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Old and New Retail Environment in a Post-Communist City: Case Study from the Old Town in Bratislava, Slovakia[1]

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Abstract

The future success, vitality and viability of urban shopping areas in Slovakia have attracted considerable attention from academics and policymakers alike over the last few years. This paper reports the current state of the urban retail environment in Bratislava (Slovakia) as a result of various transition waves that reflect its changes over a forty-four year period (1967 – 2011). The outcome of this paper is the identification of concentric zones with the highest rates of changes based on analysis of old and new retail data from both temporal and spatial aspects. In addition to this, it also offers a variety of approaches to measuring the change of urban retail environment in a post-communist city.

Keywords: *retail transition, post-communist, Bratislava, spatial analysis*

JEL Classification: L81, P25, R11, R12

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Introduction

The 1990s brought a lot of significant social and economic changes to post-communist countries (cf. Cudny, 2012; Musil, 1993; Sýkora and Bouzarovski, 2012). Of course, these changes were reflected in the retail sector (Garb and Dybicz, 2006; Kok, 2007; Krásny, 1992; Križan et al., 2016; Michalak, 2001). The most important changes were democratisation of society and transformation towards a market economy. As N. Kshetri (2009, pp. 236 – 237) notes, the transition of post-communist countries to market economies has proven to be a challenging experience for these economies because of the absence of appropriate political, legal, economic and commercial structures needed for a free market economy or due to difficulties related with developing these structures. The transition from a centrally-planned to a free-market economy is a complicated process requiring economic, political, and social transformations for the post-communist economies (Musil, 1992). These economies also differ dramatically in terms of the nature and degree of such transformations. Retail is considered to be such a rapidly transforming sector of the economy on which the transformation trends and globalisation processes can be documented (Simová, 2010; Spilková, 2003; Maryáš et al., 2014). The dynamics of retail transformation and demonstrations of the globalisation processes have not always been the same in the context of the political and economic situation of a post-communist state (region).

Over the last 50 years, the most significant changes in the Slovak retail environment – just one example of the post-communist transformation – were observed after 1989 (Krásny, 1992). These changes are of structural as well as of functional character (Szczyrba, 2005). While the character of retail in general was being changed markedly, it can be treated as a complex transformation (Smith, 1996). Excessive changes of the retail occured also in the post-war period. After these radical changes, the retail sector in Slovakia became unified, and there were practically no changes for several decades. Only political-economic transformations of the society after 1989 brought the changes into the economy of the country, or more precisely, into the retail environment (Drtina, 1995; Krásny, 1992; Križan et al., 2016; Mitríková, 2017; Spilková, 2008; Seitz, 1992; Trembošová, 2012) as well as into the changes in consumer behaviour (Kunc et al., 2012a; Nagy, 2001; Spilková, 2003; 2012; 2018).

For better understanding of the transformational changes in retail in the analysed periods, two time horizons were chosen – years 1967 and 2011, mainly for two reasons: The first one is a comparison of the ‘old’ and the ‘new’ retail. During the communist area, after 1968 there were significant changes in Slovak economy (Williams, 1997), and these were observable in all spheres of the society. The planned economic reforms were stopped during normalisation. In the late 1970s and 1980s Czech economy was gradually losing competitiveness (Vltavská and Sixta, 2015). The initial normalisation stability of the Communist dictatorship benefited in many ways from concepts created in the 1960s. Later, however, it failed to saturate the increasing demands of citizens at a time when Europe was flooded with large shopping centers on the outskirts of cities. Consumer infrastructure of the Communist dictatorship reached its breakthrough phase during the 1960s. The result of the distribution transformation illustrated in many ways not only the formation of a consumer society in Czechoslovakia, but also the birth of a new category of citizen, the consumer (Táborský, 2016). The second reason is that the accessible data – those from the communist era – are preserved only partially. Transformation of retail in Slovakia has been taking place differently in the urban and rural environment (Križan et al., 2016) – the urban transformation is faster and more expressive with a more noticeable functional and spatial range. Therefore, Bratislava, the capital city of the Slovak Republic, was selected as a model region for this paper. The strongest transformation processes in retail within the republic appear in this city (Križan et al., 2015).

The aim of this paper is to evaluate the transformation changes in retail on the example of a post-communist city from the temporal and spatial points of view. The analysis of the transformation in time refers to comparison of retail conditions in the studied region as of 1967 and 2011. The analysis of the transformation in space refers to given concentric zones in the centre of the city of Bratislava. This approach is rather innovative in the urban retail analysis. We concentrate on answers to the following questions:

Q1: Which changes can be observed in the urban retail of a post-communist city from temporal point of view? In this construct, changes in number of stores are discussed (Q1a) as well as the size of the gross leasable area (GLA) (Q1b) and the changes of the retail structure (Q1c).

Q2: Which changes can be observed in the urban retail of a post-communist city from spatial point of view? In this construct, changes in the shopping zones (Q2a) and specialisation of the shopping zones (Q2b) are discussed.

