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NO. 1.
TYPOLOGY OF SHOPPING CENTRES IN BUDAPEST

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1. TYPOLOGY OF SHOPPING CENTRES IN BUDAPEST

(Tamás Sikos T.[1] *– Magdalene Hoffmann)*[2]

All over the world shopping centres have been often built on derelict urban land (in the so-called rust zone). This was also the case in Budapest, as the example of WestEnd City Center, Pólus Center, Mammut[3] and MOM Park shows. These retail establishments appeared on land of low price, liable to urban redevelopment, formerly occupied by industrial estates, railway stations, military bases. At the same time proximity of transport junctions was a due requirement. Once they were built, these shopping centres exerted a strong impact on real estate prices in their vicinity. Areas of hitherto unfavourable setting had been upgraded, as it has been indicated, by rising land prices. This phenomenon could be observed almost everywhere in the immediate neighbourhood of the centres.

The first generation shopping centres of the Hungarian capital (Flórián, Skála) were constructed in the 1970's. Their common feature is that floor space remained below 20,000 square m and they were surrounded by car parks only for some hundred vehicles. Similar to the above establishments, Skála Co-operative Department Store, which was built in 1976 on 20,148 square m (Fig. 1), was converted into a shopping centre only by the incorporation of Kaiser's food supermarket and other minor retail units.

Sugár built in 1980 belongs to the second generation of shopping centres. Its floor space exceeds 30,000 square m and the centre has remained very popular until now. Originally it was purposed to relieve the traditional shopping area in the CBD of Budapest. IKEA I (home furnishing) was added with a delay of some years. The two establishments together have played a significant part in shaping modern forms of retailing in Budapest. The location of Sugár and IKEA centres is highly favourable, they are situated near metro (underground) and HÉV (suburban train) terminals. The developers relied on a daily transit traffic of about 250,000 persons. The proximity of a housing estate (Füredi út) also played a positive factor influencing site selection. The complex has attracted consumers from the whole capital and from the eastern part of the agglomeration of Budapest. Sugár had remained the largest shopping centre in Hungary until 1996. The middle class was targeted predominantly. Its 35 shops still attract 15 million shoppers annually. Árkád shopping centre on 42,000 square m comprising 170 shops and IKEA III opened in 2002.

The time interval between 1980 and 1994 was a period of the construction of second generation shopping centres. Skála Metro (1984) with a floor space of 10,000 square m, Árpád Center

[1] J. Selye University, Prof. Tamás Sikos T.,
[2] Budapest Corvinus University Prof. Magdalene Hoffmann
[3] A mosaic word of "Major Associated Mall Mart and Universal Town".

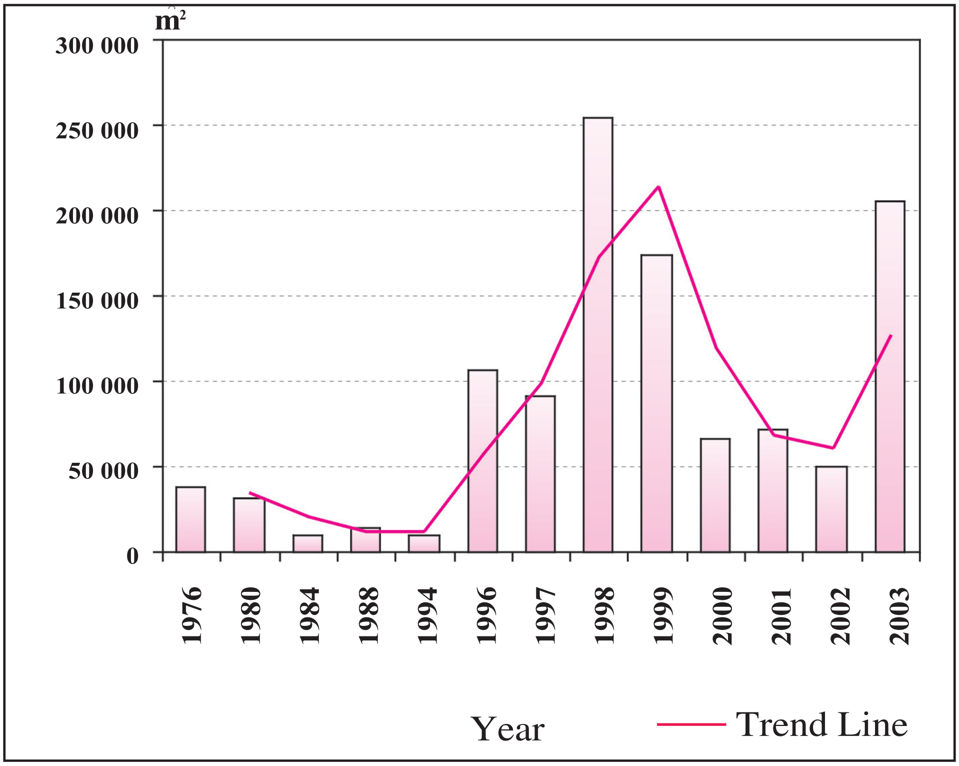


Fig. 1. Growth of floor space in shopping centres between 1976 and 2003

(1988) on 10,718 square m, Hegyvidék Center (1988) on 3,600 square m and Budagyöngye Center (1994) on 10,000 square m followed with a combined number of 209 retail units and 748 parking lots. A real explosion occurred in the second half of 1996, with the appearance of the third generation shopping centres. Due to their size Duna Plaza (42,000 square m) and Pólus Center (56,000 square m) represent a mall and a centre proper, respectively. In the year 1997 centres opened on 91,500 square m floor space: Millennium Center (10,000 square m), Csepel Plaza (19,000 square m), Europark Kispest (30,500 square m), Panama Shopping Center (2,000 square m), a Dunaház (6,000 square m) TESCO (10,000 square m) and CORA (14,000 square m). Although investment at a lower price, Csepel Plaza and Europark Kispest were important, because they have raised the standard of retail supply in certain districts. Csepel Plaza with 82 shops and relying on a trade area with 100,000

