LOCATION AND FUNCTION OF HYPERMARKETS AND SHOPPING CENTERS IN ZAGREB

Aleksandar Lukić*, Martina Jakovčić
Geografski odsjek, Marulićev trg 19, 10000 Zagreb
*e-mail: alukic@geog.pmf.hr

Abstract
Paper deals with the spatial distribution, commercial structure and functions of newly built shopping centers and hypermarkets in Zagreb. Research has included mapping of all newly built shopping centers and hypermarkets, classification of their commercial and other functions according to numbers of business premises in them, and questionnaire survey conducted in three shopping centers on different locations in Zagreb. Questionnaire survey has been done in order to understand how visitors perceive shopping centers concerning their functions and urban location.

Key words: retail, shopping centers, hypermarkets, transition, spatial distribution, Zagreb, Croatia

LOKACIJA IN FUNKCIJA HIPERMARKETOV IN NAKUPNIH SREDIŠČ V ZAGREBU

Izvleček
Članek obravnava prostorsko razmestitev, funkcijsko strukturo in funkcije nakupovalnih središč in hipermarketov v Zagrebu. Raziskava je zajela vsa nova nakupovalna središča , ki so klasificirana glede na njihovo funkcijsko in drugo zgradbo, glede na število dejavnosti na osnovi podatkov vprašalnika na različnih lokacijah v Zagrebu.Raziskava s vprašalnikom je bila zastavljena tako, da bi lahko ovrednotili nakupna središča glede na njihove funkcije in lokacije v Zgrebu.

Ključne besede: trgovina na drobno, nakupovalno središče, hipermaket, tranzicija, prostorska razporeditev, Zagreb, Hrvaška

INTRODUCTION

The process of transition from a centrally planned to a market economy has brought both overriding social change, as well as structural economic changes to the formerly socialist countries of Central and Eastern Europe. Retailing is one of many economic activities which was reorganized and adapted to new conditions within a very short period (Standl, 1998). These changes were reflected in the dimensions and facilities of sales outlets, the structure of the products on offer, ownership relations ensuing from privatization and the opening of a large number of new sales outlets. Countries in transition are generally characterized by privatization and the formation of new commercial firms with domestic owners, accompanied by the simultaneous collapse of the until-then leading retail chains and the opening of foreign and multinational retail chains (Pütz, 1997). These processes are also present in Croatia, although the arrival of foreign retail chains in Croatia began at a rather late date in relation to other transition countries. The reasons for this were low buying power, unregulated property rights, and similar problems. Cities in transition countries experienced drastic growth in retail sales due to growth in consumption. At the same time, Croatia recorded stagnation and even a decline in the number of sales outlets. Abrupt (statistical) growth was recorded in 1998, but this was the result of methodological changes rather than actual growth. Despite numerical indicators, in Croatia there is a high rate of both opening and closing of sales outlets. Over the last several years, a notable trend has been the opening of a large number of domestic and foreign-owned hypermarkets and the opening of several shopping centers in Zagreb's city center and peripheries.

GEOGRAPHY AND RETAILING

How can these processes and their manifestation in space be approached from the geographic point of view? How do geographers go about conducting research into retailing? It is not our intent to delve into these problems, rather we want to point out the basic objectives of geographic research into retailing.[1] The hierarchical and functional organization of retailing and its impact on spatial development are among the 'oldest' interests of geographic research into consumption and provisioning (Lukić, 2003). This began within the framework of urban geography during the 1930s, and intensified after the 1950s. German geographers, primarily employing quantitative methods and mapping, conducted research into the development, functional structure and limits of commercial streets and zones, frequency of use, their gravitational zones and transformation (Pak, 1977). In this research, the emphasis was placed on city centers, which follows from their role as the business and commercial core of the European city. Anglo-American geographers of the mid and late

[1] For more detailed review of geographic research in retailing by the same authors: Lukić, A. (2003) Geografski aspekti istraživanja maloprodaje i trgovačkih centara, u Toskić, A. (ur.) Zbornik radova III Hrvatskog geografskog kongresa, rujan 2003., Zadar (u pripremi za tiskak)

twentieth century were particularly interested in these aspects of the subject: 1. what forms make up the retail system of the (Anglo-American) city and at which locations? and 2. what impact do new shopping centers in suburban zones have on the vitality of the central business district? Besides these questions, geographers have conducted research into the location strategy for retail outlets (models, GIS), retail trends and transformation (geographic aspects of supply and demand) and, in recent years, the intermingling and simultaneous examination of the economic and cultural components of retailing (the so-called new retail geography, Wrigley and Lowe, 2002).

