

Tenant Mix Structure in Shopping Centres: Some Empirical Analyses from Poland

Bartłomiej Marona, Anna Wilk

ABSTRACT

Objective: The objective of this paper is to find an ideal tenant mix structure for the current shopping centres in Upper Silesian Urban Area Region in Poland, taking under consideration consumer preferences and behaviour.

Research Design & Methods: Apart from literature review, empirical research is based on a survey questionnaire. The Analytic Hierarchy Process was applied in the analysis of the data collected.

Findings: The research confirmed that to a great extent the valid tenant mix structure in the surveyed shopping centres meets with friendly attitude of customers. However, there are areas where improvement can increase the visitors' satisfaction. Moreover, it was proven that shopping remains the main reason for customers' visits in shopping centres, in spite of extending the offer of this type of places with new functions.

Implications & Recommendations: Real estate managers are recommended to take actions aiming at increasing competitiveness on the market via the extension of the proposed shopping offer and their adjustment to customers' expectations. For the managers, the results of the conducted research suggest lack of the necessity for radical transformations, and transforming Polish shopping centres into facilities of the fourth and fifth generation, which is slow in Poland, is, as it turns out, not necessarily expected, since customers identify shopping centres mainly with their traditional function.

Contribution & Value Added: The proposed research model and findings can serve as a useful lens within the research of tenant mix structure in shopping centres in other parts of the Poland.

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INTRODUCTION

The retail market in Polish agglomerations is becoming saturated (Krakow REM, 2014). According to Knight Frank' Report (Commercialmarket H1 2015, 2015), at the beginning of 2015, the total retail stock in Poland exceeded 11 800 000 sq m. The largest volume is situated like in the case of office market (Zieba, Belniak, & Gluszak, 2013) in major agglomerations – 6 400 000 sq m. Another 3 300 000 sq m was offered in the medium-sized markets (populated by 100 000-400 000 inhabitants) and 2 100 000 sq m in the small-sized cities (below 100 000 citizens). Due to increasing competition in the retail market in Poland, other shopping centers have been extended and re-commercialized. The total space of extended phases amounted to 80 000 sq m in H1 2015. Concept of tenant mix seems to be useful in the case of developing new shopping centres as well as in the case of restructuring and reorganizing existing ones.

Tenant mix can be defined as a relationship between the percentages of different store types in a shopping mall (Dawson, 1983) and it is an important key to the success of a shopping centre. Literature on tenant mix can be divided in two parts (Borgers *et al.*, 2010); "the first part focuses on the question *how to get as many customers as possible to a shopping centre to spend their money there?* This question is related to the competitive position of the shopping centre in the region. The second stream of the literature deals with the question *how to tempt customers to visit all parts of the shopping centre?*". Our study deals with the first question and the main objective is to find an ideal tenant mix structure for the current shopping centres in Upper Silesian Urban Area Region in Poland, taking under consideration consumer preferences and behaviour. Apart from literature review, the study is based on survey research. The Analytic Hierarchy Process was applied in the last part of data analysis.

LITERATURE REVIEW

Tenant Mix of Shopping Centres

A shopping centre is a group of selected retail and service outlets within a well-planned, designed and managed allocated space. The group, determined by the tenant mix structure, is one of the most important criteria of choosing a shopping centre by customers who search for friendly atmosphere inclining to do shopping. An adequately planned tenant mix structure is important for customers, also from the perspective of a possibility to save time (Ojouk, 2010). Tenant mix bears great practical significance, and thus it is the subject of scientific deliberations, the effect of which is the emergence of interesting theoretical concepts.

It is believed that the optimum structure should be characterized by a compatible variety of goods suppliers and service providers, as well as effective space allocation and tenant placement, thus bringing about the interaction with customers. In a broader perspective, it should include sufficient public facilities and services, qualitative shopping environment in order to meet customers' expectations in regard to offered products and services, comfort, entertainment or sensations (You *et al.*, 2004).

The function of the retail sales centre which a shopping centre performs is the reason for which on its area there are outlets with clothes and accessories, furniture and furnishings, sport, hobbies, presents, multimedia, office equipment, music and books in accordance with GAFO (General Merchandise, Apparel and Accessories, Furniture and Other Sales) classification (Michon *et al.*, 2008). In addition, one of the main functional components of the facility is considered to be a super or a hypermarket (Rutkowski & Skarzyński, 2011). However, due to the occurrence of new formats of commercial establishments on the market and the resulting intensification of market competition, as well as the pressure of Internet sales, a trend of changes in the tenant mix structure is observed. Some shopping centres decide to introduce specialization focused on the development of clothes and accessory trade, therefore resigning from electronics, furnishings or sports articles (Mejia & Eppli, 1999).