population opened in the 21st district and Europark Kispest with 59 retail outlets in the 19th district and they dominate the environs. They represent an up-to-date retail structure in a previously poorly serviced area.There are success stories in the development of shopping centres but some of them are lagging behind with regard to efficiency (Dunaház, Lurdy, Rózsadomb Center, Hattyú
Üzletház, Új Udvar etc.)

The year 1998 experienced a new boom on the market of shopping centres with the construction of more than 250,000 square m floor space. The first loser of this period of growth has been Lurdy built on 42,000 square m. Mammut I located along the boulevard in Inner Buda became one of the great winners of the boom of 1998. Besides the skillful management this praises the lucky site selection. The proximity of Moszkva tér as one of the most busy traffic junctions of the capital has proven to be a major factor in the success.

The number of shopping centres in Budapest had risen to 33 by 1999. WestEnd City Center, the flagship of Trigránit Co. Ltd., opened at the end of that year on the edge of the CBD. It comprises 94,000 square m floor space, 514 retail and service units and 1,700 parking lots. This is a multi-use centre with commercial, office and hotel functions being a major contribution to the revitalisation of the urban core. This "construction of the century" (as it was often labelled) took place on plots which formerly belonged to Hungarian Railways (Western Railway Station) and were turned derelict. This 200 million USD investment (one of the most expensive in Central Eastern Europe) became well- known all over the continent and drew public attention to the 'new city centre'.

In the year of 2000 we saw a further expansion of hypermarkets by the opening of Tesco on 10,000 square m in Pesterzsébet, (with 41 outlets), Auchan on 21,000 square m in Soroksár (with 67 units) and Tesco on 15,000 square m at Budaörs (with 54 shops). This increasing construction activity became a characteristic feature in the suburbs and in the agglomeration. At Budaörs and Törökbálint, a so-called "Bermuda Triangle" of Tesco, Auchan and Cora was formed. In 2001 3 new shopping centres (Baross Trade Center on 7,000 square m floor space Rózsadomb Center /RC/ on 15,147 square m, with 29 outlets, MOM Park on 39,000 square m, with 79 shops) opened in Budapest, to which one hypermarket was added (Auchan in Dunakeszi on 10,600 square m with 62 retail units).

2. TYPOLOGY OF SHOPPING CENTRES

Centres built in Budapest were classified according to the typology by Dawson, J. A. *(Fig. 2., Tab. 1):*

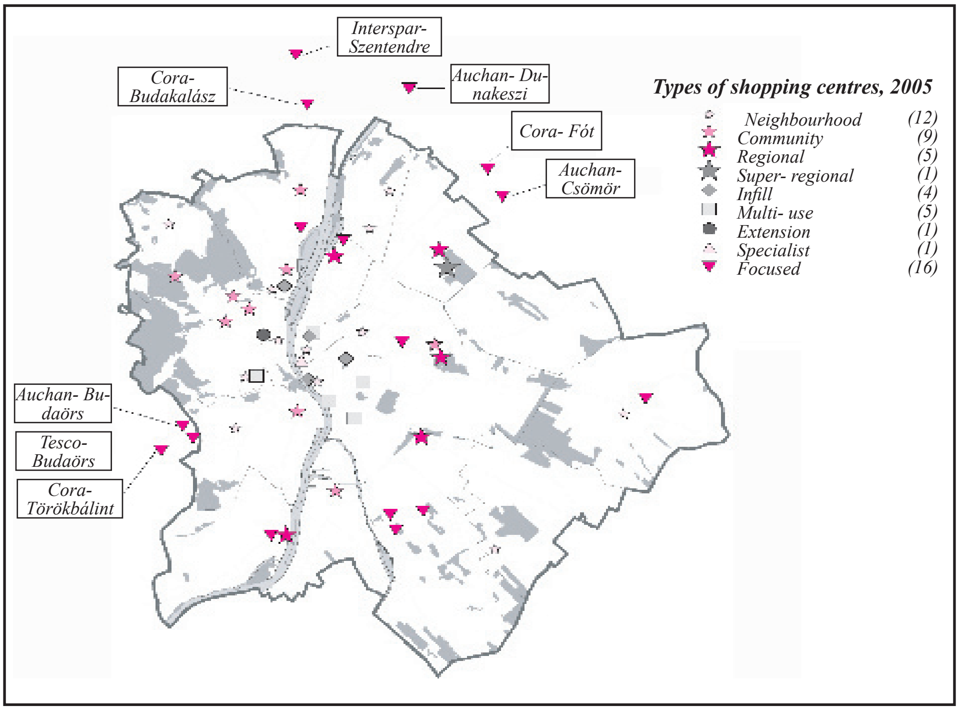


Fig. 2. Typology of shopping centres at Budapest

Construction of shopping centres in Budapest started in the mid-1970's. In the Hungarian capital and its agglomeration their number amounted to 49 by 2005. Most of the multi-purpose centres (WestEnd City Center, MOM Park, Árkád, Dunaház, etc.) are located in the central part. The inner area is surrounded by a ring-shaped transitional zone, where district and regional shopping centres prevail. On the Buda side almost all centres fulfill district and regional functions (with the exception of Mammut and MOM Park).