OBJECTIVES AND RESEARCH METHODS

In compliance with the basic retailing trends delineated in the introduction, examples of geographic research into consumption and, perhaps mostly importantly, the shortage of research into changes in Zagreb's retailing system in the modern era, two research objectives have been set. These only partially touch upon a series of unanswered questions pertaining to the transformation of retailing in Zagreb and its impact on the city's economic, socio-cultural and physical space. The first objective was to categorize newly-opened retail outlets with larger sales floors in relation to the structure of the commercial space and, within certain categories, the range of goods on offer.[2] Possible regularities in the locations of these outlets in the city's space given their category shall also be considered. Most of the necessary data was gathered in field work. The other objective was prompted by something of an innovation which (primarily) shopping centers have introduced to the city: their role in the public and social life of Zagreb's residents (Lukić, 2002). The way visitors perceive shopping centers, how they utilize them and to which degree they see them as public spaces will be examined. Particular emphasis will be placed on a comparison of the functions of shopping centers given their location, in an attempt to determine whether the location influences the way shopping centers are used by visitors. The data for this portion of the rese-

2 In this article, newly-opened sales outlets are those opened during the transition period, meaning since 1990. The first hypermarkets and shopping centers were opened in 1994, but most of these outlets were opened in 2000 and after. The 2,000 m2 as a minimum floor space was chosen arbitrarily, keeping in mind the article's objective (research into newly-opened sales outlets with larger sales floors). Since this norcentery refers to hypermarkets and shopping centers, we have attempted to set boundaries based on definitions of them. However, they are very diverse, so that hypermarkets vary in size from 2,500 m2 to a minimum of 5,000 m2 (Anić, 1998; Vresk, 2002; Pacione, 2001). Therefore, with the goal of encompassing the greatest number while still retaining the size criteria, a floor space of 2,000 m2 was set, which in some cases was borderline.

Using these criteria, 31 retail outlets in Zagreb were encompassed. Not included were automobile salons, furniture stores, household appliance and construction materials stores which, despite approaching the floor space established by the criteria, nonetheless differ from those outlets that were encompassed due to their orientation toward a single type of product. "Metro" was also placed in the hypermarket category, even though it is owned by a wholesale chain and primarily meant for businesses. However, the Metro sales outlets in Zagreb record robust retail sales alongside their wholesale turnover, so they were therefore included in this work. A starting point for records of retail sales outlets was a document released by the Croatian Chamber of Commerce, "Trgovački centri, stanje 31. prosinca 2003. godine" (Shopping centers, Status as at 31 December 2003). Fieldwork also established the current status of all outlets mentioned in the document, while new facts were recorded. Regardless of the aforementioned, due to the pace of construction and opening of new outlets, and the fact that official statistical sources do not provide a thorough overview of the places being studies (particularly with reference to sales floors), it is possible that some facilities were left out.

arch were obtained by surveying 1,624 visitors in three retail formats at various locations in Zagreb: "Centar Kaptol" in the city's (business) center, "Mercator" at the intersection of two major urban thoroughfares, and "King Cross", not far from the highway interchange at the city's western periphery/entrance. Visitors were selected using the systematic random sampling method at the entrances/exits of shopping centers as they were departing. Visitors were asked about their reasons for coming to the shopping center, if they visited any of the hospitality facilities while there and with whom they visited the center.[3]

NEW RETAILING FORMS IN ZAGREB – CATEGORIZATION AND LOCATION

The opening of new forms of retailing in Croatia, particularly those with larger sales floors, was largely proportional to the total population of a given area. As at July 2003, not one retail outlet with a sales floor greater than 2,500m^2 was opened in the territory of a municipality, which, with few exceptions, has much smaller number of inhabitants than city. Cities were exclusive location for new hypermarkets and shopping centers. These are almost always the largest cities in counties. The City of Zagreb and Zagreb County account for over one third of the total newly-opened capacity in Croatia[4].

The first shopping center in Zagreb was the "Importane Centar" on Starčevićev trg (at the central train station) in the very heart of the city, opened in 1994. During the same year, the first hypermarket-shopping center, "Getro" in Sesvete, was opened in the city's eastern periphery. In 1995 the first "SuperKonzum" hypermarket-shopping center was opened, while in 1998 two more were opened, and three in 1999. By 2000, there were eight newly-opened retail facilities in Zagreb with sales floors larger than 2,000 m^2. This number grew to 31 by March 2004 (see note 1).