Recently, the growing significance of the entertainment function in a shopping centre is noticed. More and more often commercial establishments use entertainment-related facilities as a key strategy to attract customers. The statistics indicate that owing to the introduction of the entertainment function in their offer, the time of customers' stay in the shopping centre prolongs, which also influences an increase in their spending. What is more, a worldwide trend emerges which consists in the promotion of the idea of family entertainment centres through extending the offer with amusement parks, mini golf courses, thematic museums, laser rooms or games in virtual reality. However, the most frequently used facilities with regard to broadly understood entertainment include: an isolated restaurant part, technological stalls with games, children's playgrounds, various events, such as exhibitions, fashion shows, etc. The need for entertainment can be also satisfied directly by tenants who influence shopping sensations via external stimuli (e.g. Barnes&Noble bookshop, or Herman's sports store). It is particularly desired from the perspective of consumers who more and more often expect sensations engaging all senses by interesting sights, pleasant sounds or desired fragrances (Kong & Kim, 2013). A challenge in designing the tenant mix is to keep a balance between retail tenants and non-retail tenants, including tenants implementing the entertainment function (Ojouk, 2010).

Factors Contributing to Success of Shopping Centres: Theory Overview

Central place theory assumes that tenant mix structure in a shopping centre is not significant. It assumes that a consumer chooses the centre nearest to his habitation. However, central place theory is commonly criticized because it is limited to one factor only, which is location, and does not consider the others, such as: price, quality or image (Ojouk, 2010). In addition, the theory is based on the assumption that while choosing a shopping centre, the customer is guided by a single purpose - for example, he is planning to buy specific merchandise or take advantage of one service only. Nowadays, when going to a shopping centre consumers aim at meeting numerous needs, thus, the reason for their visit is not limited to the purchase of one good/service (Mejia & Eppli, 1999).

Spatial interaction theory derives its sources from the gravity theory. It is based on the assumption that "the share of customers that a shopping centre attracts from its environment is inversely proportional to distance and proportional to the attractiveness of the shopping centre". Over the years, the theory evolved and served to define the probability of choosing a particular shopping centre by a customer by means of a defined algorithm.

Reservations around this theory arose largely around the notion of attractiveness. Scientists tried to define attractiveness by means of measurable ratios, forgetting that it is a “multidimensional concept”, and in addition “people may have imperfect impressions of these objective attributes” (Timmermans, 1993).

Minimal differentiation theory refers to the concept of clustering stores operating within a specific market sector in order to achieve better performance (Ojouk, 2010). The theory refers to the idea of comparison shopping, which, from the customer’s perspective is desired, particularly during the purchase of full search goods. Possibilities to compare goods categorized within the same group are searched for by consumers. Bucklin (1967) observes that savings expected by customers on account of comparing the goods exceed the related costs of transport, even in the case of the necessity to visit many shopping centres (Eppli & Benjamin, 1994).

The above approach is developed in agglomeration theory which also assumes the occurrence of product heterogeneity in shopping centres, intensifying search activities of consumers, which in a real way influences an increase in the amount of shopping in so-called clusters. In agglomeration theory, the use of the economies of scale is emphasized. Great significance is attributed to the phenomenon of so-called co-opetition, also called competitive cooperation or co-competition. On the one hand, tenants cooperate using the infrastructure and the environment (for example, parking facilities or architecture), co-creating marketing strategies or directly benefiting from the flow of customers appealed by attractive shopping centre (agglomeration). On the other hand, tenants compete with each other for customers’ wallets and their time (Teller & Reutterer, 2008). In this theory, among advantages of the tenant agglomeration process, the variety and growth of the attractiveness of a shopping centre are mentioned (You et al., 2004). From customers’ perspective, the main advantage of commercial establishments’ clustering is regarded to be the provision of utilitarian and hedonistic values by the establishment. Such an experience becomes possible owing to the assurance of the atmosphere influencing stimuli, various stores, entertainment facilities, parking space, customer-oriented system and broadly understood accessibility (Abghari & Hanzae, 2011).