Buda is the zone with the highest purchasing power in Hungary. On the Pest side a semicircular meso-zone formed between the Hungária Boulevard and boundary of Budapest. Similar to the Buda side, district and regional centres are typical here.

Beyond the transitional zone a ring of hypermarkets are found, in the suburbs and settlements of the agglomeration. A remarkable fact is *(Fig. 3.)* that there are districts (8th and 16th), where no shopping centres have been built yet. The spatial pattern of different types of shopping centres (local, district, regional, super-regional) has a close relationship with purchasing power potential and population density in their surroundings, accessibility and with linkage to settlement hierarchy.

Tab. 1: Essential data on the shopping centres at Budapest, indicating the types

Name	District	Gross floor space, square m	Type	Year of opening	Number of outlets	Number of parking lots
Szépvölgyi úti Üzletközpont	III	800	Neigbourhood	N.d.	20	N.d.
Eurovitalis Üzletközpont	IV	1000	Neigbourhood	N.d.	N.d.	N.d.
Konsumex Atrium Üzletház	V	1000	Neigbourhood	N.d.	N.d.	N.d.
Balassi Üzletház	XVIII	1500	Neigbourhood	N.d.	N.d.	N.d.
Városkapu Üzletház	IX	1600	Neigbourhood	N.d.	N.d.	N.d.
Széphalom Bevásárlóközpont	II	3000	Neigbourhood	N.d.	N.d.	20
Centrum Flórián Áruház	III	8784	Community	1976	52	60
Skála	XI	20148	Community	1976	20	200
Sugár	XIV	31456	Community	1980	80	200
Skála Metro	VI	10000	Infill	1984	10	N.d.
Árpád Üzletház	IV	10718	Neigbourhood	1988	15	190
Hegyvidék	XII	3600	Neigbourhood	1988	50	20
Budagyöngye Bevásárlóközpont	II	10000	Community	1994	134	268
Lőrinc Center	XVIII	8000	Neigbourhood	1996	36	250
Süba Bevásárlóközpont	III	10476	Community	1996	52	200
Duna Plaza	XIII	42000	Regional	1996	181	1600
Pólus Palota	XV	56000	Regional	1996	343	1500
Tesco	XIV	10000	Focused	1997	14	
Cora (Törökbálint)	Pest county	14000	Focused	1997	61	N.d.
Millennium Center	V	10000	Infill	1997	14	300
Csepel Plaza	XXI	19000	Community	1997	82	2800
Europark Kispest	XIX	30500	Regional	1997	59	300
Panama Shopping Center	V	2000	Specialized	1997	N.d	N.d.
Dunaház	IX	6000	Multi-use	1997	17	260
Interspar	XX	3741	Focused	1998	6	N.d
Cora (Budakalász)	Pest county	11677	Focused	1998	21	N.d

Tab. 1 (continued):

Name	District	Gross floor space, square m	Type	Year of opening	Number of outlets	Number of parking lots
Interspar (Szentendre)	Pest county	8200	Focused	1998	7	N.d.
Auchan (Budaörs)	Pest county	24500	Focused t	1998	62	1000
Új Udvar	III	17500	Infill	1998	39	400
Rózsakert	II	17500	Community	1998	67	250
Eleven Center	XI	10000	Community	1998	42	340
Hattyú Üzletház	I	16000	Ancillary	1998	11	100
Lurdy	IX	42000	Regional	1998	156	2000
Mammut I-II.	II	103000	Extension, Regional	1998,2001	332	800
Cora (Fót)	Pest county	20000	Focused	1999	69	N.d.
Campona	XXII	60000	Regional	1999	141	2680
West End City Center	XIII	94000	Multi-use	1999	514	1700
Tesco	XX	10000	Focused	2000	41	N.d.
Auchan	XXIII	21000	Focused	2000	67	N.d.
Tesco (Budaőrs)	Pest county	15000	Focused	2000	54	N.d.
Orczy bevásárlóközpont	VIII	20000	Multi-use	2000	35	100
Auchan (Dunakeszi)	Pest county	10600	Focused	2001	62	600
Baross Trade Center	VIII	7000	Infill	2001	N.d.	N.d.
Rózsadomb Center	II	15147	Community	2001	29	200
MOM Park	XII	39000	Multi-use	2001	79	2000
Tesco	XVII	10000	Focused	2002	17	N.d.
Auchan (Csömör)	Pest county	10000	Focused	2002	28	N.d.
Home Center	XVII	10000	Community	2002	N.d.	N.d.
Stop.Shop	II	8200	Community	2002	35	350
Árkád	X	42000	Regional	2002	170	1000
Auchan Óbuda	III	10000	Focused	2003	35	N.d.
Ázsia Center	XIV	205000	Super-regional	2003	N.d.	N.d.
Récsei Center	XIV	8000	Community	2004	24	N.d.

Source: Own data collection, HCSO and HCSC.

