THE DEVELOPMENT OF SHOPPING CENTERS IN TURKEY: THE CASE OF DENİZLİ

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ABSTRACT

THE DEVELOPMENT OF SHOPPING CENTERS IN TURKEY: THE CASE OF DENİZLİ

In the last decade, even though the importance of shopping centers appear to decrease day by day, their place within the Turkish real estate market displays a considerable rise. Among those reasons underlying the increase of investments on shopping malls take place the stability of the economic environment, the insufficiency of supply within the market of shopping centers, the young and dynamic population, the increase on gross domestic product, and the high profit ratio compared to other countries.

As an explanatory research, this study targets at evaluating the changes and development of shopping centers in history, identifying the characteristics of today's shopping centers, examining the location criteria of shopping centers, and focusing on the development of shopping centers from the world-wide scale to Turkey and Denizli.

This study has dwelled upon the characteristics and classification of shopping centers in the world by ICSC and DeLisle and of those in Turkey by AMPD. Among the examined issues take place the adopted criteria in selection of location for shopping centers and the development process of Turkish shopping centers as based on quantitative information obtained. The development process of shopping centers in Turkey have been analyzed for the period between 1988-2009 and in addition to existing circumstances, future considerations have also been made. Examination of the development process of shopping centers in Denizli, on the other hand, has involved consideration of firstly the geographical and socio-economic status of the city, and then of the urban development profile as well as the traditional trade district. In the final stage of the examination, all shopping centers in Denizli have been chronologically analyzed in terms of their development processes, investors, relations with the urban pattern, physical characteristics, transportation facilities and accessibility. In result of the comparative evaluation, discussions focus mainly on the location of shopping centers and their harmony with the urban pattern as well as their future strategies against the threat of becoming identical with one another.

ÖZET

TÜRKİYE'DE ALIŞVERİŞ MERKEZLERİNİN GELİŞİMİ: DENİZLİ ÖRNEĞİ

Son dönemde Türkiye gayrimenkul pazarında önemli bir gelişme gösteren alışveriş merkezlerinin Türkiye ekonomisine büyük katkılara sağlaması yanında her geçen gün günlük hayatımızdaki önemi daha da artmaktadır. Türkiye'de alışveriş merkezleri yatırımlarının artış göstermesinde ekonomide yaşanan istikrar ortamı, alışveriş merkezi pazarındaki arzın yetersizliği, genç ve dinamik nüfus büyüklüğü, gelir düzeyinde yaşanan artış, diğer ülkelere göre yatırımlarda daha yüksek getiri oranlarının sağlanması sayılabilir. Bu nedenle, alışveriş merkezlerinin öneminin son yıllarda ülkemizde artmasıyla, yatırımlar ivme kazanmıştır.

Bu çalışma, tanımlayıcı bir araştırma olup tarihsel süreçte alışveriş merkezlerinin değişimi ve gelişimini açıklamak, günümüz alışveriş merkezlerinin özelliklerini tanımlamak, alışveriş merkezi yer seçim kriterlerini araştırmak, alışveriş merkezlerinin gelişimini dünya ölçeğinden Türkiye ve Denizli ölçeğine inerek incelenmesi amaçlanmıştır.

Bu çalışma da ICSC'nin ve DeLisle'nin dünyadaki; AMPD'nin Türkiye'deki alışveriş merkezleri sınıflandırması ve özellikleri açıklanmıştır. Ayrıca alışveriş merkezi yer seçimi sürecinde dikkate alınan konular incelenmiştir. Türkiye alışveriş merkezleri gelişim süreci sayısal verilerle ele alınmıştır. Türkiye alışveriş merkezi gelişim süreci 1988–2009 yılları arasında incelenmiş, mevcut durum ve gelecek öngörüleri değerlendirilmiştir. Denizli de alışveriş merkezlerinin gelişim süreci incelenirken öncelikle Denizli'nin coğrafi, sosyo ekonomik statüsü incelenmiştir, kentsel gelişimine ve geleneksel ticaret alanına kısaca değinilmiştir. Son olarak Denizli'deki süreç içinde var olmuş olan bütün Alışveriş Merkezleri kronolojik olarak ele alınarak, gelişim süreçleri, konumları, yatırımcıları, kentsel mekanla ilişkisi, fiziki özellikleri, ulaşım ve erişebilirliği incelenerek değerlendirme yapılmaktadır. Değerlendirmeler sonucunda Alışveriş Merkezlerinin yer seçimi, kentsel mekanla olan uyumu ile ilgili çıkarımlar ve zamanla birbirine benzeyen Alışveriş Merkezlerinin gelecekteki durumları ile ilgili öngörülerde bulunulmaktadır.

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CHAPTER 1

INTRODUCTION

1.1. Nature and Scope of the Study

Shopping as a phenomenon, which has existed since the early history of humanity to meet needs, is an indispensable activity of today. Throughout the history, shopping places has been constructed according to physical, economic and cultural characteristics of the area, and they have been transformed in time with the changes and necessities in life. Increasing population, changing living conditions and technology depending on this growth have an enormous impact on production and consumption activities of communities. Particularly the 21st century has led to a profound change in living standards of individuals. With the global liberal economy surrounding the whole world, such kind of transformation has caused in changing social attitudes like increasing demands and consumption; moreover, the trade centers in cities are also subject to change in time. Changing consumption behaviors, increasing consumption, product variety, and technological improvement, which ensures mobility and production with ease, have provided shopping center formation. Along with the construction of shopping centers, people find chance to enjoy their leisure time with the activities like shopping, dining, traveling and relaxing in shopping centers. Throughout time these centers has also developed new creative functions for the comfort of their visitors.

Today, shopping centers constructed with a modern architecture are generally preferred to traditional shopping area. Present day Shopping center construction began in the 1960s in USA, and Turkey met with the initial concept of shopping center in 1988 with the construction of Galleria in İstanbul. After Galleria Shopping Center, which had 42 thousand m^2 area, Turkey has around 250 shopping centers with seven million m^2 of total area today. According to Real Estate Investment Trusts' (REITs) report, which is named "Retail Market in Turkey and Prognoses for Shopping Centers by 2015", Turkey is a potentially appropriate place for the investors. Although İstanbul is considered as the main point for many shopping center construction projects today, the other cities in Anatolia are also seen as the other potential places. 83 percent of the total shopping centers in Turkey are situated in İstanbul. In conjunction with İstanbul, in other big cities of Ankara and İzmir, the total number of shopping centers is 110; and in the other cities in Anatolia, this number surmounts 130.

Shopping centers have become an indispensable phenomenon for societies since their emergence. Therefore, this research aims to investigate the phenomenon of shopping center development, typologies, and development trend in Turkey and in Denizli. This thesis investigates the rapidly increasing numbers of shopping centers in Denizli in spatial and physical dimensions.

Since the beginning of the 21st century, shopping centers have become an essential part of human life in Turkey as they have become in the world. Since their emergence, shopping centers in Turkey have incessantly developed, and such a steady development has recently resulted in growing investments rates in Denizli, which has a substantial position with regards to socio-economic concerns. Furthermore, in this study points out that while shopping centers are being constructed, comprehensive analysis and researches are inevitably required. Due to this fact, several concerns are deeply examined in terms of socio-economic and physical characteristics of the city, which is suitable for the establishments of shopping centers. Adding to this point, shopping centers, which are the big investments for the provinces where they are built also, affect the economic, sociologic, and spatial conditions of their environments.

1.2. Aims and Method of the Study

In this thesis, in order to meet the aim, the development of shopping centers across the world has been examined by descending from the world-wide scale to Turkey and Denizli, and the subject of the their classifications and location have been observed by the chronological order of shopping centers development.

It is obvious that such a steady rise of shopping center development in Turkey has drawn attentions. Most of the publications on shopping center development are market oriented and few of them are academic research that documents shopping center development in different cities of Turkey (İstanbul, Ankara, İzmir, Konya, Antalya). This study documents Denizli case and contributes to the literature on shopping center development in Turkey.

This descriptive research aims to examine the development of shopping centers first in Turkey and second particularly in Denizli. This is conducted_through a detailed analysis of development of shopping centers, diversity of uses, interviews with the shopping center managers, examination of the spatial characteristics and layout, and how they relate with the urban pattern. Research questions mainly consist of a) local/national or foreign investment, b) classification/typology, c) leasable area comparisons of Denizli d) comparison of shopping center development trend in Denizli with general development trend in Turkey.

To reach the objective of the study, the primary and secondary data have been obtained from the relevant materials, such like; journals, books and academic articles which are from both the national and the foreign literature press. With this theoretical and literal framework, the physical changes of shopping centers from the very beginning of their emergence until today, their structural types, and service differences have been evaluated.

The overall nature of this research is qualitative and three types of sources were used for the completion of this research:

1) Several publications by academic studies as well as market research,

2) Official planning documents, shopping center design schemes and plans, newspaper articles, various websites and other informal publications,

3) Interviews and informal conversations with owner and managers of the shopping centers, planning department officials.

Managers and owner of the shopping centers included in this study has been interviewed, and the necessary official and unofficial organizations have been contacted in order to deeply observe and analyze the improvements in the areas of shopping centers, and lastly the visual demonstrations have been applied to illustrate the required and possible changes in this concept of research.

I interviewed five people including owner and managers of the shopping centers Üçgen Çarşısı, EGS Park, Pekdemir Çiftliği, Teras Park and Forum Çamlık, and asked the open ended questions that are listed below:

What is the reason of location? Did you develop any professional feasibility study for this investment?

Are there any anchor stores in the shopping center?

How many people are employed?

What is your customer profile like?

How many customers visit the shopping center in a day, week or a month?

In what ways do other shopping centers affect yours?

1.3. Organisation of the Thesis

This thesis is consisted of five chapters. Chapter 1 is introductory and presents the general context of the thesis. It includes the problem definition, aim of the thesis, and the methodology and sources. In Chapter 2; the literature review, includes for the beginning the retail development process, the modifications and transformations of the shopping places in history; the classification of shopping centers according to International Council of Shopping Centers Standards (ICSC), Delisle and variety of researches; the site analysis and location criteria for shopping centers; the development of shopping centers in the world and Turkey are discussed. In Chapter 3; the general characteristics of Denizli with its urban development tendencies as well as the location development of the trade sector in Denizli are mentioned. In Chapter 4: the case shopping centers have experienced their classifications/typologies and their “site analysis” and “location criteria” are examined in physical features. The analyzed Shopping Centers in Denizli consist of the following: Üçgen Çarşısı, Demokrasi Gençlik, Adese, EGS Park, Pekdemir Çiftiliği, Teras Park, Forum Çamlık and Sümer Park. The examined Shopping Centers are analyzed in terms of their specific characteristics on the one hand, and with a common classification system that avails for comparative analysis. In Chapter 5: future considerations and discussions are made as guided by the evaluation

CHAPTER 2

LITERATURE REVIEW

This chapter examines previous research on Shopping Centers and focuses on the development and characteristics of shopping centers as well as the site analyses and location criteria involved.

The indispensability of the shopping centers , as identified and criticized by a number of academic surveys, articles and theses, constitutes an important field of research. In order to understand world- and nation-wide significance of shopping centers development and their place within society, the study firstly dwells upon specific research supported by shopping center investors, consumers and different institutions. The obtained information is further augmented by up-to-date data from specific websites in relation.

This study examines voluminous research and study reports of major associationg and institutions in this area, such as the Real Estate Investment Trusts (REITs), Shopping Centers and Retailers Association (SCRA), Shopping Mall Investors' Association (SMIA), and International Council of Shopping Centers (ICSC).

In addition to such unique data resources, the elaborate analysis also covers the scientific researches held by the REITs, particularly the report titled as "2015- The Previsions for Turkish Retail Market and Shopping Centers" published in 2008 and the publications by SCRA and ARASTA on shopping centers. Moreover, the organization titled as "The First Shopping Centers Investments Conference" performed by AYD in 2009 accompanied by other academic researches that have presented different viewpoints and made valuable contributions about shopping malls, have also been scrutinized to highlight the findings of this study.

In general terms, the academic research covers mainly a) the investigation of development of shopping centers with particular reference to cities in Turkey; b) questioning of the relations between shopping centers and the spatial structure of those cities at which they are located, c) consideration of the development process of shopping centers, d) their architectural designs and locational preferences; and e) evaluation of shopping centers in terms of their sociological dimension.

2.1. Historical Overview of Shopping Center Development

In the social development-course of humanity, shopping centers have always attained their role as important aspects of the city centers despite the changes they have gone through in parallel to socio-cultural and technological developments. The ancient Greek word ‘agora’ standing for ‘people gathering together’ during 7th century B.C., has, in the following centuries, changed in meaning to ‘market place’, a term used for places that bring social, economical, political and even religious elements together and gain importance in city morphology (Çetinel, 1999). The first structure resembling what today is considered as a "shopping mall" is located in the City of Damascus, the capital city of Syria. It is called Al-Hamidiyah Souq in old Damascus and dates back to the seventh century. Isfahan's Grand Bazaar, a largely covered bazaar, dates to the 10th century. The 10 kilometers-long, covered Tehran's Grand Bazaar also has a long history. The Grand Bazaar of İstanbul was built in the 15th century and is still one of the largest covered markets in the world, with more than 58 streets and 4,000 shops (Karpuz, 2007; Konur, 2001). Gostiny Dvor in St. Petersburg, which was opened in 1785, may be regarded as one of the first purposely-built mall-type shopping complexes, as it consists of more than 100 shops covering an area of over 53,000 m^2. At the beginning of the 19th Century, the shopping centers were located at central areas of the cities. The first department store named “Bon Marche” was opened in Paris. The development for the Schoenherr Shopping Centers can be divided into five different categories for the period until 1990. These categories are:

1) Garden City:

As it is mentioned afore, the shopping centers were initially located at city centers. However, by the end of the 19th Century, especially in North America, there has been a rise in the suburban style of life. This has had a pushing effect over the shopping centers out from the city centers. Small shopping malls have begun to be established at non-central areas of the city rapidly. This move has started the shopping mall development called the “**Garden City**”.

At 1891, an architect named Edward Bouton has built the so-called “store block” for residential areas. Store blocks are retail stores, which are located side by side along a block.

2) Automobile Center:

In reaction to changing consumer needs, the changes in consumption and leisure habits have caused shopping areas be designed in new forms, creating the shopping malls of our day. The modern shopping center, which includes everything from small **suburban strip centers** to the thousand-square-meters super-regional malls, had its genesis in the 1920s.

In 1916, the Market Square was built in Chicago including 28 retail stores, 12 offices, and 30 residential apartments. It has been for the first time that the architecture and planning layout of this shopping center included storage and parking spaces for the automobile (Yıldırım, 2010).

The concept of developing a shopping district away from a downtown is generally attributed to J.C. Nichols of Kansas City. His Country Club Plaza, which opened in 1922, was constructed as the business district for a large-scale residential development. It featured unified architecture, paved and lighted parking lots, and was managed and operated as a single unit (ISCS, 2005).

In the later half of the 1920s, as automobiles began to clog the central business districts of large cities, **small strip centers** were built on the outskirts. A supermarket and a drug store, supplemented by other convenience-type shops, usually took place at the centers. The typical design was a straight line of stores with space for parking in front.

3) Suburban Center:

Shopping areas are always a center of changing goods and points of focus for inhabitants. However, starting from the 1950s, the image of shopping areas have changed into that of a "**city-center**", a recreational area for activities, or a meeting place, or a place that people go for shopping, eating, having fun, gathering together with friends and neighbors, making business connections and getting engaged in various activities out of their homes. Today, shopping centers play the role of a city-center in European countries and the United States. These centers have such commercial activities almost equivalent to those of city-centers, and shelter working-places and offices within. In addition to their commercial facilities, they comprise social, cultural and spare-time activities as well. Therefore, shopping centers are defined as city centers with regard to their impacts upon economical, residential and social perspectives of our day (Aksel, 2000).

According to the International Council of Shopping Centers (ICSC, 2004), a shopping center is defined as a commercial establishment, which is designed, planned, constructed, and managed by a central unit and enclosed with retail and service-oriented entities. Shopping centers containing various types and sizes of business enterprises are configured to serve for the consumers in a limited trade area or a specific consumer group. In other terms, shopping centers are the group of commercial and retail complexes providing several commercial products with a convenient and peaceful shopping facility to costumers. Instead of including a group of the same and limited designs of various retail entities, such kind of shopping centers also function as business areas including several small retail stores, cinemas, banks, pastry shops, cafes, hairdressing saloons, and pharmacies.

However, prior to dwelling upon the history and emergence of shopping centers, the development of the retail sector should be briefly explained in this part of the study. The origin of the retail sector in the world is known to be the United States of America. Kujuba states that after the World War II, due to the obsolescence in infrastructural facilities of those shopping malls which were constructed at city centers and having been enclosed with several shopping stores, these commercial entities have begun to lose their attraction in time with increasing numbers of problems such as lack of convenient parking places. Therefore, the construction of new supermarkets encountering the excessive needs of the population moving to suburban areas has had its reflections in increased figures of the retail sector in United States. Such a commercial development in suburban areas has also triggered the small-sized neighborhood shopping centers containing a new supermarket, pharmacy and a service-oriented shop. A short while after this, new commercial establishments called "**strip centers**" including 15-20 shops with adequate parking places in front, have emerged. (Kujubu, 1999)

In the following course of time, similar to United States of America, it was also observed in Europe that the habits of shopping and consumption have begun to alter with higher rates of migration towards bigger provinces and the growing numbers of employed people and nuclear families. Because of such changing circumstances, the structure of retail stores have began to be effective in the United States of America as well. France as the first country with highest figures in a large-scale distribution, and Germany as the country most developed in related terms following France have both attained a significant stage of commercial development. The Great Britain, after

Germany, also shelters the other most effective chain of retail sector at that time in the world (Arasta, 1999).

Contemporary shopping centers have begun to be shaped in the 1950s when the architect Victor Gruen in America aimed to design the first "**enclosed shopping center**" as an alternative city center to supply the social and shopping needs of the people residing at suburban areas. Designed to serve such needs of the residents, however, these places were planned as enclosed establishments with a single center around the courtyard and a compact circumscribing system of circulation areas. In the end, regional shopping centers were emerged. They were typically enclosed with 30 to 50 specialized, big, multiple-storey shopping units and these early regional shopping centers were mostly areas with open canopies. In 1950, Northgate, the first regional shopping center defined as a "mall", opened near Seattle on April 21. Anchored by a Bon Marche department store, it provided 75.000 m² for stores arranged in a linear pattern along a widely pedestrian walkway, or "mall" that would become the center spine of all future regional shopping centers. The word came from the British game of pall-mall, or "ball and mallet" combining elements of croquet and golf, played since the 1500s on a wide fairway green.

Along with the renovation of old shopping centers and newly developing models, these shopping establishments gradually became widespread, and with foundation of the "International Council of Shopping Centers", a new sector was born in 1957. Moreover, in the beginning of the 1960s, the sector was introduced with the term "**Enclosed Mall**". Enclosed Malls consisted of one-storey shops and 50-80 specialized shops surrounding the closed courtyard and passageways. The severe climatic conditions taken under control indoors had a triggering effect, to draw the attention of costumers to these shopping malls. Today, malls provide profitable shopping facilities for their costumers and large parking spaces for thousands of automobiles, and present closed comfortable shopping areas when compared to shopping places on the chaotic "**Main Street**" (Redstone, 1973).

4) <u>Festival Marketplace</u>:

In 1970s, shopping malls have become more specialized and were considered as not only places to sell garments, but also to offer their customers a wide range of services including cinemas, restaurants and amusement centers (Kujubu, 1999). Because of the oil crises, the competition between shopping malls has increased during this period. To turn conditions of the crisis into an advantage, shopping malls have organized interesting shows and activities to attract more consumers to their malls. This has also been reflected upon architectural designs of new shopping malls. Such new shopping centers were called "**Festival Shopping Malls**", and the first example of this kind of shopping malls is Fenauil Shopping Center in Boston.

5) <u>Entertainment Center</u>:

The 1980s and 1990s were the years during which the phenomenon of "globalization" has begun to interfere into daily life of costumers more intensively than ever before. Nonetheless, with the technological improvements, the retailers also began to perceive of the retail sector from a different perspective. During 1980s, the inner parts of cities were not abandoned places like in the 1960s. Concerning these areas, the investors were ready to make investments for new business enterprises, the financial sponsors were ready to loan credits, and the entrepreneurs were ready to pay high rents for the shopping places.

In this period, the European retail sector has begun to develop as sprouting numbers of American-style shopping centers and outlet firms selling cheap products. During the establishment phase of these shopping centers, it was intensively required to have "Anchors", the famous shopping firms of larger scale that attracted customers. In addition to this, the change in consumers' behaviors has had an increasing impact upon the number of business firms operating in fields especially out of the food sector. Therefore, globalization emerges as an important factor in line with these improvements, while the diversification of developments differing by each country's history can also be considered to have another important determining effect. From another standpoint, the increases in cross-border trade, foreign investments and firm partnerships, constitute an essential factor affecting this period (Arasta, 1999).

2.2. Typology of Shopping Centers

Shopping centers can be classified in numerous ways based on size, the served market, design, function, location, and theme, but almost all centers fit within the following definition: A group of architecturally unified commercial establishments built on site that is planned, developed, owned, and managed as an operating unit related, in its location, size, and type of shops, to the trade area that it serves. The unit provides on-site parking in definite relationship to the types and total size of the stores.

Shopping centers are often difficult to categorize. Trade literature often divides centers broadly into regional malls and strip centers and by size and physical configuration. Considerable variety exists within each of these groups, however, and a more useful way to categorize shopping centers is by the markets that they serve and the types of tenants they contain.

The design of retail centers in urban areas has changed significantly during the twentieth century, expanding from walkable town centers to auto-oriented centers, and the diverse types of retail centers we see today. Many of the changes have been linked to metropolitan growth patterns, changes in urban transportation systems - including the rising dominance of the automobile - and evolving retailing technologies.