1. Transformation of Retail Systems in Slovakia

Development trends in the Slovak retail sector were significantly influenced by political as well as economic conditions in the country. Transformation of the retail environment in Slovakia occurred in several waves (Križan et al., 2016), similar to other countries of Central and Eastern Europe. Retail transformation in the post-communist countries, including Slovakia, began in the period 1989 –

1991. In some of them globalisation trends were first seen in 1996, while in others only after 2002 (Dries, Reardon and Swinnen, 2004). We may identify the following three stages of retail development: (i) communist stage, (ii) transformation stage, (iii) globalisation stage. For each of these stages, several characteristics can be specified (Table 1). We must note that development may be different in various countries. An example of this is a retail development on brownfields during the transition stage in some countries, while in the Slovak and Czech Republics were dominated by greenfield development (Križan et al., 2017). After evaluating the transformation waves, Slovakia can be grouped with the Czech Republic, Hungary and Poland. However, somewhat delayed globalisation trends in a West-East direction can be seen in these countries, too (Szczyrba, 2005).

T a b l e 1

Key Characteristics of the Three Stages of Retail Transformation

Characteristics	Communism	Stages Transition	Globalisation
Concentration in retail sector	High	Low	High
Dominant source of capital	Domestic	Domestic	Foreign
Foreign investment	–	Brownfield	Greenfield
Share of modern retail	Low	Low	High
Share of large multinationals	Low	Low	High
Location of modern retail outlets	–	Cities	Everywhere

Source: Dries et al. (2004).

1.1. Retail in Slovakia during the Communist Era

For the post World War II period, typical features of the Slovak retail network were its fragmentation, prevalence of individual ownership and its uneven geographical distribution. An important moment was the change in ownership conditions after 1948. Prior to that year, a private retail character prevailed, but after nationalisation, a state-run retail system was formed. Until 1948, 88% of stores belonged to the private sector, whereas in 1949 just 25% of retail spaces were under private control, by 1950 the private ownership share dropped to 9%, and after 1960, the private sector almost did not exist (Očovský, 1976). The communist Slovakia (Czechoslovakia) represented a typical example of the centralised or state-controlled model of retail ownership (Dries, Reardon and Swinnen, 2004). The main function of the state trade was to supply primarily the towns and cities; the countryside, on the other hand, was supplied by consumer cooperatives that were unified under the name Jednota. Another important feature in retail development was an introduction of unified prices, which served as the de facto end of competition in the retail environment. Supplemented by street trading and the revival of local markets, the development of the retail network gradually took off (Križan et al., 2016). A characteristic feature of both towns and cities was the strong concentration of retail in centrally-located deparment stores, such as Prior. This retail network consisted of aproximately 17,000 stores and it remained practically unchanged from the 1960's throughout the following three decades (Očovský, 1974).

Before 1989, retail in the former Czechoslovakia (in Slovakia, respectively) was characterized by the following periods of development (Viestová, Vávra and Francová, 1999): (i) The period of formation of socialist trade foundations in 1945 – 1948; (ii) The period of nationalisation and socialisation of trade in 1948 – 1953; (iii) The period of the first five-year plans in 1953 – 1965; (iv) The transition period to the economic system of business management in the years 1966 – 1970; (v) Economic consolidation period 1970 – 1989.

This retail development in Slovakia led to building of the organisational structure, the employment and management system, the creation of economic and planning rules and legal norms. This led to several market deformations such as the creation of a state monopoly and cooperative trade, administrative separation of trade and production, or limitations of the retail network and the number of employees in the retail sector (Viestová and Vávra, 1997). From a historical point of view, consumption was planned, which meant that the market was rejected as a price regulator based on supply and demand.

Compared to developed European economics, the retail in Slovakia (former Czechoslovakia) was underdeveloped (cf. Blažek and Krásný, 1989) and negatively assessed in many aspects (Krásný, 1992):

(i) The density of the retail network (expressed by number of stores per 1,000 inhabitants) was very low (approximately half the average of Western Europe). Specific and noteworthy was the limited range of stores in large cities.

(ii) The retail capacity (retail floor area per 1,000 inhabitants) was also very low (only one-quarter of the average level observable in Western-European countries). The supply of goods (especially foods) to the stores was quite limited.

(iii) There were inadequate conditions in the retail sector stemming from density and capacity levels related to structural deficits, such as a lack of non-food stores and an absence of modern large-scale retail stores, as well as significant differences in the role of retail at local and regional levels in terms of satisfaction of consumer needs.