It is beyond doubt that shopping centres exert a profound impact on the spatial structure of cities and towns. This role of the "new cathedrals of consumption" is decisive in changing of the previous urban settlement pattern. The development of the transport network of the capital and its agglomeration could not follow the rapid expansion of these retail and service establishments. The earlier retail zones[4] have not proven competitive enough to respond challenges from the new centers *(Fig. 3)*. The secondary shopping zone (retail network of the Rákóczi út and Nagykörút /Grand Boulevard/) became the greatest loser. There are retail units with 150,000 square m floor space doubling similar ones accommodated in large numbers within shopping centres. An overwhelming part of shops in the secondary shopping zone have not been able to change profile and to find market gaps in order to maintain their competitiveness. In the new situation only those traditional retail outlets have the chance to survive which are missing from the shopping centres, or can be found there in small numbers.

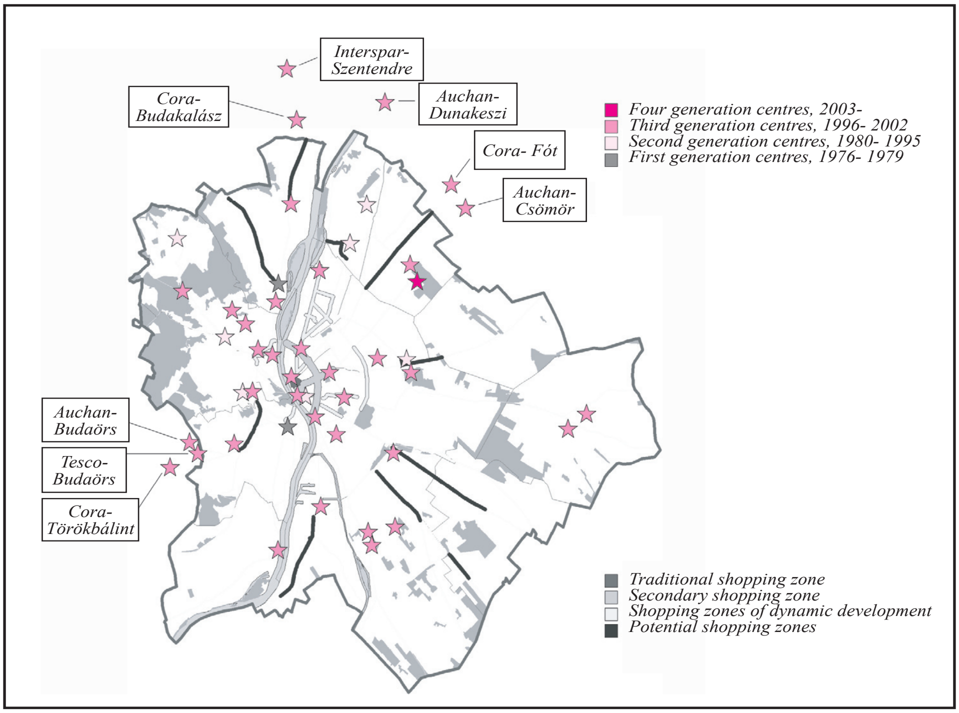


Fig. 3. Shopping centres by the year of construction

[4] Sikos T. Tamás (2000): Marketingföldrajz. Budapest. VÁTI. p. 88.
In the traditional, dynamic and potential retail zones retail outlets are to be found, which are not competitors for shopping centres. E. g. potential zone features car dealers, stores of fuel and construction material so they cannot be considered challengers to these centres. The traditional zone in the city is a similar case, with the difference that it is an amalgamation of shops selling luxurious products. The standard of quality and price differs significantly from that of commercial product mix of the shopping centres.

2.1. Winners and losers

By now the circles of winners and losers on the shopping centre market have become clearly discernible. A sharp competition has resulted in full success of Duna Plaza, WestEnd City Center, Árkád, Europark, and Mammut, based on a well-considered site selection. Basically the losers should blame site selection as well. For example, in the case of Csepel Plaza the purchasing power potential of the population within its trade area was overestimated. Before its construction, Lurdy's neighbourhood was an area void of retail outlets and services so the prospects were promising. However, the accessibility of the centre is most complicated and spending power within its trade area is relatively low.

In Új Udvar and Rózsadomb the mistaken site selection is further corroborated by an unfavourable shop mix and poor morphological features of these centres. There are shopping centers such as Pólus Center that lost their formerly leading position after the appearance of quickly reacting competitors. On the market of shopping centres the "domino-principle" works. It means that the rank of power of centres is in permanent change. For example, the market position of Campona had improved significantly after an incorporated Tropicarium opened. This center has taken full advantage of the opportunities in a district short of retail outlets. Due to spatial detachment it has a well-defined trade area. Tropicarium has proven to be a great attraction in Campona: its former 80 per cent saturation index has risen nearly to 100 per cent. Eleven Center has not been so successful in increasing its index: it is stagnating around 35 per cent. The reason is an unfortunate site selection. Gazdagrét housing estate could have provided a sufficient purchasing power in itself, had new centres built in the ”Bermuda Triangle” not distracted the consumers.

It is highly probable that the construction of shopping centres is to take a new direction in the future with the hypermarkets dominating the scene. Along with the extension of the already built centres new ones are expected to appear in other regions of the country showing an increased dynamism of economy. A basic prerequisite of their success is that the developers pay special attention to the criteria of optimal site selection.

2.2. Estimation of trade areas of shopping centres in Budapest

49 shopping centres of the capital cover the inner areas and most of its suburbs. In some of the districts their density is higher, whereas other areas are virtually void of shopping centres. An analysis of trade zones and flow of consumers is based on own investigations.