A lot of significance in planning tenant mix structure is also attributed to locating individual stores in the shopping centre. Bid Rent Theory refers to this aspect. According to the principles of Bid Rent Theory, all economic activities seek the accessibility to customers and labour that centrality bestows. Because each function differs in its ability to earn profits from the use of a central location, a process of competitive bidding occurs in the form of the rent each is prepared to pay. Therefore, at least in theory, all retail locations are occupied by the function capable of paying the highest rent, and land is put to its optimum use. This will typically result in higher-order functions occupying core locations and lower-order functions locating on the periphery of a retail centre (Reimers & Clulow, 2004). What are practical implications of Bid Rent Theory for customers of shopping centres? The use of the described theory in planning tenant mix structure in shopping centres boils down to locating entities operating in individual industries in the central location of the premises or on its periphery. Therefore, the customer visiting a shopping centre can expect that in the central part of the shopping centre he will buy, for example, jewellery or other luxurious goods. The reason for such a state of affairs is the fact that the optimum area of such stores is relatively small, and at the same time, the unit price and the unit cost of the sold

merchandise are high. On the other hand, an example of units located in the peripheral zones include retailers operating in the clothing trade (Tang, 2009). As the research by Benjamin, Boyle and Sirmans shows, the biggest traffic of customers is observed in the central part of the facility, and along with the increasing distance from the exact centre, the traffic is less and less intense (Carter & Allen, 2012).

In planning the location of individual stores, findings of the research conducted into the social life and consumer behaviour are useful (Szczepeńska, 2001). Urban Land Institute, with the cooperation of S. Brown referred to social conditionings, where a relation between the allocation of tenants and impulse buying was observed. The aforementioned relation in practice implies the location of stores or service outlets contributing to impulsive behaviours in the places where the flow of customers is regarded to be high. In consequence of the above, it is recommended to locate tenants fulfilling such conditions on lower floors, where consumer traffic is bigger (Yiu, Xu, & Cheong, 2008).

Recently, a theory referring to external effects is gaining popularity, which in the context of a shopping centre usually boils down to so-called "anchor-tenants". In this case, an external effect is manifested in the fact that customers are appealed by attractive "anchors", and at the opportunity they also do shopping in smaller shops. It has been proven that the image of "anchor-tenants" is a significant success factor of less important tenants (Mejia & Eppli, 1999). The use of this theory is also related to the necessity of the most optimum tenant placement. For this purpose, research into customer traffic in shopping centres is applied. The results of the conducted research enabled to create the "dumb-bell" concept consisting in the location of "anchor-tenants" on two opposites poles of the centre. Between them there are smaller varied units situated in the shopping arcade. The mutual relation of "anchors" is based on competition, however, they are so attractive from the customer's perspective that the distance separating them is not an obstacle for consumers who cover a specific distance. The functioning of a shopping centre designed in such a way can be compared to the operation of a magnet – "anchors" attract customers, and the side effect is the creation of customer flow between them. Also smaller tenants located in arcades, passed by customers on their way from one "anchor" to another, take advantage of such placement. The component of the presented design are also side arcades which do not lead to so-called "anchors". The choice of the place in the side arcade for a tenant usually means a lower rent rate, but at the same time it is connected with lower frequency of customer traffic. The central court performs the function of a transport node, enabling customers to choose direction, whereas the court located in the neighbourhood of the anchor is the passage area (Fong, 2003).

In designing aisles of contemporary shopping centres strong reference to the concept of American Main Street is visible. The concept, rooted in the United States, refers to such values as simplicity, safety and light-heartedness of childhood years. Strong American propaganda performed by various media, bore fruit in the transfer of this design to the shopping centre. A worldwide trend of interior design of shopping centres emerged, manifested in the appearance of isles imitating city streets, giving customers a possibility to return to childhood (Celińska-Janowicz, 2011).

MATERIAL AND METHODS

The main objective of this study is to find an ideal tenant mix structure for the current shopping centres in the Upper Silesian Urban Area Region in Poland, taking under consideration consumer preferences and behaviour. The objective is accompanied by three research hypotheses.