One result of this change is that communities have inherited a mix of current and older retail centers that vary in economic performance and physical character. In suburban locations, many retail centers were developed as automobile-oriented, low-density, exclusively retail districts, and are poorly integrated with their surrounding development and landscape patterns. As these locations are redeveloped to maintain their competitiveness, there is a promising opportunity to transform them to transit-friendly land-use patterns by adopting current urban design approaches that emphasize links to local neighborhoods, walkability, transit access, complementary land uses, and natural amenities.

The term “shopping center” has been evolving since the early 1950s. Industry nomenclature originally offered four basic terms: neighborhood, community, regional, and super-regional centers. However, as the industry has matured, these four classifications no longer remain adequate to get rid of ambiguity and accommodate new shopping center formats. Shopping Center is a group of retail and other commercial establishments that is planned, developed, owned and managed as a single property, with on-site parking provided. The center’s size and orientation are generally determined by market characteristics of the trade area to be served. The three main physical configurations of shopping centers are malls, open-air centers, and hybrid centers (ICSC, 2005).

ICSC categorizes the classification system of shopping malls into two different groups: European and American style shopping centers. European shopping centers are classified as depending on their size and specialty. The American shopping center classification system, on the other hand, divides the centers into groups as based on their location.

European Shopping Center Classification System: The unification of Europe has created significant interest in European business activity, including the shopping center industry. In 2005, ICSC Research published a review article that reviewed the various shopping center definitions that had been adopted by various countries prior to unification (ICSC, 2005). European Shopping Centre is "a retail property that is planned, built and managed as a single entity, comprising units and communal areas with a minimum gross leasable area of 5,000 m^2".

Table 1. ICSC Shopping Center Classification for the Europe
(Source: Arasta, 2006)

FORMAT	SIZE		LEASABLE AREA
TRADITIONAL	VERY LARGE		80.000m² and over
	LARGE		40.000–79.999m²
	MEDIUM		20.000–39.999m²
	SMALL	Comparative	5.000–19.999m²
		Necessity focused	5.000–19.999m²
SPECIALIZED	Retail park	Large	20000m² and over
		Medium	10.000–19.999m²
		Small	5.000–9.999m²
	Outlet center		5.000m² and over
	Thematic	Recreational	5.000m² and over
		Non-recreational	5.000m² and over

American Shopping Center Classification System: Over the years, ICSC's classification system for shopping centers has undergone several modifications and updates (DeLisle, 2005). The catalyst for this analysis was a growing number of requests from members and industry participants who were seeking a better understanding of the structure of the US market in light of many of the recent changes stemming from the introduction of new shopping center concepts, as well as modifications of existing formats. The current classification system assigns centers to two major categories: malls, which include regional and super regional centers; and open-air centers which include neighborhood centers, community centers, lifestyle centers, power centers, theme/festival centers, and outlet centers. The classification matrix presented in table 2 combines qualitative and quantitative information to facilitate the appropriate classification of individual centers. The data elements include the underlying shopping center concept, a minimum and maximum square footage of the center and site, the number and type of typical anchors, the ratio of anchors to total stores, and the geographic range of the primary trade area (DeLisle, 2009).

Regional Center: This center type provides general merchandise (a large percentage of which is apparel) and services in full depth and variety. Its main attraction is the combination of anchors, which may be traditional, mass merchant, discount, or fashion department stores, with numerous fashion-oriented specialty stores. A typical regional center is usually enclosed with an inward orientation of the stores connected by a common walkway. Parking surrounds the outside perimeter.

Super regional Center: Similar to a regional center, but because of its larger size, a super regional center has more anchors, a deeper selection of merchandise, and draws from a larger population base. As with regional centers, the typical configuration is an enclosed mall, frequently with multilevel. Parking may also be structured to accommodate the sheer size of the center.

Neighborhood Center: This center is designed to provide convenience shopping for the day-to-day needs of consumers in the immediate neighborhood. According to ICSC's score publication, roughly half of these centers are anchored by a supermarket, while about a third has a drugstore anchor. Stores offering drugs, sundries, snacks and personal services support these anchors. A neighborhood center is usually configured as a straight-line strip with no enclosed walkway or mall area and parking in the front. Centers may have a canopy or other façade treatment to provide shade and protection from inclement weather, or to tie the center together.

Community Center: A community center typically offers a wider range of apparel and other soft goods than the neighborhood center. Among the more common anchors are supermarkets, super drugstores, and discount department stores. Community center tenants sometimes contain value-oriented big-box category-dominant retailers selling such items as apparel, home improvement/ furnishings, toys, electronics or sporting goods. The center is usually configured in a straight line as a strip, or may be laid out in an L or U shape, depending on the site and design. Of the eight center types, community centers encompass the widest range of formats. For example, certain centers that are anchored by a large discount department store often have a discount focus. Others with a high percentage of square footage allocated to off-price retailers can be termed off-price centers.

Power Center: A center dominated by several large anchors, including discount department stores, off-price stores, warehouse clubs, or "category killers," i.e., stores that offer a vast selection in related merchandise categories at very competitive retail prices. The center typically consists of several anchors, some of which may be freestanding (unconnected) and only a minimum amount of small specialty tenants.

Theme/Festival Center: These centers typically employ a unifying theme that is carried out by the individual shops in their architectural design and, to an extent, in their merchandise. Entertainment is often a common element of such centers, although it may come in the shopping experience as much as in the tenants themselves. These centers are often targeted to tourists, but may also attract local customers who might be drawn by the center's unique nature. Theme/festival centers may be anchored by restaurants and entertainment facilities. Generally located in urban areas, they are often adapted from older, sometimes historic, buildings, and can be part of mixed-use projects.

Lifestyle Center; Most often located near affluent residential neighborhoods, this center type caters to the retail needs and "lifestyle" pursuits of consumers in its trading area. It has an open-air configuration and typically includes at least 5.000 m^2 of retail space occupied by upscale national chain specialty stores.

Other elements differentiate the lifestyle center in its role as a multi-purpose leisure-time destination, including restaurants, entertainment, and design ambience and amenities such as fountains and street furniture that are conducive to casual browsing. These centers may be anchored by one or more conventional or fashion specialty department stores.

Outlet Center; This center type consists of manufacturers and retailers' outlet stores selling brand-name goods at a discount. These centers are typically not anchored, although certain brand-name stores may serve as "magnet" tenants. The majority of outlet centers are open-air, configured either in a strip or as a village cluster, although some are enclosed."

Table 2. ICSC shopping center definitions for the United States
(Source: ICSC, 2004)

TYPE OF SHOPPING CENTERS	CONCEPT	LEASABLE AREA (m^2)
MALLS		
REGIONAL CENTER	Genereal Marchandise; Fashion Mall, Typically Enclosed	37000 m^2- 75000 m^2
SUPER REGIONAL CENTER	Simillar Regional center but has more variety and assortment	75000 m^2
OPEN AIR		
NEIGHBORHOOD CENTER	Convencience	2700 m^2 - 14000 m^2
COMMUNITY CENTER	General Marchandise; Convenience	9000 m^2 – 32000 m^2
LIFESTYLE CENTER	Upscale national chain specialty stores; cining and entertainment in outdoor setting	14000 m^2 – 46000 m^2
POWER CENTER	Category-domin antanchors few small tenants	23000 m^2 – 46000 m^2
THEME/ FESTIVAL CENTER	Leisure; tourist-oriented; retail and service	7500 m^{2-} 23000 m^2
OUTLET CENTER	Manufactures' outlet stores	46000 m^2 -37000 m^2

The mixed profile of the tenants, the type of retail, and the variety of functions all allow one to possibly come up with different combinations. These three key factors are crucial for categorizing the shopping centers. In a typology based on function, the possible types can be given as follows:

1) Multi-Functional Shopping Centers: Offices, hotels, residential units, show parks, and convention centers are included within the shopping centers. In urban areas, particularly those centers located at Central Business Districts usually address to upscale customers. This raises quality of the lifestyle at that particular urban district.

Outside the city center, one can run into a diversity of original approaches. Hotels, health centers, ski and golf complexes, and convention centers take place side by side with the shopping centers. Business, Health and Sporting Centers constitute the main key factors in building the shopping mall.

2) Entertainment Shopping Centers: These kinds of shopping centers offer entertainment facilities attached to those of shopping. It can be a movie or an amusement park attached. Shopping becomes part of the entertainment. This type of shopping centers appears to have emerged after 1990s.

3) Lifestyle Shopping Center: This type of shopping centers are located at proximity to living areas of those upscale customers who play leading roles in city life, are educated and much appreciated in societal terms. The shopping centers are very nicely designed.

4) Fashion Center: Fashion Centers have similar characteristics with those of lifestyle shopping centers. This type targets the same consumer profile and includes high-end expensive retail products. It does not have big department stores like Boutique Center. It has smaller designer and more brand name stores. The major difference from the lifestyle shopping centers is their sizes, where Fashion Centers are larger in space,between 10.000 to 15.000m^2.

5) Specialty Shopping Centers: These shopping malls are product-focused, based on the tenant population, and their sizes vary between 5000m^2 and 10000m^2 . There provide consumers specialized products and are located at central areas of the city with strong connections with their surroundings.

6) Hypermarket-Oriented Centers: This type of shopping malls may be located at inner urban areas or at areas close to the peripheries. The core is mainly the hypermarket. Such types can be found mostly in Europe. These malls are influential upon the city centre at which they are located. Their sizes vary between 30 000 m^2 to 50000m^2 designed as only one-storeyed buildings. The target group of consumers consists of those who commute by their cars within mostly half-an-hour drive to the centers.

7) Outlet Centers: Most brand-name factories are grouped at one centre to sell their goods directly to public. Products are mostly overstocked, off-season, low cost or flawed and include such information on their sale tags. Electronics, toys, sporting goods and apparel take place among the main lines of goods to be sold. Shopping malls have their small entertainment centers for kids as well as their own food courts. The first outlet center was built as the ‘factory outlet’ of a company for men outfit in 1936. Because of the financial crises in 1980s, the factory outlet stores tended to group at shopping centers in Europe and North America.

8) Retail Parks: Middle- and small-sized units get lined up together along an open-air design of one-storeyed building. Located outside the urban boundaries, these entities are also called “big box retailing” or “depot retail parks”. In addition, they also prefer to take place at intersections major highway routes. While the sizes of retail parks vary between 25000m^2 to 55000 m^2, those of the stores range between 500m^2 to 2500m^2.

Based on the definition and the standards from AMPD, the ICSC Europe office has categorized the shopping Centers in Turkey into two main categories as “functional” and “traditional”.

Common Classification Criteria: According to James the typologies can be considered in the development of a global classification system for shopping centers, it is useful to identify some of the more common variables that might be considered.

1) Size: A criterion that is common to many classification systems is the size of the center, and/or the size of the land area. Since size has been widely adopted in classifying centers, some measure of size should be included in a classification system. However, several issues must be resolved in applying it to the global market. For example, there must be a clear definition of what is included in the size of a center and whether it refers to the gross area of space, or the space rented or occupied by tenants. In addition, a decision must be made whether space occupied by non-retail tenants is included, especially when such tenants are governmental agencies or non-profit entities such as schools, libraries, and other services. Furthermore, it must be clear how to measure centers, which have food court, common areas, entertainment venues, theaters and restaurants.

2) Design: In many classification systems, centers are grouped into open-air and enclosed categories, along with other design features such as the shape, location of anchors, and number of stories. In addition to the type of design, some systems differentiate centers based on the quality of design, as well as the overall sense of place it conveys to the market. One of the challenges posed by such criteria relate to the difficulty in quantifying a concept, which is inherently qualitative, as well as dealing with projects that blend various design aspects and don’t fall into a clear category.

3) Number Of Anchors/Tenants: In many respects, shopping centers can be viewed as establishments that feature an "assortment of goods and services." Thus, distinguishing elements can include such criteria as the number of anchors, the nature of anchors (department stores, variety stores, specialty stores), the price points they represent(e.g., value, discount, high end), and the customer bases they serve. In addition to anchors, some systems incorporate measures of the total number of tenants, as well as the ratio of anchor tenants to in-line tenants.

4) Location: In some countries, centers are classified as to their locations including urban core, suburban, or rural. These spatial delineations are also broken down into other categories depending on whether they comprise a node or center of activity, or whether they are part of a larger trade area, which exhibits some agglomeration effects. Some systems also include secondary location attributes including airport locations, resorts, villages or districts.

5) Themes: The various classification systems include a number of themes or market positioning strategies. Some common themes include entertainment-oriented centers, lifestyle centers, outlet centers, power centers, convenience centers, high-end centers, discount centers, value centers, resort centers, and other recreational centers. In addition, some centers may be targeted toward a particular ethnic group, or to a specific demographics segment of the market using price, value and amenities as differentiating factors.

2.3. Site and Location Criteria of Shopping Centers

In the case of shopping centers, there are a few specific points to be considered. Real Estate developers make a few decisions that are as crucial as selection of the site of their next development. The decision who affect with tenants will be interested in locating in the center, where consumers will frequent the center. In short, the decision will largely determine the success or failure of the project and will determine whether the developer and investor in the project will in fact realize negative, average or superior returns on their investment of capital and time (Dunne, 2004).

Numerous elements go into a given site analysis. The element includes location, neighborhood context, site and zoning, legal elements, natural physical features, fabricated features, circulation, utilities, sensory, human and cultural and climate. After defining the target and market analysis, developers look for a site evaluation factors. Each center tenant expressed obvious concern about the character and desirability of a given site. While many pertinent will be issues will be discussed each site is unique and will have its own unique attributes which will be of concern or interest to the tenants. A knowledge of the individual tenants preferences will not only facilitate negotiation and site planning for the developer, but when synthesized contribute significantly to an understanding of critical success factors in site selection for the community center as a whole (Peiser, 1992).

According to Yıldırım, the best shopping centers are those located along highways. The neighboring lands affect the development of shopping centers as well. In allocation of a land to a local center, the main issue worth notice is the development plan of the area. While shopping centers improve the physically quality of its environs, they have to be good neighbors.

If the land is accessed only from local roads, the community council may possibly reject the project. If the shopping center is located close to office buildings as well as residential areas that will also create food traffic, then it means that its location is perfect. The most important factor in preference of location for a shopping mall is the feasibility of its location. The increase in its population capacity necessitates the land upon which the shopping mall will be located, to be larger in size as well. Such land characteristics cannot be found at central areas of the cities. For this reason, while investors try to find available locations for their shopping centers within close distance to the city centers, they may also prefer lands close to highway crossings from where they can attract the commuters or residents who live in the city. Site location gives the investor the opportunity to be close to the consumer and to successfully create a good-planned city center. Regardless of the size of a project, the decision to invest on a land to build a shopping center has to take the below issues into careful consideration:

- Market area and competition
- Location and neighborhood; proximity to key locations in urban area; quality of surrounding environment; parks and recreational facilities; amenities; public improvements
- Characteristics of demographic structure
- Accessibility
- Visibility

- Potential tenant mixture
- Availability of the size and shape of the land
- Suitable topography
- Infrastructure
- Neighborhood and the effects
- Legal constraints; utility easement; private easement; deed restrictions
- Cost of the land
- Site conditions: slopes, vegetation, land excavation, filling or grading; existing physical structure
- Utilities: water, electricity, sewerage, etc.

The success of a shopping center project depends mainly on its location. It is very difficult to find the right location. During the phase of searching for a site, the appropriate location has to meet the majority of the required criteria. Location can be deemed as giving personality to the center as well, because whatever takes place at the center of the city or at its peripheries, the size of land, its architectural design, the combination of retailers, the concept and the marketing strategy, all are those characteristics that give the centers their identity. The success of a shopping center depends on accomplishment of serious researches and analyzes to be held by a professional team.

2.4. Development of Shopping Centers in Turkey

With the influence of retail corporations from developed countries upon the sector of commerce in Turkey, Migros has given start to such investments in 1950s and this development has been followed by the establishment of Gima in 1956. In 1970s the supply of foodstuff stores, which were constructed by municipalities with the intention to organize the sector, has covered the common habits of customers for cheap and collective shopping, and with the major shift in politics towards import substitution for industrialization, consumers' interests to imported goods have increased in 1980s. Therefore, the emerging need to sell these products has entailed the construction of shopping centers as a necessity, and by the 1990s, retailers and shopping center establishments have rapidly grown with the foreign capital. In 1988, the first example in this sector in Turkey, namely the Galleria Shopping Center for which "The Galleria" in

Huston has been an inspiration, was built in Ataköy İstanbul by state partnership. In those periods, as a shopping center located in Ataköy Tourism Center, Galleria was influential upon not only Ataköy, but also the entire city of İstanbul. When it was first opened, the leasing conditions within the shopping center drew unexpected attention of the entrepreneurs such that almost all the chain-shopping stores began to have a place in this center, although the leasing conditions of the center were heavier than those of street storekeeping of the time. In Turkey, the metropolitan cities were the first targets of the shopping center developments, and İstanbul is considered as the first city providing all the conditions and sites available for shopping center facilities. Following this, there has been a rise in the number of shopping centers built in other big cities. Atakule and Karum Shopping Centers in Ankara were the other centers built after Galleria in Ataköy. Recently, the construction of such buildings has begun to be seen in other Anatolian cities as well (Cengiz and Özden, 2005).

In 1980s and 1990s, the economical, political and cultural impacts of globalization have become manifest in Turkey. In this process, new shopping and entertainment centers began to find available sites firstly in İstanbul. These centers mainly resulted from the technological developments, which involved shopping and social activities within. These facilities have firstly been located at central areas of the cities until the end of 1980s, and with the effect of improvement in public transportation systems, they have begun to move to peripheral areas in 1990s. As a consequence, it is observed that urban macroforms have gone through important changes based on the location of major shopping centers, whether they are in or out of the city. Furthermore, while the need for mass public transportation and parking areas have resulted in traffic congestion, excessive competition, and increasing annuity costs, there also had to be changes in the urban structure and utilities of the land (Celal, 2006).

Shopping centers are the most important establishments of the organized retail market. They are the centers that avail for rapid development of organized markets along with the growth of retail market in Turkey.

The first shopping center in Turkey was opened in İstanbul in 1988, after which the shopping centers appear to have developed along two categories. With the beginning of 2001, during which Turkey offered a considerable opportunity of investment for developers and investors due to increasing inflation and devaluation, the first wave of individual investors began to take place in Turkey’s three biggest cities resulting in establishment of 62 shopping centers covering a total area of 1.37 billion m^2 and an area of 21.2 m^2 per person. Research has shown that there were 243 shopping malls in Turkey by the end of 2009. (The figure includes shopping malls smaller than 5000 square meters). In 2010, seven more shopping malls were added to this figure. However, the mentioned research includes only those shopping malls which are opened between the years 1988 and 2010. By the end of 2010, 63 more shopping malls are expected to be opened (Table 3).

In the period after 2001, the economic circumstances and the level of national income in Turkey have begun to improve and prosper. The data inputs of the new estimation method display that the national income of Turkey has reached 658.8 billion dollars in 2007, while the same figure was 196.7 billion dollars in 2001. Today, Turkey is listed as having the 17^{th} biggest economic profile in the world, and with the surge of national income, it holds a significant potential for retail investments.

Owing to economic growth and national income, the national income per capita has increased. While the national income per capita was 3.037 dollars in 2001, it has increased to 9.333 dollars in 2007 with the new population and national income rates.

Table 3. Economic Indicators (Billion Dollars)
(Source: REIT 2015, 2008)

INDICATOR	2002	2004	2007
NATIONAL INCOME	230.5	390.4	658.8
NATIONAL INCOME PER CAPITA DOLLARS	215.5	348.6	550.1
PRIVATE CONSUMPTION EXPENDITURE / PRIVATE EMPLOYMENT INCOME	72.7	79.8	84.5
PRIVATE CONSUMPTION EXPENDITURE	156.7	278.3	465.1
RETAIL EXPENDITURE / PRIVATE CONSUMPTION EXPENDITURE %	55.3	52.9	48.0
RETAIL EXPENDITURE	86.7	147.3	221.6

The expenditures of private consumption and retail investment tend to increase with economic growth. Furthermore, the economic growth directly related with the development of shopping malls is synonymous to retail investments. The retail expenses cover a part of the expenditures of private consumption and they consist of two components: the expenditures in food and beverage and the retail investment expenditures in sectors other than food. In 2002, the retail investments have added up to 86.7 billion dollars whereas in 2007 they increased to 221.6 billion dollars. The rate of the retail expenditure to private consumption expenditure is 48%, while the rate of food and beverage expenditure in total retail expenditure is 56.7%, and its extent is estimated as 125.6 billion dollars. The rate of retail expenditure in sectors other than food is 43.3% and its extent is 96 billion dollars.

Table 4. Increases in the Total Number of Shopping Centers and Leasable Areas between 1988 and 2009

YEARS	TOTAL LEASABLE AREA	TOTAL NUMBER OF SHOPPING CENTERS
1988	42,974	1
1989	64,749	3
1991	88,749	6
1993	201,599	9
1994	233,406	11
1995	265,577	13
1996	328,787	16
1997	478,500	22
1998	697,147	30
1999	993,464	40
2000	1,310,764	51
2001	1,593,087	63
2002	1,794,677	71
2003	2,034,802	87
2004	2,209,492	100
2005	2,535,035	118
2006	3,022,510	146
2007	4,018,816	177
2008	4,986,653	214
2009	5,753,198	243

Between the years of 1988 and 2002, there were 63 shopping mall investments in Turkey. In addition, the leasable area was 1.6 million m^2. Among these, 34 of the shopping centers were located in the biggest cities of Turkey. (27 of the shopping malls were located in 13 different cities in Anatolia (Antalya, Bursa, İzmit, Konya, Muğla, Adana, Denizli, Diyarbakır, Gaziantep, Malatya, Tekirdağ, Afyon and Bolu). The leasable area was 640.000 m^2.