Of the districts studied the 2nd district (ca. 90,000 inhabitants) is supplied the best with 5 shopping centres. These shopping and service establishments serve the consumers commuting to the capital by crossing this district ranking third with respect to its areal extension, as well as the population of the 1st district. Inhabitants of the ca. dozen settlements in the Pilisvörösvár microregion commute daily to the capital to work, to educational institutions or for other purposes using inter-urban bus services or private cars.

Zones of attraction of the shopping centres in Budapest were analysed using statistical data sets and enquiries. These zones cannot be described in general terms; this is why the establishments in the sample are tackled and investigated one by one.

2.3. Budagyöngye

This centre is to be found in a densely populated area of Pasarét, in the junction of three thoroughfares, with a petrol filling station, car wash and car park. These highways lead to the agglomeration of high purchasing power of the population and to a commercially less supplied areas of Buda. These places form the primary trade area of the centre, but people living in the 12th, 5th and 13th districts also occur among its customers. The supply is positioned on population of medium spending power. No food shops, cinema and amusement facilities are found in Budagyöngye, and this circumstance decreases its attractivness.

82 per cent of its costumers visit WestEnd City Center, 48 per cent occasionally go to Duna Plaza and 47 per cent to Mammut I and II. This is due to the easy accessibility of the centres mentioned by tram and metro services in Buda.

Tab. 2: The following shopping centres were involved in our studies:

1. Budagyöngye	II. district
2. Rózsakert	II. district
3. Mammut. I	II. district
4. Mammut II	II. district
5. Duna Plaza	XIII. district
6. WestEnd City Center	VI. district
7. Pólus Center	XV. district
8. Sugár	XIV. district
9. Campona	XXII. district

2.4. Rózsakert

As its trade area suggests this establishment is positioned on consumers with a higher purchasing power. It is found in the most prestigious quarter of the capital (Rózsadomb)at a crossing of urban thoroughfares, offering a rich choice of leisure facilities, car parking and food supermarket.

Its attraction zone is restricted to Rózsadomb, as it is accessible on foot or by car comfortably. There are bus stops in the nearby as well. This might attract consumers who reach the shopping centre in 10 to 15 minutes to purchase minor items, i.e. typically food buyers or people using catering and/or personal services. Local customers are satisfied with the choice of food, other retail units and with leisure-time facilities *(Fig. 4)*. Those living in other districts of the capital arrive occasionally, rarely would come here to do shopping but more frequently to eat or drink.

Customers of this centre also visit Mammut I and II (88%) and WestEnd City Center (65%). This can be explained with

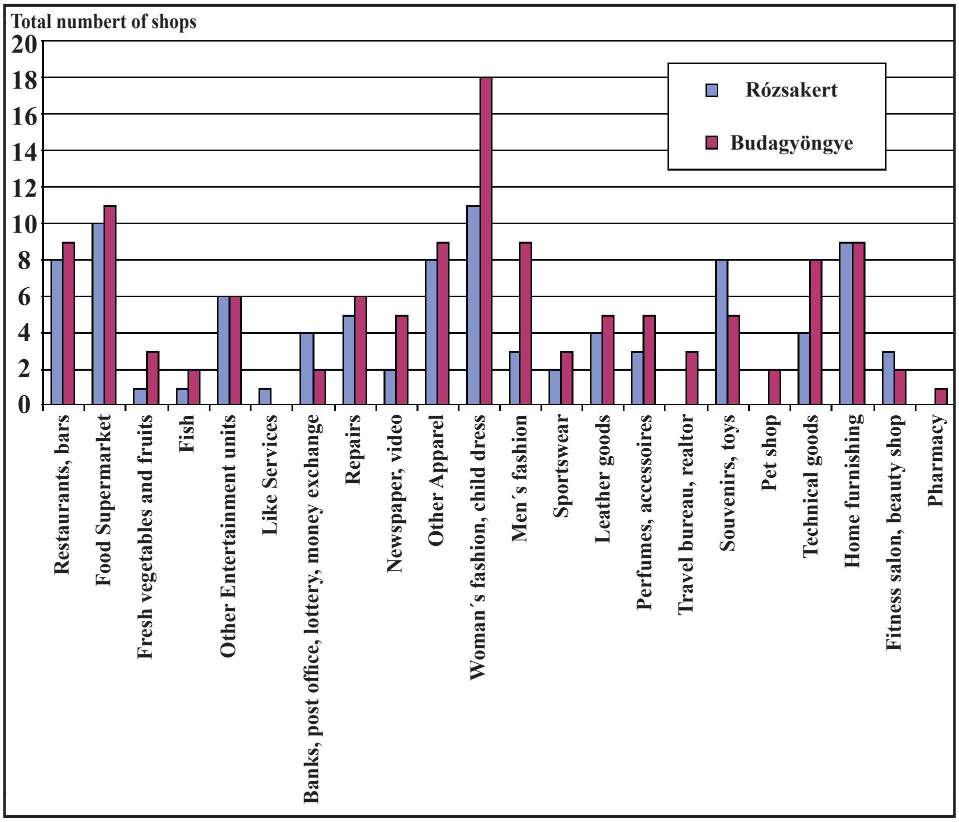


Fig. 4. Shop mix of Rózsakert and Budagyöngye

an easy reach of these centres (including the latter, which is on the Pest side) using public transport (tram, metro).

Nevertheless, the clientele of Rózsa-kert typically goes shopping by car, taking advantage of the huge car parks in Mammut I and II and thosein WestEnd City Center.