1.2. Retail in Slovakia during the Transition Stage

The most important changes in retail took place only after 1989 when the economy was transformed from a centrally-controlled one to one that was market-based. T. Krásný (1992) calls the period from the beginning of the centrally-

-controlled economy until 1989 as a long and stressful way from capitalism to capitalism. The transition consisted of three parallel processes. The first one included liberalisation and stabilisation processes; the second was an institution-building; and the third process covered a microeconomic restructuring of the existing capacity (Kolodko, 2000). After 1989, amid the new social-economic conditions the retail sector was undergoing a significant transformation, and within quite a short period of time several transformative processes regarding the rise of globalisation in retail were observed (cf. Kunc et al., 2012b). Since the first hypermarket, as a manifestation of globalisation, was opened in Slovakia only in 1999, the period of retail transformation can be defined by the 1989 – 1999 decade (Križan and Lauko, 2014).

Various factors influenced the beginnings of the transformation of internal trade. These factors included market liberalisation, changing forms of ownership, decentralisation and demonopolisation of retail, as well as price liberalisation (Krásný, 1992; Taylor, 2001). The limitation of consumption and the development of retail as such were two main consequences of price liberalisation. One example of this development was the sharp increase in prices beginning in January 1991, an average yearly inflation reached 32% (Drtina, 1995).

Changes of ownership forms in the retail economy included restitutions of properties to their original owners, involving new stakeholders in the economy, and also transfer of state properties to private hands through privatisation (cf. Brada, 1996, Ovaska and Sobel, 2005). Privatisation of the state property was organised in two waves, so called „little“ and „big“ privatisations (cf. Kotrba and Svejnar, 1994; Vitkovič, 1998). The development of retail was strongly supressed by so called „coupon privatisation“ that ran in two phases (Baláž, 1996). It was based on buying a coupon book with investment points serving for taking over some shares in privatised companies.

A typical feature of the retail climate in Slovakia in this period was the process of atomisation. This process was marked by various intensities, durations and globalisation features in various countries (Szczyrba, 2010). As a result of privatisation and restructuralisation processes, we could observe a formation of large numbers of businesses and a simultaneous closure of many old large, well-established organisations, accompanied by a slow formation of new branches. Atomisation of trade was spatially and also organisationally characterized by a fragmentation of the retail structure, showing some signs of decentralisation and deconcentration of the retail network that led to considerable fragmentation. The number of organisations active in trade and services was rising, which resulted in a growing number of employees working in this sector (Mitríková, 2008). Moreover, transformation of the retail network in the period of atomisation proceeded almost exclusively without any participation of a foreign retail network; indeed, private domestic capital played a key role in retail development. The retail network was also influenced by transformation processes related to the disintegration of state and cooperative organisations of domestic trade.

In general, the structure of trade concepts that were active in the Slovak retail market during the period of atomisation can be characterised as unsatisfactory. The prevailing ones were small self-service stores, counter-based stores, and mixed grocery stores. Other types of shops included department stores with wide assortment; and specialised or mixed shops selling specialty goods (Mitríková, 2008; Maryáš et al., 2014). At the same time, the retail sector was supplemented by traders mainly of an Asian origin (Williams and Baláž, 2005).

A result of the retail atomisation was both an increase in the number of stores and a decrease in the number of customers per shop. GLA was increasing rapidly and the area standard (the ratio of the population (in thousands) to the GLA) was rising as well. At the same time a service standard (the number of inhabitants per one employee in retail) was decreasing (Szczyrba, 2005). Atomisation was also apparent in wholesale, where a sharp increase of non-registered subjects could be observed. In Slovakia, there were 450 registered companies, in 1990, this number rose to 19,500 (in 1993). Towards the end of 1992, more than two thirds of revenue were generated by companies with fewer than 25 employees (Drtina, 1995).

Small-scale stores were the main spots of trade realisation. This was mainly as a consequence of the initial phase of retail transformation in all post-communist countries. It represents a transformation phase in development trajectory from a centrally-controlled and isolated economy through dynamic demonstrations of globalisation processes to an internationalised retail sector (Križan et al., 2016). One should note that after the atomisation process a new retail development phase was identified in Nitra, which can be titled as a consolidation phase (Trembošová, 2010; Trembošová and Dubcová, 2013). There were no significant changes visible in urban retail environment. After this phase, major changes have occurred in urban retail trade due to globalisation processes.

1.3. Retail in Slovakia during the Globalisation Stage

Relatively soon after the transformation from a centrally-controlled to a market economy, retail in Slovakia underwent a phase of globalisation processes, such as internationalisation, concentration and cooperation (Križan, 2009). Considering just one specific feature of Slovak economic development, the internationalisation of the Slovak retail sector became intensive after 1989, there was a real transformation to the trade economy (Drtina, 1995; Krásný, 1992). Nevertheless, it is important to note, for example, that there were some Julius

Meinl (based in Vienna, Austria) retail stores in Czechoslovakia before 1939. However, after World War II, these stores were either demolished or nationalised during the socialist period (Dawson, 1994, pp. 267 – 268). A lot of international companies became successful in domestic markets of the post-communist countries and this trend also continued in the second half of 1990s (Knežević, Delić and Knego, 2014). It continues today, as well.