According to the report, since 2002, the shopping centers have begun to go through the second wave of development. In late 2009, provided that this wave involved the proliferation of investments in other cities, the increase in the numbers of new projects, the participation of foreign retail investments, there have been 243 shopping centers constructed as covering a total area of 5,75 billion m^2 (Table 4) whereas the size of potential leasable area was 49.8 m^2 in 2007.

Table 5. Comparison of the Development of Shopping Centers between Three Biggest Cities and Anatolia

PERIOD	1988-2001		2001-2009		TOTAL IN 2009	
	NUMBER	LEASABLE AREA (m^2)	NUMBER	LEASABLE AREA (m^2)	NUMBER	LEASABLE AREA (m^2)
İSTANBUL	19	591,185	64	1,698,027	83	2,289,212
ANKARA	9	230,913	21	667,411	30	898,324
İZMİR	6	132,942	11	226,555	17	359,497
ANATOLIA	27	638,707	83	1,756,067	110	2,394,774
TURKEY	61	1,593,747	177	4,348,060	243	5,753,198

The Shopping centers as the important establishments in organized market rapidly grow as investments of commercial real estate because of the developments in retail market.

As mentioned earlier, the shopping centers were usually located in the three big cities in Turkey until 2001. However, in parallel to global shopping center trends, the investors turn their faces to Anatolia where they can find the potential consumer trend.

Therefore, in 2005 there has been a huge boost in Anatolia-based shopping center investments.

In 2009, there are shopping centers in 39 cities of Turkey, and there are totally 110 shopping centers in İstanbul, Ankara and İzmir, and 130 shopping centers in the remaining 36 cities. The size of the leasable area is about 2.27 billion m^2 in three major cities (Table 5) while it addp up to 1.25 billion m^2 in other Anatolian cities. Ankara takes the first row with the size of 144.5 m^2 leasable area per thousand people; secondly, Eskisehir has the size of 110.020 m^2 leasable area; and İstanbul stands in the last row of the ranking with the size of 108.4 m^2 leasable area. In 2009, the leasable area of shopping centers per thousand people is estimated as 77 m^2 for Turkey.

İstanbul occurs as the center of the shopping center investments. İstanbul holds the title of being a European Capital City of Culture for 2010. Beside this title, İstanbul is a major shopping destination for its neighboring countries from the Middle East and especially for the Arabic countries. For some of the neighboring countries, İstanbul is a touristic destination only for entertainment and shopping. İstanbul had five shopping centers in 1995, 19 in 2001, and the figure has jumped up to 83 in 2009 (Table 5).

The most common shopping centers are the small-scaled ones. There take place 116 of such small shopping centers in Turkey. On the other hand, there take place seven large-scale shopping centers, six of them which are located at İstanbul and Ankara (for instance, Cevahir in İstanbul or Ankamall in Ankara). The Forum Shopping Centers are owned by foreign investors and the company named Turkmall with foreign capital. As such, there exist 11 very large shopping centers, one of which is studied as the case of this thesis.

Figure 1. Leasable Areas per Thousand People in Turkey
(Source: AMPD, 2008)

Table 6. Distribution of Shopping Centers in Turkey by Provinces in 2001 and 2009

		2001	2009
1	İSTANBUL	19	83
2	ANKARA	9	30
3	İZMİR	6	17
4	ANTALYA	1	11
5	BURSA	6	9
6	İZMİT	3	6
7	KONYA	1	6
8	MUĞLA	2	6
9	ADANA	3	5
10	DENİZLİ	1	5
11	AYDIN	-	4
12	DİYARBAKIR	2	4
13	GAZİANTEP	1	4
14	MALATYA	1	4
15	MERSİN	-	4
16	ESKİŞEHİR	-	3
17	GİRESUN	-	3
18	KAYSERİ	-	3
19	TEKİRDAĞ	2	3
20	AFYON	2	2
21	EDİRNE	-	2
22	KIRKLARELİ	-	2
23	SAMSUN	-	2
24	TRABZON	-	2
25	UŞAK	-	2
26	ZONGULDAK	-	2
27	AKSARAY	-	1
28	BOLU	1	1
29	ÇANAKKALE	-	1
30	ERZİNCAN	-	1
31	KARABÜK	-	1
32	KASTAMONU	-	1
33	NEVŞEHİR	-	1
34	ORDU	-	1
35	SAKARYA	-	1
36	SİVAS	-	1
37	ŞANLIURFA	-	1
38	TOTAL	74	243

Five of the analyzed shopping malls are thematic (for example, Kadir Has Children Center). It seems that Thematic Shopping Centers are going to be the future trend of shopping centers. In 2010, there were four newly-built thematic shopping centers (car, puppet museum, furniture and wedding concept). In Eskisehir, a new thematic shopping center is planned to have the concept of houseware only (AYD, 2010).

Table 7. Classification of Shopping Centers in Turkey by size

	VERY LARGE	LARGE (80.000 m2)	MEDIUM (40.000-80.000)	SMALL (40.000-20.000)	OUTLET	THEMATIC
İSTANBUL	3	19	23	31	8	5
ANKARA	3	5	7	16	5	-
İZMİR	-	1	5	9	3	-
ANATOLIA	1	18	24	60	8	1
TURKEY	7	39	59	116	24	5

Analyzing the development levels of the shopping centers in Turkey, the REIT Report makes an evaluation on basis of a comparison between national and international retail markets. According to the comparative report, among the 34 European countries, Turkey takes place in the 7th row with an employable income of 581.3 billion dollars and a consumption expenditure of 484.4 billion dollars. In addition to this, Turkey also occupies the same row with its 232.5 billion dollars of retail expenditure and retail market among the European countries. The potential of retail market accelerates the development of shopping centers. Turkey is the fifth biggest market in Europe with its 130.2 billion dollars food market expenses. Excluding the expenses for food, Turkey is the eighth biggest market with the 102.3 billion dollars expenditure. With its retail expenses and its extent of market, Turkey has a significant potential value in Europe-wide retail sector. In relation with that, the investments for development of the shopping centers have been improving and increasing in recent years (REIT, 2008). According to the report, in line with these developments in retail sector, Turkey was expected to be the ninth country possessing the widest leasable area, which were to reach 4.85 billion-m^2 land area in the late 2008. United Kingdom takes the first row with its 17.8-billion

m^2 leasable range of field. Besides, Turkey is in the 17th place in terms of its $49.8 m^2$ of leasable land per thousand people, while Norway takes the leading place with its 825-m^2 of land area. In the first 10 countries, the leasable land area per thousand people exceeds 170 m^2. The extent of potential retail expenditure per leasable area changes between 16.570 dollars and 122.310 dollars in 34 countries. The potential retail expense per m^2 is around 35-36 billion dollars in the developed markets of United Kingdom, Italy and France, and it is around 18-19 billion dollars in the developing markets of Poland, Czech Republic and Hungary. However, the potential retail expense of Turkey per leasable land area (m^2) is relatively high with an amount of 47.490 dollars (Table 8).

Shopping centers as real estate investments offer relatively high earnings in Turkey. In developed markets in Europe, the annual return of the shopping center investments is 5% in average, and in developing markets in Europe, it is around 6-6.5%. However, in Turkey it is annually 7-8% in cities such as İstanbul, Ankara, and İzmir, and 8-9% in other Anatolian cities (Table 8).

According to findings of the REIT, there has been an augmentation of investments for shopping centers as reflected in their returns and the shopping centers as real estate projects have also begun increase in order to reach higher returns. Despite the relatively lower returns in Europe, investments for shopping centers have been perpetuated. In 2000, the leasable 65.1 million m^2 land area in 34 countries of Europe has increased to 122 million m^2 land area by the end of 2008. In all developed and developing countries, the investments for shopping centers have been in progress. Within this scope, the shopping center investments as real estate investments have been drawing the attention of foreign real estate investors and funds in Turkey, and it has been demonstrated that there have been 33 shopping centers with the size of 1.164.561 million m^2 leasable land area owned by the foreign investors or the joint ventures by the end of 2007.

Table 8. Comparisons of Shopping Centers' Indicators (2008)
(Source: REIT 2015, 2008)

COUNTRIES	LESABLE AREA (MILLION m²)	LEASABLE AREA PER THOUSAND PEOPLE m²	LEASABLE AREA (m²) PER POTANTIAL RETAIL INVESTMENT (DOLLARS)
ENGLAND	17.80	260	36.210
FRANCE	15.70	243	36.120
SPAIN	12.80	221	28.160
ITALY	11.40	171	34.720
GERMANY	11.00	124	61.660
HOLLAND	8.00	391	18.610
RUSSIA	8.00	35	40.290
POLAND	7.00	127	18.510
TURKEY	**4.85**	**50**	**47.940**
SWEDEN	4.00	410	19.275
PORTUGAL	3.00	183	16.570
CZECH REPUBLIC	2.80	178	17.180
IRELAND	2.20	369	27.680
BELGIUM	1.80	120	52.440
HUNGARY	1.75	128	25.380

Based on the same approach, the REIT report elaborates the shopping center investment potential for 42 cities between the years 2011 and 2015 where the cities are evaluated in a matrix of investment for shopping centers. In the investment matrix, the three biggest cities are positioned apart from the categories of the developed, developing and underdeveloped cities and considered in terms of saturated market as well as the level of high, limited and low investment potentials. According to this analysis, the cities that possess high investment potentials (100.000 m^2 and more) are İzmir, Bursa, Konya, Kocaeli, Mersin, Hatay and Manisa, while the saturated markets are Ankara, İstanbul, Antalya, Tekirdağ and Kayseri (Table 9).

Table 9. Distribution of Cities by Investment Potentials for Shopping Centers between 2011 and 2015 (Source: REIT 2015, 2008)

MATRIX OF INVESTMENT	**THREE BIG CITIES**	**DEVELOPED CITIES**	**DEVELOPING CITIES**	**UNDERDEVELOPED CITIES**
HIGH INVESTMENT POTENTIAL 100.000 m^2	İZMİR	BURSA KONYA KOCAELİ MERSİN	HATAY MANİSA	
LIMITED INVESTMENT POTENTIAL 30.000-100.000 m^2	-	-	AYDIN DİYARBAKIR EDİRNE SAMSUN TRABZON ZONGULDAK MUĞLA BALIKESİR	AFYON ELAZIĞ ERZURUM ORDU KÜTAHYA URFA TOKAT UŞAK VAN ISPARTA
LOW INVESTMENT POTENTIAL 10.000-30.000 m^2	-	ADANA DENİZLİ GAZİANTEP ESKİŞEHİR	K. MARAŞ SAKARYA	ERZİNCAN NEVŞEHİR ÇANAKKALE KARAMAN
SATURATED MARKET	ANKARA İSTANBUL	ANTALYA	TEKİRDAĞ KAYSERİ	

It is estimated in all findings of the REIT report that the potential accepted for the period until 2010 will be valid for 2015, until when the size of 8.39 million m^2 leasable area is to be reached. Furthermore, by the end of 2011, the investments for shopping centers will be slowing down; but yet, it will again reach the size of 10 million m^2 leasable land area by 2015. The return of Turkey's shopping mall investments as real estate investments are supposed to slow down between the years 2010 and 2015 and nonetheless, the effects of the return will be seen in other countries (Table 10).

Table 10. 2011-2015 Previsions for Shopping Centers
(Source: Adapted from REIT 2015, 2008)

YEARS	LEASABLE AREAS	PER THOUSAND PEOPLE
2010	8.393.811	114.6
2011	8.900.000	120.2
2012	9.200.000	122.8
2013	9.500.000	125.3
2014	9.700.000	126.6
2015	10.000.000	129.1

After 2010, the development and growth of shopping centers are supposed to become more stabilized and selective. There exist three factors affecting the return of Turkey's shopping center investments as real estate investments between the years 2008 and 2015. These factors are: the powerful interest for developing markets while the returns decrease in Europe, Turkey's economic development and stabilization politics, and the slow-down process despite the rise of investment costs.

Table 11. Ten Fundamental Tendencies in Retail Sector.
(Source: REIT 2015, 2008)

BASIC TENDENCIES	**IMPACTS**
ORGANIZED RETAIL DEVELOPMENT	CONTRIBUTION OF INVESTMENT IN
TRANSITION FROM FAST GROWTH TO STABLE GROWTH IN RETAIL SECTOR	RENEWAL IN RETAILING DECISIONS AND PROJECTIONS
DENSE AND FLAWED PROJECTS IN SPECIFIC AREAS IN SHOPPING CENTERS	CONSOLIDATION, BUYING AND MERGING, CHANGES MADE FOR FOREIGNERS IN PURCHASES AND ALLOCATION OF FUNCTIONS
INCREASE IN FOREIGN INVESTMENTS	INSTITUTIONALIZATION A ND INCREASING COMPETITION
TRANSITION FROM INDIVIDUAL TO ORGANIZED INVESTORS	HEALTHIER GROWTH
NEW BALANCE IN RELATIONSHIP OF TENANT - INVESTOR - CREDITOR	DIFFICULTIES IN SOME PROJECTS AND HEALHY AND SUSTAINABLE INVESTMENTS
RETAIL IN REAL ESTATE AND BUILDING SITE INVESTMENTS – TRANSITION TO IMMOVABLE PROPERTY INVESTMENT IM MOVABLE	HEALTHIER GROWTH IN SHOPPING CENTERS
BALANCE BETWEEN SUPPLY AND SHOPPING CENTER SUPPLY IN RETAIL SECTOR	DEVELOPMENT OF NEW RETAIL BRANDS
INCREASING COMPETITION BETWEEN SHOPPING CENTERS	DIFFERENTIATION, INCREASE IN THE QUALITY OF SERVICE SPECIALIZATION, BRAND MARK DIVERSIFICATION, EFFECTIIVE ADMINISTRATION
NEW LEGAL REGULATIONS	DEGRADATION IN RETAIL SECTOR COMPETITION AND SLOWDOWN PROCESS OF GROWTH

2.5. Summary

The shopping-areas had been changed in parallel to socio-cultural and technological developments within social developmental process of humanity, they were always important aspects of city centers since ancient to todays. However, the today's shopping centers had been initiated to build in America and Europe, in 1900s. Firstly the shopping areas located in suburb, then the shopping center had been started to locate at inner city, in 1950s. The shopping centers development in world can be examined in five phases: 1) garden city, 2) automobile center, 3) suburban center, 4) festival marketplace, 5) entertainment center. Since 19^{th}, the quantity of Shopping Centers has been growing fastly, and the characteristics of shopping center difference between each region. It is very difficult to categorize each Shopping Center. ISCS was created to bring standards to the shopping malls and classificated the shopping Centers as follows: Regional Center, Super regional Center, Neighborhood Center, Community Center, Power Center, Theme/Festival Center, Lifestyle Center, and Outlet Center. The other classification, which is made by DeLisle about shopping centers, includes typologies according to size, design, theme, location and tenants.

The success of the shopping center project is mostly depending on the projects location and site analysis. They are comprise of location and neighborhood, demographic structure, accessibility, visibility, potential tenant mixture, the size and the shape of the land, topography, infrastructure, neighborhood and the effects, legal constrain; utility easement, private easement, deed restrictions, the cost of the land, Site conditions. Finding the right location is very difficult.

The shopping center development initiates by Galleria in 1988, in Turkey. Until year 2001, due to the finical crises, shopping centers were developing only at three big cities in Turkey. However, today because the economic development, the quantity of the shopping center has almost increased to 250 around Anatolia. During our research, we find out between 1988 to 2001, here were only 61 shopping centers in Anatolia. However, tat year 2009, here were 247 shopping centers all around Anatolia. Same as other counties all around the world, the shopping centers were first built around the edge of the city. As time goes by, shopping center location gradually moves to the center of the city by the demand of city population.

CHAPTER 3

INTRODUCTION OF THE STUDY AREA: CASE OF DENİZLİ

This chapter includes information about the geographical, demographic and economic structure of Denizli, a city taking place among the developed cities of Turkey and dwells upon its urban structure and traditional trade area. This chapter aims to understand the interaction between the shopping centers and geographical, demographic and economic structure and urban development of the traditional trade area at Denizli.

3.1. Geographical, Demographic and Economic Structure of Denizli

The Province of Denizli is located in the south-western region of Anatolian Peninsula and the south-western part of the Aegean Region. Denizli is neighbored by Afyon and Burdur to the east, Muğla to the south and Manisa, Uşak and Afyon to the north. It serves as a passageway between the Aegean, Mediterranean and Central Anatolia regions. With its area of 11.868 km^2, the province occupies 1.5 % of the area of the country and 18.5 % of the Aegean Region (Denizli Province Official Website).

The mode of transportation of Denizli consists mainly of road, rail and airway systems. Denizli is an important junction in the transportation network and is located along an axis that provides not only regional, but also national connections.

Furthermore, even though it used to take place in second and third place for long years, the development of railway transportation is considered to be a potential that will provide substantial returns to Denizli, since it is located along an important railway route.

Within a distance of five kilometers from Çardak district, the airport is 65 km away from the city center of Denizli. Opened in 1991, the airport has gained international status in 1999. Considering the importance of the city in terms of tourism and national export, utilization of the airport facilities becomes even more essential (Denizli Province Official Website).

Since Denizli is the second important city of the Aegean Region and Inner West Anatolia after İzmir, its hinterland covers eastern Lakes Region and western parts of Afyon, and extends up to Nazilli in the direction to İzmir. Denizli is also the second most populated city of the Aegean Region after İzmir. As its economic structure has become specialized, it has built economic relationships with centers of higher rank outside the region. Under circumstances as such, Denizli has begun to be influenced by, or got in mutual interaction with other higher-rank centers as well as İzmir. Furthermore, spatial development of the city of Denizli has had major effects upon villages and towns within the boundaries of the central district (Denizli Province Official Website, 2009).

It is under the influence of İzmir for fifth and sixth order urban needs while, like all the other cities in the country, it is dependent on İstanbul for seventh order needs. According to "Ranking of Socio-economic Development and Investigation of the Provinces" by the State Planning Organization (2003), Denizli is ranked as the second among provinces of the Turkish Republic. In this group, there are several provinces, which altogether are called "The Tigers of Anatolia" including Eskişehir, Denizli, Bilecik, Kayseri, Gaziantep and Çanakkale, where industrialization has reached a certain level each.

According to the same report by the State Planning Organization, while Denizli was ranked in the 16th place in the socio-economic development in 1996, it has moved upwards to the 12th place in 2003 (8th Five-Year Development Plan Period). Today, Denizli still keeps its position developed as a center of industrialization. This development has been depicted as a model by the State Planning Organization with regard to the magnitude of improvement of the previously under-developed cities of Turkey (DTO, 2009). According to the census statistics of 2000, the population of Denizli is 850.029. While the ratio of urbanization is 49%, the rate of annual population growth is 1.24% and the number of person per kilometer is 73.

Influenced by the global economic turmoil, the Turkish economy has begun to slow down in the third quarter of 2008. According to data of Turkish Statistical Institute (TSI), the country performed an average growth of 6-8% between the years 2004 and 2007, while the highest growth rate was recorded in 2008 despite the influence of global economic turmoil. Beyond the expectations however, Turkish economy in the very beginning of 2009 has witnessed negative growth despite the full growth records after many years. The Gross Domestic Product (GDP) of Turkey contracted by 3.30% over the last four quarters of 2009. According to World Bank, the GDP is 794 billion dollars, amounting to 1.28% of the world economy.

Turkey is a rapidly developing country and has the largest national economy in Central and Eastern Europe. Turkey's dynamic economy is a mixture of modern industry and commerce, along with the traditional agriculture sector that still accounts for nearly 30% of employment. It has a strong and rapidly growing private sector, though the state is a major participant in basic industry, banking, transportation, and communication. Due to the dynamics of the country with its growing young population, and increasing levels of income, the retail market is one of the fastest growing and developing sectors of real-estate market in Turkey. This has been further triggered by the demand for high quality retail space of international and domestic retailers. Several major international brands that have entered the Turkish retail market are satisfied with their profits in Turkey, which has in turn affected the market entry of other brands in a positive way. All these developments have resulted in the development of various shopping centre projects throughout the country.

Denizli is the fourth biggest city in the Aegean Region in terms of population and an important destination for textile production in Turkey. Denizli Province has a population of 917.836 in 2009. Representing itself in the domestic and international markets, the textile industry in Denizli grew rapidly during the 1980s and 1990s. The economic growth has been faster than that of its counterparts in the Aegean Region. Denizli offers a wide range of businesses integrated into the markets of İstanbul and İzmir as well as the other national markets. Apart from the textile industry, the main crafts are iron and metal works, food processing, plastics, wooden furniture and tanning workshops. At present, 266 companies amounting to 36% of the members of Chamber of Commerce are textile and apparel manufacturers. Denizli-based textile firms currently export their products to more than 120 countries. Due to the fact that the economy of the city depended mainly on exports, Denizli has been vastly hit by the crisis. The number of jobs in Denizli textile industry sector declined by 9.9% during the first ten months of 2009, while the figures for exports declined by 22% in November in comparison with the same month of the previous year.

According to Denizli Chamber of Trade (DCT), Denizli is one of the most essential global gates in Turkey with its high level of trade and industry. In 2002, while export revenue was recorded as 285.982.969 USD, import revenue was 66.069.257 USD. In the same period, 164.055.104 YTL of income tax, 31.684.274YTL of corporation tax and totally 418.465.867 YTL of tax accrual has been recorded.

Figure 2. Location of Denizli in Turkey

Denizli takes place in the 22nd order in the cities of Turkey with its current price GDP of 2.564.314.369 YTL (belongs to the 2001 statistics), and in the 20th order with 2.159 YTL fixed price GDP. It has been indicated in the Research of Population Growth of Denizli Province that the highest increase was peak of the period between the years of 1985 and 1990. As of 2000, the ratio of urban population to total population is 48.7%.

According to the census statistics of 2009, total urban population was recorded as 517.911, and provincial population, as 926.362. Based on these figures, the Municipality of Denizli is ranked as the 25th among 80 cities in total.