2.5. Mammut I and Mammut II

These shopping centres are to be found along the most busy route of Buda and in the immediate surroundings of Moszkva tér (square) fulfilling central functions. This is why the trade area is not restricted to the districts of Buda even though their population is among the potential consumers. A combined population number of the 1st, 2nd and 12th districts amount to 175 thousand and then we do not count with the agglomeration; its inhabitants may use long-distance bus services arriving at the station opposite Mammut. An important destination of others is the food market (Fény utca) but also many people make use of the public transport of the capital. As a result, Mammut I and II is the shopping centre of Buda with the highest potential.

Our investigations on the composition of customers have confirmed large extension of the trade area. The data suggest that Mammuts with WestEnd City Center and Duna Plaza attract visitors from almost all parts of Budapest, mainly owing to an

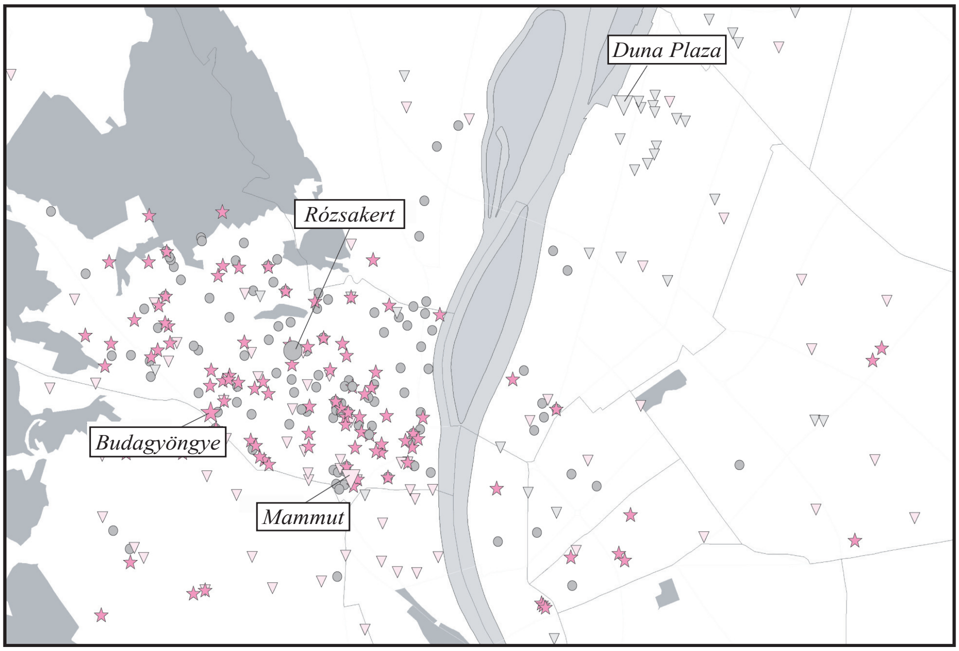


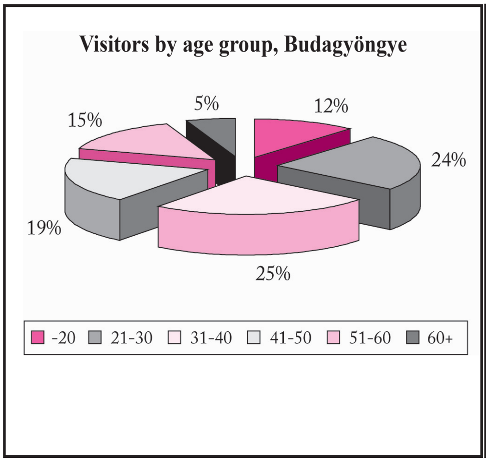
Fig. 5. Spatial distribution of the visitors to shopping centres Budagyöngye, Rózsakert, Mammut and Duna Plaza by their residence

excellent accessibility by public transport *(Fig. 5)*. In the offer of Mammut a great role belongs to leisure-time facilities, restaurants and food supermarkets. A large number of young people are attracted this way providing a flow of customers all week long.

Leisure-time activities are important in the attraction of young age groups and this is not only due to the cinemas. There is a 28–40 per cent share of the 14–29 years of age groups and a 16–34 per cent of people over 60 (within the resident population, by districts).

Tab. 3: The majority of randomly chosen visitors were from the above two age groups. E. g.:

Shopping Centres	14-29 years	60 years and over
1. WestEnd City Center	48%	12%
2. Pólus Center	39%	8%
3. Duna Plaza	43%	10%
4. Mammut I.és II.	34%	9%
5. Budagyöngye	36%	5%
6. Rózsakert	51%	5%
7. Lurdy	59%	6%
8. Sugár	42%	3%



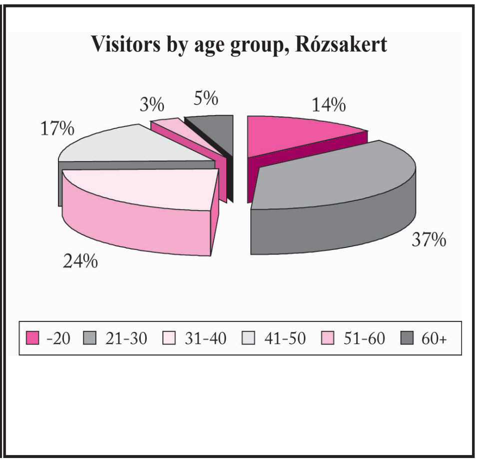


Fig. 6. Distribution of customers by cohorts

A general rule is that the potential clientele of the individual shopping centres reflects the age structure of the district of Budapest. Naturally, shopping centres appear more attractive for young people than for the elderly. The circle of visitors is selatter exert a positive impact on the zone of attraction of the establishment. As it is common with all big cities, in Budapest there are districts where the younger generations prevail and others with ageing population. Compared with the national age structure the ratio of 60 and over is higher than in the capital:

This way Duna Plaza attracts customers virtually from all over the capital.