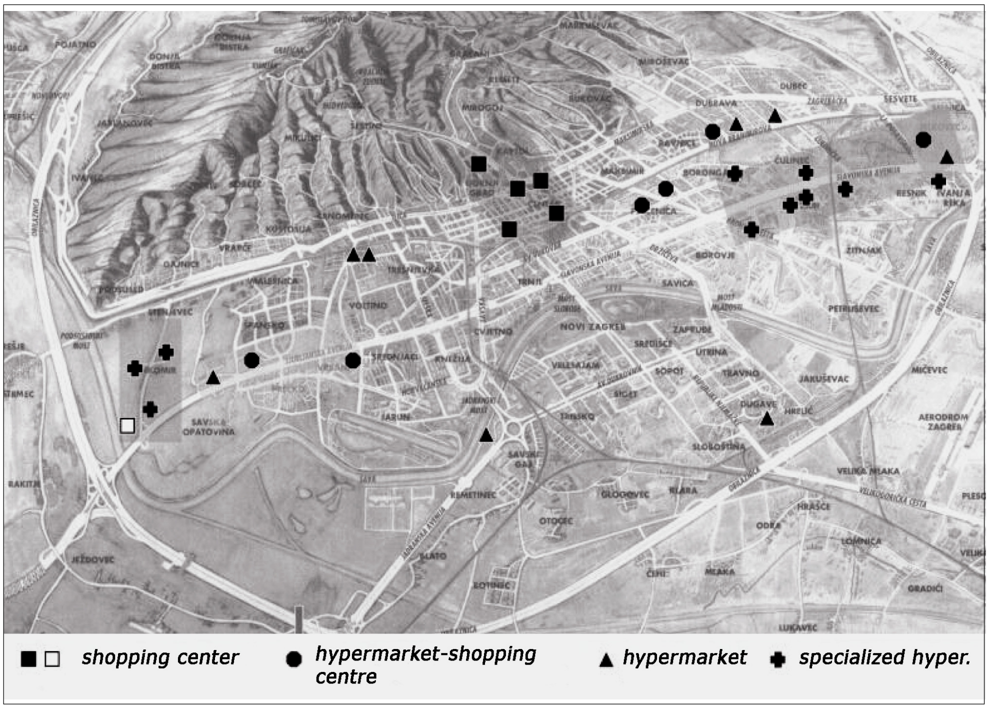
Given the structure and number of commercial facilities (activities), four categories of newly-opened retail outlets with sales floors greater than 2,000 m^2 have been defined: shopping centers, hypermarkets-shopping centers, hypermarkets and specialized hypermarkets.

Shopping centers

In the paper, usual definition of "shopping center" as a group of retail and other commercial outlets planned and developed as a consolidated unit, is used. Ownership and operation of the center are also consolidated. Parking spaces are secured on the grounds of the center. The size and orientation of the center is generally determined by the features of the market to which it caters.

[3] Surveys at Centar Kaptol were conducted from 17 to 23 December 2001. Surveys at the other two centers were conducted from 1 to 13 December 2003. The responses being compared in this article were given to the same questions posed at each of the shopping centers. For more details on the conducted surveys, see Lukić, 2002.
[4] Source: Ministry of Economic Affairs Documentation, July 2003.

Figure 1: Location of newly-opened retail outlets with large sales floors in Zagreb



Seven sites, mostly opened at the end of 1990's and beginning of 2000's, have been placed in the "shopping center" category (Tab. 1). Five are in the city's business center, 10 to 15 minutes by foot from Trg Bana Jelačića, Zagreb's main square. The remaining two are at the western ("King Cross" in Jankomir) and southwestern ("Mercatone" in Donji Stupnik) entrance to the city, not far from the highway interchanges of the Zagreb beltway. Among the shopping centers in the city center, the "Rotonda" stands out due to its scanter floor space. "Centar Kaptol" and "Branimir Centar" were constructed on the sites of former factories ("Astra"-shoe factory and "Josip Kraš"-food factory), while the "Importanne Centar" was built along the underpass at the central train station that links the city's tramcar lines with bus lines to Novi Zagreb. The underpass has traditionally accommodated shops and catering facilities. "King Cross" and "Mercatone", shopping sites at the city's periphery, were constructed on until then unused land. Although all seven sites are in the "shopping center" category, there are several considerable differences between those in the city center and those on its peripheries. All of them are dominated by retailing, at least in terms of the number of commercial outlets, followed by catering/services and then financial services. Major differences appear if the structure of the commercial outlets is observed in terms of floor space. Retailing encompasses a much larger floor space in the centers at the city's peripheries due to the presence of hypermarkets. The shopping centers in the city center do not have hypermarkets (rather just their scantier versions, supermarkets), but as opposed to the centers at the city's periphery, considerable floor space is set aside for enter-tainment and leisure activities (e.g. multiplex cinemas, casinos, cultural center). With the exception of the "Importanne Centar", all shopping centers in the city center have facilities not directly intended for more frequent visitors-consumers: office and housing space, hotel. Among these, the smallest center, the "Rotonda", offers the most service functions (cosmetics and beauty salons). In a word, the shopping centers in the city center have multiple functions: commercial, service, entertainment and housing/business (offices). At least two of them, "Centar Kaptol" and "Branimir Centar", approach the concept of the "Urban Entertainment Center" in Anglo-American and Western European countries in terms of the structure of their commercial outlets (although clearly in an "abbreviated" version). The centers at the city's periphery primarily serve consumption and service functions (entertainment is limited to cafés and restaurants).