The first of the adopted hypotheses assumes that the majority of customers are satisfied with the currently valid tenants mix structures in shopping centres in the Upper Silesian Urban Area Region in Poland. However, it is assumed that there is certain percentage of people who are dissatisfied and that there are discrepancies between the current trade structure in shopping centres and the one preferred by consumers. Based on the conducted research, the areas within tenant mix which require alteration will be identified.

Moreover, the research also assumed (hypothesis no. 2) that the most important determinant when choosing a shopping centre in tenant mix is the number of stores. Verification of this hypothesis will enable managers to plan tenant mix properly and direct their activities to the most important aspects. Hypothesis no. 3 concerning the most frequent reason for visits in shopping centres, which is considered to be doing shopping, in spite of extending the offer to include other functions, performs an analogous role.

The research was divided into two stages. In the first stage, information on the expectations of customers of shopping centres was collected by means of PAPI- Paper and Pencil Interviewing conducted from 24th to 25th October 2015 in the neighbourhood of one of Silesian shopping centres. 259 respondents took part in the interview, the majority of them living in the Silesian Province cities. The research method was selected due to its efficiency and the reliability of the respondents' answers. The questionnaire included a question about a general level of satisfaction with current tenant mix structures in shopping centres. The aim of the study was also the identification of motives guiding respondents visiting the shopping centre. The questionnaire included also the aspect of lines of trade the respondents are interested in during a visit in the centre. On that basis, a comparative analysis was performed with currently valid averaged tenant mix in 10 biggest shopping centres in the Upper Silesian Urban Area Region, namely Silesia City Center, C.H. Europa Centralna, Galeria Katowicka, M1 C.H. Czeladź, M1 C.H. Zabrze, C.H. Forum, C.H. Auchan Sosnowiec, C.H. 3 Stawy, C.H. Pogoria and Rawa Park Handlowy. The next part of the questionnaire assessed factors which, based on the literature of the subject, have impact on the choice of a specific shopping centre by the respondents with regard to tenant mix. Within the group of factors related to tenant mix, the following factors were included in the survey questionnaire:

- The number of stores;
- Trade diversification - the number of available industries. e.g. fashion, footwear and leather goods, health and beauty, sport, furnishings;
- Gastronomic offer - the number of restaurants and cafes located in the shopping centre;
- Entertainment offer - the number of entertainment units, including the cinema and fitness;
- Trade specialization - a share in the structure of the selected trade which is most numerous with regard to the number of shops;

- Well-known brands - the presence of the most common brands according to the analysis of the Polish Council of Shopping Centres in December 2014 (Play, Inmedio, Orange, CCC, T-Mobile, Rossmann, Plus GSM, Apart, Reserved, Deichmann, Vision Express, Sasec, Poczta Polska, Empik, Orsay) (Sadat, 2015).

Trade diversification is not the opposite of trade specialization. An example is a situation in which in a shopping centre there is mainly an offer of construction articles and furnishings, however, in the facility there are individual units representing other lines of trade - a chemist's, a bank, household appliances. Numerous stores with construction articles and furnishings will determine the specialization, and completing with single health, service or multimedia stores will determine diversification.

In the next stage of the conducted research, Analytic Hierarchy Process was applied. In the research a Super Decisions computer tool was used. The use of the AHP enabled the full realization of the main objective and the verification of hypothesis no. 2, which, in consequence, enabled to formulate recommendations for managers, aiming at an increase the attractiveness of tenant mix structures in the surveyed shopping centres (Adamus & Gręda, 2005). The structure of the decision-making model started from the formulation of the main objective which was assumed to be the definition of the possibilities to make tenant mix in shopping centres more attractive. Then, decision-making criteria were defined, which for the needs of the research were limited to tenant mix. The decision-making criterion helps to determine what influences the fulfilment of the objective, and sub-criteria - what influences the fulfilment of specific criteria (Prusak, Stefanów, & Gardian, 2013). Within this research, such sub-criteria as a bigger number of stores, gastronomic or entertainment outlets and well-known brands, diversified structure or trade specialization were distinguished. Sub-criteria influencing the choice of a shopping centre with regard to tenant mix were determined based on the literature of the subject (during their selection, a quantitative limitation principle was pursued) (Adamus & Gręda, 2005). The research skipped the stage related to the indicating decision variants. The full model was presented in Figure 1.

