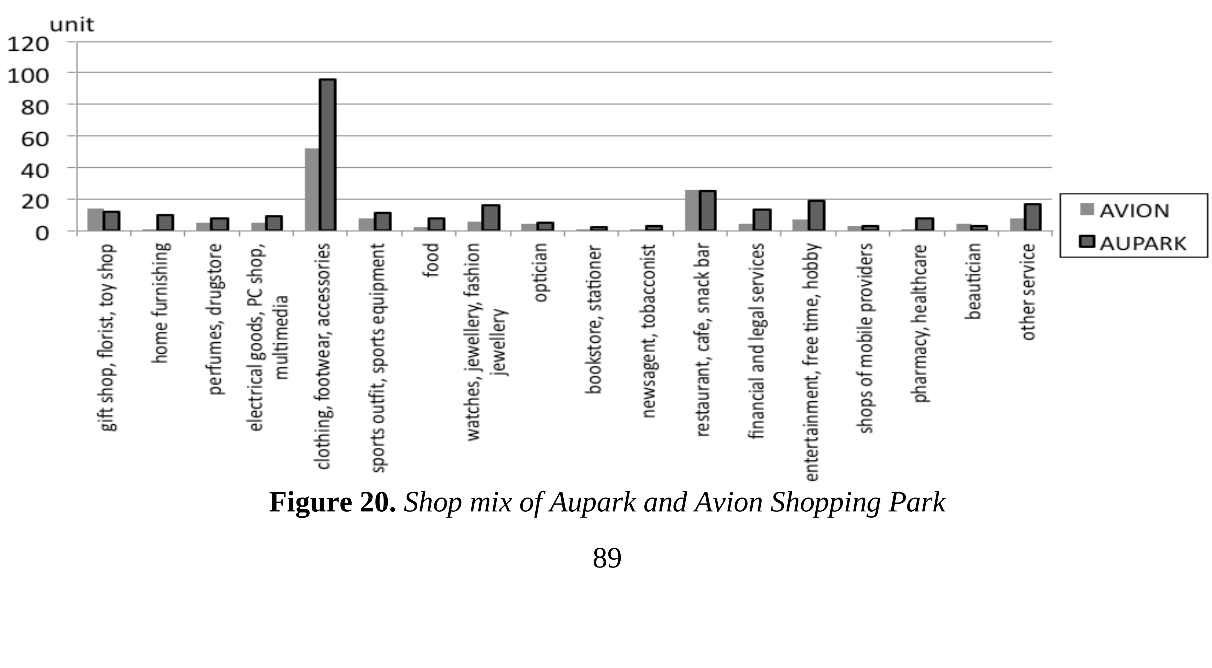

Figure 20. *Shop mix of Aupark and Avion Shopping Park*

CONCLUSION

This paper focused on the competition between Aupark and Avion Shopping Park by providing their comparative analysis. The research was based on a questionnaire survey. Aupark is visited by more female visitors than by male ones. While respondents in Aupark were dominated by visitors in their twenties, it was visitors in their thirties who prevailed over the respondents in Avion. The majority of shoppers came to the centres as private individuals and most respondents were Bratislava residents. As regards to their occupation, it is students who dominate visitors in Aupark, and intellectuals are the most significant ones at Avion. The above mentioned facts also influence respondents' aim of shopping and the value of their spending per visit. Besides shopping for food and clothing, there are a considerable number of visitors who go to Aupark without a special aim. Besides shopping for food and clothing, it is services that contribute largely to the turnover of Avion. Aupark can be attributed with lower values of spending per visit than Avion. The explanation for this phenomenon lies in the occupational structure of its visitors, since students do not spend as much as those who already work and have some white collar jobs.

Discrepancies were also found during the analysis on how visitors get to each centre. Both centres are located near a motorway. The distribution of those going to Aupark by car, public transport and on foot is even. Visitors to Avion, however, approach the centre mainly by car. This is an explanation for the fact that Avion is less frequently visited than Aupark, where daily and weekly visitors prevail.

Respondents give preference to their favourite shopping centre, and they do not usually go to other centres. The questionnaire revealed that few respondents have also other favourite centres except the one where they were surveyed.

Shopping centres have significantly changed the retail structure of Bratislava since they appeared in the city. As a result of this development, the traditional retail zones of the city have lost on their importance. In spite of all these, it is customers who came out as winners from the competition between shopping centres.

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