Table 1: Shopping centers in Zagreb (March 2004)

Name	Opening year	area (m²)	No. of business premises	Structure of business premises (activities)	Other contents	Address
Importanne Centar	1994	31000	223	M- 85.7, U- 4.0, FI- 1.3, Ug - 9.0	PP (> 500)	Starčevićev trg bb
Rotonda	1995	2200	33	M- 51.5, U- 30.3, FI - 6.1, Ug -12.1	UP	Jurišićeva 19
Mercatone	1999	36000	26	M- 50.0, U- 19.2, FI -11.5, Ug - 19.2	P	Gospodarska ulica 5, Donji Stupnik
Importanne Galleria	1999	47000	144	M- 83.3, U- 5.6, FI- 2.0, Ug - 9.0	PP (> 500), K (1:336), UP, S	Iblerov trg bb
Centar Kaptol	2000	20000	110	M- 79.1, U- 10.0, FI- 1.8, Ug - 9.1	PP (520), K (3:753), UP, S	Nova Ves 17
King Cross	2002	118000	94	M- 70.2, U - 11.7, FI- 3.4, Ug -14.9	P	Škorpikova 34, Jankomir
Branimir Centar	2003	-	28	M- 67.9, U- 10.7, FI- 0.0, Ug -21.4	PP, K (13:2940), UP, H	Branimirova 29

M-retail; U-services; FI-inancial services; Ug-catering services;
P (520) - parking area with 520 spaces; PP (520) - underground parking with 520 spaces;
K (13:2940) – cinema with 13 halls and 2940 seats; UP - offices; H - hotel; S – apartments

Sources: Field resarch; Croatian Chamber of Commerce; Shopping centers web-sites; Shopping centers management

Hypermarkets-shopping centers and hypermarkets

Hypermarkets-shopping centers is a newly constructed category of retail format emerging in Zagreb. It is actually hybrid between hypermarket and shopping center: a facility dominated by the hypermarket, while the remaining content is considerable scantier in terms of number and space than in a 'shopping center.'; a facility is placed in this category if besides the hypermarket it has at least one more retail outlet; as a rule, a hypermarket-shopping center is owned by the retail hypermarket chain and has its name (e.g. "Kaufland", "Super Konzum", "Mercator") which is an additional argument for separating such retail outlets from the 'shopping center' category.

Hypermarket is a self-service outlet with sales floor greater than 2,000 m^2, intended primarily for the sale of groceries and consumer goods, but can also offer other products (e.g. clothing, footwear, audio and video equipment, etc.).

Six sites have been placed in the "hypermarket-shopping center" category (Tab. 2), and eight sites have been placed in the "hypermarket" category (Tab. 3). As opposed to the other two categories, wherein regularities in the location of sites are recognizable, here matters are not that clear. The sales floors in this category are not located in the narrower or in the wider city center. What is noticeable are locations along or near streets such as Nova Branimirova, Ulica Grada Vukovara and Ilica at the Črnomerec neighborhood, city thoroughfares marked by only slightly less traffic than avenues such as Slavonska and Ljubljanska (7 of 14 sites). These are simultaneously locations next to some of the major residential zones in the city. Five sites are located in the immediate vicinity of the already mentioned "western" and "eastern" zones at the peripheries/exits to the city, or along or in the immediate vicinity of Slavonska and Ljubljanska avenues. The two remaining hypermarkets are located near the residential neighborhoods Savski Gaj, Remetinec, Trnsko and Dugava and Sloboština. Both hypermarkets are near road interchanges. With the exception of both "Metros", hypermarkets-shopping centers have more floor space than hypermarkets, and they have a more diverse range of outlets and the accompanying amenities. The number of commercial outlets in them ranges from 5 ("Getro-Vrbani") to 31 ("Mercator"). In terms of structure, retailing is the key function of all hypermarkets-shopping centers. Other activities are also present: services, catering and financial services. Given the number of commercial outlets (and partially the structure), within these categories it is possible to discern three sub-groups: the first consists of "Mercator" and both "SuperKonzums", the second of "Kaufland", and the third consist of the "Getro" centers. The first sub-group is most similar to facilities in the "shopping center" category (particularly "Mercator", which could rightly be placed in this category, but nonetheless is not due to the domination of the hypermarket which accounts for one third of the total sales floor and its ownership by a retail chain of super/hypermarkets). "Mercator" has, besides several cafes, a restaurant, as opposed to both "SuperKonzums", where catering facilities are much less present. "SuperKonzum" (on Vukovarska avenue) is the sole site out of the 31 being analyzed that includes a post office. In "Kaufland" and the "Getro" centers retail-ing is even more marked.