Objective
Making tenant mix more attractive
Main criterion
K1: Tenant mix
Detailed criteria
K11: Bigger number of stores
K12: Greater trade diversification
K13: More gastronomic outlets
K14: More entertainment outlets
K15: Greater trade specialization
K16: More well-known brands

Figure 1. The decision-making model of the choice of most attractive shopping centre in the Upper Silesian Urban Area Region in 2015

Source: own study.

The analysis of the presented decision-making model takes place from the level of sub-criteria (detailed criteria) in relation to the main criterion.

The main problem in the discussed method is considered to be the difficulty in measuring qualitative opinions and phenomena expressed verbally. Due to the above, a numerical Saaty Rating Scale was developed, which enabled to compare pairs of individual criteria. The Saaty Rating Scale using figures from 1 to 9 should be interpreted as follows:

- 1 – equal importance of the compared criteria,
- 3 – weak or moderate advantage of one criterion over the other,
- 5 – strong advantage of one factor over the other one,
- 7 – very strong dominance of one determinant over the other one,
- 9 – extreme preference of one element over the other one.

Pair-wise compared values express compromising perception of the adjacent factors. The comparison of individual factors in relation to each other is characterized by the inversion. It means that juxtaposing, for example, K11 and K12 giving value a is equal to the fact that comparison of K12 and K11 is $1/a$. In the performed AHP, opinions on individual sub-criteria from respondents participating in the PAPI research were used. In this research they are treated as a group of experts possessing necessary knowledge to solve a decision problem (Prusak, Strojny, & Stefanów, 2014). Due to the multitude of opinions, it was necessary to aggregate them in accordance with the procedure of group decision making process.

RESULTS AND DISCUSSION

An analysis of the research results enabled to confirm hypothesis no. 1 that the overwhelming majority of the respondents are satisfied with the valid tenant mixes. Positive answer was given by 79% of the respondents. 21% of the respondents expressed dissatisfaction, and among major causes of their dissatisfaction they indicated dispersion of stores belonging to one trade in the area of a shopping centre. Customers who went to a shopping centre in order to buy a specific product, particularly high order goods decide to compare offers prior to the purchase. Due to too big distance between stores of a given trade, customers are forced to cover relatively far distances, thus, wasting their time which evokes the sense of frustration. With regard to the above, dissatisfied customers are opponents of multi-storey shopping centres because their architectural solutions cause considerable limitations in moving around. In addition, with regard to the location of individual stores and service outlets, an architectural solution using individual premises separated from each other with open space cause unfavourable conditions to customers due to the changeability of atmospheric conditions. An argument frequently appearing among the respondents was noise caused by changes in tenant mix. In their responses, the surveyed mainly referred to an example of Katowice shopping centre in which so-called lifting tenant mix is taking place. Although the process has been spread into a few months so that customers felt its consequences to the smallest extent possible, it still raises general frustration among visitors. Going to the shopping centre with a specific intention, customers have recently come across closed shops. The lack of the update to the premises map causes confusion among customers. Moreover, the surveyed people relatively often

stressed the fact that new brands in shopping centres meet their expectations to a lesser extent, because they are often luxurious brands or firms completely unknown to them. The attachment to brands which for a long time have stayed in the area of shopping centres visited by them questions the validity of the changes being made. However, it should be remembered that some changes do not depend on the centre managers. Among other factors causing negative reception of the present tenant mix is an insufficient number of brands. Some respondents also think that in the area of shopping centres there is too few stores offering men's attire. Shortages are also observed with regard to specialist stores. In addition, the offer of basic services, such as tailor or shoemaker is insufficient. More and more often, customers of shopping centres expect complex services from this type of places. Among the responses, there were also indications to insufficient child care services. In some shopping centres there are no points taking care of children during their parents' shopping or the demand exceeds the available offer.

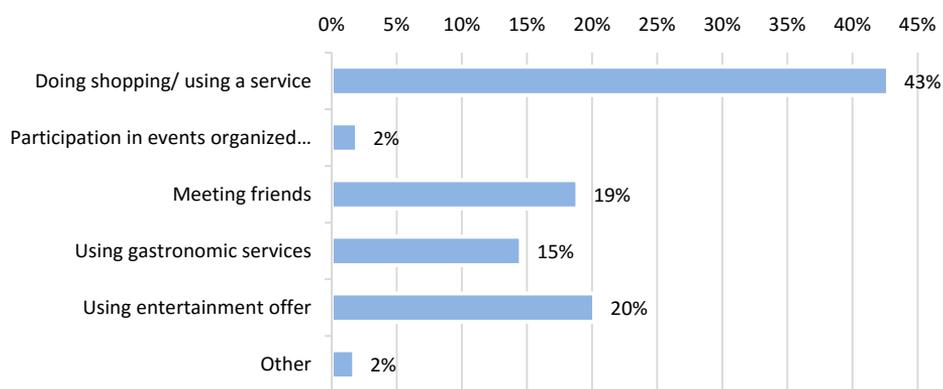


Figure 2. Reasons for customers' visits in shopping centres in the Upper Silesia Urban Area Region in 2015