According to State Institute of Statistics sources, urban population has increased by 10.3% in each period of five years between 1985 and 1990. Although this ratio has decreased down to 9.2 between 1990 and 1995, the figure has risen to 15.3 for the period of 1995-2000 (Table 12). Similarly, in the period of 2000-2005, it increased up to 20.3 again and the population has been estimated as 1 million by 2010.

Table 12. Demographic Indicators for the City of Denizli
(Source: Adapted from TUIK Official Website, 2009)

YEARS	1980	1985	1990	1995	2000	2009
POPULATION	182.541	224.447	275.983	321.962	398.484	517.911

3.2. Urban Structure of Denizli

Based on the rapid industrialization and liberal economy politics since 1983, the Province of Denizli has been subject to rapid urbanization, excessive population growth and high migration rates as result of the credit incentives. The specific location of the city of Denizli has a number of natural and cultural restrictions:

- There exist dense forestry areas in the eastern, western, southern parts of the city, and a preserved water basin, Gökpınar Dam in the east.
- Fertile agricultural lands (i.e. Lykos Valley) which constitute the basis for the urban life for 2500 years and Pamukkale Special Environment Protection Area take place in the northern part of the city.
- There also are other preserved ancient places; such as, Laodikya, and Clossae which give hints of heritage for the early urban culture.

Depicted as such, the urban development tendencies within the geographically restricted areas are noteworthy indeed. At this point, considering that the highways of Ankara, İzmir and Muğla had considerable impacts upon spatial development, the high risks of urban development of Denizli become manifest.

3.3. Traditional Retail Area in Denizli

The hints for early settlement in Denizli can be observed in the historical Kaleiçi Bazaar within the district of Bayramyeri where commercial activities prevail even today. Since 1980s, the Province Denizli and its CBD appears to have developed within a circular movement. Kaleiçi, known as the Bayramyeri district located at the interface of the interurban and local public transportation, has been “the only address” for many years for those who come from the neighboring districts and villages for shopping. However, although Kaleiçi-Bayramyeri has been loosing its economic liveliness and its strong competitive climate, the Central Business District (CBD) to its southern direction still preserves its significance.

While until the beginning of the 20th century, the land use pattern consisted only of the inns, Turkish baths, and coffee-houses in Kaleiçi Bazaar, the corners of the historical castle have been replaced by shopping places and stores after the 1900s. From the ancient door of Bayramyeri in the district of Kaleiçi-Bayramyeri, to the southern and southwestern directions (along the Atatürk Boulevard at the Delikliçınar District), the urban area has developed as the CBD of the city. Today, it is observed that this area shelters not only shopping centers, but also some public offices functioning in the service sector. The historical Kaleiçi Bazaar tends to lose its historical identity because of the devastation of its ancient doors and the rest of the historical site in the bazaar is heavily destroyed and demolished. Although almost all the mayors of Denizli have been repeatedly mentioning about the most promising renovation plans and projects for the bazaar to improve its touristic value, there yet have not been any satisfactory result of substantial progress reached. With the increase in the number of alternative shopping places, the citizens prefer to visit these shopping centers instead of Kaleiçi Bazaar. Today, in many provinces, growing numbers of people tend to do their shopping in large-scale shopping centers, which causes a serious risk factor resulting in breakdown of traditional shopping and commercial activities in Denizli. On the other hand, at this essential point in time, the population of the Denizli Province is expected to exceed 1.500.000 with the Master Plan on scale 1/25000, and it is stated that such structural urban plans will have a vital significance to prevent the decline of the city center.

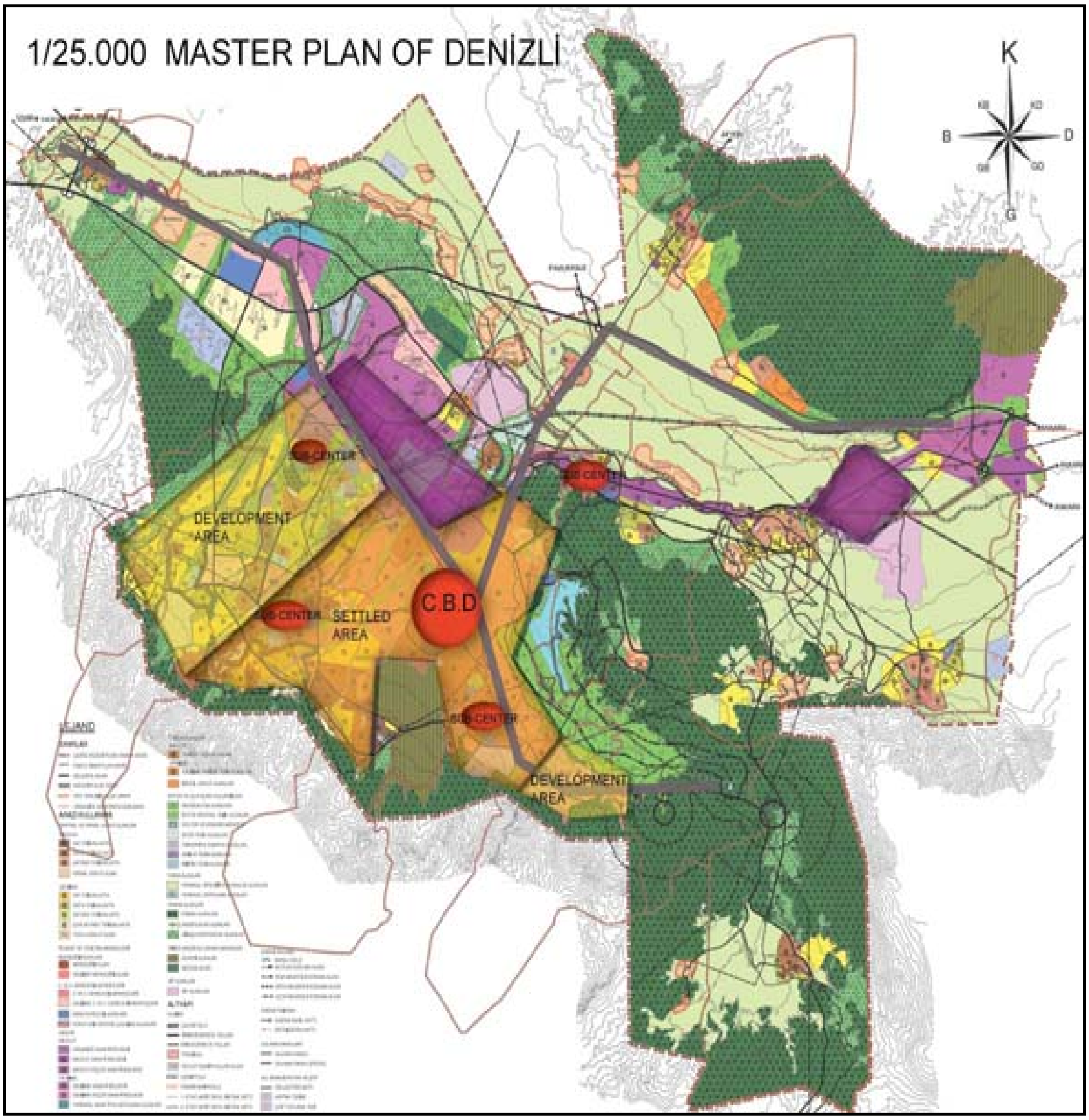

Figure 3. Master Plan of Denizli and the proposed sub-centers
(Source: Denizli Municipality, 2007)

The basic decisions of the Master Plan on scale 1/25000 (Figure 5), targets at preserving and improving the current urban characteristics of Denizli; and the proposal of the new railway route and improvement of the bus terminal and stations are both considered elaborately in planning activities. One of the most significant proposals of this master plan is to increase the convenience of transportation to the city center particularly for university students and lower class families. Because of this approach, the plan is shaped mainly by a convenient railway system, which is to provide access to the University Campus through the city center until it ends at residential areas on the southwestern part of the city. According to the report of Denizli Master Plan (Figure 6), the potential rack railway system will play an important role in upgrading interurban public transportation while those areas at proximity to bus terminals and bus stations will serve as pivotal focal points within the development of CBD. In this plan approach, it is anticipated that proximity of the bus terminal and station to the city center will become an important advantage, which will also add to liveliness of the city center.

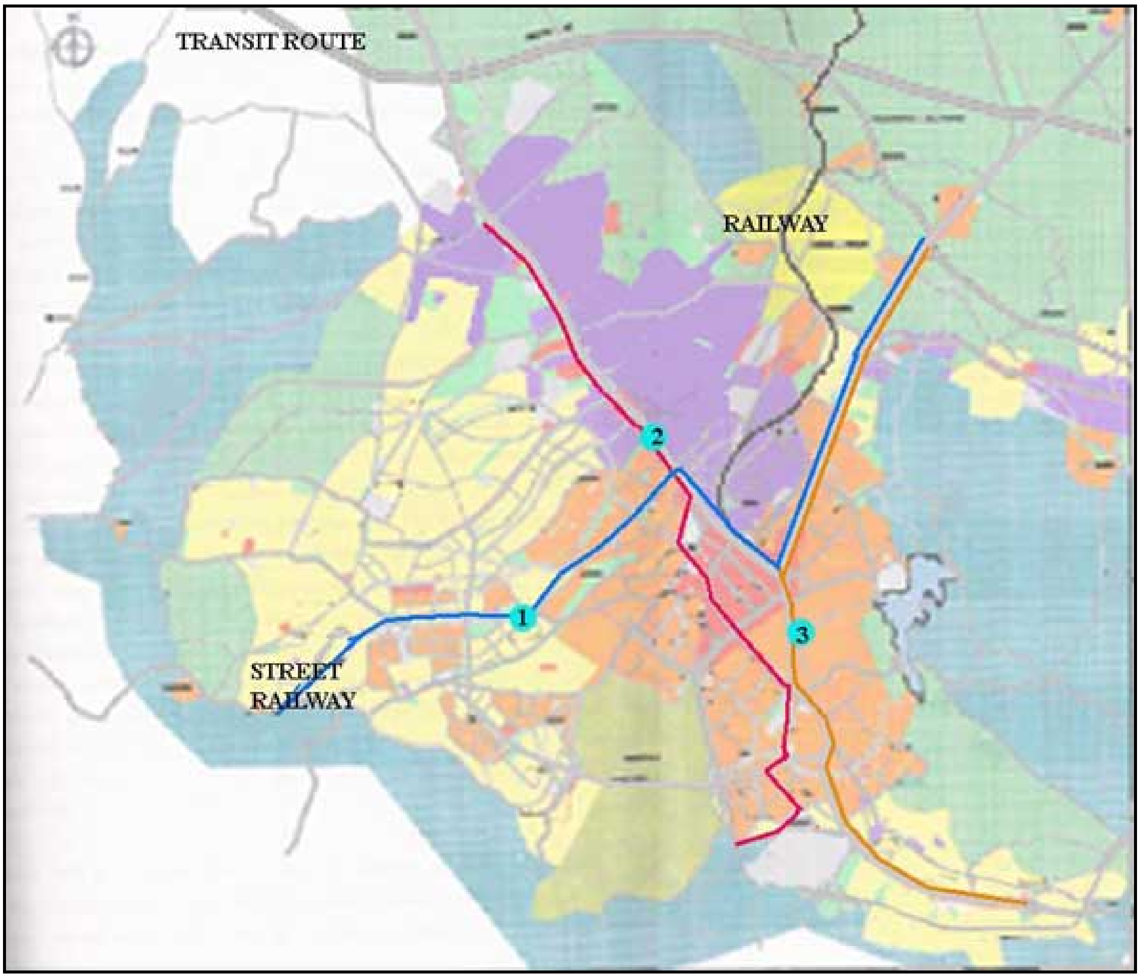

Figure 4. Transportation Master Plan of Denizli, 2003
(Source: Denizli Municipality, 2005)

In many of the small- and large-scaled city centers of Turkey, several shopping areas within the historical districts have recently been closing down and loosing their once-vigorous economic activities due to construction of newly-built large shopping and business centers. The traditional shopping and trade center of Denizli, Bayramyeri-Delikliçınar is one of the most essential examples of this ongoing situation. There is not much space for further development of Denizli retail market causing the current market be vulnerable to the economic crisis. Due to high unemployment rates and migration from the city to villages, the city does not appear to offer any major recovery in the short term. Therefore, pricing plays a crucial role in determining the shopping behavior of residents. Meanwhile, shopping is not as much strong enough as expected on either the shopping centre or the main streets due to the decreasing purchasing power of inhabitants in Denizli.The main street of Denizli displays a strong character where people have the traditional tendency to visit and do shopping. As major businesses and public institutions including the municipality are located around these areas, the daily number of visitors of major high streets is high. Ataturk Boulevard, Çınar Street, Kaleici and Bayramyeri constitute the major axis of shopping areas in the city, among which Çınar Street emerges as the primary street, accommodating uses such as retail, fast food and banking. Ataturk Boulevard accommodates mostly local brands or service stores, whereas Bayramyeri is best known for its jewelers.

Even though the rents/turnovers and occupancy levels of high-street shops are adversely affected both by the economic crisis which has hit Denizli vastly and the opening of the shopping centers due to the vividness of the area, those shops located especially along the Cınar Street are released rather quickly. Bayramyeri and Lise Street are the two streets mostly-affected from vacancy. The major problem of the main streets pertains to very limited availability of parking areas, which in turn becomes an advantage for the shopping centers.

3.4. Summary

According to report by the State Planning Organization, Denizli was in the 16th place in the socio-economic development in 1996, and it moved to the 12th place in 2003. Denizli is the fourth biggest city in the Aegean Region in terms of population and an important destination for textile production in Turkey. According to the census statistics of 2009, total urban population was 517.911, and provincial population was 926.362. In the light of these results, the Municipality of Denizli is the 25th city among 80 cities. The Denizli City has the rapid urbanization; excessive population growth and high immigration rates resulted by the credit incentives based on the rapid industrialization and liberal economy politics since 1983.

CHAPTER 4

SHOPPING CENTERS IN DENİZLİ

Some of the shops in Turkey located in historical places in the center of middle and high scaled cities have begun to lose their economic activity due to big shopping malls and new CBD's, which have been building increasingly last years. The axes of Bayramyeri-Delikliçınar, which are the traditional trade area in Denizli, are one of the most important examples to this situation. In recent years, with the increasing establishments of shopping center chains, the automobile, home-textile and furniture showrooms, the important trade axis have begun to be built in Antalya, İzmir, Ankara public highways, the important constructions of Denizli's urban structure. However, the first biggest trade structure of Denizli is Üçgen Çarşısı built in 1984 (Figure 5).

In 1980s, leasable shop were not found in historical Kaleiçi Bazaar and it was not allowed to issue a permit to open a shop in the city center, therefore; the idea of building shopping centers evolved and cooperation's were structured. As the demands for cooperation's were so high, the idea of structuring an office building turned to the idea of building a shopping center, as a result of this, Üçgen Çarşısı was built. Before its structure, there were no feasibility studies. In 1990s, it was allowed again to have a license to open shops in city centers, however; this idea also lost its attraction quickly. Kaleiçi, which gained its license, also found its liveliness in short time, and since the big shopping centers were built, it was the center of attraction and economic activity. The first shopping center enterprise in Denizli was Adese whose origin was Konya and established in 1995 on the way to Ankara. Although it did not fit today's shopping center understanding with its one floor building and 10 shops, it attracted attention in Denizli in that period.

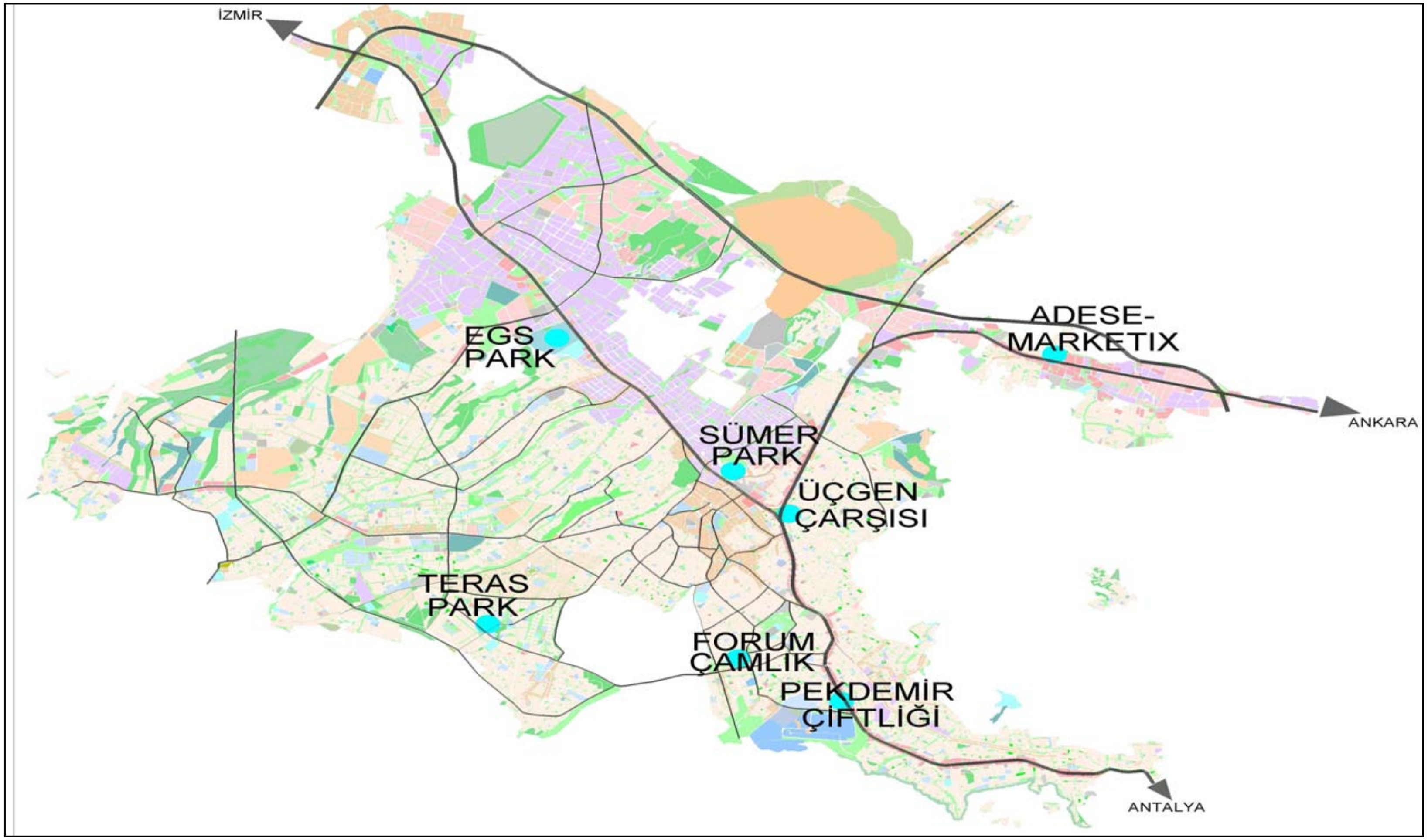

Figure 5. The Shopping Centers in Denizli
(Source: Adopted from Denizli Municipality, 2010)

In 1998, EGS Park was built in Denizli in 1998 with ICSC standards. Egs Park was opened, with a GLA of 23.000 m^2, is located on the north of Denizli on Denizli-Aydın Road in Gümüşler District. The centre is anchored by Kipa, which attracts customers with its brand awareness and price appeal. The immediate surrounding of the centre is not densely populated therefore the access is provided via transportation. In 2006, Pekdemir Çiftliği was established with ICSC standards by local investment and it was the first modern multi-storey shopping center in Denizli. Pekdemir was opened with a GLA of 9.000 m^2 has an established customer base, especially for the food retail and offers the cheapest cinema in the city although lower quality compared to The Pekdemir Çiftliği. The Pekdemir Çiftliği is located on Antalya Road, with high visibility, where the daily car circulation is very high.

In 2000s, Denizli was affected with the breakout of shopping center investments in Turkey. Although the investors did not abdicate to open shopping centers in big cities, such as; İstanbul, Ankara, İzmir, they realized Denizli's industry, tourism and demographic potential and invested their capital in Denizli. Firstly, Teras Park was opened in 2007. Teras Park is located on the south-west of city centre in Yenisehir District. The surrounding residential is mostly composed of multi storey buildings, which is a growing district of Denizli. % 51of the shares of the shopping centre are owned by Corio. After this progress, Forum Çamlık, which is a chain of Forum shopping malls, was established in Denizli. In the building plot of Forum Çamlık, Demokrasi Youth Center was initially located as an investment of Denizli Municipality. Because of economic reasons, when the construction was not completed, the place was sold out to Turkish Made Article Company and it was collapsed for the construction project of Forum Çamlık.

Sümerpark, being developed by Global-Pera REIT, is a mixed-use project composed of residential, hotel, hospital complex and shopping centre functions. The project remains within the industrial area as planned on the land of ex-Sümerbank Textile Factory; therefore, the immediate neighborhood requires regeneration as a whole. The expected GLA of the centre is 55.000 m^2. The project is expected to be anchored by Kipa. As the project is currently on hold, the opening date is not yet certain. Based on verbal inquiries in Denizli Planning Department, there are no planned shopping centre developments in the pipeline other than Sümerpark. In our opinion, currently the city cannot absorb any further shopping center developments.

