DEVELOPMENT OF RETAIL AND SHOPPING CENTRES IN LJUBLJANA

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Abstract
Over the past 15 years Slovenia has gone through major economic and political changes. Retail was one of the economic activities that experienced the most proufound changes in the process of economic transition. In the paper the main characteristics of development of retail in Ljubljana with special regard to creation of new suburban shopping centres are presented. The main goal of the research was to analyse spatial distribution and functions of shopping centres and hypermarkets in Ljubljana. In order to establish whether shopping centres have started to develop social functions or are they still predominantly places of retail questionnaire survey in 5 largest shopping centres was conducted.

Key words: retail, shopping centre, hypermarket, social functions, Ljubljana, Slovenia.

RAZVOJ TRGOVINE IN NAKUPOVALNA SREDIŠČA V LJUBLJANI

Izvleček
V zadnjih 15 letih je Slovenija prešla skozi pomembne gospodarske in politične spremembe. Trgovina je ena izmed gospodarskih dejavnosti, ki so se v času gospodarske tranzicije doživele zelo izrazite spremembe. V prispevku so predstavljene osnovne značilnosti razvoja trgovine v Ljubljani s posebnim poudarkom na nastanku novih trgovskih centrov na obrobju mesta. Glavni cilj raziskave je bil analiza prostorske razporeditbe in funkcij trgovskih središč v Ljubljani. Za ugotavljanje socialnih funkcij trgovskih središč in odgovor na vprašanje ali je nakupovanje ostalo njihova osnovna funkcija, je bilo izvedeno anketiranje v 5 največjih trgovskih središčih.

Ključne besede: trgovina, nakupovalno središče, hipermarket, socialne funkcije, Ljubljana, Slovenija.

1. INTRODUCTION

Over the past 15 years Slovenia has gone through major economic and political changes. Retail was just one of the economic activities that went through process of transition. Transition in retail include: emergence of new retail forms, changes in location of outlets, changes in floor space, changes in the structure of products on offer and changes in ownership relations. The result of these changes is a general trend of creation of large number of domestic and foreign owned shopping centres, hypermarkets and other retail outlets (Kulke, 1997; Pütz, 1997). The development and transformation of retail in Slovenia is a part of general tertiarisation of economy and is influenced by transition to market economy accompanied by privatisation, development of private entrepreneurship, foreign direct investment, underdevelopment of retail in socialist economy, increased social segregation and purchase power and changes in shopping behaviour. The main process is the development of large, mostly suburban shopping centres and gradual decline of retail in city centres. The total retail floor space increased from approximately 825.000 m² in 1989 to 1.510.000 m² in 2001. Due to fast development in the last five years total retail floor space has increased considerably but unfortunately statistical data is not available.

2. GOALS AND METHODOLOGY

The main goal of this research is to analyse functions of shopping centres and hypermarkets in Ljubljana. Development of retail in Slovenia and in Ljubljana with special regard to new shopping centres is presented in the first part of the paper. A general spatial distribution of retail and suburban shopping centres is presented as well. Intent is to establish whether shopping centres have started to develop social functions or are they still predominantly places of retail. By developing social functions shopping centres would become public spaces were people come to spend free time and socialize. In countries like USA, Canada and countries of Western Europe shopping centres are places of consumption were retail and leisure are offered together and borders between them are vain. In those places shopping is a way of life and its social dimension is of great importance in defining one's position in society. (B. Holbrook, P. Jackson, 1996; Goss, 1993). Researches conducted in Zagreb revealed that in transition countries like Croatia retail is still the main function of shopping centres. We could say that, when additional functions of shopping centres are concerned, in transition countries development is still in its early stage. Researches revealed differences between shopping centres located in the city centre and those located in suburbs. Shopping centres in the city centre are developing social functions and are more and more becoming places of leisure and socialization. They can in a way be treated as public spaces[1] (Lukić, 2002). In the same time centres in the suburbs and at the fringe of the city still have accent on retail function but are trying to establish themselves as family centres (Jakovčić, Spevec 2004; Lukić, Jakovčić, 2004).

[1] Due to limitations, security cameras and some other factors shopping centres can only tentatively be considered as public spaces.

In conducting this research different methods have been used. Besides using secondary sources, filed mapping and survey were done. Mapping was conducted in following shopping centres and hypermarkets: BTC-Hala A, City Park, E'Leclerc, Mercator and Interspar. All business establishments were mapped and by doing that insight in their morphological and functional structure was gained. Survey was conducted on 18th, 19th, 24th and 26th November 2005. Students from the Department of Geography in Ljubljana carried out the survey. Questioner comprises 21 questions, which can be divided in five groups. First group comprises general questions about age, sex, education and employment structure. Second group comprises questions about the modality of visiting to the shopping centre (when, how often, with whom, how). Third group of questions deals with reasons of coming to particular shopping centre and about services used during today's visit. Fourth group of questions deals with advantages and disadvantages of certain shopping centre. Last, fifth group of questions deals with frequency of shopping in local shops and in city centre. Visitors were questioned when leaving shopping centres. Potential respondents where chosen by the method of systematic sampling where every fifth visitor was approached. Children younger than 8 were not considers to be active visitors and therefor were not approached.

3. DEVELOPMENT OF RETAIL IN SLOVENE TOWNS

In the period of economic transition after 1990 retail in Slovenia has experienced a very fast development. The number of outlets and the total retail floor space doubled between 1989 and 2001 (Rezultati raziskovanj 733, 2002). Retail floor space per capita thus increased from 0.42 m² to 0.76 m², in Ljubljana urban region to 0.87 m². As a consequence of financial and spatial concentration and the development of new shopping centres the number of outlets diminished from 12231 in 1999 to 10885 in 2001, whereas the average size of outlet increased from 108 m² to 133 m². The share of larger shops with more than 1000 m² increased from 2.7 % in 1998 to 3.9 % in 2001 with more then 32 % of total retail floor space (Rezultati raziskovanj 773, 2002).

In comparison with overall growth of retail the growth of employment was relatively moderate. Turnover of retail sector increased from 357 billion SIT (Slovenian Tolars) in 1992 to 1976 billion SIT in 2002, whereas the number of employees in the same period increased for only 4000, from 48729 to 52934. This indicates a very fast growth in productivity. In the same period turnover per employee increased from 9.7 million SIT to 37.3 million SIT, whereas retail floor space per employee increased from 26.3 m² in 1999 to 30.3 m² in 2001 (Rezultati raziskovanj 803, 10).

Retail is a typical urban activity. Therefore in Slovenia most of retail is located in towns. In 11 urban municipalities there is 41.6 % of all business premises and 54.9 % of total retail floor space in Slovenia. In 80 Slovene towns there is approximately 1.150.000 m² or 76 % of all retail floor space in Slovenia.

Towns with the largest number of business premises and retail floor space are shown in table 2. In three largest Slovene towns, Ljubljana, Maribor and Celje there is more then 35 % of all retail floor space in Slovenia. Together with other regional centres this amounts to 55 %. There are significant differences among towns in regard to retail floor space per capita. Above average values are characteristic for smaller and medium sized regional centres with relatively large gravitation areas, as Murska Sobota, Slovenj Gradec, Koper, Ptuj and Nova Gorica.