Source: own study on the basis of the conducted research ($n=259$).

Definitely most frequent reason for visiting shopping centres is doing shopping and using a service offer, which is shown in Figure 2. In the conducted survey this aim was declared by 43% respondents, which at the same time confirmed hypothesis no. 3. 20% of the respondents answered that most often they visit a shopping centre to take advantage of the available entertainment offer, and 15% of the surveyed people decide to visit it because of gastronomic services. Meeting friends is one of the most important factors influencing the respondents' decision to visit a shopping centre and it was chosen by 19%. The reason most seldom indicated in the survey questionnaire was organizing an event in the commercial facility by the managers. Only 2% of the respondents chose that answer. Such low percentage of people indicating the participation in events in comparison with the other answers can be justified by the fact that some shopping centres occasionally organize various events, concentrating more on its basic activities. Some respondents (2%) also indicated other reasons for their visits in shopping centres. Among additional reasons, a wish to use the work zone or attending a business meeting occurs. What is more, the respondents in this group indicated the lack of more attractive, alternative activity. This

category also includes the use of the closeness of a shopping centre while waiting long for the city means of transport. Some of the respondents attribute a passage function to a shopping centre, treating the facility as the passing route to a bus or rail station. An example of a shopping centre fulfilling the passage role is Galeria Katowicka (Katowice Shopping Centre).

The next question referred to the interest of shopping centre customers in individual lines of trade. The question did not limit the number of responses. The obtained results are presented by means of Figure 3.

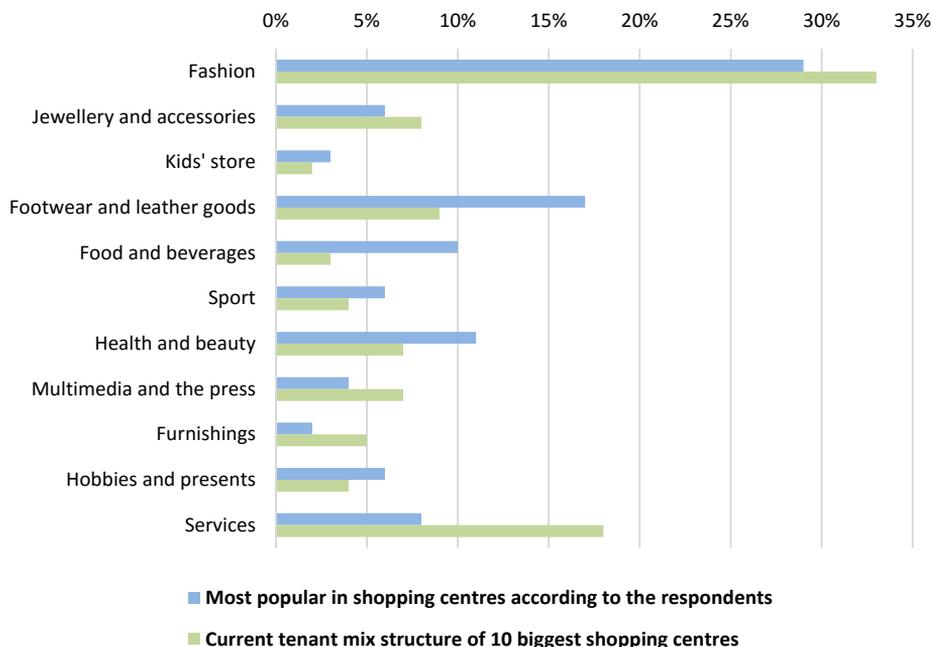


Figure 3. A comparative analysis of the popularity of trades according to the respondents and current tenant mix in 10 biggest shopping centres in the Upper Silesian Urban Area Region in 2015

Source: own study on the basis of the conducted research ($n=259$).