4.1. Üçgen Çarşısı

Üçgen Çarşısı takes place at a crossing called Üçgen junction where the main routes from Denizli to Ankara-Antalya and İzmir intersect. This junction, as the largest and the most important crossing of Denizli, also shelters a green area known as the Ulusal Egemenlik Park. For this reason, its location plays a pivotal role in inter- and intra-urban transportation both. The location of this junction and the site where Üçgen Çarşısı Shopping Center takes place can be deemed as a midpoint of the city. In addition, its location is within several kilometers from the Traditional Trade area, namely the Kaleiçi-Bayramyeri district. Since the site is situated at a rather central place, it can be reached easily by pedestrian and vehicular access both. Its inter-urban accessibility also provides comfortable ways of transportation for those coming from other cities, since the bus terminal and train station are within close distance. Thousands of pedestrians and vehicles pass through this junction everyday (Figure 7). Studies held for the transportation master pan indicate that approximately 50.000 people drive through this junction every day. (Report of Denizli Transportation Master Plan, 2003). Members of the association (cooperative) which is established only by local capital, consists of Denizli inhabitants, among them expatriates in particular. While the association had about 600 members at the time of its foundation, today this figure appears to have exceeded 1000 members.

Due to the facts that there were no rental properties in Kaleiçi Çarşısı and no workplace license was granted from the city center during 1980s, the idea for building an office block was brought forth to meet the demand. In result, a cooperative has been established in 1975. As the demand to become a member of the cooperative was more than expected, the final decision has been to build not an office block, but rather a large shopping center instead. The land was purchased in 1977. No feasibility study has been carried out during phases of construction. After having the construction work be invited for tenders, the construction started in 1981 and was completed in 1988 (See Figure 6). In 1990s, the demand for the shopping center reduced although it was quite new, because the authorizations began to be granted in the city center from the beginning of the decade (Interview by Özdoğan, 2010). Yet, due to neglection of the required works for maintenance and repair for about two decades, the building has been subject to serious damage and obsolescence. Contrary to having been the biggest shopping centre of Denizli and Aegean region of the times during which it was built, it does not seem to attract any attention or demand these days. The current use of the building largely for storage purposes lacks any coherence with its physical potentials such that the building holds a considerable potential for business, but unfortunately remains far behind its capacity.

The function, design and quality of Üçgen Çarşısı Shopping Center do not seem to encounter the trends and needs of today's shopping centers by any means. The shopping center lacks the required quality level in terms of its physical characteristics. There exist 624 shops with 36 m^2 in size each; 34 kiosk-shaped shops; and a parking lot with a capacity of 600 vehicles. Üçgen Çarşısı offers 22.400 m^2 of leasable areas. Today 325 stores are used for storage purposes. Having one large and nine small interior gardens, the building can also be entered from nine different points from where vehicular access is also possible. In addition to the stairs, the ramps providing vertical circulation ease the transport of heavy and large loads (Figure 6). Owing to characteristics as such, the building has begun to be used mainly as a warehouse (Interview by Özdoğan, 2010). Furthermore, as the rental charges remain quite low at its surrounding areas, single workers tend to use some stores for residential purposes as well.

The pedestrian circulation axes are designed as semi-open. On the condition of taking the building permit of the areas currently used by showroom owners as car park, it is possible to extend the commercial uses by way of utilizing those areas the municipality has left for multi-storey car park and the recreation area to the east of the center, Constructed in a semi-prefabricated system, the building avails for all sort of renewals and repairs. A number of meetings have been held by the administrative body of the cooperative to rehabilitate the center as a thematic bazaar and there has been some search for investors as well, but but these attempts could not be able to draw any attention at all.

Owing to the development of industry in Denizli to be appreciated, there have been many outlet stores and retail stores selling various kinds of home textile products. The cooperative's administrative body has attempted to gather these stores under a single shelter of the shopping center with the intention to establish a thematic bazaar, but these attempts have been unsuccessful.

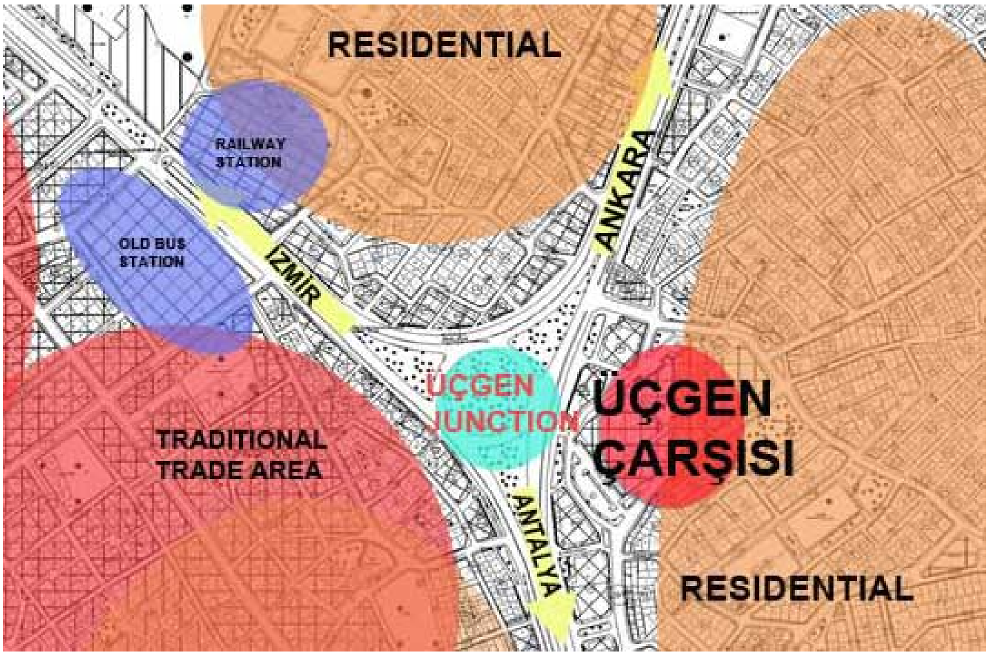

Figure 6. Implementation Plan for Üçgen Çarşısı Shopping Center and the functional layout of its environs (Source: Denizli Municipality, 2010)

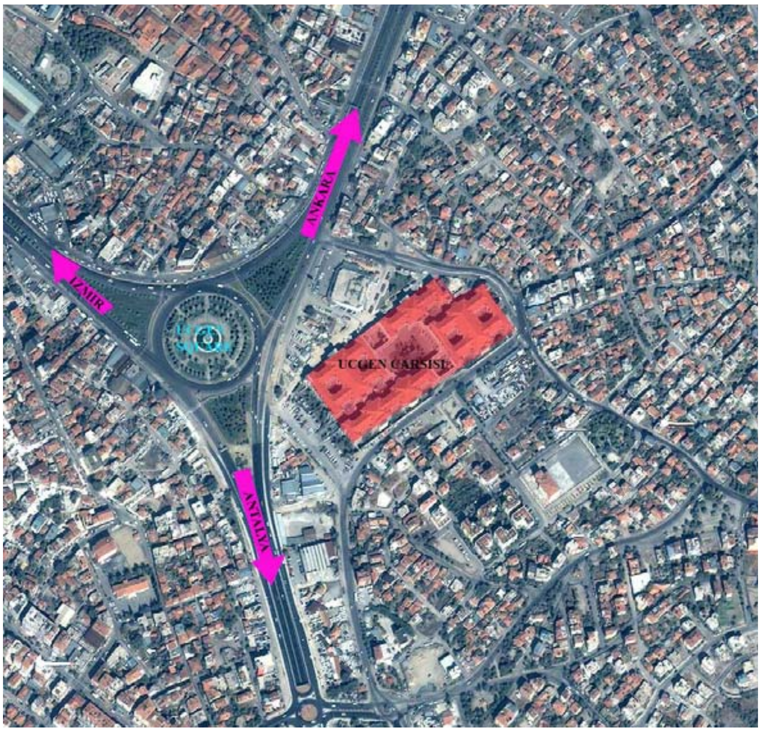

Figure 7. Satellite image of Üçgen Çarşısı and the Surrounding Environment (Source: Denizli Municipality, 2007)

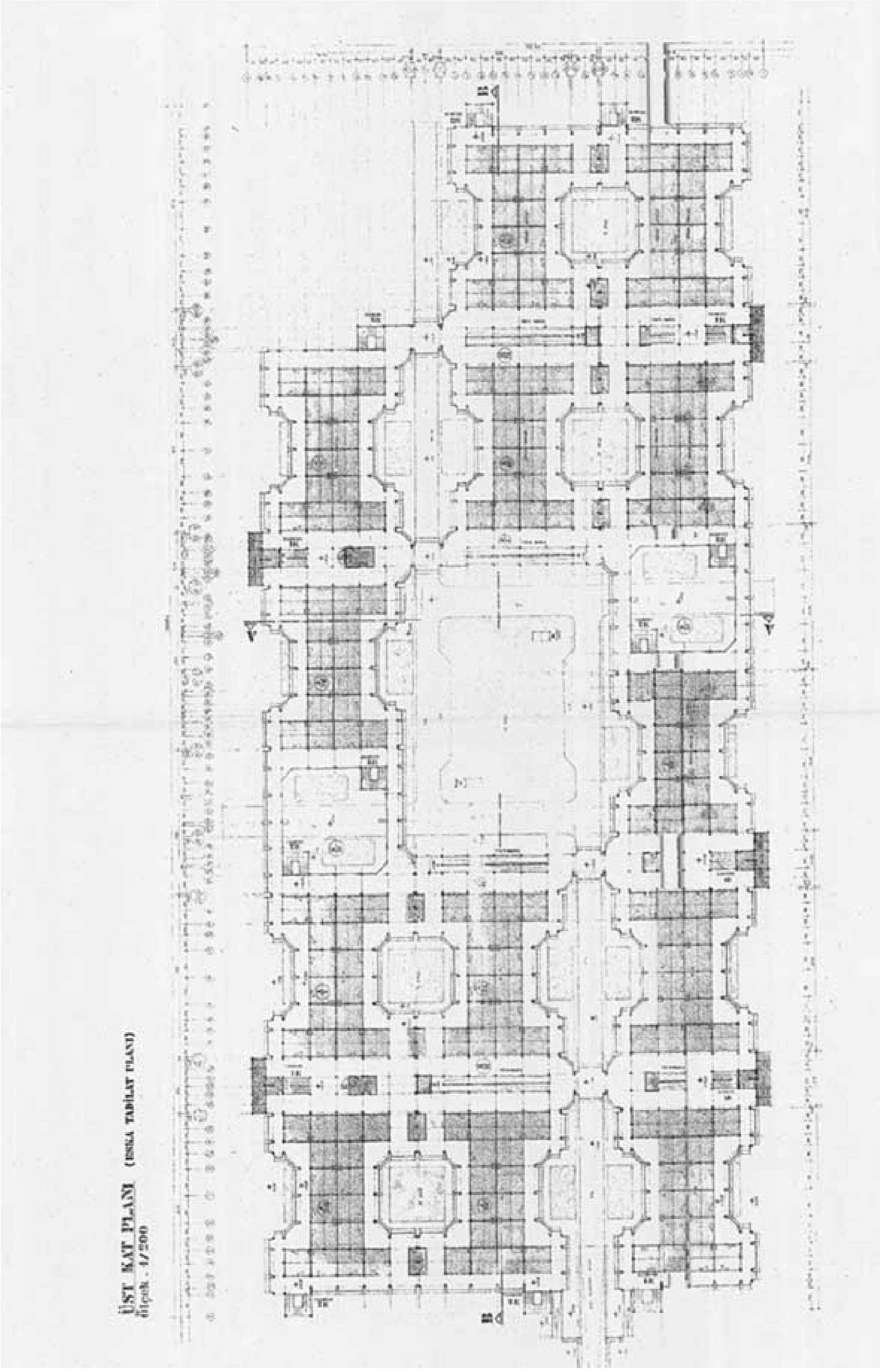

Figure 8. The Architectural Project of Üçgen Çarşısı
(Source: Cooperative of Üçgen Çarşısı, 2005)

Figure 9. View from the Junction
(Source: Wowturkey/1, 2010)

Figure 10. Front View of Üçgen Çarşısı in 1987
(Source: Wowturkey/2, 2010)

Figure 11. View from the main Courtyard

Figure 12. View from a Vacant Shop

Figure 13. A view from the Vacant Shop

4.2. Adese

Adese is located out from the city center along the main road to Ankara. The surrounding district is composed mainly of industrial areas densely located along the road and neighbours agricultural lands as well as low-density residential areas to the north (Figure 15). Having been opened in 1995, Adese is a member of chain supermarket and shopping store which is centered in Konya, Turkey. The owner company has been adversely affected by the economic crisis in Turkey and has had to close down its Denizli branch in 2002. The establishment has been sold to Dentex, which, among others in Denizli, is an outstanding textile company that targets at expanding its investments in retail. The new owner of the company has completely renewed the shopping center building and renamed it as Marketix (Wowturkey, 2010).

Its close distance from the residential areas avails for pedestrian access to the shopping center. However, vehicular traffic is also quite high due its location. It is built up on an area of 24000 m^2, within which 12000 m^2 is leasable area, and and the capacity of its parking lot is 900 vehicle. The food court, playground and movie theaters can be listed among the facilities served. The center also provides employment to 350 people. Denteks opened several stores in the city center (Figure 14) of Denizli, each carrying the same brand name as Marketix and the number of stores increased to 11 at end of the year 2008. Due the financial crisis, however, Denteks went bankrupt, causing all stores to be closed down. Despite all the renovations and annexes made, Marketix also had to be closed down for it could not succeed in receiving the required amount of attention because of its long distance from the city center.

Figure 14. The front façade of Adese
(Source: Wowturkey/3, 2010)

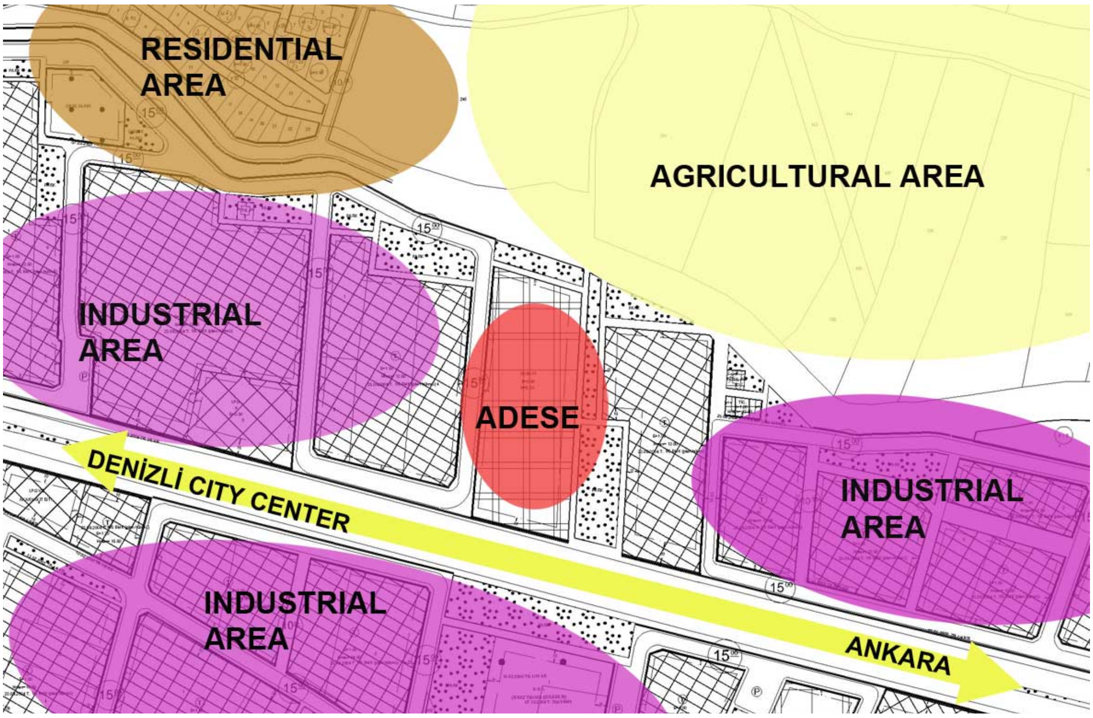

Figure 15. Implementation Plan for Adese-Marketix Shopping Center and the functional layout of its environs (Source: Denizli Municipality, 2010)

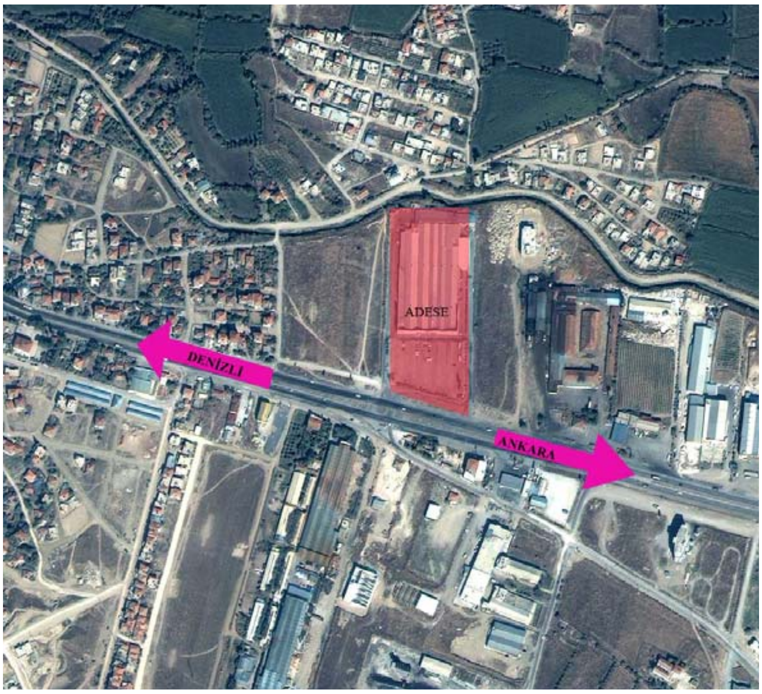

Figure 16. Satellite View of Adese Shopping Center (Source: Denizli Municipality, 2007)

4.3. Demokrasi Youth Center

Demokrasi Youth Center was previously constructed at where Forum Çamlık shopping center is currently located today. For this reason, those statements given about the location of Forum Çamlık shopping center count for this center as well. If this building owned by the municipality could be completed at the time of its construction, it would hold the title of being the first shopping center of Denizli.

Having started the construction works in 1997, the building was planned to be completed in 1999. The construction failed to be completed because of financial difficulties, so attempts were made to find both domestic and foreign investors. Therefore, some feasibility studies were carried out and certain reports were prepared in order to complete the project, but there has not been any demand received from any investor in the course of eight years (Figure 17). he building was then sold to Multi-Turkmal Company, which was established with the partnership of the biggest independent project of Europe, Multi Development and the Turkey's most project developer company, Turkmall. Guided by the analysis studies carried out by the company, it was decided to tear down the building and have it be rebuilt afterwards. Accordingly, the building was demolished two months after its sale.

Having been planned within functional layout of the building if it were completed, such facilities as movie theaters, foyer, art gallery, exhibition hall, two-storeyed shops, divisible stores, restaurant and cafeteria, fast-food units, hypermarket, Famecity, and bowling saloons could be kept in the newly-built center. Among the targets of this project took place the strategy to fulfill the need for movie theaters in the region.The project has about 41.000 m^2 of construction area and 17.000 m^2 of leasable areas. The building has five storeys. The junction where the building is situated is occasionally allocated to big meetings and shows held at Denizli (Figure 18). There exists a tower with 43 meters in height, 21,5 meters of which arise from the buildings. There were planned indoor and outdoor cafeterias provided within this cap. The vacant area designed in front of the building was placed there for some activities such as foreign circuses, bazaars and festivals (Figure 19). The design of the project has a modern style structured in reinforced concrete framework system. The design and its implementation were to be of high quality.

Figure 17. View from the Construction

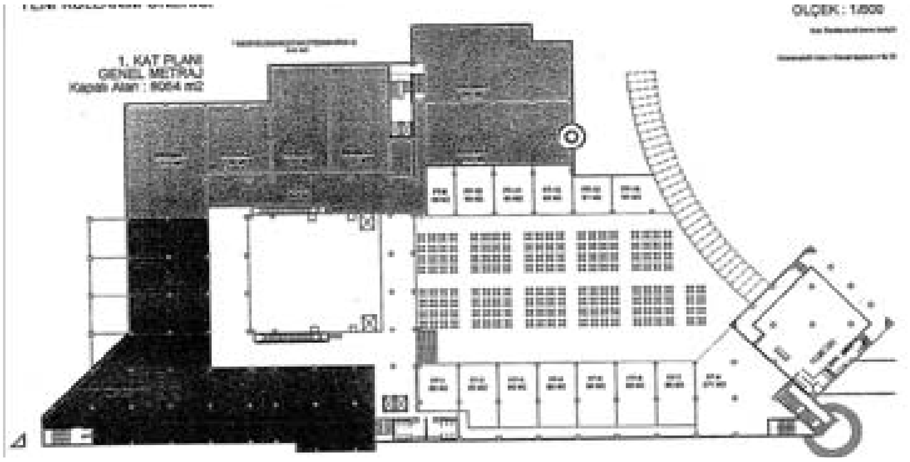

Figure 18. Proposed plan of First Floor
(Source: Denizli Municipality, 2004)

Figure 19. View the Demolished Building of Demokrasi Project
(Source: Denizli Municipality, 2004)

4.4. EGS Park Denizli Shopping Center

EGS Park is located along the main road to İzmir within a distance of five kilometers from the city center. As it takes place within boundaries of an industrial zone, the main axes providing access to the shopping center are subject to considerable levels of industrial traffic in addition to intensive passenger and vehicular traffic along the İzmir road. There exists no recreational center and the center lacks any element adding prestige to itself (Figure 21) .According to the Report of Denizli Transportation Master Plan, the number of visits to the shopping center has been gradually increasing. Whilst the number of visitors was about 1.4 million people in year-round, this figurehas increased up to 2.5 million people in 2006. Although the shopping centers provide service vehicles, visitors generally prefer private vehicles. In comparison to the number of visits by vehicle, the number of visits by pedestrians remains low behind. Since its opening, EGS Park has been visited by many people almost equally in summer and winter seasons. The visits have shown a considerable rise at weekends in particular. The target group is usually the middle-income group (Directorate of EGS Park).