In the neighbourhood with a radius of one km there are 11,000 households, in the five km zone their number amounts to 190,000, whilst the circle with ten km radius encloses 660,000 households. Thus (due to the easy accessibility by metro) the catchment area includes even the 1st, 2nd, 3rd and 12th districts situated on the Buda side. All the Pest districts confined to metro lines can be considered part of the immediate gravity zone. People arriving at the railway station from the agglomeration are also potential customers.

Tab. 4: Age structure of population in Budapest and in Hungary

Age (years)	Budapest	National average
0-14	12, 9%	16, 3%
15-39	29, 1%	35, 2%
40-59	27,1%	27,9%
60 +	30,9%	20,6%
Total	100,0%	100,0%

Source: KSH 2001. Statisztikai Évkönyvek. Budapesti p.101, Területi p. 63

2.6. Duna Plaza

Of the shopping centres this mall can rely on a mix of potential customers from the most different districts. Its urban geographical setting is favourable, with a nearby metro station (line 3), which provides links to railway stations, bus terminals and even to the more distant areas of Buda and Pest.

At the moment of the investigation 40 per cent of the visitors arrived from the 13th district, 20 per cent came from the 4th and 14 per cent from the 3rd districts 26 per cent of the interviewed customers were residents of other origin. This composition is to be considered a random one. It is very probable, however, that the majority of the visitors prefer public transport as it is suggested by a high share of young people (though the older age groups are also represented fairly well).

Duna Plaza offers a wide range of commodities and services; this differentiated strategy of merchandising has proven to be able to satisfy the demand of different social segments. It is a highly popular shopping and leisure center with a heterogeneous clientele. A supply adapted to a wide variety of demands is the main attraction.

2.7. WestEnd City Center

Although its catchment area is overlapped with that of Duna Plaza, this centre can rely on well-defined population flows. At the moment of investigation most of the visitors arrived from the 13th, 7th, 6th, 5th, 2nd and 1st districts with a lower representation of dwellers from the 8th and 14th districts. The share of those arriving from the countryside was fairly high (45 per cent) as well. 74 per cent of the customers visited the two shopping centres alternatively or subsequently, creating a specific situation in both of them. An explanation for this phenomenon is that these two centres are located along the same metro line. It offers easy accessibility both for a circle of customers arriving from beyond the boundary of the capital and for the residents of Budapest.

According to the interviews 52 per cent visited only WestEnd City Center, 14 per cent have only been in Duna Plaza, and 90 per cent attended both of them. As they are easily accessible with the same metro

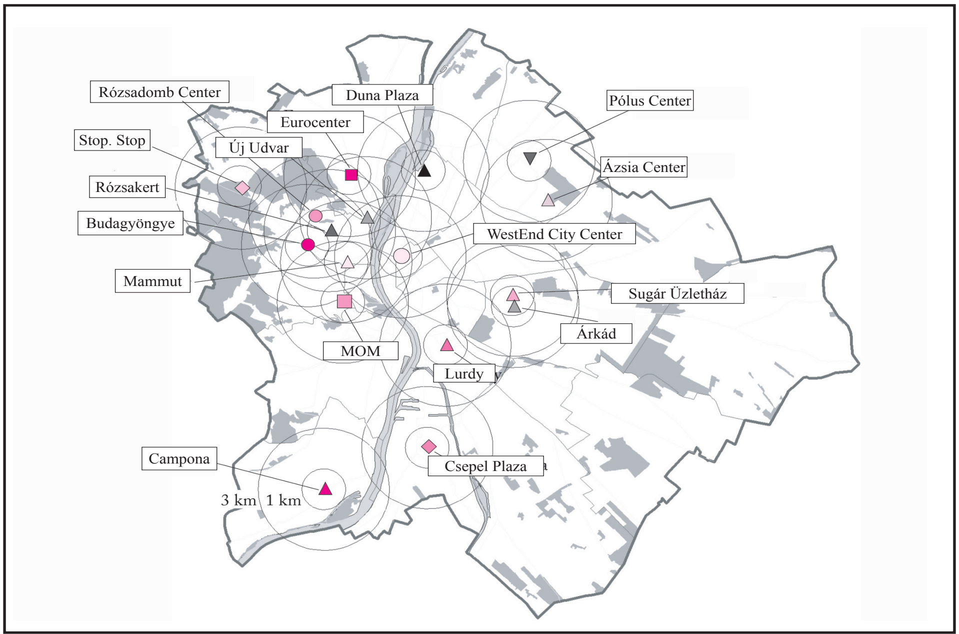


Fig 7. Gravity zones of shopping centres with 1 and 3 km radius

line and other ways of public transport, they seem to have fulfilled complementary functions for visitors shopping of some kind of goods or taking advantage of certain services. This suggests a double loyalty of the consumers. Moreover, for the Buda dwellers Mammuts play a similar role of substitution. Naturally, the above situation does not rule out the competition between the three shopping centres; it just calls for taking care about the potential customers.