Table 1: Number of business premises and retail floor space in selected Slovene towns
Preglednica 1 : Število prodajaln in površina prodajnega prostora v nekaterih mestih Slovenije

	1989 No. of business premises	1989 Retail floor space (m²)	1999 No.of business premises	1999 Retail floor space (m²)	2001 No.of business premises	2001 Retail floor space (m²)	No.of business premises 1989/1999	Retail floor space (m²) 1989/1999
Slovenia	6.106	824.740	12.231	1.321.372	11.359	1.511.558	186	183
Ljubljana	879	148.942	1589	225.436	1585	334.791	180	224
Maribor	394	58.093	707	94.864	728	139.558	184	240
Celje	172	39.277	364	57.481	341	64.654	198	164
Kranj	156	22.975	326	41.405	284	43.794	182	190
Novo mesto	91	12.936	280	30.594	235	23.619	258	182
Mur. Sobota	85	13.244	218	30.186	233	37.347	274	281
Ptuj	87	11.250	235	29.519	239	32.141	274	285
Izola	53	4.218	90	10.296	73	7.889	137	187

Source : Drozg, 2001, Rezultati raziskovanj 733(1999) and Rezultati raziskovanj 773(2002).

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The authors of the study of shopping centres in Slovenia Vladimir Drozg and Mirko Pak (Drozg, Pak, 2000) argue that the growth of retail sector in Slovenia in the nineties was mostly a consequence of creation and fast development of new shopping centres in suburban areas, which was accompanied by a gradual decline of retail in city centres. Drozg proposed a following typology of shopping centres in Slovenia: hypermarket, large specialized outlet, commercial centre and commercial complex (Drozg, 2001, 11-12). According to this typology there were 61 shopping centres in Slovenia in 2001. A minimum size of 7000 m² was determined for a commercial centre. Commercial centres with more then 20.000 m² were categorized as large commercial centres (Drozg, Pak, 2000). 26 commercial centres, among those 7 large commercial centres were identified in Slovenia. They were located in 11 regional centres:

Ljubljana (8 commercial centres), Maribor (4), Celje, Koper, Murska Sobota, Novo mesto (2), Velenje, Brežice, krško, Škofja Loka in Slovenj Gradec. Two of commercial centres were located in small towns in Ljubljana region (Domžale and Medvode). Large commercial centres were all located in three largest Slovene towns: Ljubljana (4), Maribor (2) and Celje (Drozg, Pak, 2000, 187).

Table 2 : Number of business premises, retail floor space, no. of employees and average floor space per shop in larger Slovene towns in 2001
Preglednica 2 : Število prodajaln, prodajne površine, število zaposlenih in povprečna površina na prodajni prostor v prodajalni v večjih slovenskih mestih leta 2001

	No.of business premises	**Retail floor space (m²)**	**Retail floor space per capita (m²)**	**Share of retail floor space (%)**	**No. of employees**	**Average floor space per shop (m²)**
Ljubljana	1585	334.791	1.29	22.1	9732	211
Maribor	728	139.558	1.48	9.2	3751	192
Celje	341	64.654	1.70	4.3	1887	190
Koper	271	44.386	1.87	2.9	1396	164
Kranj	284	43.794	1.23	2.9	1391	154
Nova Gorica	221	39.444	1.75	2.6	1299	178
Murska Sobota	233	37.347	3.00	2.4	1047	160
Ptuj	239	32.141	1.75	2.1	1073	134
Velenje	152	25.090	0.93	1.7	848	165
Novo mesto	235	23.619	1.05	1.6	816	101
Trbovlje	119	18.776	1.15	1.2	441	114
Slovenj Gradec	121	17.902	2.32	1.2	507	148
Škofja Loka	104	16.757	1.36	1.1	469	107
Jesenice	97	14.916	1.11	1.0	392	99

Source : Rezultati raziskovanj 803 (2004), 103-129.

The most common location of shopping centres in Slovene towns is suburban area. Very often they developed in former industrial areas, thus being transformed into shopping or business centres. After 1995 shopping centres on new locations were developed. The main location factor being good accessibility with private car most of shopping centres is located close to highway exits or main avenues. Shopping centres in city centres are very rare, they can be find in Maribor, Velenje and Koper. The development of shopping centres begun after 1993 and accelerated in the second half of the nineties. In 1999 total retail floor space in shopping centres reached 280.000 m² or 25 % of all retail floor space in Slovenia (Drozg, Pak, 2000, 187).

4. DEVELOPMENT OF RETAIL IN LJUBLJANA

As in the rest of Slovenia the development of retail in the period of economic transition was very fast in Ljubljana as well. Total retail floor space grew from 150.000 m² in 1989 to 225.000 m² in 1999 and 335.000 m² in 2001. Though relative growth of retail floor space was even faster in some regional centres, the share of retail floor space in Ljubljana in comparison with Slovenia augmented from 18 % in 1989 to 22 % in 2001. This is an evidence of concentration of retail in larger regional centres in the last 15 years.

According to the study Retail in Municipality of Ljubljana in year 2002, commissioned by Urban Planning Department of Municipality of Ljubljana, total retail floor space in Ljubljana reached 453.000 m² in March 2003 (Trgovina na drobno v Mestni občini Ljubljana v letu 2002, 44). This number is much higher than the official one, published by the Statistical Office of Republic of Slovenia, as a consequence of different methodology of collecting data. The data of the Statistical Office of Republic of Slovenia is based on declarations of working hours by individual business premises. As all business premises do not send their declarations to Statistical Office, this data is not complete. The authors of the study on the other hand collected the data on the basis of internal database of Municipality of Ljubljana, completed with questionnaires and field survey. According to the authors of the study, this is a very good estimation of actual amount of retail floor space in Ljubljana. Comparison with year 2000 shows an extraordinary growth of retail, in only three years retail floor space increased for 38 %. Retail floor space per capita thus reached 1.7 m² (Trgovina na drobno v Mestni občini Ljubljana v letu 2002, 44).

The factors that determined the development of retail in Ljubljana are similar to those valid for the rest of Slovenia, but some specific factors are characteristic as well. Among common factors we can list economic transition from planned to market economy, privatisation, development of entrepreneurship, foreign direct investment, underdevelopment of service sector in socialist economy, increased social polarisation and increased purchase power of population. For Ljubljana and the whole Ljubljana urban region very favourable development trends with above average economic growth and growth of incomes are characteristic in the last 15 years. GDP per capita is about 40 % above the national average, gross income base per capita for 22.3 % and salaries for 16.3 % (Pečar, 2003). This indicates much higher purchase power then in the rest of the country. Increased purchase power is generally reflected in increased consumption of durable goods. Another element, which influenced fast development of retail in Ljubljana, is good and even improved traffic accessibility of Ljubljana. Plevnik argues the Ljubljana has far the best accessibility of all Slovene regional centres. After the termination of Slovene highway network the accessibility of Ljubljana will improve considerably (Plevnik, 2000, 246). About 650.000 or one third of population of Slovenia will live in 30 minutes isochrones from Ljubljana. Increased accessibility directly influences the enlargement of gravitation area of retail in Ljubljana. Gravitation area of retail is determined by a willingness of population to commute with a purpose of shopping. It is in direct relation with distance, time consumption and travel expenses, but also with quality and variety of goods and services. In the study Planning of development of retail in Municipality of Ljubljana market area of Ljubljana was estimated as complementary with Ljubljana urban region, with approximately 210.000 households (Usmerjanje razvoja trgovine na drobno v prostoru Mestne občine Ljubljana, 2001, 14). The authors argue that customers from larger area come to Ljubljana occasionally as well. Development of retail was influenced by the growth of tourism and the number of tourist visiting Ljubljana as well. Tourists contribute to increased consumption of different goods and services. Tourist office of Ljubljana estimates the number of overnight visitor in Ljubljana to be 195.000 in 2001 and 310.000 in 2005 (Letno poročilo Zavoda za turizem Ljubljana za poslovno leto 2005, 2005). In addition a much higher number of one-day visitors is typical for Ljubljana.