Hypermarkets almost do not have additional content (with the possible exception of ATMs and the occasional cafe), so their basic (and sole) function is consumption.

Table 2: Hypermarkets-shopping centers in Zagreb (March 2004)

Name	Opening year	Sales area (hypermarket) in m²	No. of business premises	Structure of business premises (activities)	Other contents**	Address
Getro-Sesvete	1994	17900 (8500)	6	M- 4, U- 0, FI- 1, Ug - 1	P (300)	Ljudevita Posavskog 5
Super Konzum (P-222)	1995	4000 (1974)	14	M- 9, U- 4, FI- 0, Ug - 1	P	Ulica Grada Vukovara 275
Getro-Vrbani	1998	18413 (4653)	5	M- 4, U- 0, FI- 1, Ug -0	P	Ljubljanska avenija 7
Mercator	2001	24000 (5000)	31	M- 19, U- 5, FI- 3, Ug - 4	P	Ulica Grada Vukovara 269b
Super Konzum (P-277)	2001	12000 (3000)	17	M- 11, U- 4, FI- 1, Ug - 1	P	Ljubljanska avenija 108
Kaufland	2003	5186	10	M- 7, U- 1, FI- 1, Ug - 1	P	Branimirova 29

M- retail; U - services; FI - financial services; Ug - catering services;
P (520) - parking area with 520spaces;

**sales area*

**** While in tables "Hypermarkets" and "Specialized hypermarkets" "Other contents" comprises coffee-shops, FINA agencies or exchange offices in this table they are comprised in "Structure of business premises" since those are premises that differs "hypermarkets-shopping centers" from "hypermarkets".*

Sources: as in Tab.1.

Table 3: Hypermarkets in Zagreb (March 2004)

Name	Opening year	Sales area (m²)	Other contents	Address
Billa Zagreb Rotor	1999	oko 2000	P, B	Jadranska avenija 2
Billa Zagreb Dubrava	1999	oko 2000	P, B	Kneza Branimira 163
Billa Zagreb Dugave	2000	oko 2000	P, B	Ulica SR Njemačke 3
Plodine	2001	3500	P, K	Štefanovečki zavoj 10
Metro Jankomir	2001	8400	P	Jankomir 31
Metro Sesvete	2002	7938	P	Slavonska avenija 71
Billa Zagreb Črnomerec	2003	oko 2000	P, B	Zagrebačka ulica 3
Getro-Črnomerec	2003	3350	PP (220, P (90) B, K, F	Prilaz Baruna Filipovića 42

P (90)- parking with 90 spaces, PP (220) underground parking with 220 spaces, B - ATM, K - coffee-shop, F - FINA agency

Sources: as in Tab.1.

Specialized hypermarkets

Specialized hypermarket is a self-service outlet with sales floor greater than 2,000 m^2, intended for the sale of goods for specific purposes, primarily to meet medium- and long-term needs (home furnishings, home improvement, gardening and workshop tools and equipment).

This category encompasses 10 sites (Tab. 4). They are located in two zones: a scantier and less concentrated "western" zone (3 sites), which is part of the already mentioned area at the city's western edge (Jankomir), and a larger and more dispersed "eastern" zone (7 sites), which encompasses the area from Radnička road, along Slavonska avenue to the Žitnjak section to the area not far from the eastern interchange of the Zagreb beltway. What both zones have in common is that they are in, or near, Zagreb's traditional warehousing, customs and wholesale zones. In the "western" zone, specialized hypermarkets were constructed on until-then unused land along Velimira Škorpika street, while those in the "eastern" zone were less often newly-constructed on previously empty land ("Baucentar", "MD profil", "Lesnina-Merkur"), and more often partially "moved into" existing structures previously used for warehousing or commercial purposes (e.g. "Bauhaus" in the former building of the "NAMA" department store in Žitnjak, "Turbo Sport/Turbo Limach" in the building of the goods terminal, "Gramat" in a former outdoor storage and sales site...). The "eastern" zone is somewhat more diverse in its range of specialized hypermarkets: besides non-food products for homes, gardens, and workshops which dominate the "western" zone, here there are hypermarkets for sporting equipment and accouterments for children, the sales outlets "Lesnina" (furniture and interiors) and "Merkur" (home improvement consumer goods). Besides the hypermarkets themselves, all sites in this category have cafes/fast food restaurants, and most have ATMs.