Of the interviewed persons those declaring visits to several shopping centres mentioned WestEnd City Center, Duna Plaza and Mammut in a ca. similar proportion (20 to 26 per cent) as complementary. It means that they turn up in one of them at least monthly. Theoretically the attraction of a centre depends on its accessibility, the presence of 'magnet' supermarkets, availability of leisure facilities enhanced by a specific atmosphere. The three centres are positioned on nearly the same group of customers, making their choice easy, even if the shop-mix, the goods and services offered differ. Consumers prefer reliable choice in order to avoid disappointment with shopping and frustration.

2.8. Pólus Center

The focus of this shopping centre falls to one of the largest housing estates of the capital. At the moment of data collection 46 per cent of the interviewed visitors were residents of the 15th district; those living in the 14th and 16th districts added further 18 per cent. The ratio of those coming from the countryside did not reach 9 per cent and the occurrence of customers from other places of the capital was rare. This is because of its poor accessibility by public transport, even though there is a regular bus service called Pólus Center from the Eastern (Keleti) Railway Station, which makes the shopping trip comfortable in both directions.

More than 60 per cent of the customers arrived by car and in some days some 35 per cent of them came on foot. The latter is not a typical case but for doing convenience shopping (food and everyday consumer goods) in its hypermarket is an attraction. The public enquiry showed that the majority of visitors arrived from home (on foot or by car).

A specific feature of the attraction zone is that no competitor can be found within a circle of 3 km radius. Its 5 km surroundings are overlapping with those of WestEnd City Center *(Fig. 7)*.

Among the persons interviewed during the investigation 25 per cent also go shopping to WestEnd City Center, 18 per cent to Duna Plaza, 11 per cent to Lurdy and 10 per cent to Mammut. Other centres (MOM Park, Europark, Sugár, Cora, Campona and Metro) were mentioned as well (2 to 6 per cent). It is suggested that potential shoppers may occur in Pólus Center almost from all over Budapest. They arrive occasionally, during sales (24 per cent) or when new products appear (12 per cent).

2.9. Sugár

This centre has a large trade area and takes advantage from being accessible easily both by public and individual transport. Questionnaires showed that the visitors arrived from the 5th, 6th, 14th, 15th, 16th and 17th districts. 39 percent of the customers used public transport facilities: frequent and rapid services of metro, suburban railway, tram, bus, trolley. Its geographical setting is favourable but a massive flow of customers from remote urban places is not likely to occur.

This shopping centre satisfies the demand of the population of the surrounding districts together with IKEA III and Árkád centers located in its immediate neighbourhood. As time passes, however, the latter might generate a broader clientele and make this amalgamation attractive for several social segments. All these centres might benefit from a competition of this type because new motivations appear to visit the area and they could make the public interested in doing shopping in Sugár, too. At the moment of data collection young age groups prevailed among the customers.

2.10. Campona

This shopping centre with Tropicarium provides a unique leisure-time activity. The geographical setting, the demographic features of its zone of gravity are well reflected by the shop-mix and the presence of entertainment facilities.

This shopping centre is accessible directly from two highways of national importance by bus and by car, and there is a railway platform. Several settlements of the Budapest agglomeration (Tárnok, Diósd, Törökbálint) and Érd, a rapidly developing town are found in its extensive attraction zone.

The inhabitants of the nearby housing estates of South Buda (Kelenföld, Albertfalva, Őrmező, Budafok, Nagytétény) use different ways of transport when they go to Campona. They form an important segment of customers within the zone of gravity.

3. SUMMARY

After the accession to the European Union in May 2004 channels of the free exchange of manpower, commodities, experience and knowledge will open, changing Hungary's place in the continent. The Hungarian economic organisations will find themselves in an environment with new conditions of operation. Enterprises from the earlier member countries of the EU have a rich experience and skills of orientation in this system. They are familiar with the ways of how to overcome barriers, have got used to monitoring shopping behaviour of the customers and know the triggers to it, have a clear idea about risk in economy. In short, Hungarian economic organisations start in the competition with a handicap.

Hungarian shopping centres and hypermarkets are owned by European, or overseas corporations. These proprietors have an experience of long decades in planning, development, organisation and management of these new cathedrals of retailing. This might be an advantage in a sharp competition with other countries that will join the EU simultaneously but have a less established network of similar centres of retailing and entertainment.

The accession of Hungary to the Euro zone is expected to bring further challenges. Differences in prices all over Europe will lead to enrichment in choice and both customers and entrepreneurs are going to benefit from the uniform monetary system. The Hungarian consumers are likely to become more mobile as the common currency will encourage them to go shopping to the nearby countries.

The free exchange of goods will affect shopping centres and hypermarkets in a sense that the circle of potential suppliers is to be enlarged. Hungarian suppliers are going to compete with those from other member countries occasionally offering better conditions and the merchants will be able to make their choice without any bureaucratic procedures. This would accelerate the procurement of the product to be sold (e.g. it will be possible to procure fashion goods in cash & carry stores of the neighbour countries), merchandising will be able to follow the rapidly changing demand with the acknowledgement of new trends.

In this process those who will react quickly are likely to become winners as against the less mobile ones, which easily would become losers. The accession of Hungary to the EU could enforce a thorough self-analysis from the developers of shopping centers. The positive effect on the potential customers is at stake as they will have to count not only with the domestic changes but with the new developments expected in the neighbour countries as well.

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