5. SPATIAL DISTRIBUTION OF RETAIL IN LJUBLJANA

In the framework of studies of functional structure and transformation of Ljubljana a great emphasis was put on research of retail and other service activities. Service sector contributes more then 70 % of GDP of Ljubljana urban region and presents an important element of urban land use as well. In studies on retail and services in Ljubljana (Rebernik 1992; Rus, Stanič, 1994; Pak, 2000; Pak, 2002; Pak, 2004) most of the authors defined areas of concentration of retail and other service activities as "retail and service areas". Pak defined 29 retail and service areas in Ljubljana: 16 local retail and service areas, 7 district retail and service areas and 5 regional retail and service areas (Pak, 2004, 30). Till 1990 most of retail and service activities were concentrated in city centre and local retail and service areas located within residential areas. Local retail and service areas were planned and developed according to distribution of population to enable good accessibility to basic goods and services. In 1992 Rebernik determined 57 retail and service areas, divided into four categories: regional retail and service area, district retail and service area, neighbourhood retail and service area and local retail and service area (Rebernik, 1992, 68-71). In the study carried out for the division of Ljubljana to city districts 37 retail and service areas, among them 13 centres of districts were defined (Rus, Stanič, 1994). The development of suburban shopping centres not only caused gradual decline of retail in city centre, number of customers and turnover of retail in local retail and service areas diminished as well. Typology of retail and service areas or centres in Ljubljana has to take into account a distinction between local retail and service centres, located mainly within residential areas, with basic goods and services for local population, and larger and mostly suburban shopping centres with more specialised goods and services and larger gravitation areas. With increased mobility and changing shopping behaviour the use of larger shopping centres for basic goods and services is becoming more frequent.

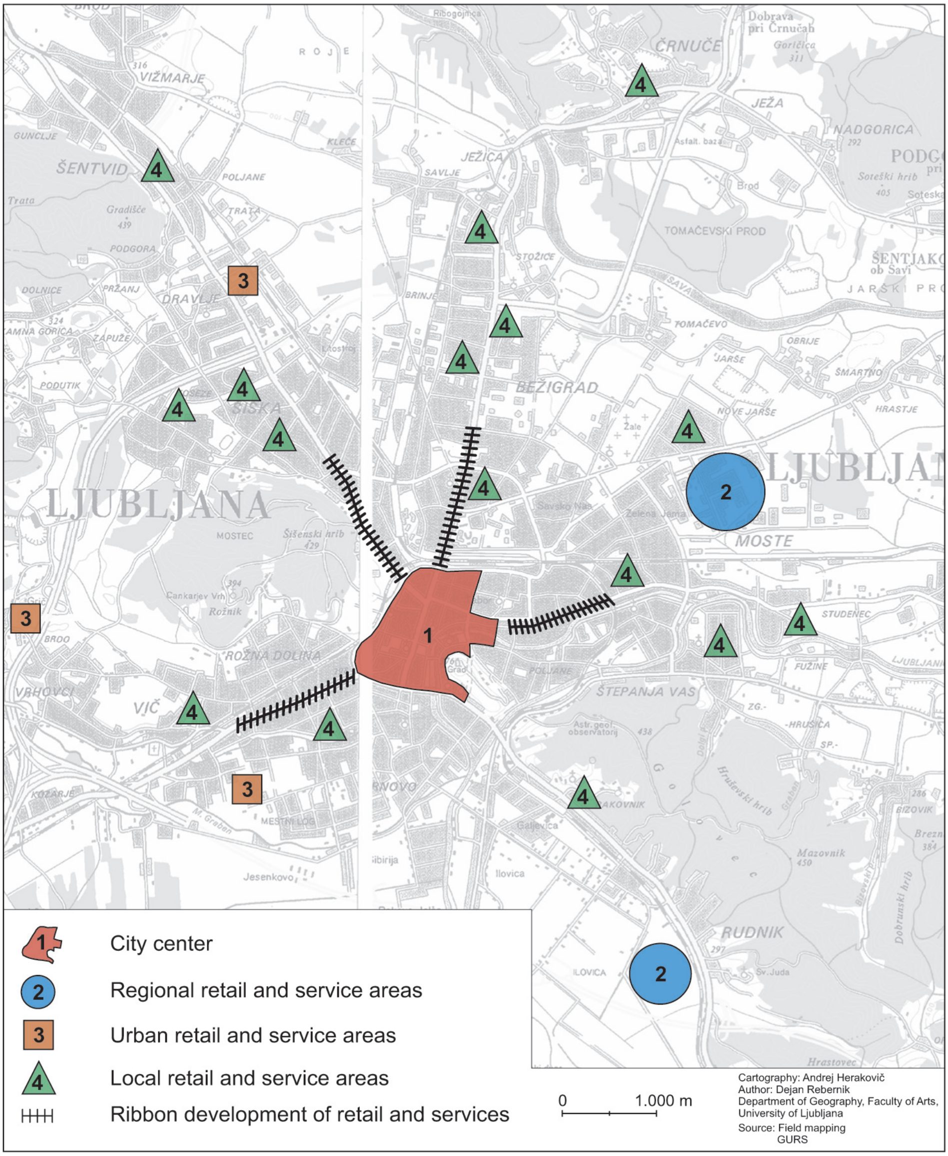
Retail and service areas are defined as parts of the city with predominant tertiary orientated land use. They can be considered as areas of spatial concentration of retail and other service activities. The main criteria for delimitation of retail and service areas were: number and type of business premises, type of goods and services for short-term, middle-term and long- term provision and an estimation of extension of gravitation area. On the basis of the data on sales floor for 2003 (Trgovina na drobno v Mestni občini Ljubljana v letu 2002, 2003), field mapping and a survey carried out in November 2005 following typology of retail and service areas in Ljubljana was developed.