Among the surveyed group, the biggest percentage (29%) indicated the interest in the fashion trade. A relatively big share reflecting the customers' preferences was also obtained by the footwear and leather goods trade. The remaining trades enjoy moderate interest among the respondents, and among subsequently mentioned by the respondents there are: health and beauty (11%), food and beverages (10%) and services (8%). Even fewer people pointed out to hobbies and presents, as well as jewellery and accessories - 6% each. The multimedia and the press category, as well as kids' stores obtained a very low result, on the level of 3-4%. Stores offering furnishings enjoy the least interest among the respondents, selected only by 2% of the respondents.

What arises from the research is that the averaged tenant mix in the trade approach occurring in 10 biggest shopping centres in the Upper Silesian Urban Area Region (Figure

3) largely corresponds with customers' expectations. Differences of 3% should be regarded a standard and they include the following industries: jewellery and accessories, kids' stores, sport, multimedia and the press, furnishings and hobbies and presents. An insufficient offer in the current offer of 10 biggest shopping centres occurs with regard to shoe and leather goods stores, food and beverages, and health and beauty stores. On the other hand, the excess of shops currently located in shopping centres concerns fashion and service outlets.

The next stage in the conducted data analysis employed the Analytic Hierarchy Process. As a result, a model was formed which attributes to each of the factors the weight reflecting the influence of the determinant on the choice of a shopping centre by the customer. The obtained results were normalized with the use of the Super Decisions tool, which is presented in Figure 4.

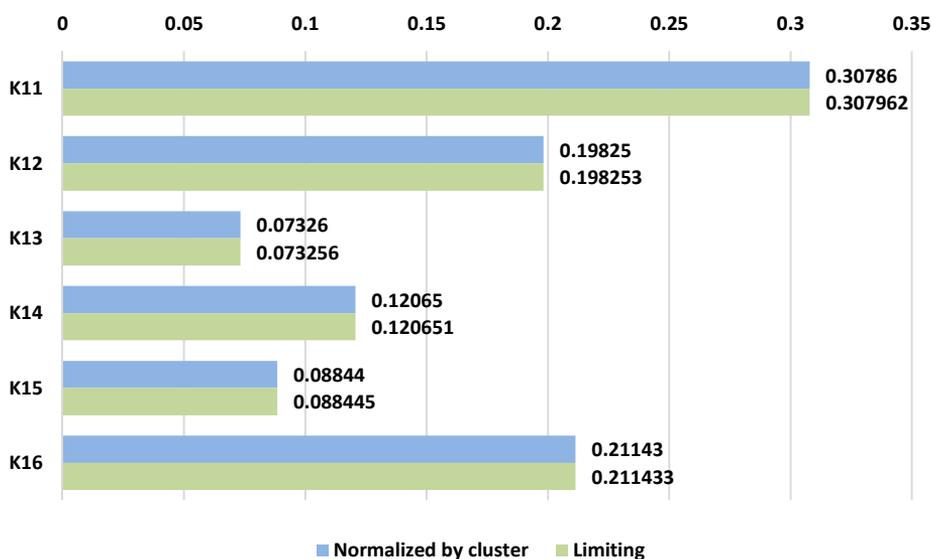


Figure 4. The priorities of the customers of shopping centres in the Upper Silesian Urban Area Region as for tenant mix structure in 2015

Source: own study.

Analysing respondents' preferences, it is observed that the most important of the analysed factors determining the choice of shopping centres is the number of shops. Then, the respondents prioritize the presence of well-known brands and trade diversification in a shopping centre. On the other hand, the fulfilment of the entertainment and gastro-nomic function by a shopping centre is less important from their perspective. The respondents attribute the least importance to trade specialization.

With the use of the Super Decisions tool, the Consistency Ratio was also designated. In accordance with the recommendations, the maximum value not exceeding 10% is allowed. The condition in the Analytic Hierarchy Process was fulfilled (Prusak *et al.*, 2014).