Because of the debts of EGS Real Estate Investment Trust (REIT), its audit privileges have been transferred to the Saving Deposits Insurance Fund (SDIF). CSDF then has called for tenders to sell EGS Park Denizli Shopping Center, which was the property of EGS Real Estate Investment Company. The property was confiscated because of the debts of the company. The tender was offered to sell Denizli Shopping Center at appraised value of 33 million US Dollars in 2006 (Wowturkey/4, 2008).

Though built in 1998, Denizli EGS Park could commence its activities in 2000. Kipa has opened its 4^{th} chain hypermarket within EGS Park in 2001. The center is of special importance since it constitutes the first and biggest shopping and entertainment center in Denizli. When Saving Deposits Insurance Fund has seized operations of EGS REIT Corporation. because of the company's debts, no offer was given for the bid to sell. Having shareholders among the business milieu of Denizli, EGS Park Shopping Center has been introduced as one of the biggest investments of that period and it still keeps its primacy (Directorate of EGS Park).

Targeted at developing congress tourism and increasing the international market share of Denizli as a growing commercial, industrial, tourism and university city, bridging the Aegean, Central Anatolian and Mediterranean regions, the Convention Center with its capacity of 1500 persons has begun to be used within the fair area of EGS Park in 2000 (Figure 28), Having opened its doors, a significant number of important cultural, art and tourism activities have been held at the center. EGS Park building covers a construction area of 283.000 m^2 in total, of which 45.000 m^2 are indoor space including 23.000 m^2 of leasable area. The shopping part comprises 43 large stores and 27 small-sized shops. Among the facilities provided, there takes place a carting track, playground for children, stores, and supermarket, restaurant, café and movie theaters situated within the first phase. EGS Park is planned on a land of 6000 m^2 in Denizli. The second part includes the fair and convention center (Interview by the Director of EGS Park). The building is made of reinforced concrete in modern architecture. It is attractive for customers both in summer and winter due to its well-designed outdoor style of space (Figure 23) , but the-gates and the squares as common areas attain a semi-open style. There exist two courtyards. The four different corridors along which the shopping stores are lined up, merge at the same courtyard in the middle. The square avails for divergent access to the movie theaters, playgrounds (bowling saloons and carting track) and the car park facility provides for comfortable and easy parking (Figure 27). Divided into four different parking areas in four different locations, the car park has a capacity of 1300 vehicles in total (Figure 24).

Figure 20. Model of EGS Park Shopping Center
(Source: Wowturkey/4, 2008)

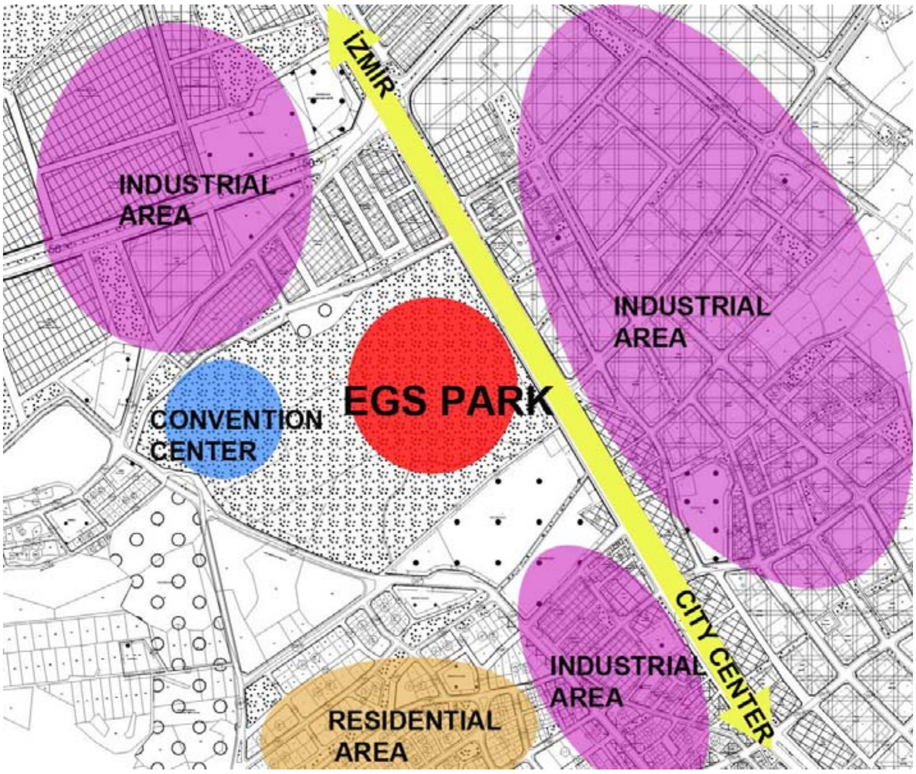

Figure 21. Implementation plan for EGS Park and the functional layout of its environs
(Source: Denizli Municipality, 2010)

Figure 22. Satellite view of EGS Park
(Source: Denizli Municipality, 2007)

Figure 23. View from the garden of EGS Park

Figure 24. View from the front side of shops and the Car-park

Figure 25. View from the Entrance to Shops

Figure 26. Corridor of shopping stores in EGS Park

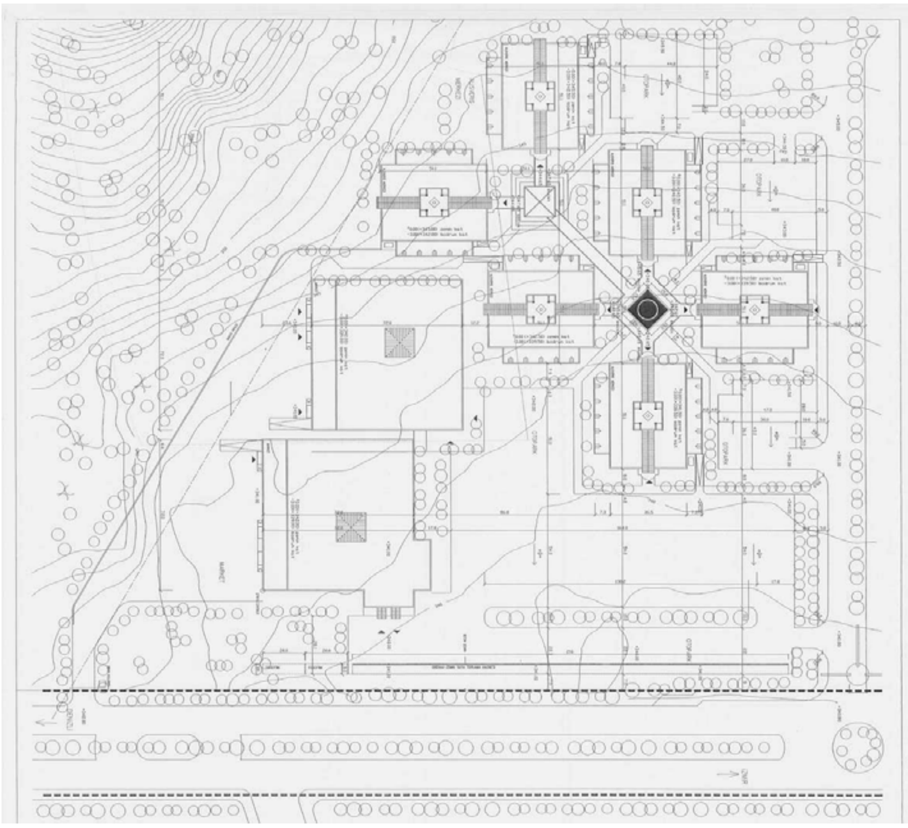

Figure 27. Site Plan of EGS Park
(Source: Previous Gümüşler Municipality, 2004)

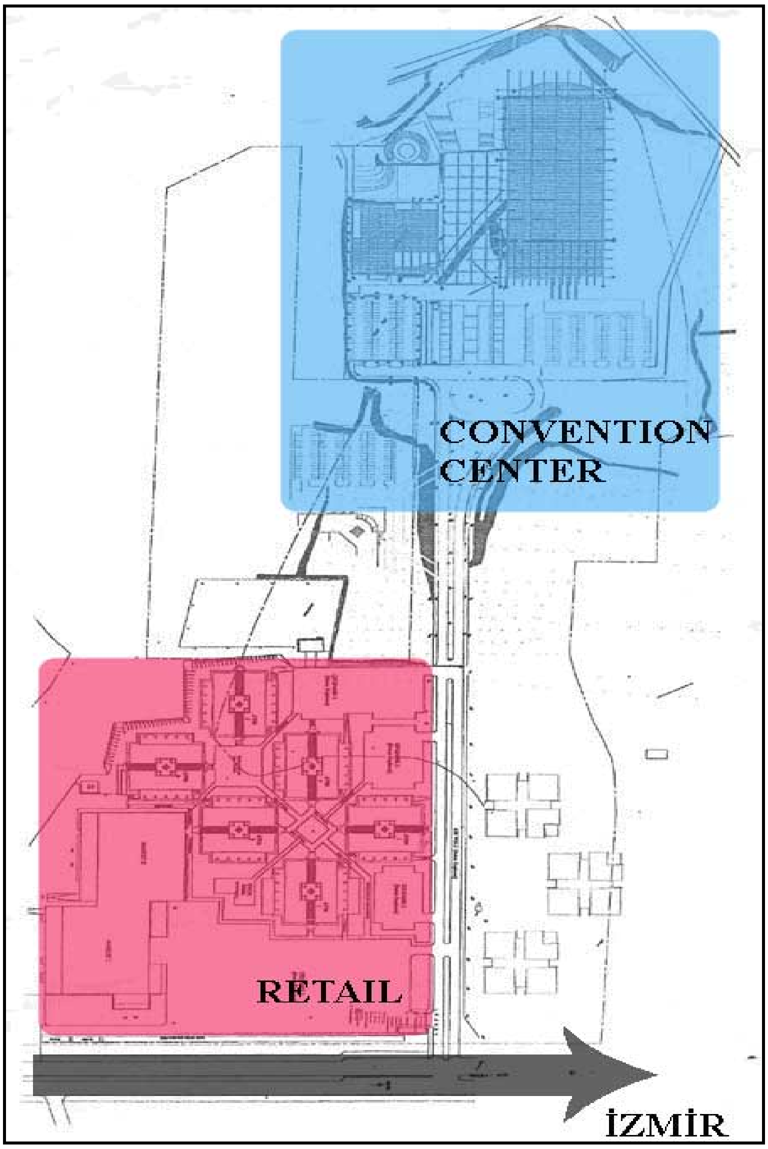

Figure 28. Site Plan of EGS Park
(Source: Previous Gümüşler Municipality, 2004)

4.5. Pekdemir Çiftliği Shopping Center

Pekdemir Çiftliği Shopping Center is located at Yunus Emre District on the Süleyman Demirel (Antalya) Boulevard along the main road to Antalya. This road is an important highway that provides connection between Denizli and Antalya. The fact that there takes place a gas station neighbouring the shopping mall makes an ideal rest stop for the commuters who travel through Denizli to Antalya. There are furniture – household textiles stores and car showrooms located on the highway. This attraction point is about one km from the Pamukkale University. Estimating the number of students and academic and administrative staff working in the University, who live close to the area as well as thousands of people coming to University for daily doctor visits, there emerges a considable amount of traffic flows for the food facilities of the shopping center. Most people encounter their daily shopping needs at this center. Prior to its construction, the location of Pekdemir Çiftliği Shopping Center was decided in 1992. Yet, this decision was devoid of any professional feasibility studies held for construction of the center. The common concern, however, was that it could be a wrong decision to make such an investment at a point where there was no settlement after Kayhan region at all. However, a creative future for the investment was anticipated in the following course of time, because, according to its director, this area can be deemed as a bridge that connects the Aegean to the Mediterranean and serves as a gateway from Denizli to the Mediterranean. During the search for an available land for the investment, especially the plot situated on the right-hand side of the exit was targeted. The only road to the famous picnic place of Cankurtaran and to the touristic cities of Muğla and Antalya pass through this area. Moreover, those travelling to the countryside and their hometowns also appear to prefer that route (Interview by the Director of Pekdemir Çiftliği).

The construction works for this shopping center were initiated in 1997. While the construction was pending in 2000, the Pekdemir Hypermarket was opened in the shopping center. In 2004, the large chain store, primarily operating as a franchise, opened its doors for business on the first floor. In 2006, the entire construction was finished and the shopping mall was finally in business (Interview by the Director of Pekdemir Çiftliği). This multi-storey shopping center with escalators is known as the first shopping center in Denizli .The shopping center has functioned as a stimulator in development of its neighboring environment. After its construction, many showrooms for furniture, household textiles, and interior decoration stores etc. were built and the number of dwellings has increased. In addition, the university hospital within the campus has also been constructed under its effect. The center has therefore begun to function as a place for social affairs and meetings (Interview by the Director of Pekdemir Çiftliği).

The inhabitants of Denizli can be regarded as loyal, because they prefer shopping at local stores. According to a public survey held to analyze the user profile, the rate of those who support their own local shops amounts to 80%. This figure indicates that in line with their support, they inhabitants resist against other national (chain) shopping stores. Denizli constitutes a good example for this statement such that Pekdemir Çiftligi Shopping Center has been the locomotive of the corporation. Having the Forum Çamlık and Teras Park Outlet Centers be opened, however, the number of customers to Pekdemir declined by the rate of 15%. It has been concluded in the mentioned survey that potential customers mostly prefer to visit the shopping center within their neighborhood. However, since their customers are loyal and steady in terms of their level of mobility, this situation affects them not so much.

Pekdemir Çiftliği hypermarket functions as the stimulator and outlet center of a huge anchored store can be considered as the leading center. The shopping center ensures employment for 150 persons. The number of potential customers has exceeded the daily and weekly targets of the center., while the number of visitors changes around 5-10 thousand, a figure which can become four-fold during weekends and on special days. While the main user group were of upper-middle and higher income groups prior to opening of Teras Park and Forum Çamlık shopping centers, the main groups have been the middle and upper-middle groups afterwards.

Pekdemir Shopping Center with its four floors is the first multi-level shopping center in Denizli. Among the facilities served in 9000 m^2 take place the Pekdemir Supermarket, a franchise large store and 22 stores, a movie theater, and a food court. It has a capacity for parking 800 cars (Interview by the Director of Pekdemir Çiftliği).

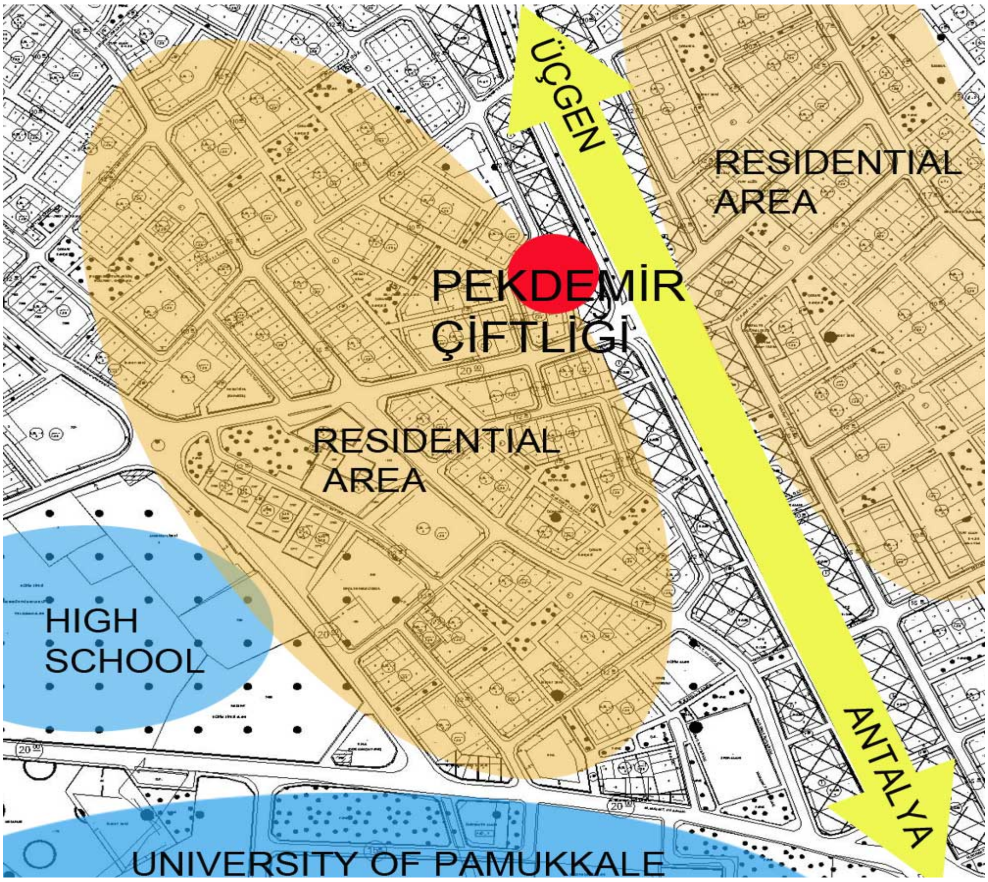

Figure 29. Implementation Plan for Pekdemir Çiftliği Shopping Center and the functional layout of its environs (Source: Denizli Municipality, 2010)

Figure 30. Satellite view of EGS Park
(Source: Denizli Municipality, 2007)

Figure 31. View from the Pekdemir Shopping Center

Figure 32. View from the interior of Pekdemir Shopping Center

Figure 33. View from the front side of Pekdemir Shopping Center

Figure 34. View from the inside of Pekdemir Shopping Center

Figure 35. View from the interior of Pekdemir Shopping Center

4.6. Teras Park Outlet Center

Teras Park is located on the “Askeri Geçiş” road. The road provides access to the southeastern and the southwestern parts of Denizli. The property that is owned by the Turkish military is situated in the southern part of Denizli where there is discontinuity between the southeastern and southwestern parts of the land. The “Askeri Geçiş” road, with its 30 meters width between these two regions has provided an important connection since 2004. Additionally, Teras Park Outlet Center is located seven kilometers away from the southwestern part of Denizli City center, in a district called Yenişehir. The district where mostly the middle-income classes reside, has been designated as a sample area in terms of the urban development. In addition to this, the region holds the highest quality of rural life with its nature and prestigious architectural designs after Çamlık. Situated in Denizli’s new development and residential areas with its commodious and modern architecture, it occupies an important place in lifestyle of the inhabitants especially residing close. While public transportation is performed by various minibuses and buses to the shopping center, it is easy to access from all directions and distances by private transportation as well. However, the physical accessibility of pedestrians is subject to certain difficulties, since the center takes place at a newly-developing residential area where infrastructural facilities are yet not completed (Interview by the director of Teras Park).

Built by mutual corporation of Dutch Corio and Denizli’s well-known Tan Real Estate Company of Tan Group, Teras Park has been operating since 2007. As the most comprehensive living center of the city, construction of the shopping center was completed with a cost of 30 million Euros. While the Dutch Corio that owns 170 companies in Europe with its returns of five million Euros holds 40 percent share of Teras Park, it has increased its share to 51 percent in 2009 by taking over the management of the place regarded as the first biggest shopping center in its category in Denizli. Since then, after having undertaken the management of “Teras Park Outlet Center” in Denizli, Corio has changed the concept of the center and redesigned it as an outlet center with the intention to construct an authentic living center by composing facilities of amusement, technology, art and fashion at the same time in one place (Interview by the director of Teras Park). Because of the global financial crisis, however, the shopping center has had to face some economic problems. Last year, one of the foreign shareholders of the Park, Corio GYO has taken out %51 of their shares, and the business management has had to be taken over as well. Therefore, with the effect of financial turmoil, the center has decided to change its concept, which finally has been adopted as the “outlet concept”.

Considerable renovations have been made in the center and effort has been spent to find an appropriate architecture style suitable for the outlet concept. Outlet centers typically have narrow passages, small scale circulation or free use places for customers, but the shopping center has gone beyond this scope. The design has been based on the concepts of “water” and “green”. The storey of food court and movie theaters has been completely changed. The new concept has been the “Speed City”. In general, shopping centers are places for merely consumption where the center offers its visitors a comfortable and exhilarating atmosphere. For instance, it includes TV- and relaxing-rooms for gentlemen who do not like shopping or for elders who rather get tired; reading places where visitors can enjoy reading newspapers or books; and for children, it has play-centers, special dining rooms and children’s toilets, which can be called as the first creation. These changes mean compelling transformation and improvement for the center. After the renovations, the company returns and the number of customers have risen up to %30, and between the years 2009 and 2010, the center was placed in the 3rd ranking among Turkey’s Developing Shopping Centers (Interview by the director of Teras Park).

In Teras Park Outlet Center, there take place 130 different national and international stores ranging from apparel, household textiles, electronics, and hairdressing to dry cleaning. It also targets at a wide range of visitors by provision of a number of entertainment and multi-activity centers, including, a movie theater with seven different saloons, a bowling saloon with 12 straps, a youth entertainment center, Speed city in which several Formula 1 simulators stand. According to the director of Teras Park, the movie theater has the best saloons in Denizli. Fun-time, which is a special place for children, is the biggest one in the Aegean region. Moreover, there are two big and 12 small fast-food restaurants, three coffee-houses, two tennis courts, bowling and billiard saloons, spa and fitness centers, hypermarkets, and administrative offices on international base.

Teras Park Outlet Center employs 1000 people and 85% of its storerooms are occupied. The shopping center has received 474 thousand visitors last year. The number of customers has been estimated as 12.000 per day on weekdays and around 25.000

visitors per day on weekends. After the shift in the main concept of the center, the visitor profile has not been any less than 450 thousand customers per month. On special days this number even increases by four- or five-fold such that, for instance,the center had 100.000 visitors on Valentine's Day in 2010. When it was first opened, the target group was merely the upper-income level group, but with the necessity to have a shift in the concept, the target group also had to be changed. At present, the center intends to be in serve of middle and upper-middle income groups in general (Interview by the Director of Teras Park).