1. City centre. In 2003 there were about 80.000 m² of sales floor in city centre (Trgovina na drobno v Mestni občini Ljubljana v letu 2002, 2003), which is less then in the largest suburban shopping centre. Specialised shops for middle and long-term provision, bars, restaurants and a variety of services (banks, insurance companies, tourist agencies, cultural institutions and similar) are predominant. Gravitation area includes the whole urban region, for some very specialised goods and services it includes the whole country.
2. Regional retail and service areas. In this group only two new suburban shopping centres were included: BTC, which has together with nearby specialised hypermarkets approximately 105.000 m² of sales floor and 450 business premises and Rudnik with 65.000 m² of sales floor (Trgovina na drobno v Mestni občini Ljubljana v letu 2002, 2003, 46). With a predominance of specialised hypermarkets, regional retail and service areas have a very extensive variety of goods and services for middle and long-term provision. They also develop social functions like leisure, cultural and recreational activities. Gravitation area includes whole urban region.
3. District retail and service areas. In this group other larger suburban shopping centres were included. Retail and service area Vič (Interspar, Merkur) has 20.000 m², Brdo – Lesnina 12.000 m² and Šiška – Mercator 8000 m² of sales floor. Hypermarkets and specialised hypermarkets offer a wide variety of goods for short and middle term provision. Services and social functions are developed in much lesser extent then in regional retail and service areas. Gravitation area is limited to a part of urban area with close surroundings.
4. Local retail and service areas. In this group all smaller retail and service areas located mainly within residential areas are included. According to the estimation of the study Retail in Municipality of Ljubljana in year 2002 in local retail and service areas there are about 170.000 m² or 37 % of all sales floor in the city. Older ribbon development of retail and services along main avenues (Dunajska, Celovška, Tržaška and Zaloška Street) is characteristic. Other local retail and service areas comprise older traditional centres of individual neighbourhoods or suburban settlements (Šentvid, Polje, Rakovnik, Črnuče, Trnovo), planned shopping, service and administrative centres of former municipalities (Bežigrad, Šiška, Moste, Vič) and planned local shopping centres within new high-rise housing estates (Fužine, Štepanjsko naselje, Dravlje, Nove Jarše). Goods and a limited selection of services for short-term provision is characteristic. Gravitation area of each local retail and service centre is limited to nearby residential areas.

6. SPATIAL DISTRIBUTION AND FUNCTIONS OF NEW SHOPPING CENTRES IN LJUBLJANA

The growth of retail in Ljubljana is mainly the consequence of creation and development of suburban shopping centres in the last 15 years. The beginning of suburban shopping centres in Ljubljana and Slovenia can be observed in the year 1993 when the first suburban shopping centre BTC was opened. In the following years the development of suburban shopping centres was very fast and has been accompanied by gradual decline of retail in city centres. In

Map 1: Retail and service areas in Ljubljana (2006)
Karta 1 : Oskrbno - storitvena območja v Ljubljani (2006)



Ljubljana only 18 % of all sales floor remained in city centre, whereas 45 % of sales floor was located in suburban shopping centres.

In our research we defined shopping centre as a group of retail and other commercial outlets planned, developed and managed as consolidated unit (Lukić, Jakovčić, 2004, 42).

Table 3 : Shopping centres in Ljubljana (March 2006)
Preglednica 3 : Nakupovalna središča v Ljubljani (Marec 2006)

Name	**Type**	**Area (m²) – estimation**	**Opening year**	**No. of business premises**
BTC	Commercial centre	70.000	1993	400
Rudnik	Commercial centre	50.000	2000	25
City Park	Commercial centre	37.500	2002	90
Leclerc	Commercial c.-Hypermarket	10.000	2000	22
Interspar Vič	Commercial c.-Hypermarket	10.000	1997	25
Mercator Center	Commercial c.-Hypermarket	9.000	1998	35
Bauhaus	Specialised hypermarket	15.000	1997	1
Lesnina Brdo	Specialised hypermarket	12.000	1999	3
Harvey Norman	Specialised hypermarket	10.000	2002	1
Merkur Vič	Specialised hypermarket	5.000	1998	1
Diskont Črnuče	Hypermarket	2.000	1998	1
Hofer	Hypermarket	2.000	2005	1

Source : Trgovina na drobno v Mestni občini Ljubljana v letu 2002 (2003) and field mapping, March 2006.

Shopping centre provides parking spaces, has a common opening hours and a common management responsible for financial, economic and spatial development, marketing and public relations. Classification of shopping centres in Ljubljana was a topic of several urban geographical studies. In his study Shopping Centres in Slovenia Drozg defined 16 shopping centres in Ljubljana, among those 7 were classified as "large" shopping centres with more then 20.000 m² sales floor (Drozg, 2001). In our research we implemented a typology of shopping centres developed by Lukić and Jakovčić in their study on shopping centres in Zagreb, Croatia (Lukić, Jakovčić, 2004, 42-47). The typology of four categories comprises shopping centres with more than 2000 m² sales floor: commercial centre, hypermarket – commercial centre, hypermarket and specialised hypermarket. Commercial centre is defined as a group of retail and other commercial outlets planned, developed and managed as consolidated unit. Hypermarket – commercial centre comprises a hypermarket and several smaller retail and other commercial and service outlets in one building. A hypermarket – commercial centre is owned by the retail hypermarket chain and usually bears its name. Hypermarket is a self-service outlet with sales floor greater then 2000 m², intended primarily for the sale of groceries and consumer goods, but can also offer other products. Specialised hypermarket is a self-service outlet with sales floor greater then 2000 m², intended for the sale of goods for specific purposes for middle and long term provision (furniture, home, garden and technical equipment) (Lukić, Jakovčić, 2004, 45).

Location and spatial distribution of shopping centres is in the first place determined by good accessibility with cars. Shopping centres BTC, City Park, Rudnik and Brdo are all located close to highway exits that gives them excellent accessibility from all urban region. Shopping centres Mercator and Vič are located at main entrance avenues from northwest and southwest. Their accessibility from the rest of urban region is relatively poor but on the other hand they are located close to densely populated residential areas. Although good accessibility with public transport is characteristic for shopping centres BTC, City Park, Interspar and Mercator a vast majority of visitors use their cars to reach these shopping centres. A survey conducted in 5 largest shopping centres in Ljubljana in November 2005 has shown that cars are dominant mean of transport to the shopping centre (79.3 %), followed by walking (11.1 %). Percentage of visitors who use cars is the highest in the case of shopping centre Leclerc. This can be explained by the fact this shopping centre has no public transport line. The highest, but still relatively low percentage of visitors who use public transport is characteristic for shopping centres BTC and City Park (14 % and 13.2 %).

Gravitation area of individual shopping centres was evaluated by the survey. 71.8 % of visitors questioned lives in Ljubljana, 27.7 % in other municipalities in Slovenia and only 0.5 % abroad. This indicates that the main gravitation area of shopping centres is the city of Ljubljana and its close surroundings. The highest share of visitors from other municipalities is characteristic for larger shopping centres BTC, City Park and Rudnik (between 28.7 and 41.7 %) which indicates that they have a role of regional shopping centres with larger gravitation areas. Gravitation area of regional shopping centres is thus the whole urban region and all parts of the city. On the other hand most of visitors questioned in smaller shopping centres Mercartor and Interspar live in nearby residential areas. In this way it is confirmed that gravitation area of district shopping centres is limited to a part of urban area.

In spite of development of other functions retail is still a predominant activity in shopping centres in Ljubljana. Share of retail among all business premises is between 82 % and 60 %. Most of shopping centres are dominated by a large hypermarket. Among other outlets garments, footwear and sport equipment are the most common. The second most frequent are outlets with home and garden equipment, furniture and technical goods.

Modern shopping centres have developed several other functions besides shopping. Larger shopping centres are getting more and more multifunctional (Pak, 2005, 31). Several studies have shown that shopping centres have acquired social functions (Lukić, 2002). In the eighties shopping centres became places for leisure, recreation and social contacts, some even became real tourist attractions. The share of services, catering and leisure activities remains relatively low in shopping centres in Ljubljana. The percentage of different services among all business premises is between 10 % and 20 %, the percentage of catering outlets between 9 % and 14 %. The only shopping centre that has developed a wide variety of leisure and recreational activities is the largest commercial centre in Ljubljana and Slovenia BTC. According to the results of the survey shopping centres in Ljubljana still didn't develop social functions. This is confirmed by the fact that retail is the most important reason for visiting a shopping centre (around 80 %). Spending free time, socialising with friends and using catering facilities occupy between 5 % and 10 % each. The only exceptions are commercial centres BTC and City Park where restaurants and several leisure and recreational activities represent important reason to visit the centre.