Table 4: Specialized hypermarkets in Zagreb (March 2004)

Name	Opening year	Area (sales area) in m²	Other contents	Address
Pevec-Žitnjak	1998	cca. 6000*	P, K	Ulica Grada Gospića 5
Bauhaus Žitnjak	2000	8000	P, B, K, F	Žitnjak bb
Gramat	2000	6000*	P, K	Radnička cesta 184
Doma-Elektromaterijal-Casa	2001	8300**	P, B, K	Žitnjak bb
Lesnina - Merkur	2002	6000*	P, B, K	Slavonska avenija 106
Pevec-Jankomir	2003	15 000 (cca. 8000)	P, K	Jankomir
Bauhaus Jankomir	2003	oko 11000	P, B, K, M	Velimira Škorpika bb, Jankomir
Baumax	2003	10500 (inside), 1000 (outside)	P, B, K, I	Velimira Škorpika bb, Jankomir
Baucentar MD profil	2003	8000 (inside) + 10000 (outside)	P, K	Slavonska avenija 17
Turbo Sport/Turbo Limach		5000***	P	Žitnjak bb

P - parking, B – ATM, K - coffe-shop, snack-bar, F - FINA agency, M - exchange office, I - play-room
** sales area, ** only furniture showroom, *** including storehouse area; Sources: as in Tab.1.*

VISITOR PERCEPTIONS OF SHOPPING CENTERS AND HYPERMARKETS/SHOPPING CENTERS

Commercial structure and location of retail forms is just one aspect of researching their functions. Commercial structure is actually expression of what investors would like their center to be(come). But how particular shopping center will be "brought to life" depends in large on how it is perceived and used by its visitors. Special emphasis in this research was put upon whether location really matters, when perception and way of using shopping centers is in question. Questionnaire surveys were conducted at three sites in different locations in Zagreb: city center ("Centar Kaptol"), location near to important avenues and residential zones ("Mercator") and edge of the city ("King Cross"). As a convenience, all retail forms in survey will be termed "shopping centers", although "Mercator" is hypermarket-shopping center.

In general, all shopping centers are characterized by the existence of shopping, service and catering activities in one place, and they can be considered the basic content of each center. Besides this basic content, "Centar Kaptol" is characterized by the presence of businesses and housing. Based on the number and structure of businesses among the shopping centers being compared, there are no significant differences in shares of individual commercial outlets. In all three shopping centers, based on the number of commercial outlets, the largest share accounts for retail sales, followed by services, catering services and financial services. The only exception is the "King Cross" center, in which the number of catering outlets ranked second. Considerable differences are notable if the structure of outlets is examined in terms of floor space. Thus in "Centar Kaptol" retailing occupies 79.1% of the total number of commercial outlets, but if examined in terms of floor space, then retailing accounts for only 50% of the total floor space of the shopping center. In the remaining shopping centers, retailing occupies a much greater floor space due to the presence of hypermarkets. Also, in "Centar Kaptol", 10% of the floor space consists of a cinema complex with three theaters, while office space occupies as much as 20%. Such a ratio between individual types of commercial outlets influences the function of shopping centers, so that "Centar Kaptol" is a shopping/business (and residential) center, while "Mercator" and "King Cross" are exclusively shopping centers.

As a daily average, consumption is the primary reason for going to all three shopping centers, but the data for individual centers differ considerably. In "Centar Kaptol", 26.8% of the visitors stated that their reason for coming was to take a stroll, leisure or recreation. If these visitors are added to those who stated that their reason for coming was to socialize with friends and go to a café/restaurant, it follows that 50.8% of the visitors do not go to "Centar Kaptol" to shop, but rather for entertainment or to spend their leisure time there.

The share of visitors who come to "King Cross" and "Mercator" to meet with friends or visit a café or restaurant is only 6.58% in "King Cross", and 7.82% in "Mercator". This confirms the assumption of perceptions of "King Cross" and "Mercator" first and foremost as places of consumption.

Table 5: Structure of business premises in selected shopping centers and hypermarket-shopping center

Type of premises	Centar Kaptol		Mercator		King Cross	
	Broj	%	Broj	%	Broj	%
Retail	87	79,1	19	61,29	66	70,2
Hypermarket / Supermarket	1	0,9	1	3,23	1	1,06
Clothing, footwear, toys	54	49,1	12	38,71	45	47,87
Gadgets, appliances	10	9,1	2	6,45	6	6,38
Bakery	2	1,8	0	0	0	0
Florist's, gifts shop, drug store, kiosk, jewellery	20	18,2	4	12,9	14	14,89
Services	11	10,0	5	16,13	11	11,69
Beauty and hair salon	4	3,6	1	3,23	1	1,06
Pharmacy	0	0,0	0	0	1	1,06
Optician's	0	0,0	1	3,23	2	2,13
Betting shops	1	0,9	1	3,23	2	2,13
Photo	2	1,8	1	3,23	2	2,13
Entertainment center	1	0,9	0	0	0	0
Play-room	1	0,9	1	3,23	1	1,06
Scenter repairs (cobbler etc.)	0	0,0	0	0	1	1,06
Tourist agencies	2	1,8	0	0	1	1,06
Financial services	2	1,8	3	9,68	3	3,19
Banks	1	0,9	2	6,45	2	2,13
Exchange office	1	0,9	1	3,23	1	1,06
Catering services	10	9,1	4	12,9	14	14,89
Coffee shops, bars, pubs	6	5,5	3	9,68	8	8,51
Restaurants, snack bars, pastry shop	4	3,6	1	3,23	6	6,38
Total	110	100,0	31	100	94	100