In it own standards, Teras Park is the primary shopping center project for Denizli. Hence the interest of the community has been considerably high. However, when Forum Çamlık Shopping Center was established, Teras Park was adversely affected in financial terms. The reason behind this negative impact is that Forum Çamlık is located closer to the university campus and the means of access to Forum Çamlık was easier than Teras Park, giving Forum Çamlık an advantageous position drawing the interests of inhabitants. Even though Teras Park has been built in a developing district, it still has some problems in terms of transportation. While those who have their own vehicles can visit the center comfortably, those who do not may have troubles of access. For this reason, even if by public transportation, one prefers to visit Forum Çamlık, because people would like to reach their destination by using only one vehicle (Interview by the Director of Teras Park).

Teras Park was constructed on an area of 52.614 m^2 in size. The shopping center covering 95.310 m^2 of indoor space with 46.500 m^2 of leasable areas offers its customers 150 stores and carpark with a limited capacity of 1500 vehicles. The building has been planned on a sloppy land, the view of which opens to the entire urban landscape. The terraces of Pamukkale have been the departure point of inspiration for the Teras Park conception. Various problems in functional layout of the building have been solved by the slopy topography, terracing and grading of the land. (Interview by the director of Teras Park)

10 meters of difference in elevation between the two sides of the land has been utilized by way of giving separate entrances from both directions, availing for each floor be designed with distinctively different advantages of usage. Guided by the specific characteristics of the land, the entrances have also been designed by taking different forms in harmony with the environmental context. The site plan is shaped around the main atrium and the second atrium placed in relation to the first. Since the

capacity of the hypermarket occupies a considerable place on the lower floors, the second atrium is situated as skipping the first two floors. On the other hand, the second atrium facilities are based mainly on entertainment, and gastronomy, while the ice rink at the center of the main atrium gives dynamism to the inner part of the shopping center. At one point of attraction, the Green Court gives a sense of tranquility as if sitting in the garden furnished with some banks, different seating and resting places, tables and game corners built for children as workshops. While visitors have their rest in the Green Court designed with wooden elements and green painting, children can enjoy their time in the workshops. At another attraction point called the Blue Court, the concept of water has repeatedly been used dominated with the color of blue, and the pool with water jet stands in middle. Children and visitors are attracted by an alternatively different world in Blue Court. Furthermore, in Food Court, there are special drinking and eating places where children can feel comfort, and their parents can enjoy their visits in safety and contentment.

While being transformed into an outlet center, the mall has been given a different design concept, attracting those brand marks and retailers which had not preferred any of the previously-constructed shopping centers, all to the Teras Park. Hence, Corio has converted the center into an area where customers can buy high-quality products in affordable prices. The outlet concept of Teras Park involves also making extensive bookings for its visitors in order to provide a friendly atmosphere with better service, and to encounter the expectations of children and families from Denizli for high quality.

Figure 36. View of Teras Park

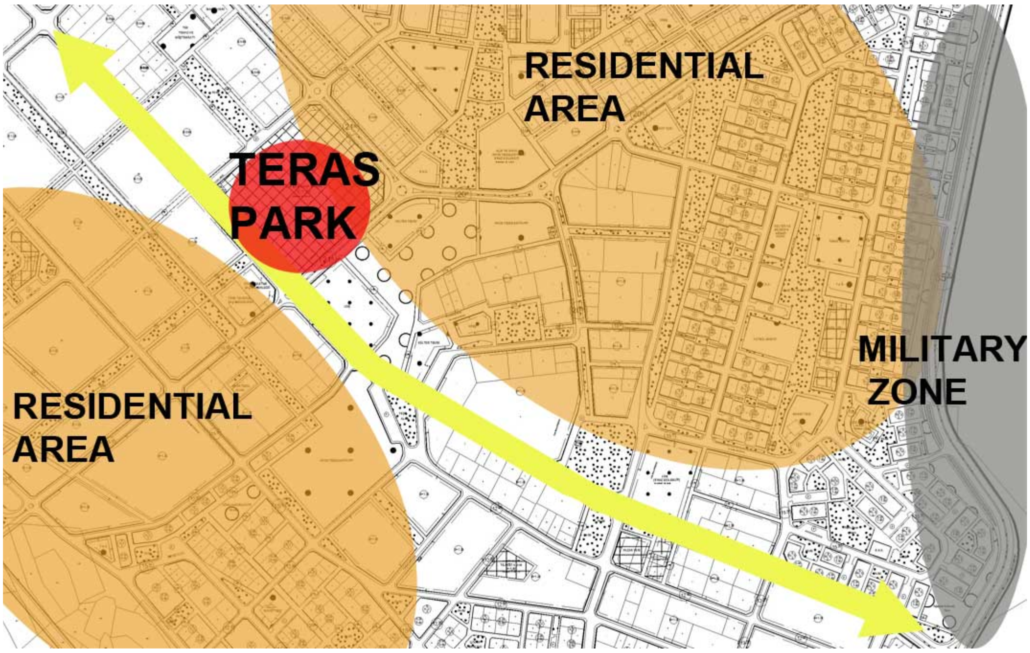

Figure 37. Implementation plan for Teras Park Shopping Center and the functional layout of its environs (Source: Denizli Municipality, 2010)

Figure 38. Satellite Image of Teras Park and the Surrounding Environment. (Source: Denizli Municipality, 2007)

Figure 39. Interior view of Teras Park

Figure 40. View from the front façade of Teras Park

Figure 41. Emphasized use of water in Teras Park

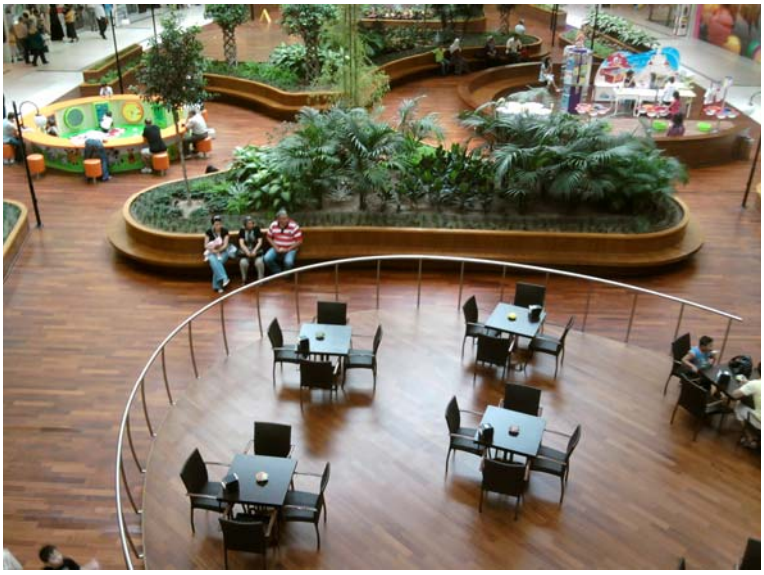

Figure 42. Emphasized use of green in Teras Park

Figure 43. Interior view of Teras Park

4.7. Forum Çamlık Shopping Center

It is located on a busy intersection point at one of the high-income districts of the city. There are many recreation and entertainment areas in its surrounding. The real estate values at the surrounding district reach the most expensive values of the city. It is located at a point 100 m. below the Çamlık Boulevard, along which the most luxurious restaurants, cafes and bars take place. Çamlık district constitutes the major part of a developed zone, going through Bağbaşı District, the south development axis. Çamlık district is known for its high socio-economic and cultural profile. The district emerges as an attraction center with its recreational facilities offered. The mentioned prestige elements attract visitors from nearby districts and villages. The central campus of Pamukkale University, sheltering the Faculty of Engineering and Faculty of Education is located in the district with its capacity of 14.000 students. Most students reside at the nearby surrounding. The district is alive during days and nights. Due to the prestigious characteristics of the district and its environs, the demand for the region keeps growing. There take place various points of attraction in the nearby environment: Çamlık Grove, Central Campus of Pamukkale University and campuses of Engineering and Education, open-air theatre, Conservatory, and Demokrasi Square. According to its director, Forum Çamlık has emerged as a new prestige element for Denizli and will accordingly strengthen the urban infrastructure by ensuring the integration of cultural and commercial facilities along the Çamlık Boulevard.

Prior to the construction of Forum Çamlık Center, Demokrasi shopping center was yet an uncompleted building. The mentioned center was sold to Multi-Turkmall Company and was established with the partnership of the biggest independent project of Europe: Multi Development and the developer company, Turkmall as the leading name in developing the greatest number of projects in Turkey. Based on the analysis carried on by the company, the decision was given to demolish and then rebuild the building and it accordingly was demolished two months after its sale (Denizli Municipality, 2010). Established by the partnership of Multi Development as Europe’s biggest project developer and Multi-Turkmall as Turkey’s one of the biggest project developing companies, Multi-Turkmall realizes its second investment in the Aegean region. Forum Çamlık Shopping center has been started to be built in September 2006 and completed to commence its activities in 2008.

For the investor, the location should be appropriate for the adopted concept of the shopping center. As mentioned earlier, previously there was the construction of Demokrasi Youth Center Project in these premises. However, when the municipality of Denizli put this area on sale, the company developed a professional feasibility study for the shopping center that had been planned. As budgeting is of primary importance for the investors, it has initially been the customer profile of the city that is investigated. Firstly, the location of the area is considered as the main point, and then leasable areas and square meter prices for the possible construction are defined. The payback period of the investment is also estimated. When the project is regarded as a profitable and promising investment for the investors, the construction comes into question (Interview by the Director of Forum Çamlık).

Its concept design was developed by a Dutch company and its architectural works,by a Spanish company. The project aims at presenting a modern urban life with its indoor and outdoor pedestrian areas and the galleries. In the center, a car park with a capacity of 1000 vehicles will be in serve of the guests.

Prior to construction of this place, a target customer profile has been drawn by surveys held. According to this profile, the brand marks and their extent have been defined. On the other hand, there also exists another target segment to be adopted after the opening of the shopping center. However, the most important issue is to recognize that both target profiles overlap with each other. The biggest part of the customer profile belongs to high and middle-high income groups. A general statement can be made such that the main group of customers consist of those who are between 25 and 35 years old and have specific occupation and income. The high-income group of the Shopping Center comes primarily from its own neighborhood. The center also attracts inhabitants from Servergazi who normally could be customers for Teras Park Outlet Center because of its location. The number of customers is estimated as 650 visitors per month. . The number of customers is estimated as 17.000 per day on weekdays and around 32.000 visitors per day on weekends (Interview by the Director of Forum Çamlık).

Location of the center is advantegous in the sense that pedestrian and vehicular accessibility is both high . Nine bus- and four minibus-lines pass through the main street that the front façade of the building faces. As per estimations of the Directorate of Regional Traffic in the municipality, approximately 10.000 vehicles and 5200 pedestrians pass by the center during daytime (Report of Denizli Transportation Master

Plan, 2003). Forum Çamlık is located to the north of Demokrasi Junction, one of the important junctions in Denizli.

The shopping center shelters in 125 business enterprises, and there are 1100 employees working in these private stores (From interview with the director of Forum Çamlık). Forum Çamlık shopping Center has 34.000 m^2 of leasable areas. In Forum Çamlık Shopping Center, famous brands' stores, restaurants, entertainment units and seven movie theaters and 120 shops are in serve of the guests. Forum Çamlık Shopping Center was completed at the end of 2007.

Forum Chains of Shopping Centers, which highlight the affluent culture of the region where they are located, are composed of distinctive architectural heritage elements with its natural green areas, pools, landscape, and facades inspired by the travertines of Pamukkale. In the design of the center, each indoor plaza and street that the customer runs into while walking, appears to symbolize real urban settings. One of the plazas in Forum Çamlık takes its name from the Democracy Square, and the name of second plaza comes from the worldwide famous place Pamukkale that receives attraction from the enchanting travertines. The other streets connected to Democracy and Pamukkale Squares in Forum are known with their authentic names.

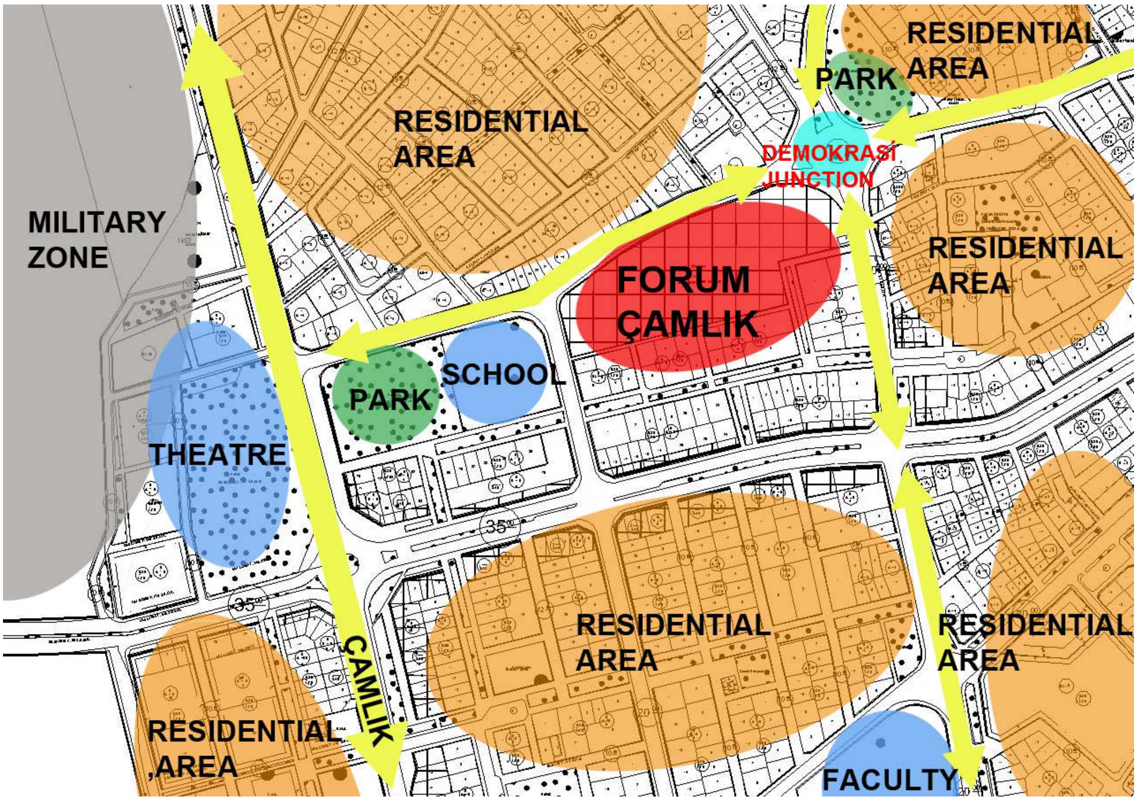

Figure 44. Implementation Plan for Forum Çamlık District and the Functional Layout of its Environs (Source: Denizli Municipality, 2010)

Figure 45. Satellite Image of Forum Çamlık Shopping Center and the Surrounding Environment (Source: Denizli Municipality, 2007)

Figure 46. Aerial view of Forum Çamlık
(Source: Wowturkey/5, 2010)

Figure 47. The Facility While Being Demolished
(Source: Wowturkey/6, 2010)

Figure 48. Ground floor of the construction

Figure 49. View from the Interior of Forum Çamlık Shopping Center

Figure 50. View from the corridor in Forum Çamlık Shopping Center

Figure 51. Site Plan of Forum Çamlık
(Source: Wowturkey.com/7)

4.8. Sümerpark Shopping Center

Sümerpark Shopping Center is located to the north of and within a close distance from Üçgen Çarşısı Shopping center. Even though it does not directly face the main road, it is placed at proximity. The surrounding environment consists mainly of industrial manufacturing units, which causes the district to be of low quality urban space. The center takes its name. from the Sümer Park (Grove) that is located on the northern direction. There partially are housing estates on the south. It is within considerably short distances to the main bus (coach) and the train stations. The expectation is that having such a project will have a triggering effect upon conversion of industrial manufacturing units into other functions (From the Municipality of Denizli).

Having been developed by the Global-Pera REIT, Sümerpark is a mixed-use project composed of such functions as including residential units, hotel, hospital complex and a shopping center. The project was prepared by Kentsel Real Estate Inc. and approved by the Municipality. The project targets at regenerating the region from an industrial into business and Touristic district.

The project remains within the industrial zone as planned on the land of ex-Sümerbank Textile Factory; therefore, its vicinity requires regeneration as a whole. As the project is currently on hold, the opening date is not yet certain. Sümerpark project plan was discussed at the City council and the plan were displayed for review prior to final appeals and then approval. In the following course of time, the project was approved by the city. However, the project has been subject to heavy criticism from the Union of Chambers of Turkish Engineers and Architects (UCTEA). UCTEA has claimed that the project is going to destroy one of the largest green zones of the city center including 80-year-old trees. The claim was furthered that the entire city nodded a revised zoning plan, but the municipality changed only the zoning plan instead. UCTEA mentioned that with this plan existing schools are going the replaced with business centers and trees are going to be replaced with buildings. With the intention to make this project come to and end, UCTEA has sued the municipality. Last year, the court arrived at a decision and announced the municipality as having the rights due. The plan was cleared.

Sümerpark covers a total of 162.000 square meter indoor space. It is going to be accepted as one of the biggest projects of Turkey. The expected gross leasable area of the centre is 55.000 m^2 (Figure 50) . The construction works for the project were started in 2008 and planned to be finished in four stages by February 2010, but due to financial cries, the project was put on hold. The project was designed by Concept Design Architecture (Figure 51). The project consists of two ground floors with capacities of 1650 parking spaces. The spatial layout of the design brings the Shopping Center and the hospital, hotel and housing together.

Shopping Center: It covers 35.232 m^2 of land, has a total of 95.126 m^2 leasable area, and an area of 13.000 m^2 for the hypermarkets. The target is to become one of the biggest of Turkey. It will be operated by a huge hypermarket chain. It has 33.500 m^2 leasable store space and 1.200 parking spaces. Designed as a semi-enclosed shopping center, the facility is deemed as becoming the only shopping center with the most distinctive architecture in Denizli, and perhaps in Turkey (Pera GYO, 2009).

Hotel: It is located on an area of 10.000 m^2,availing for construction of 25.000 m^2 of indoor space in total, comprising 150 rooms and an accommodation capacity of 300 beds, and five star hotel and convention hall. It is targeted to be the first five star hotel in the city center and the first of its kind on the world with its unique architectural design. Issues of urban aesthetics have been sensitively emphasized in the project.

Housing: It covers an area of 46.500 m^2 of land, amounting to116.500 m^2 of indoor space and 600 luxurious dwellings. It has a capacity of 600 vehicles in its carpark.

Hospital: It is going to be operated by a big private hospital chain. With its heliport and medical facilities, this center is targeted at being an attractive health center open for domestic and international health services. It is going to be the center of health tourism. It takes place on a land of 3.000 m^2. It has 8.500 m^2 of indoor space and a capacity of 100 beds.

Based on the verbal inquiries of the members in Denizli Planning Department, there exist no planned shopping centre developments in the pipeline other than Sümerpark. Currently the city cannot take in any further shopping center developments.