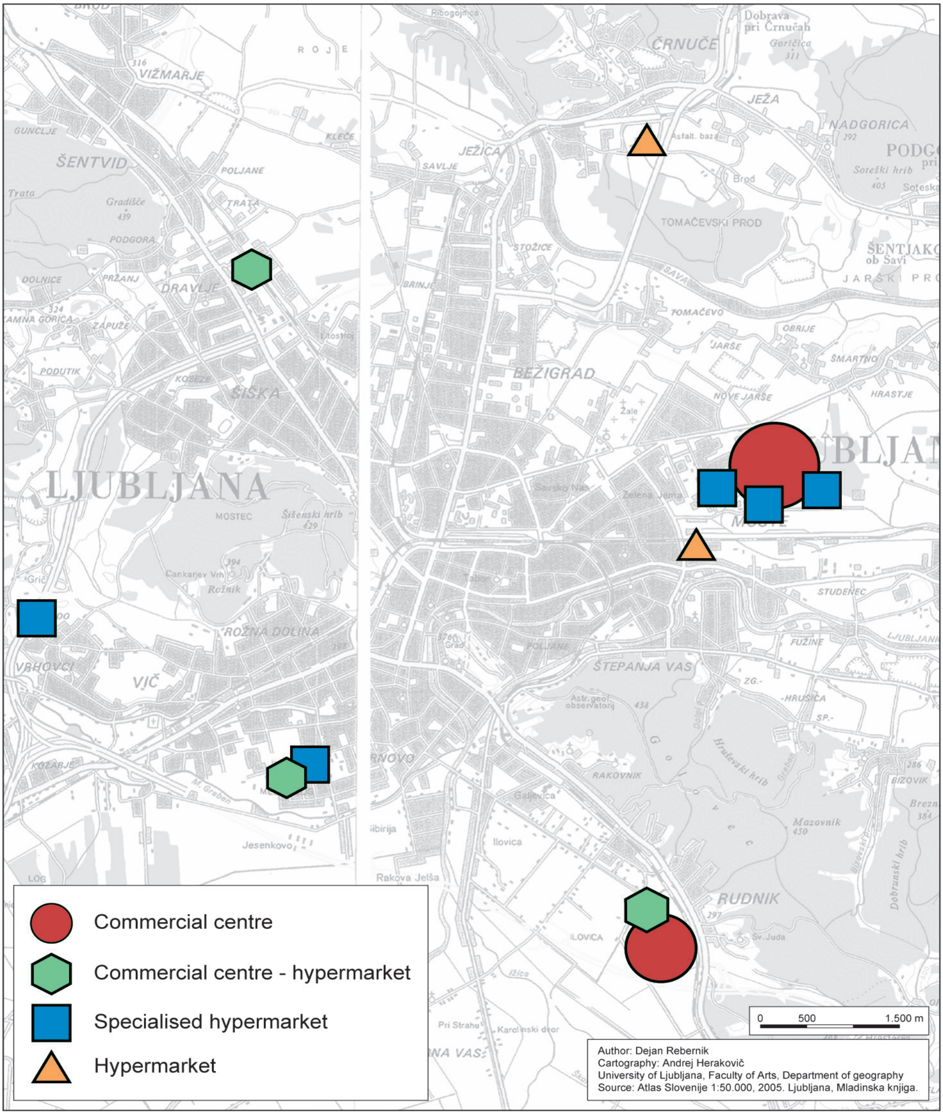
Table 4: Structure of business premises in selected shopping centres in Ljubljana in 2006
Preglednica 4: Struktura poslovnih prostorov v izbranih nakupovalnih središčih in v Ljubljani leta 2006

Type of business premises	BTC		City Park		Mercator-Šiška		Interspar Vič		Leclerc and Rudnik	
	No.	%	No.	%	No.	%	No.	%	No.	%
Retail	325	82	66	77	21	60	17	68	31	66
Hypermarket	1	1	1	1	1	3	1	4	1	2
Food	28	7	1	1	0	0	0	0	1	2
Cloth and footwear	174	43	34	41	10	29	9	36	12	25
Home, garden and technical equipment	70	18	15	17	5	14	2	8	10	22
Other goods	52	13	15	17	5	14	5	20	7	15
Services	36	9	9	10	10	28	5	20	9	20
Personal care and recreation	15	3	1	1	1	3	1	4	1	2
Bank, tourist agency	10	3	3	3	4	11	1	4	3	7
Other services	11	3	5	6	5	14	3	12	5	11
Catering	36	9	11	13	4	12	3	12	6	14
Bars and pubs	22	5	5	6	2	6	2	8	3	7
Restaurants	14	4	6	7	2	6	1	4	3	7
Together	397	100	86	100	35	100	25	100	46	100

Source : Field mapping, March 2006.

The largest shopping centre in Ljubljana and Slovenia BTC developed on the site of former warehouse and customs centre established in 1954. With the breakdown of Yugoslavia the warehouse and customs centre with a surface of 300.000 m² got gradually abandoned. In 1993 first warehouse hall was transformed into a small shopping centre (Drozg, 2001). In the following years the shopping centre grew very fast, in year 2004 the total surface reached 365.000 m². It has to be pointed out that this development was not regulated by any urban planning document. Today there are more then 300 shops, among them several specialised hypermarkets with furniture, technical equipment and equipment for home and garden. After

Map 2 : Shopping centres in Ljubljana (2006)
Karta 2 : Nakupovalna središča v Ljubljani (2006)



2000 BTC shopping centre begun to develop other functions besides shopping: recreation (sport centre Millennium, "water city" Atlantis, wellness centres), entertainment (cinema, theatre, entertainment centre Arena) and offices (BTC Business Centre).

City Park is located within BTC shopping centre, but it belongs to other hypermarket chain. It was opened in 2002 as modern, integrated and planned shopping mall in one building. After enlargement in year 2006 it occupies 37.500 m² sales floor (http://www.citypark.si, 8.3.2006). Shopping centre City park includes the largest hypermarket in Ljubljana and specialised hypermarket with home and garden equipment. There are 11 restaurants with over 3000 m² floor space and parking house with 1270 parking places.

Shopping centre Rudnik begin to develop after year 2000. It is located in the southeastern part of the city, close to the highway ring, on the area planned as industrial zone. Due to deindustralisation and demand of investors for land for commercial development the industrial zone was converted into shopping centre. In the Urban plan of Municipality of Ljubljana this area is classified as "regional shopping centre" and new shopping and service activities will be located mainly in this area. In 2006 started a further enlargement of shopping centre Rudnik. In year 2003 there were about 65.000 m² sales floor, mostly in large specialised hypermarkets with home, garden and technical equipment. There are few catering and service facilities. Due to location at the highway good accessibility from the rest of urban region is assured. On the other hand shopping centre Rudnik is not connected with public transport and is relatively distant from densely populated residential areas of Ljubljana.