Source: Field resarch

Table 6: Main reason for going to shopping centers and hypermarket-shopping center

Total	Centar Kaptol		Mercator		King Cross	
	No	%	No	%	No	%
A	274	34,6	182	44,49	202	49,27
B	97	12,2	10	2,44	9	2,19
C	97	12,2	22	5,38	18	4,39
D	-	-	66	16,14	71	17,32
E	212	26,8	-	-	-	-
F	112	14,1	129	31,54	110	26,83
Total	792	100	409	100	410	100

Morning						
A	153	44,6	59	49,17	41	43,16
B	44	12,8	1	0,83	2	2,11
C	36	10,5	8	6,67	6	6,31
D	-	-	12	10	12	12,63
E	60	17,5	-	-	-	-
F	50	14,6	40	33,33	34	35,79
Total	343	100	120	100	95	100
Afternoon						
A	85	34,7	87	42,23	104	50
B	32	13,1	10	4,85	3	1,44
C	21	8,6	8	3,88	8	3,85
D	-	-	41	19,91	35	16,83
E	71	29	-	-	-	-
F	36	14,7	60	29,13	58	27,88
Total	245	100	206	100	208	100
Evening						
A	36	17,6	36	42,86	57	43,51
B	21	10,3	3	3,57	1	0,76
C	40	19,6	3	3,57	7	5,34
D	-	-	13	15,47	28	21,38
E	81	39,7	-	-	-	-
F	26	12,7	29	34,52	38	29,01
Total	204	100	84	100	131	100

A= consumption, B= socializing with friends, C= hospitality and other services, D= convenient location, E= stroll, leisure and/or recreation, F= other

Source: Questionnaire survey

Although as a daily average consumption is the most important reason for coming to all three shopping centers, over the working day there are variations in the reasons for coming to “Centar Kaptol”. The share of visitors who state consumption as their reason for coming declines from morning toward evening. At the same time, the share of visitors who come to the center for leisure, socializing with friends or to visit cafés or restaurants grows. Such changes indicate a change in the function of “Centar Kaptol” as the day progresses. In the evening hours, social functions at “Centar Kaptol” intensify and it becomes a place for socializing and spending leisure time. “Mercator” and “King Cross” do not record such changes in function over the working day, rather the retailing function remains dominant throughout the day.

Data on the level of social functions are also obtained from the data on frequency of visits to individual shopping centers. There are considerable differences between the centers. In “Mercator” as many as 57.8% of the respondents visited it alone, while for the other two centers this share was much lower, accounting for only one third of the total number of total number of respondents. The social functions of "Centar Kaptol", i.e. its role as a place for gatherings and socializing, are reflected in the data that almost one third of the visitors of "Centar Kaptol" visited it with friends, while at the "King Cross" shopping center this share was much lower and accounted for only 12.73%. At the same time, almost half of the respondents at "King Cross" came with their families, and their share grew as the day progressed from morning to evening. From this we can conclude that "King Cross" is a place of family shopping. The share of respondents who came to "Centar Kaptol" with their families declined as the day progressed from morning to evening, even as the share of visitors who came with friends grew. This data once more confirms the assumption on the change in the function of "Centar Kaptol" over its working hours.

Table 7: With whom do visitors come to shopping centers and hypermarket-shopping center?

Total	Centar Kaptol		Mercator		King Cross	
	No	%	No	%	No	%
A	269	33,6	237	57,8	149	34,49
B	97	12,1	11	2,68	29	6,71
C	248	31	50	12,19	55	12,73
D	186	23,3	112	27,32	199	46,06
Total	800	100	410	100	432	100
Morning						
A	166	47,8	77	64,17	47	51,65
B	23	6,6	2	1,66	1	1,09
C	71	20,5	15	12,5	11	12,08
D	87	25,1	26	21,67	32	35,16
Total	347	100	120	100	91	100
Afternoon						
A	74	29,7	116	56,31	75	35,71
B	26	10,4	5	2,43	10	4,76
C	84	34,9	26	12,62	27	12,86
D	62	24,9	59	28,64	98	46,67
Total	249	100	206	100	210	100
Evening						
A	29	14,2	44	52,38	27	20,61
B	48	23,5	4	4,76	18	13,74
C	90	44,1	9	10,71	17	12,98
D	37	18,1	27	32,14	69	52,67
Total	204	100	84	100	131	100

A= alone, B= with boy/girlfriend, C= with friends, D= with family

Source: Questionnaire survey

The orientation of the “King Cross” and “Mercator” shopping centers toward retailing is additionally confirmed by the fact that out of the total number of visitors who visited the shopping center alone, only 1.1% at “King Cross” and 3.4% at “Mercator” came to meet with friends or visit a café or restaurant. Similar data are obtained even if one considers visitors who came with their families. At the same time, as many as 23.2% of the visitors at “Centar Kaptol” came to meet with someone.