CONCLUSIONS

The research confirmed that to a great extent the valid tenant mix structure in the surveyed shopping centres meets with friendly attitude of customers, however, there are areas which improvement can increase the visitors' satisfaction. Moreover, it was proven that shopping remains the main reason for customers' visits in shopping centres, in spite of extending the offer of this type of places with new functions. Therefore, real estate managers are recommended to take actions aiming at increasing competitiveness on the market via the extension of the proposed shopping offer and their adjustment to customers' expectations. For the managers, the results of the conducted research mean the lack of the necessity for radical transformations, and the process of transforming Polish shopping centres into facilities of the fourth and fifth generation, which is slow in Poland, is, as it turns out, not necessarily expected, since customers identify shopping centres mainly with their traditional function.

The conducted research also indicates certain discrepancies in customers' expectations towards currently valid trade structure. A necessity of even bigger adjustment of the shopping centre structure considering visitors' preferences is confirmed. The biggest differences between preferences and the current state concern service outlets, and for real estate managers it is a signal to decrease their number. Next, managers are recommended to increase the number of footwear and leather goods stores and those offering food products, as well as health and beauty ones. Moreover, a view prevailed among the respondents about a necessity to place stores operating in one trade in close distance from each other, establish cooperation with a bigger number of brands and raise the number of stores offering men's fashion. However, not all recommendations must be reflected in designing tenant mix. It should be remembered - in accordance with the presented theoretical deliberations - that locating stores representing one trade in close neighbourhood can contribute to diminishing trade turnovers of shopping centres. A necessity to cover a considerable distance between selected stores sometimes makes the customer visit other outlets being "on the way". Another aspect which hampers taking adequate actions aiming at the reduction of the level of dispersion of stores belonging to one trade is the resistance of tenants due to fierce competition in the case of close neighbourhood of brands competing with each other. However, recently this trend is becoming reversed. Although the authors did not undertake research into the placement of individual stores and trade allocation within shopping centres, it was noticed based on own observations that recently built facilities more and more often take those critical remarks into consideration. An example of a shopping centre in the Upper Silesian Urban Area Region which used the idea of the placement of stores of individual trades in relatively close neighbourhood on one floor is Galeria Katowicka. This change in the allocation of tenants is positively perceived by consumers and in comparison with the remaining real estate it is a distinguishing feature. It is obvious that planning tenant mix in an already existing facility is characterized by definitely less flexibility than in the case of only emerging real estate. Therefore, for managers of commercial units already operating on the market, radical changes within the scope of adopting to customers' expectations are a challenge. The next issue tackled by customers in the context of the necessity to make changes concerns a bigger number of new brands. The general trend occurring in Poland shows that each year the number of

brands is increasing. What results from market reports (Retail Research Forum) is that the majority of brands debuting on the Polish market decide for the location key centres in Poland, especially in Warsaw. The challenge of managers of commercial real estate is to compete for new brands which will make the centre offer more attractive. Due to the fact that customers expect comprehensive service provision from a shopping centre, the extension of the offer to include service providers not occurring in the facility so far is worth considering. In order to do this, a necessity arises to take actions promoting the facility and create an attractive offer for potential tenants which would consider discounts and benefits from the lease in a given facility. The above activities make sense if they are supported by a carefully planned information campaign. Customers of shopping centres expect current information on the conducted changes. Consumers informed in advance are able to prepare for modifications of tenant mix. An example of a well-organized information action enabling to get familiar with new brands is the creation of a website by one of Katowice shopping centres, totally devoted to the issue of a change in tenant mix structure.

To sum up, it should be stated that in the course of the research, all three research hypotheses were confirmed and the research objective was achieved. The main limitation of the research is a not fully representative sample. Unrepresentative sample makes the lessons learned applicable only to the respondents and cannot be generalized to the entire population. Despite this limitation the paper can initiate discussion on the tenant mix structure for the current shopping centres in Poland. Moreover in the future it is recommended to extend research related to tenant mix structure to include more detailed deliberations on efficient space allocation (both size and number) in Polish shopping centres.

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Authors

Bartłomiej Marona

Assistant Professor at the Cracow University of Economics, Faculty of Economics and International Relations, Department of Real Estate and Investment Economics. His research focuses on real estate economics and real estate management.

Correspondence to: Bartłomiej Marona, PhD, Cracow University of Economics, Department of Real Estate and Investment Economics, 27 Rakowicka Str., 31-510 Krakow, Poland e-mail: maronab@uek.krakow.pl

Anna Wilk

Bachelor of real estate management and international management (University of Economics in Katowice); Master of business consulting (Jagiellonian University in Cracow); Master of real estate management (Cracow University of Economics).

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