Transformation of retail under the concentration processes is typical for the urban environment. Concentration in retail is connected mainly with the construction of large-scale stores, together with the entrance of international retail networks into the domestic market. By analysing the behaviour of retail networks in the Slovak market, it is possible to define four phases (cf. Križan et al., 2016; Szczyrba, 2005):

(i) phase of a dynamic development in supermarkets[2] network (from 1995);

(ii) phase of a dynamic development in network of discount stores network (from 1997);

(iii) phase of a dynamic development in hypermarkets[3] network (from 1999);

(iv) phase of a dynamic development in shopping centres network (from 2000).

In the spatial structure of towns and cities and in their retail structure that started by the process of retail concentration, various changes can be identified. Those in the spatial stucture of towns and cities happened in the physical and function structure. Those in the physical structure can be characterised as new morphology structures – vast single-storey hypermarkets, specialised wholesalers, and the like (Bednář, 2005). On the other hand, changes in the functional structure represent the changes in using areas on the edge of compact built-up urban area, where the main purpose was to construct shopping centres (Kunc et al., 2016), and through this, to create a new type of vast area of monofunctional commercial facility (cf. Spilková and Šefrna, 2010). The second group of the changes includes new forms of retail sale – supermarkets, hypermarkets and hobbymarkets, as well as assortment decline in central district shopping centres, reducing the importance of deparment stores in the city centre, a dual spatial structure of ownership and rent of the sale units according to the location rent (local vs. national, multinational retailers), oligopolisation of the grocery sale, sharp competition among individual forms of retail groceries, change in the hierarchy of the retail network and its new organisation and the attenuation and limitation of street trading.

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[2] Supermarket is retail store selling a wide range of foods, supplemented by non-food items for daily consumption. GLA of the supermarket is between 400 and 2,500 m^2.

[3] Hypermarket is large-scale self-service retail store selling a wide range of foods and non-food items. GLA of hypermarket is over 2,500 m^2.

2. Methods and Data

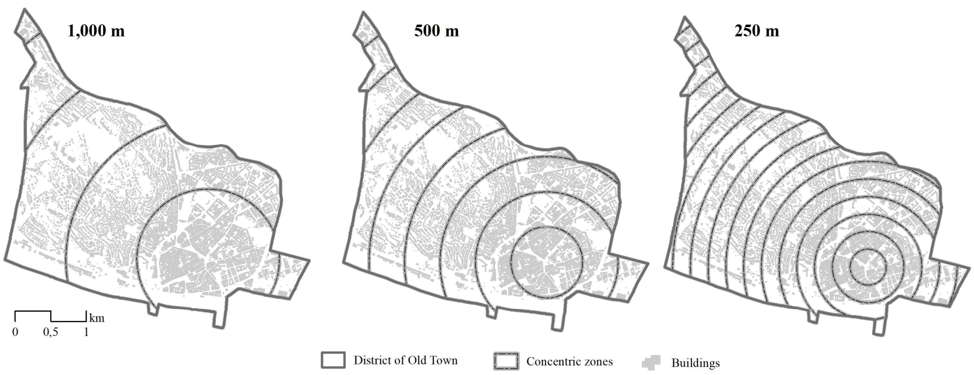
A comparison of two databases of retail stores in Old Town (Bratislava) serves as a resource for this analysis. These databases relate to the years 1967 and 2011 and so it is an analysis of changes over a forty-four year period of retail transformation. In the studied area the retail stores were divided into several classes according to the NACE SK, Rev. 2 classification. For better clarity, the chosen familiar classes of the database were combined into eight classes.

The first part of the research was based on comparison of databases Retail_1967 and Retail_2011 in the environment of Geographic information systems (GIS). The size of changes and their character in individual classes of NACE SK, Rev. 2 were quantified by GIS tools. Spatially, the biggest changes were defined the same way as in the analysis of land cover by M. Šveda (2011).

The second part of the analysis was aimed at construction of concentric zones (Križan et al., 2018). Representing the database of stores by concentric zones allows for recording some spatial differentiation processes. We can assume that their intensity should change (increase or decrease) with the growing distance from the city centre. The most suitable range was the interval of 0.25 km – it neither divided the area into too many zones, nor did it ignore the distribution and shape of the city districts. It also took into account the character of built-up area (Figure 1). A longer-distance interval would have included some of quite different city districts into one zone. A database of the current distribution of retail stores, their character, structure, size of the retail area, etc. was processed within the project VEGA 1/0039/11 (Kita et al., 2011; 2013). A database of retail stores in the area of Bratislava for the year 1967 was processed by N. Fučíková (1971; 1973).

F i g u r e 1

Delimitation of Concentric Zones in Old Town with a Width of 1,000; 500 and 250 m.