In light of all previous considerations, the fact that there are no notable differences in the number of visitors who visited a café or restaurant during their sojourn in a shopping center could be a little surprising. Their share was 34.5% in “Centar Kaptol”, 29.27% in “Mercator” and 28.24% in “King Cross”. However, in “Centar Kaptol” there were once more considerable differences in the share of visitors who visited a café or restaurant during the working day. From morning to evening, the number of visitors who visited a café or restaurant grew from 27.4% to 40.7%. At the same time, at “King Cross” and “Mercator” minor fluctuations were recorded in the number of visitors who visited cafés or restaurants during the working day, wherein the largest number of visitors went to cafés or restaurants during the afternoon hours.

Based on functions, spatial organization and visitor perceptions, the retailing function is at the forefront in the “King Cross” and “Mercator” centers, while the social and business functions are also well-developed alongside retailing at “Centar Kaptol”. Although “King Cross” and “Mercator” have attempted to make their premises more attractive to shoppers and pleasant for longer stay, socializing and leisure functions, the retailing still has primary importance. There are naturally differences between these two centers, so that “Mercator” attempts to attract visitors through promotional campaigns, while “King Cross” attempts to enrich its content by offering entertainment events, appearances by performers and prize competitions. “King Cross” is thereby attempting to become similar to the shopping centers in the city center to a certain extent, but survey has shown that at the moment shopping centers at the city’s peripheries and at major road interchanges are not able to “compete” with centers in the city center in the sense of social and cultural functions.

CONCLUSION

Purpose of the paper and its expected length doesn’t allow us to discus results with other published research so we proceed to conclusion. The objectives set in this work were: categorization of newly-opened retail outlets with large sales floors (minimum 2,000 m^2) based on the structure of commercial outlets (functions), establishment of any possible regularities in their locations and examination of visitor perceptions of shopping centers and hypermarkets/shopping centers, with special emphasis on the way they are used and how they are seen as potential “pseudo” public spaces.

The following conclusions were drawn:
Given the structure and number of commercial outlets (activities), four categories of newly opened retail forms with sales floors larger 2,000 m^2 have been recognized in Zagreb:

shopping centers (7), hypermarkets-shopping centers (6), hypermarkets (8), and specialized hypermarkets (10).
Given the spatial organization of the newly built retail sites, three basic locations can be discerned: a) the city's central business district (inner city); b) locations along thoroughfares and near important residential zones outside the city center; c) locations at the city's peripheries near the highway interchanges of the Zagreb beltway, partly in traditional location of warehousing, customs and wholesale facilities in Zagreb (especially eastern and western edge of the city).

a) City center is location of 5 shopping centers which combine retailing with other functions such as services, entertaining and socializing, plus office & hotel space and apartments.
b) Locations along thoroughfares and near important residential zones outside the city center are main sites for hypermarkets-shopping centers (5 out of 6) and hypermarkets (6 out of 8).
c) Locations at the city's peripheries near the highway interchanges of the Zagreb beltway are main sites for specialized hypermarkets (10 out of 10), but also for scantier number of all other retail formats (2 shopping centers, 1 hypermarket-shopping center and 2 hypermarket).

Questionnaires have revealed that:

- Location of shopping centers and hypermarket-shopping centers is important for the way visitors perceive and use them. Leisure and entertaining is still dominant in city center shopping centers. Some shopping centers in the city center are used as "pseudo" public spaces, eg. squares and streets. Shopping center(s) on the city periphery are used for "family shopping".
- In all three shopping centers where questionnaire was carried out, in a daily average con-sumption is the primary reason for coming to such center. However, while over the working day there are differences in the reasons for coming to city center in Centar Kaptol (thus indicating differing functions performed by the center which is from morning to evening becoming more "urban entertainment" and less shopping center), in the other shopping centers such differences are not as explicit, rather shopping remains the primary motive for coming throughout the day.

It is clear from the conclusions that shopping centers and even hypermarkets-shopping centers have not only economic but social and cultural dimension as well. Their location is very important for how and by whom are they used. They influence complex geographic space in much more than one way. We hope that this will be recognized and accepted by planning authorities because dynamic and "chaotic" changes in retailing (which Croatia is facing at the moment) could have serious consequences for space and society we live in.

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