Shopping centre – hypermarket E.Leclerc is located within shopping centre Rudnik. It is designed as shopping mall with large supermarket and several other shops and services in one building. Shopping centre – hypermarket Interspar was opened in 1997 in industrial zone Vič. Besides hypermarket there are 24 shops and other business premises. It is located close to large high-rise housing estate. In the vicinity there is specialised hypermarket Merkur and several other shops and services. Shopping centre – hypermarket Mercator was opened in 1998 on the site of former textile factory. It includes a hypermarket, 20 smaller shops, 10 service premises and 4 catering facilities. It is located on one of the main avenues in the city and close to densely populated high-rise housing estates.

7. ANALYSIS OF THE SURVEY

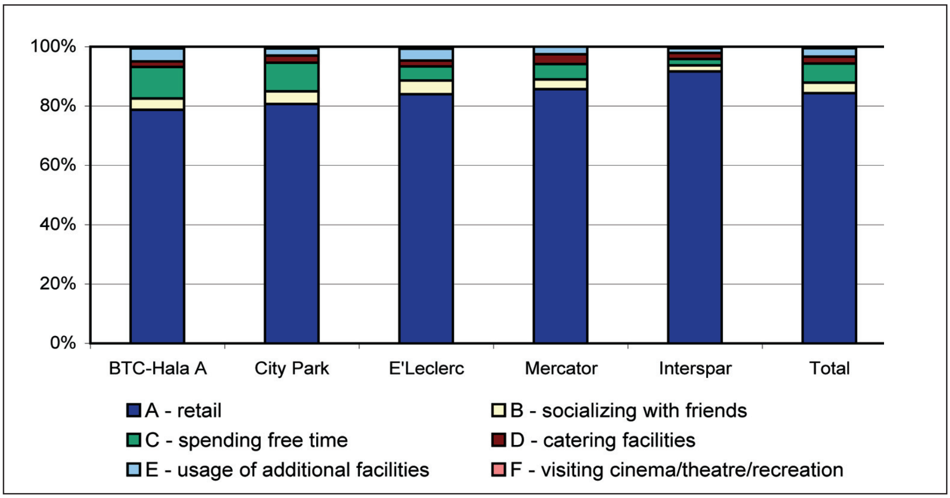
In total 834 questioners were filled. Some questioners were not completely filled but were analysed in the case that all relevant data for certain part of the analysis were filled. 44.2 % of visitors questioned were male, and 55.8 % were female. 25.2 % were aged 12-24, 69.5 % 25-65, and 5.3 % were older than 65. No visitor questioned was older than 81. In the total number of visitors questioned mean age of the visitor was 29. In the educational structure 5.8 % of visitors have finished primary school, 60.1 % have finished secondary school while 34.1 % have higher education. In the employment structure 3.9 % of visitor questioned are unemployed, 57.8 % are employed, 25.6 % are students/pupils and 12.7 % are retired.

Cars are the dominant mean of transportation to the centre (79.3 %), followed by walking (11.1 %). Results do not differ greatly between centres. Percentage of visitors who use car as a mean of transportation is highest in E'Leclerc (94.9 %), and the number of visitors who come to the centre on foot is highest in Interspar (18.1 %). Percentage of visitors who use public transportation as a mean of transportation is low, with the exception of BTC-Hala A and City Park (14 % and 13.2 % respectively). This is not surprising since a bus line is passing through the centre and two more lines have bus stops in the vicinity.

Of the total number of surveyed 21 % visit centre once a week and 19.9 % visit centre occasionally. Number of visitors who visit centres several times a week is highest in Interspar (28. %) and can be related to the fact that 91.5 % of visitor interviewed in Interspar states retail as the main reason of their visit.

Second group of questions deals with the reasons for visiting particular centre, length of stay, advantages and disadvantages of certain centre and companionships. This section tries to establish whether shopping centres and hypermarkets in Ljubljana have merely retail functions or are they beginning to develop social functions as well and by doing that are becoming places of consumption where retail and leisure are combined. (Holbrook, Jackson, 1996).

Figure 1. Main reasons for visiting specific shopping centre – daily average
Graf 1. Glavni razlogi za obisk nakupovalnega središča – dnevno povprečje: A- nakupovanje; B- druženje s prijatelji; C-preživljanje prostega časa; D-restavracije, bari; E- uporaba ostalih storitev; F- obisk kinodvorane/gledališča ali rekreacija



Source: Survey, November 2005

Main reasons for visiting specific centre are represented in figure 1. The main reason for visiting centres in daily average is retail (84 %), followed by spending free time (6. %). That percentage is highest in Interspar (91.5 %) and lowest in BTC-Hala A (78.7 %).

Our next goal was to examine whether functions of shopping centres change during the day. Table 5 shows that reasons do not change greatly during the day and retail is the main reason for visiting specific centre in all times. Share is lowest (77.6 %) between noon and 2 p.m. and higher in other times of a day. If we compare those results and the daily change in the share of visitors who come to the centres with the reason of spending free time it is surprising that share of visitors who came to centre to spend their free time is higher between noon and 2 p.m. than in other times of the day. This can be explained by the fact that many visit shopping centres in their lunchtime interval during work.

Function of shopping centres as a place of retail is further emphasised by the fact that only 32.2 % of visitors have used catering facilities and opposite of our expectations number of visitors who have visited coffee bar of restaurant is higher in the morning than in the afternoon or evening. 52.6 % of visitor who visited catering facilities were male. It is interesting to point out that 46.3 % of visitors who used catering facilities were visitors of BTC-Hala A or City Park. Importance of retail is further emphasised by the fact that only 32.9 % of visitors questioned used some of additional facilities and services. That share is the highest in Mercator (38.4 %) and the lowest in Interspar (27.4 %).

Tab.5. Main reasons for visiting specific shopping centre according to time of the day
A-retail; B-socializing with friends; C-spending free time; D- catering facilities; E-usage of additional facilities; F- visiting cinema/theatre/recreation
Preglednica 5 : Glavni razlogi za obisk nakupovalnega središča po posameznih delih dneva
A- nakupovanje; B- druženje s prijatelji; C-preživljanje prostega časa; D-restavracije,bari; E-uporaba ostalih storitev; F- obisk kinodvorane/gledališča ali rekreacija

Answer	**BTC-Hala A**		**City Park**		**E'Leclerc**		**Mercator**		**Interspar**		**Total**	
	No.	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**	**No.**	**%**
10:00 – 12:00												
A	36	90,0	42	82,3	28	82,4	36	92,3	41	93,2	183	88,0
B	1	2,5	3	5,9	-	-	1	2,6	2	4,5	7	3,4
C	2	5,0	5	9,8	3	8,8	-	-	-	-	10	4,8
D	1	2,5	-	-	2	5,9	1	2,6	-	-	4	1,9
E	-	-	1	2,0	-	-	1	2,6	1	2,3	3	1,4
F	-	-	-	-	1	2,9	-	-	-	-	1	0,5
Total	40	100	51	100	34	100	39	100	44	100	228	100
12:00 – 14:00												
A	13	61,9	25	80,7	16	80,0	18	85,7	15	78,9	87	77,6
B	2	9,5	1	3,2	1	5,0	-	-	2	10,5	6	5,4
C	4	19,1	4	12,9	-	-	2	9,5	1	5,3	11	9,8