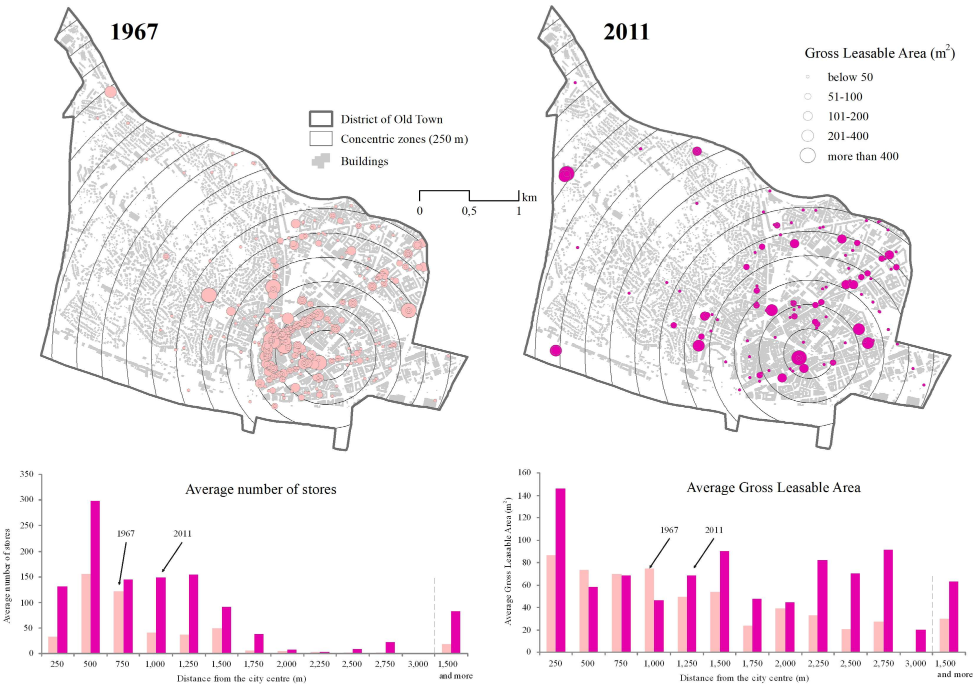
Source: Authors' elaboration.

3. Analysis of Old and New Retail: (Spatio)temporal Aspects

The transformation of retail shows different intensities in time and space in the analysed region. In general, from a temporal aspect three main transformation processes can be defined. The first one is a change of sales units. In total, the number of stores more than doubled (number of retail units rose by 136%). This increase, however, was spatially uneven (Figure 2). In 1967 a spatial concentration was more intensive in the close hinterland of the city centre: 73.5% of all stores were concentrated within 1,000 metres from the city centre (Table 3). However, in 2011 a more even distribution of stores in a wider hinterland of the city centre was observed.

F i g u r e 2

Structure of Size of the Stores' GLA and a Number of Stores in the Old Town in 1967 (left) and in 2011 (right)



Source: Own elaboration on the basis of data derived from the Fučíková (1971; 1973), Kita et al. (2011; 2013).

Change in size of GLA can be defined as the second process. From the temporal aspect, there was only an increase by 10.3% of the average GLA. More remarkable changes can be observed from the spatial aspect (Figure 2). In the communist period, a decrease in the size of GLA correlated with increasing distance from the city centre. 81.9% of all GLA were concentrated within 1,000 m from the city centre (Table 2). Also, as of 2011, a higher rate of GLA directly in the city centre could be observed. However, at the same time there were several concentric zones in various distances from the city centre showing higher concentrations of GLA. A result of this process is that in 2011, 64.7% of all GLA were concentrated in the research area.

T a b l e 2

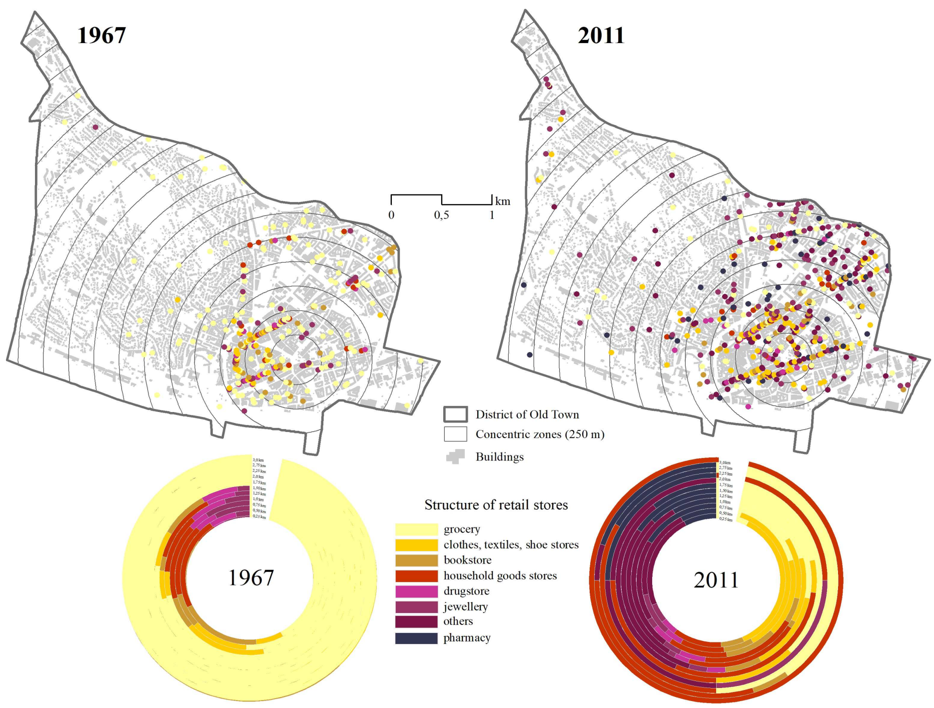
Concentration of Retail in the Old Town of Bratislava