D	1	0,5	-	-	1	5,0	-	-	-	-	2	1,8
E	1	0,5	1	3,2	2	10,0	1	4,8	1	5,3	6	5,4
F	-	-	-	-	-	-	-	-	-	-	-	-
Total	21	100	31	100	20	100	21	100	19	100	12	100
16:00 – 18:00												
A	54	77,1	22	73,3	57	87,7	30	73,2	75	96,2	238	83,8
B	2	2,9	2	6,7	3	4,6	1	2,4	-	-	8	2,8
C	9	12,9	3	10,0	3	4,6	4	9,8	2	2,5	21	7,4
D	1	1,4	2	6,7	-	-	3	7,3	1	1,3	7	2,5
E	4	5,7	1	3,3	2	3,1	3	7,3	-	-	10	3,5
F	-	-	-	-	-	-	-	-	-	-	-	-
Total	70	100	30	100	65	110	41	100	78	100	284	100
18:00 – 20:00												
A	23	82,1	42	84,0	24	82,8	19	100	39	90,8	147	87,0
B	1	3,6	1	2,0	3	10,3	-	-	-	-	5	2,9
C	1	3,6	4	8,0	1	3,4	-	-	1	2,3	7	4,1
D	-	-	2	4,0	-	-	-	-	1	2,3	3	1,8
E	2	7,1	-	-	1	3,4	-	-	1	2,3	4	2,4
F	1	3,6	1	2,0	-	-	-	-	1	2,3	3	1,8
Total	18	100	50	100	29	100	19	100	43	100	169	100

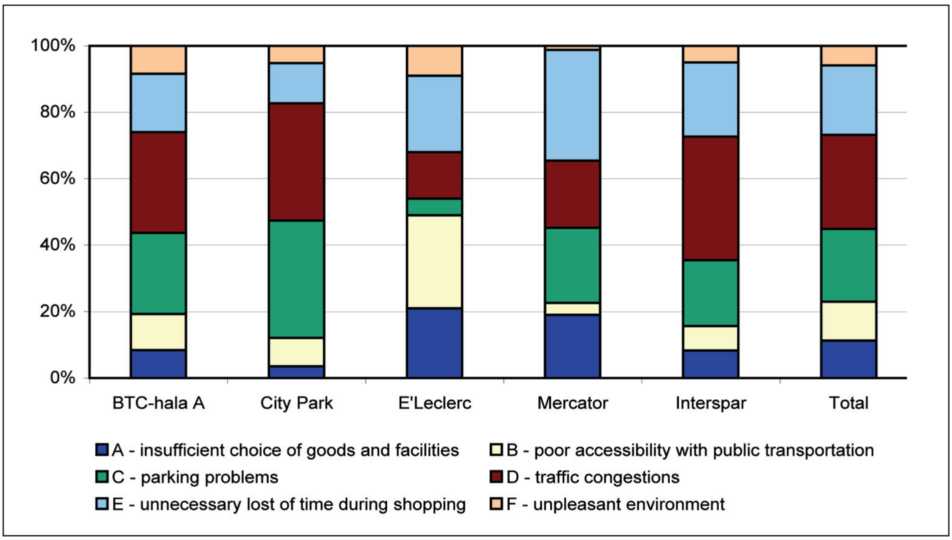
Source: Survey, November 2005

Function of shopping centres as a place of retail is further emphasised by the fact that only 32.2 % of visitors have used catering facilities and opposite of our expectations number of visitors who have visited coffee bar of restaurant is higher in the morning than in the afternoon or evening. 52.6 % of visitor who visited catering facilities were male. It is interesting to point out that 46.3 % of visitors who used catering facilities were visitors of BTC-Hala A or City Park. Importance of retail is further emphasised by the fact that only 32.9 % of visitors questioned used some of additional facilities and services. That share is the highest in Mercator (38.4 %) and the lowest in Interspar (27.4 %).

Length of stay is another important factor that indicates dominant function of a centre. In general, in shopping centres with more developed social functions visitors tend to stay longer. Of the total number of surveyed 53.1 % of visitors spend less than an hour in the shopping centre. Share of visitors that spent less than an hour in a centre is rising towards the evening which was not expected. Share of visitors who spent less than an hour in a centre is the highest in Interspar (67.5 %) and E'Leclerc (67.3 %). Share of visitors who stay in centres longer than three hours is predictably the highest in larger commercial centres City Park (7.8 %) and BTC-Hala A (7.5 %). Analysis has shown that length of a stay does not correlate with the visit to catering facilities nor to the day of the week.

Of the total number of visitors interviewed 39 % came to the centre alone and another 36.8 % came to the centre with their spouse or family. Further more 42.2 % of visitors who came to the centre with their spouse or family spent less than an hour in the centre. Companionship does not correlate significantly with the time of the day. This confirms the fact that shopping centres in Ljubljana still have not developed their social functions, nor are they becoming family centres (Jakovčić, Spevec, 2004).

Figure 2. Disadvantages of specific shopping centre
A-insufficient choice of goods and facilities; B-poor accessibility with public transportation; C-parking problems; D-traffic congestions; E-unnecessary lost of time during shopping; F-unpleasant environment.
Graf 2: Pomanjkljivosti posameznih nakupovalnih središč
A- neustrezna izbira blaga in storitev; B – slaba dostopnost z javnim prevozom; C – pomanjkanje parkirišč; D- prometni zastoji; E – prevelika poraba časa pri nakupovanju; F – neprijetno okolje



Another matter of interest of the survey was advantages and disadvantages of specific shopping centre or hypermarket. In total 803 visitors answered these questions while 31 visitors either refused to answer or claimed that there are no advantages in the centre they are visiting. For 60.1 % of visitors the biggest advantage of specific shopping centre is a good offer of goods, followed by vicinity of living place (8.8 %) and bargains/acceptable prices (7.2 %). Results among centres do not differ greatly. The biggest advantage of all shopping centres is good offer of goods (BTC-Hala A 71,4; City Park 67.3; E'Leclerc 48.4; Mercator 57.3; Interspar 56.5 %). For visitors of BTC-Hala A second most important advantage are additional facilities and services (8.4 %). For visitor of E'Leclerc important advantages are affordable prices and easy accessibility (14.4 and 9.8 % respectively).

For 35 % of interviewees there are no disadvantages in shopping centres. 28.3 % of other visitors consider traffic congestions to be the biggest disadvantage, followed by parking problems with 21.9 % and lost of time during shopping with 20.9 %. It is interesting that only 5.9 % of visitors consider unpleasant (artificial environment) to be a disadvantage of a shopping centre.

Another matter of interest was connection between buying in shopping centres and buying in the city centre and local shops. Intention was to establish whether regular visits to shopping centres affect habit of shopping in local shops and in the city centre. Of the total number of visitors 59.6 % goes to local shops to buy daily groceries. 7.4 % buy everything they need in the local shop and 13.4 % never buys in a local shop. It is interesting to see a connection between frequency of visits to the shopping centres and habit of buying in local shops. Of the total number of visitors who visit shopping centres once a week 65.7 % buy daily groceries in local shop and 12.8 % does not buy in local shop. Also of the total number of visitors who visit shopping centres every day 40 % buy daily groceries in local shops while 22.4 never visit local shops. This results shows that there is no strong connection between visiting shopping centres and buying in local shops. This might indicate that opening of shopping centres does not affect local shops. However that is not true since value of purchased goods is much higher in shopping centres.[2]

Of the total number of visitors questioned 43.4 % occasionally goes to city centre for shopping, and 39.4 % does not shop in city centre. Only 17.2 % of visitors shop in a city centre more than once in a month. It is interesting to see correlation between frequency of shopping in the city centre and in the shopping centres. Of the total number of visitors who visit shopping centres more than once a week 63.5 % said that they have been going to the city centre for shopping a lot less than they used to ten years ago. That percentage is lesser among visitors who visit shopping centres les than once a week but is still higher than could be expected (50.5 %). We could therefore conclude that opening of shopping centres have had a strong impact on the business of retail outlets in the city centre but this topic deserves further research.

8. CONCLUSION

Over the past 15 years Slovenia has gone through major economic and political changes, and retail was just one of the economic activities that went through process of transition.

[2] For instance research of Gfk conducted in Zagreb in 2001 reveled that share of value of goods bought in local shops had a 15 % fall (Lukić, 2002). It can be presumed that same trend is present in other transition countries.

The growth of retail in Ljubljana is mainly the consequence of creation and development of suburban shopping centres in the last 15 years. The beginning of suburban shopping centres in Ljubljana and Slovenia can be observed in the year 1993 when the first suburban shopping centre BTC was opened. In the following years the development of suburban shopping centres was very fast and has been accompanied by gradual decline of retail in city centres. In Ljubljana only 18 % of all sales floor remained in city centre, whereas 45 % of sales floor was located in suburban shopping centres.

The main focus was to explain changes that occurred in retail in Ljubljana and more specific to research functions of new forms of retail (such as shopping centres and hypermarkets) that have opened over the past 15 years. The intention was to establish whether shopping centres have started to develop social functions or are they still predominantly places of retail. Average visitor of shopping centre in Ljubljana is female, 29 years of age, employed and with secondary education. In general cars are the dominant mean of transportation to the centre and percentage of visitors who use public transportation as a mean of transportation is somewhat higher only in BTC-Hala A and City Park which is due to the fact that bus line is passing through the centre and two more lines have bus stops in the vicinity.

Shopping centres in Ljubljana still have not developed social functions. This is confirmed by the data that reasons for visiting shopping centres do not change greatly during the day. Retail is the main reason for visit and this is further emphasized by the fact that 32.9 % of visitors questioned used some of additional facilities and services. With this in mind we could conclude that shopping centres in Ljubljana still have not developed other functions. Main reason of such high expansion of shopping centres in the world is a fact that they offer everything at one place and so “waist” of time spent on travelling from one place to another is minimal. But based on the results of the survey we could say that shopping centres in Ljubljana have not totally put that fact to use or visitors of shopping centres have not recognized that possibility. Low social functions are also confirmed by the fact that companionship does not correlate significantly with the time of the day.

Another matter of interest was connection between buying in shopping centres and buying in the city centre and local retail outlets. Survey showed that almost 60 % of visitors’ intervieweed buy daily groceries in their local shops. But the fact that value of purchased goods is much higher in shopping centres results in small retail outlets “losing battle”. This contributes a great deal to the changing number and high rate of closure of retail outlets with small floor space. Also we could conclude that opening of shopping centres have had an impact on the business of retail outlets in the city centre but this topic deserves further research.

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RAZVOJ TRGOVINE IN NAKUPOVALNA SREDIŠČA V LJUBLJANI

Povzetek

V zadnjih 15 letih je Slovenija prešla skozi gospodarsko in politično tranzicijo. Trgovina je ena izmed gospodarskih dejavnosti, ki so doživela največje spremembe in izredno hiter

razvoj. Število prodajaln se je med leti 1989 in 1999 podvojilo, skupna površina prodajnega prostora se je povečala za 60%. Trgovina je izrazita urbana in mestotvorna dejavnost. Tudi v Sloveniji je velik del trgovine lociran v mestih. V 11 mestnih občinah je tako 41.6 % vseh prodajaln in 54.9 % vseh prodajnih površin v Sloveniji. V 80 slovenskih mestih je približno 1.150.000 m² prodajnih površin oziroma 76% vseh prodajnih površin v Sloveniji.

Rast trgovine v Ljubljani je zlasti posledica razvoja predmestnih nakupovalnih središč v zadnjih 15 letih. Začetek nastanka nakupovalnih središč v Sloveniji je leto 1993, ko je bilo odprto prvo nakupovalno središče v Ljubljani BTC. V naslednjih letih je bil razvoj nakupovalnih središč zelo hiter, spremljal pa ga je postopen upad trgovine v mestnih središčih. Tako je v Ljubljani v letu 2003 v mestnem središču ostalo le še 18 % trgovskih prodajnih površin, 45 % pa se jih nahaja v predmestnih nakupovalnih središčih. Prostorska razporeditev in lokacija nakupovalni središč regionalnega in mestnega pomena je pogojena zlasti z dobro dostopnostjo z osebnim prevozom. Nakupovalna središča BTC, City Park, Rudnik in Brdo so locirana ob izhodih iz avtocestnega obroča, s čimer jim je zagotovljena dobra dostopnost iz celotnega mesta in urbane regije. Nakupovalni središči Mercator in Interspar Vič sta locirani ob mestnih vpadnicah iz smeri Gorenjske oziroma Notranjske, od avtoceste sta oddaljeni približno 1 km. Značilnosti lokacije v veliki meri vplivajo na vplivno območje in obisk posameznih trgovskih središč. Analiza rezultatov anketiranja, ki je bilo izvedeno leta 2005 v največjih nakupovalnih središčih v Ljubljani je pokazala, da večina obiskovalcev v nakupovalno središče pride z osebnim avtomobilom. Nekoliko višji delež obiskovalcev, ki uporabljajo javni prevoz je značilen le za nakupovalna središča BTC in City Park, kjer je več linij mestnega avtobusa v neposredni bližini.

Glavni cilj prispevka je predstaviti in pojasniti spremembe v prostorski razporeditvi in strukturi trgovine v Ljubljani, s posebnim poudarkom na raziskovanju novih funkcij nakupovalnih središč. Želeli smo ugotoviti, ali so nakupovalna središča v Ljubljani začela razvijati tudi socialne funkcije. Sodobni nakupovalni centri imajo poleg trgovske razvite tudi številne druge dejavnosti. Večja in še posebej velika oskrbna središča postajajo vse bolj mnogofunkcionalna (Pak, 2004, str. 31). V trgovskih središčih se tako locirajo razne storitve in dejavnosti, ki obiskovalcem nudijo različne oblike preživljanje prostega časa. Kot so opozorile številne dosedanje študije trgovska središča poleg oskrbne prevzemajo tudi številne socialne funkcije (Lukić, 2002). V številnih nakupovalnih središčih v svetu postaja nakupovanje le ene izmed funkcij, vedno bolj so v ospredju socialne funkcije (zabava, rekreacija, preživljanje prostega časa, druženje).

Analiza rezultatov anketiranja je pokazali, da večina nakupovalnih središč v Ljubljani še ni v večji meri razvila socialnih funkcij. To potrjuje podatek, da se glavni razlog obiska nakupovalnega središča preko dneva ne spreminja veliko. Nakupovanje ostaja glavni razlog obiska, le 32.9 % anketiranih je navedlo drug dodatni razlog za obisk nakupovalnega središča. Socialne funkcije, zlasti zabava, rekreacija, gostinske usluge in druženje so bolj razviti le v največjem nakupovalnem središču, BTC.