Concentric zones/Year	1967				2011			
	GLA	*GLA_cum*	*NoS*	*NoS_cum*	*GLA*	*GLA_cum*	*NoS*	*NoS_cum*
250 m	9.0	9.0	6.9	6.9	23.4	23.4	11.6	11.6
500 m	36.2	45.2	32.5	39.4	20.9	44.3	26.3	37.9
750 m	26.8	72.0	25.4	64.8	12.1	56.4	12.8	50.7
1,000 m	9.9	81.9	8.8	73.5	8.4	64.7	13.1	63.8
1,250 m	5.9	87.9	7.9	81.5	12.7	77.5	13.6	77.4
1,500 m	8.5	96.4	10.4	91.9	9.9	87.4	8.0	85.4
1,500 m and more	1.8	100.0	4.0	100.0	6.3	100.0	7.3	100.0

Source: Own elaboration on the basis of data derived from the Fučíková (1971; 1973), Kita et al. (2011; 2013).

F i g u r e 3

Structure of Retail Stores in the Old Town in 1967 and in 2011



Source: Own elaboration on the basis of data derived from the Fučíková (1971; 1973), Kita et al. (2011; 2013).

The third process covers a change of the retail structure. In the last four decades new retail sectors have occured, or rather, these sectors have been considerably extended (Figure 3). Electronic and optic stores are examples of this process. In the past, the structure of the urban retail was less varied, and the commodity specialisation was often concentrated into more general stores (household goods stores). After the transformation to the market economomy, a notable specialisation of retail in the Old Town (Bratislava) was recorded. This was related to the development of the selected stores.

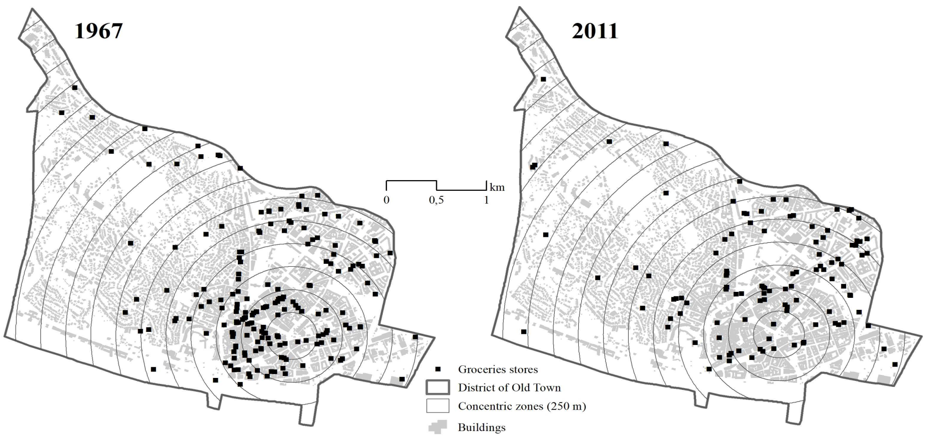
4. Analysis of Old and New Retail: Spatial Aspects

From the spatial perspective, transformation processes of retail can be evaluated from two different aspects. The first aspect is a change in the spatial distribution of retail units. In the past (as of 1967), a concentration of retail in the city centre was a typical feature, while there was only a small number of stores in other parts of the city (Figure 3). The creation of several parallel shopping zones in various parts of the city was typical for the second analysed period. In the city centre, there were two new shopping zones established in different locations – two new zones in the northern part of the research area and a new shopping centre in the south of the Old Town. However, it is important to note that in this case the key role was taken by shopping centres (cf. Križan et al., 2015; Maksić, 2016).

A specialisation of shopping zones in a post-communist city is the second aspect of spatial transformation of urban retail sector. A specialisation of shopping zones into groceries, clothing and shoe stores serves as an example. While in the case of the grocery stores (Figure 4) it is possible to identify a process of concentration, in the case of the clothing and shoe stores (Figure 5) a reverse process of atomisation is observed.

Figure 4

Specialisation of Shopping Zones in the Old Town of Bratislava in 1967 and in 2011 – Example of Groceries Stores



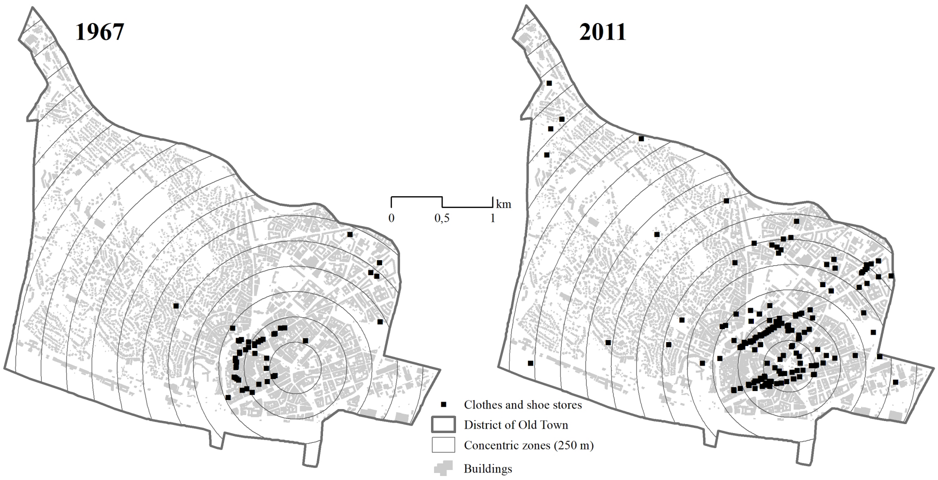
Source: Own elaboration on the basis of data derived from the Fučíková (1971; 1973), Kita et al. (2011; 2013).

A dominating central location of most of the grocery stores has changed into preferance of the edge parts of Old Town and the GLA is concentrated into the large-scale stores mainly in the city outskirts. The biggest decline of retail capacity is seen in the city centre (Figure 6).

In the case of apparel and shoe stores, an atomisation can be observed, as well as the specialisation of some premises (Obchodná street and the city centre) that are being concentrated in the city centre.

Figure 5

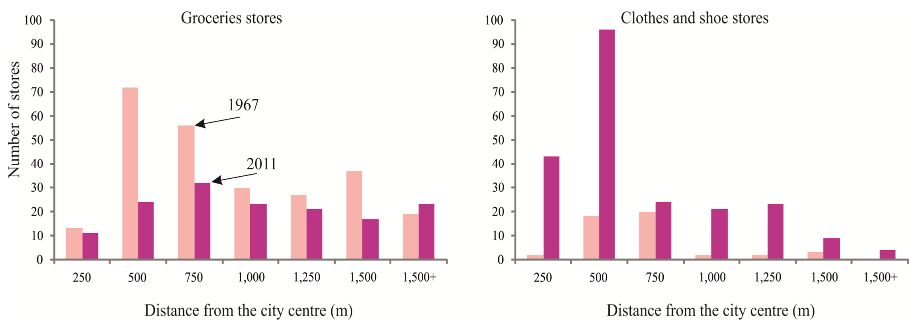
Specialisation of Shopping Zones in the Old Town of Bratislava in 1967 and in 2011 – Example of Clothing and Shoe Stores



Source: Own elaboration on the basis of data derived from the Fučíková (1971; 1973), Kita et al. (2011; 2013).

Figure 6

Specialisation of Shopping Zones in the Old Town of Bratislava in 1967 and in 2011 – Example of Groceries Stores and Clothes and Shoe Stores



Source: Own elaboration on the basis of data derived from the Fučíková (1971; 1973), Kita et al. (2011; 2013).

5. Discussion and Conclusion

Retail is changing over time and space. The paper focuses on comparison of urban retail environment in Bratislava Old Town in 1967 and 2011. The transformation of retail in post-communist cities has been significantly influenced by social and economic changes that occurred after 1990 (Aksenov, 2016). These changes appeared in retail organisation, management of production and distribution and application of new marketing approaches. The development of new retail formats in Slovak retail market (hypermarkets, shopping centres, e-commerce etc.) has enabled a labor productivity growth and an expansion of distribution. Retailers have begun adopting new business strategies to meet the increasing demands of consumers, offering new and high-quality goods and services. There is a significant shift compared to the development of urban retail and consumers' behaviour during the communist (Jindra 1996; Szczyrba, 2010; Viestová, Vávra and Francová, 1999) and post-communist periods (Aksenov, 2018; Križan et al., 2016; Trembošová and Dubcová, 2013).

Retail in many cities is considered as a holder of socio-economic development. At the macro level, the analysis of relations within the economic chain focuses on globalisation processes that are manifested by the presence of international retail chains in the market that are much more concentrated and are consolidated by a few powerful supply and logistics companies with their offensive marketing strategy and distribution on a large commercial territory. In Slovakia, globalisation can be perceived not only by number of retail outlets of domestic and foreign retail chains, but also through their organisation in the form of a supply and supply policy or through price stability (Kita, 2008).

At the micro level, it is about providing access to retail for consumers based on relationship between consumer incomes and commodity prices and factors of consumer behaviour. In this context, a change in the retail spatial management can be observed (Szczyrba, 2010; Warnaby, Bennison and Davies, 2005). An enormous growth of concentration and a revolution of large-scale stores are typical for the current retail market environment in Slovakia, as well as in other post-communist countries (Kotulič and Marchevská, 2013; Križan and Lauko, 2014). Changes in the spatial distribution of large-scale stores will continue to reflect changes in consumer demand, current trends in consumer behaviour as well as changes in spatial population distribution (suburbanisation) and eventual formation of new urban districts, and consequent changes in the retail area management (Aksenov, 2018; Mulíček and Osman, 2018).

Evaluating the intraurban schemes, retail development in the city centre, in its suburbs or outside the city's territory (cf. Nagy, 2001) should be considered. When choosing a location for a new retail business, the main criteria are no longer determined by the desire to develop new unoccupied territorial markets in the city. In this new stage of competition, quality and specialisation, as well as redistribution of existing customers rather than attraction of new ones, has become of paramount importance. In the post-transformation period, business locations are chosen to solve these new problems closely associated with changes in the demand structure (Aksenov, 2016, p. 377).

In general, from the temporal aspect, three main transformation processes (Q1) can be specified:

(i) Change in the number of retail stores. In the analysed period an increase in the number of retail stores from 480 to 1,135 (i. e. by 136%) was recorded.

(ii) Change in the size of the retail GLA. We recorded an increase from 31,737 m^2 to 82,739 m^2 (by 161%). However, it is important to note that in the case of the GLA per store indicator, only a slight increase by 10% (6.8 m^2) was recorded.

(iii) Change in the retail structure. There was a decrease in the number of grocery stores (by –59.6%) and a more than four-fold increase in the number of clothing and shoe stores.

Evaluating the retail environment from the spatial aspect, two main transformation processes can be identified (Q2):

(i) Change in the shopping zones. In the examined area, we can observe a specialisation of some locations – mainly in the marginal parts of the Old Town – into a trade function. More precisely, some zones remain preserved, but the quality and structure of the respective retail units have changed.

(ii) Specialisation in the shopping zones. The transformation process is a process of concentration of selected specialised stores in space. Grocery stores are a prime example: A rapid decrease of the stores at the expense of the retail area and large-scale stores was identified. At the same time, in the case of clothes and shoe stores, there were some concentration tendencies; however, considering the accelerated increase in the number of the stores, a certain atomisation of this retail sector can be seen as well. Through comparison of the data, it can be stated that Slovak retail (in urban environment) is notably influenced by the globalisation processes. These processes have also initiated considerable changes in the Slovak retail, such as development of supermarkets, hypermarkets, discount stores as well as large-scale stores. These processes have been notably influencing the retail network of the city.

In Bratislava, almost four out of five respondents preferred shopping malls over 'unplanned' 'urban retail and service clusters' (16.3%) situated within town/city centre and high streets. Only 5% expressed no preference for either format. These results give a first indication of an uneven competition between a comparably large number of new and professionally managed shopping malls and a limited number of barely managed or marketed urban retail and service clusters (Teller, Wood and Floh, 2016).

This study provides conclusions which are specific for a post-communist capital on one hand, and on the other hand, a discussion on universalism vs. uniqueness in post-communist urban (retail) development (Wiest, 2012). Our results show the same patterns of urban retail development once identified in other post-communist cities (Maskić, 2016; Pojani, 2011, Aksenov, 2018). Urban retail development in Slovakia is unique in terms of volume and onset period of transition. However, it is universal in terms of processes of retail transition and shopping behaviour because Slovak society can be considered a consumer society.

Limitations and Future Research

The population of Bratislava reaches to 430,000 and its retail network, together with the urban environment, cannot be compared with other Slovak cities. With the exception of Košice, population size of all other cities in Slovakia reaches below 100,000. Moreover, there is a problem with the data from the 1967 – 1989 period. Other aspects such as transport network, motorway infrastructure and geographic location, e.g. proximity to Vienna, Brno and Budapest, are not comparable with any other cities. Furthermore, the research does not deal with the role of online retail in the transition of the urban retail environment.

This paper has a potential to provide a significant set of insights into the changing nature of retail activities in Bratislava. It also provides an opportunity to explore new ways of measuring the nature and change of retail environment. The future research will focus on smaller cities or towns whose economy is developing rapidly due to large manufacturing investments, such as Žilina (Kia Motors Slovakia), Trnava (PSA Slovakia), Nitra (Jaguar Land Rover Slovakia), and others. Considering their proximity, Trnava and Nitra are interesting from various aspects, including retail structure similarity as well as differentiation of their urban shopping zones.

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