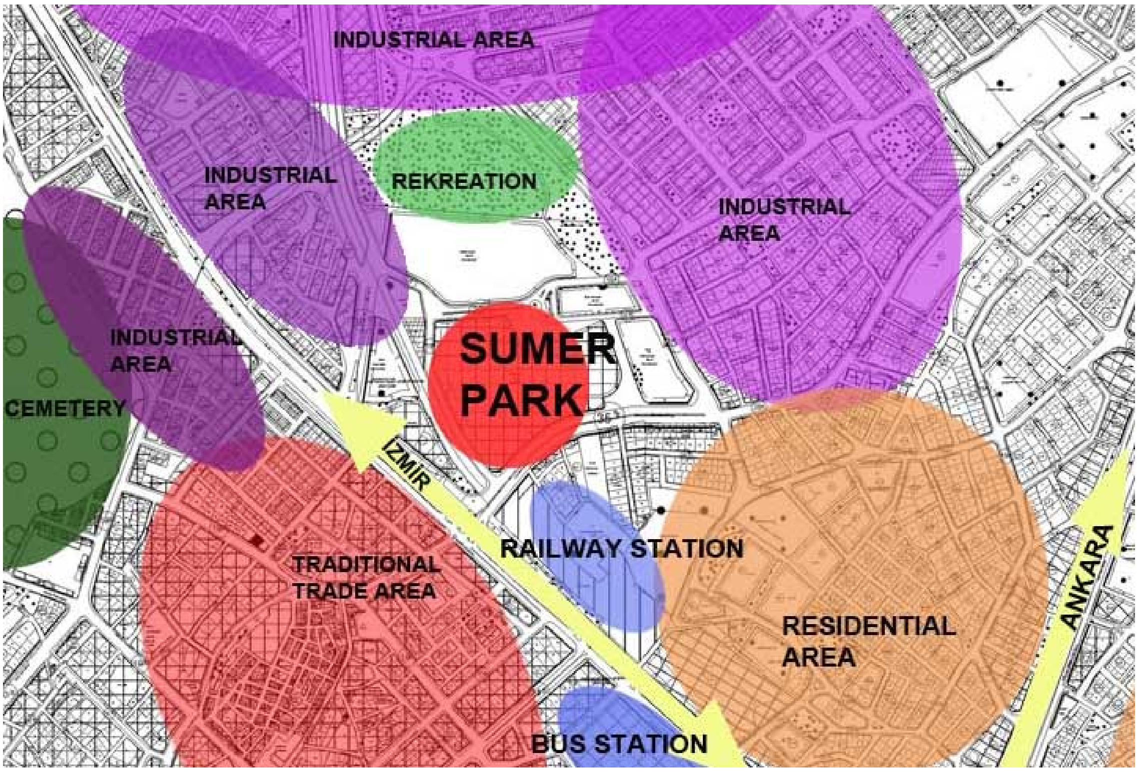

Figure 52. Implementation Plan for Sümer Park and the Functional Layout of its Environs (Source: Denizli Municipality, 2010)

Figure 53. Satellite image of Sümer Park Center and the Surrounding Environment (Source: Denizli Municipality, 2007)

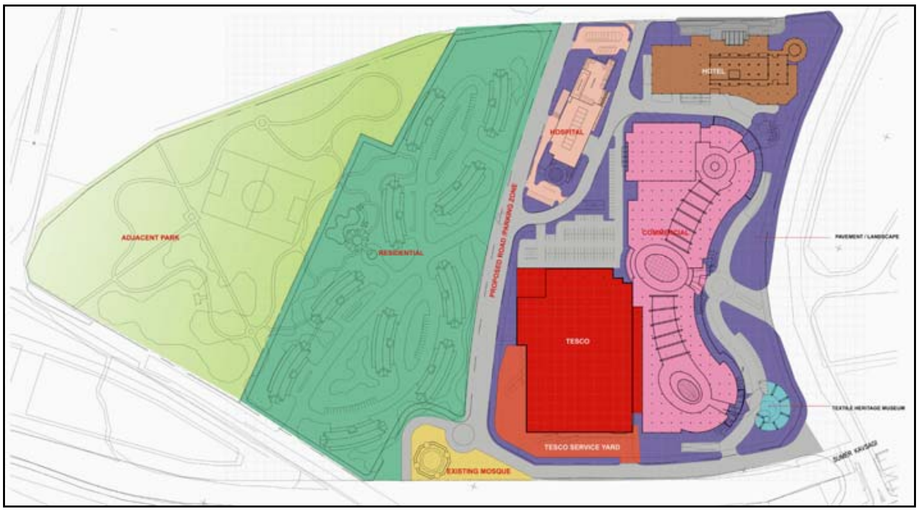

Figure 54. Site plan and zoning of Sümer Park
(Source: Denizli Municipality, 2008)

Figure 55. Aerial View of Sümer Park
(Source: Wowturkey.com/8)

Figure 56. View from Sümer Park Shopping Center Project
(Source: Wowturkey.com/9)

Figure 57. View from Sümer Park Shopping Center Project
(Source: Wowturkey.com/10)

Figure 58. View from the Construction of Sümer Park
(Source: Wowturkey.com/11)

4.9. Evaluation

In this part, a comparative analysis is made between the shopping centers in Denizli in terms of the type of investors, location and accessibility, design and harmony with the urban pattern and the sizes of leasable areas offered.

Even though titled as the first largest shopping center of Denizli, Üçgen Çarşısı Shopping Center, which has not been constructed as a building for shopping purposes and does not yet operate in full capacity, does not appear to fit into the standards and concepts adopted in shopping center trends of our day. However, the evaluation counts for its significance on urban scale with regard to its size and location. Likewise, Adese cannot be categorized in any classification in addition to the fact that it is not in operation either. For this reason, both of these centers can be regarded as projects of failure such that they have failed to reach their goals. Demokrasi Youth Center, on the other hand, is included in Table 13 as a center which has been under construction for long years until its demolishment prior to construction of the Forum Çamlık Shopping Center.

Evaluation of shopping centers in Denizli on basis of a classification by world standards reveal that EGS Park, Pekdemir Çiftliği, Teras Park, Forum Çamlık shopping centers and Sümer Park -to be opened- can be categorized under the International Council of Shopping Centers' Classification by DeLisle. Given that the numbers and types have seen a considerable rise since the day of their emergence, classification of Shopping Centers have become even more difficult. For this reason, DeLisle has formulated a common classification matrix to be valid on world scale (given in detail on page 17 of chapter on Literature Review). In the common approach suggested, the classification is based on criteria of size, design, location, theme and a mixture of tenants. However, due to lack of data on tenancy, this study does not involve any information or evaluation with regard to tenants. As manifest on Table 14, the above-mentioned five shopping centers are compared with each other in terms of size, design, location and functions involved.

Table 13. The Common Classification of Shopping Centers in Denizli

SHOPPING CENTER	SIZE	DESIGN	LOCATION	THEME
EGS PARK	Medium	Semi-open	Periphery	-
PEKDEMIR ÇIFTLIĞI	Small	Enclosed	City center	-
TERAS PARK	Large (when themed as lifestyle)	Enclosed	City center	Outlet
FORUM ÇAMLIK	Medium	Enclosed	City center	Lifestyle
SÜMER PARK	Large	Enclosed	City center	Mixed Use

Consideration of the **sizes** of shopping centers analyzed in the **common classification** as given in Table 14 indicates that Teras Park and Sümer Park shopping centers take place under the category of those having large leasable areas. Yet, Teras Park differs from others since its concept has been turned into that of Outlet centers. EGS Park and Forum Çamlık have medium sized centers both. It is only the Pekdemir Çiftliği Shopping center that can be listed under the category of small-sized centers, which is the most widespread type in Turkey.

In terms of **location**, shopping centers can be divided into two categories as those located at peripheral areas and those in city centers as listed in Table 16. This issue has been elaborated on page 96. Yet, brief information can be given for the Shopping Centers that are compared via classification. EGS Park appears to be the only center that is located at the periphery. Pekdemir Çiftliği, Teras Park, Forum Çamlık and Sümer Park all take place at the city center.

In terms of the **theme** adopted, DeLisle's classification is based on the functions involved. On this basis, comparison of shopping centers in Denizli indicates that only Forum Çamlık, Teras Park and Sümer Park can be classified for their themes. Among these centers, while Teras Park can be themed as an Outlet shopping center, Forum Çamlık and Sümer Park can be deemed as lifestyle centers for shopping.

Table 14. Comparison of Shopping Centers in Denizli

SHOPPING CENTER (years of construction)	INVESTOR TYPE	LOCATION	TARGET GROUP (BY INCOME GROUPS)	DESIGN& URBAN PATTERN	LEASABLE AREA
ÜÇGEN ÇARŞISI **1983/1988**	Local Capital	Close to the historical city center and at an important junction	-	Semi-open Courtyard and outdoor corridor	22.400 m^2
ADESE – MARKETIX **1995/1996**	National Capital	Periphery and far from the city center on industrial axis	-	Enclosed Blank facades In harmony with the urban pattern	12000 m^2
EGS PARK **1998/2000**	National Capital	Periphery and far from the city center. in industrial area	Middle	Semi-open one-storeyed, extended In harmony with the urban pattern	23.000 m^2
PEKDEMİR ÇIFTLIĞI **1997/2006**		City center On Retail axis	Middle – Upper-middle	Enclosed Facades with windows In harmony with the urban pattern	9.000 m^2
TERAS PARK **2006/2007**	51% Foreign Capital 49 % Local Capital	City center In residential area		Enclosed Blank facades Disharmonious with the urban pattern	46.500 m^2
FORUM ÇAMLIK **2007/2008**	Foreign Capital National Capital	City center In residential area	High – Upper-middle	Enclosed Partially blank facades In harmony with the urban pattern	34.000 m^2
DEMOKRASİ Youth Center 1997/2007 (demolished)	Local Capital	City center In residential area	-	Enclosed	17.000 m^2
SÜMER PARK 2008/ (under construction)	Foreign Capital / National Capital	City center In industrial area	-targets at being in serve of high income group	-Semi Open A separate city within itself Partially disharmonious with the urban pattern	55.000 m^2

Evaluation of the shopping centers in Denizli via comparative analysis indicates that: Analysis of the ***type of investors*** brings out three groups as the local, national and foreign investors. Among the local investments take place Üçgen Çarşısı and Pekdemir Çiftliği, as well as the Demokrasi Youth Center, whereas Adese and EGS Park shopping centers have been established by national investment. In the research cooperatively held by AMDP and PwC (Pricewaterhouse) in September 2010, it has been found out as figures of September 2009 that 39% of the Shopping Center investments in Turkey are established by foreign investors and further anticipating that, with the inclusion of newly-built Shopping Centers, this figure will exceed even 50% by 2011. In the mentioned research, the influence of involvement of foreign investors in the sector is also noted to have an impact upon proliferation of the different shopping center profiles (Pricewaterhouse Coopers and AMPD, 2006). This issue can be monitored at Denizli as well. Having started with the opening of Teras Park in 2007, the foreign investments have continued with Forum Çamlık and are currently under way at Sümer Park. The difference between the shopping centers of foreign and local investments is manifest with regard to typological terms on the one hand, and architectural terms, on the other.

Analysis in terms of ***location*** involves consideration of the distance to the city center, the surrounding functional layout, facades whether facing any road or junction and accessibility.

The criteria of **distance to the city center** reveals that shopping centers can be grouped into two, as those which are located within central areas of the city and those which are at the periphery. In Denizli, it is only Adese and EGS Park that have been built on the peripherial districts, while the rest take place in the city center.

With regard to the **functional layout in the surrounding environment**, there emerge three groups, such as those which are within residential areas, those which are within or at proximity to the industrial districts, and those which are close to the traditional commercial area (i.e., the historical city center). Pekdemir Çiftliği, Teras Park and Forum Çamlık take place within residential areas, whereas Üçgen Çarşısı and Sümer Park remain close to the historical city center. In addition to its proximity to the traditional commercial area, Sümer Park appears to be in close distance to industrial areas as well. Adese and EGS Park, on the other hand, are located close to the industrial districts and far from settlement areas.

Accessibility of shopping centers is analyzed in four groups, namely pedestrian access, mass transportation, private transportation and access by shuttle buses. Since located at peripheral areas far from the city center, EGS Park and Adese shopping centers necessitate being reached by private access. The shopping center providing the most comfortable ways of pedestrian access is Forum Çamlık. Pedestrian access is also comfortably provided by other centers after Forum Çamlık, namely Üçgen Çarşısı and Sümer Park. Mass transportation, on the other hand, is provided in Forum Çamlık, Üçgen Çarşısı and Teras Park. Considering the façade characteristics, whether facing the main road or junction, shopping centers can be classified into three as those facing the junction, those on the main road of intercity transportation, or those on the main axis of intraurban transportation. Among the ones having a main façade facing the junction, Üçgen Çarşısı differs from Forum Çamlık in the sense that the junction it is located at is an intersection of the main roads between cities, rather than districts. Adese, EGS Park and Pekdemir Çiftliği all are placed at junctions of main intercity transportation. Sümer Park and Teras Park, on the other hand, face the main axes within the city.

In terms of **proximity to roads or junctions**, the most advantageous center appears to be the Üçgen Çarşısı for it is located at a crossing where three main roads of intercity transportation intersect. Üçgen Çarşısı also displays locational similarities with Sümer Park because of their closeness to the coach and train stations both. However, due to lacking any façade facing the main road and more proximity to industrial districts, Sümer Park may be subject to two alternative developments in the future: it may either function as a benign virus triggering the changes to take place in its environs or because of the problems of its surrounding, it will become the second Üçgen Çarşısı in time.

Having been located at the city center in between the residential areas, Forum Çamlık, Teras Park and Pekdemir Çiftliği share similar characteristics with one another. Among the three centers, the most advantageous one is Forum Çamlık. Unlike the others, it takes place at an important and busy junction, which is significant as an intersection of the most densely used lines in terms of both pedestrian and vehicular access. Owing to the facts that it is located along the main axis of intra-urban traffic flows and is supported by numerous alternative modes of mass transportation, Teras Park is deemed as attractive for inhabitants from nearby residential areas in particular. EGS Park and Pekdemir Çiftliği are located on the main road of inter-city transportation both. Nevertheless, since it is closer in distance to residential areas, Pekdemir Çiftliği appears to be more advantageous than EGS Park, which is located within the industrial district.

Forum Çamlık and Teras Park bear similarities with one another in the sense that they are located within residential areas both. Yet, as Forum Çamlık is within close distance to the university as well as the Çamlık grove and recreation area, it is more advantageous than Teras Park shopping center.

Results of the detailed analysis and interviews with the directors conclusively point to the fact that location at the city center shall always be regarded as an advantage, because being at the center becomes synonymous to benefiting from easy pedestrian access as well. For instance, as it requires vehicular access by means of private transportation mainly, the management of EGS Park has involved provision of shuttle buses at specific times a day in order to attract visitors. Another shopping center that benefits from shuttle buses as such has been the Pekdemir Çiftliği, but the goal adopted in Pekdemir Çiftliği creates a difference in terms of the facilities provided for the surrounding district.

In the first emergence, shopping centers were usually located at outer areas of cities. In time with the changing conditions of life and needs, however, they have begun to take place in central areas of cities. Yet, their locations in city centers have always been subject to major criticism, because massive volumes of space occupying large amounts of land at city centers was creating a gap within the urban pattern on the one hand, while traffic congestion and insufficiency of parking areas also emerged as major problems, on the other. As in many other Anatolian cities in Turkey, all the city centers built in Denizli after 2001 are located in the city center.

In terms of the site analysis that question ***the design of shopping centers within the urban pattern***, the shopping centers can be grouped into three as those in harmony, those in partial harmony and those disharmonious with the urban pattern. Forum Çamlık can be categorized as partially in harmony, while Üçgen Çarşısı and Teras Park are disharmonious and yet Pekdemir Çiftliği, Adese, EGS Park and Sümer Park are in harmony with the urban pattern. Even though Pekdemir Çiftliği has been a long-shaped building that extends along the road due to the shape of its parcel availing for the design of the center to take full advantage of its parcel form, this does not seem to create any disharmony with the urban pattern for it is an expected result of the parcel form (Figure 59).

Figure 59. Pekdemir Çiftiliği and Masses of Buildings in its Environs

Among the current Shopping Centers in Denizli, Teras Park is the one which occupies the largest mass. The dimensions of its parcel, which covers a gigantic amount of space in comparison to the neighbouring pattern of small-sized parcels of residential use, has given the center the chance to be built as a single building with colossal mass. In result, the building has had adverse impacts upon the urban pattern in the sense that its gigantic scale within the small masses of dwellings has created disharmony. The existence of the shopping center as a large and massive building with its blank facades among the typical units of dwellings makes a considerable difference in the urban environment, but this variety fails to create any harmony (Figure 60).

Figure 60. Teras Park and Masses of Buildings in its Environs

The disharmony created by masses of Teras Park can be similarly observed in Forum Çamlık as well. Within the pattern of densely located housing estates, the shopping center has been built as to cover almost the entire parcel land. On the direction facing the junction where there has been a small square designed, the building's facade that is covered thoroughly with glass gives mobility to this square. This feature can be valid for the back facade as well. While the slope of the land avails the building to have an entrance from the 2^{nd} floor, there has been smaller square designed for entrance from this side, which is repeatedly enriched by the thoroughly-glass façade of the building. Yet, the remaining facades facing the road to the north and the residential areas to the south have been left blank all through the long sides, a feature that creates disharmony with the urban pattern (Figure 61).

Figure 61. Forum Çamlık and Masses of Buildings in its Environs

Due to having been located at peripheral areas of the city on a parcel larger in size, EGS Park attains a much different character among the other shopping centers of the city. The surrounding environment contains parcels of larger size since the district is allocated mainly to industrial and non-residential uses. The adopted concept requires the parcel to have only one storey and be extended along the available space given. As the surrounding spatial layout lacks any high density building pattern, there occurs no sense of disharmony with the environs (Figure 62).

Having distinctive characteristics that differ itself from other centers in terms of all criteria involved, Üçgen Çarşısı displays a difference by its architectural design as well. Availed by the concept of semi-open design, the stores in Üçgen Çarşısı face both the courtyard and the corridors that circumscribe the external facades. When stared from outer space, the stores can comfortably be seen and this gives the impression that the same style is to be continued throughout the indoor space as well. The emergence of such a colossal mass within the existing spatial layout creates disharmony with the urban pattern. Furthermore, due the fact that there have not been any works of maintenance held for the building, the building gives a disturbing appearance in terms of urban aesthetics. The building's presence at such a location of strategic importance for Denizli can be considered as aesthetically annoying (Figure 63).

Figure 62. EGS Park and Masses of Buildings in its Environs

Figure 63. Üçgen Çarşısı and Masses of Buildings in its Environs

Adese, on the other hand, is a rectangular building providing for indoor shopping facilities in its design of no distinctive architectural identity. As it is located at a rural environment where factory buildings of similar mass characteristics are lined up along the road, there is no disharmony at issue and the building does not stand out among others (Figure 64).

Sümer Park has been constructed as a semi-open building. Consideration of the outstanding architectural design of the building under construction in terms of its harmony with the urban pattern reveals the difference of style when compared with the buildings in its district. The design not only attains a holistical style in itself, but there also occurs no disharmony with the surrounding spatial pattern either (Figure 65).

Figure 64. Adese and Masses of Buildings in its Environs

Figure 65. Sümer Park and Masses of Buildings in its Environs

Analysis of shopping centers in terms of their **design characteristics** is based on an evaluation by enclosed or semi-open spaces as given in Table 14. This issue has been elaborately discussed on page 97. Among the semi-open shopping centers can be named EGS Park and Sümer Park. Teras Park, Pekdemir Çiftliği and Forum Çamlık are entirely enclosed in their design. Effort has been spent in Teras Park and Forum Çamlık for enriching their design with thematic features each. The theme adopted in architectural design of Teras Park has been the travertines of Pamukkale, reflected on the facades designed in terraces that remind of travertines. After conversion of Teras Park into an outlet center, the building has completely been revised and the newly-emphasized theme has been based on the water and the green, where the concept of green has availed for creation of an interior garden with natural planting on the ground floor. As for Forum Çamlık, the spatial layout includes stree-like corridors and squares within. The corridors have been given street names and the squares, reached through the corridors, given square names each. However, the theme of streets are felt rather excessively. The adopted theme has not been reflected on the design of building facades.

Pekdemir Çiftliği differs from others in terms of its design characteristics. It even is hard to perceive of the building as a shopping center without any orientation system or signboard having its name written. It has been designed completely as a Business Center and the interior allocation of functions have been made on basis of the services to be given.

Among the semi-open buildings take place EGS Park and Sümer Park, which is under construction. Even though both of the centers are shaped in a semi-open style, their architectural characteristics differ from one another with regard to the differences in their functional layout. EGS Park shelters regular functions of a common Shopping Center. For this reason, its design does not target at any extraordinary style in its language. Sümer Park, on the other hand, has involved additional functions of a hotel, hospital and housing. As it can be deemed as the first with regard to its distinctive type in Denizli or probably in Turkey, its design occurs as much more pretentious and attractive.

Analysis of the total amount of ***leasable area*** reveals that the leasable areas offered by the existing Shopping Centers (except for Demokrasi Youth Center) given in Table 13 amounts to **184.400 m^2 leasable areas** in total. In Denizli (where the total population can be taken as around 500.000 persons), the potential leasable areas amount to 368 m^2 per thousand people. Shopping Centers as Teras Park, Forum Çamlık, EGS Park and Pekdemir Çiftliği, all of which function in world standards, provide for leasable area of 167.500 m^2 in total. Analysis of the amount of leasable areas indicate that there has not been any Shopping Center built after 2008. Therefore, the amount of leasable areas in Denizli shall be compared to that of Turkey per thousand people in 2008. According to this comparison, while the leasable areas per thousand people has been calculated as 77 m^2 in Turkey, this rate has been measured as 335 m^2 for urban population in Denizli. On basis of the provincial population, this figure is estimated as 167.5 m^2. This figure for leasable areas per thousand people emerges as the highest in Turkey such that it gives such a picture for Denizli that goes far beyond than those of many other Anatolian cities. The classification of ICSC in European standards has been applied to shopping centers in Turkey as well. In this classification, shopping centers above 5000 m^2 are grouped as very large, large, medium, and small. In this grouping, outlet centers have also been categorized in terms of their sizes. Having a total leasable area above 5000 m^2 is accepted as sufficient.

In conclusive remarks, the existence of Shopping Centers in world standards at Denizli have begun with the involvement of foreign capital for investments, because it has been observed that Shopping Centers of local capital (namely Üçgen Çarşısı, Adese, Demokrasi Youth Center) have either been unsuccessful or have failed to attain such distingusihed physical characteristics (as of Pekdemir Çiftliği) that aid in their competitiveness.

CHAPTER 5

CONCLUSION

This study has scrutinized the evolution and development of shopping centers in the course of historical time, their typologies, the characteristics of current shopping centers, criteria of location during the phase of shopping center's project development, the development of shopping centers in Turkey and in Denizli with particular reference to their investors, location, typology and harmony with the urban pattern.

The boom of shopping centers in USA and Europe during 1970s has been reflected in Turkey only after 2000s. Underlying the rise of shopping center investments in Turkey take place the stable economic environment, young and dynamic population, rise in levels of income, insufficiency of supply in the retail market for shopping centers and higher returns of investment when compared to other countries. The shopping centers have not only had considerable contributions to Turkish economy, but also have gradually become inevitable for out daily lives.

Beyond all, shopping centers are physical investments of real estate. For this reason, in order to maintain their success and continuity, their location, design and typology have to be determined as result of reasonable decision-making processes. In selection of location for the investment, shopping centers have to be easily and comfortably accessed by customers and they have to conform to the lifestyles of the inhabitants. For the success of Shopping Centers, it remains crucial to make a comparative analysis for other centers of the same region and to arrive at specific results on basis of this comparison.

The first modern shopping center of Turkey, namely Galleria, has been opened in 1988. This is the same year during which Üçgen Çarşısı has also opened as the first largest shopping center in Denizli. Even though they are of completely different architectural styles, Üçgen Çarşısı, as the largest shopping building of the city, is significant for carrying the characteristics of its period. A comparison in between reveals that while Galleria sustains its importance, Üçgen Çarşısı has failed to keep its sensational rise at the time of its opening and has become the so-called 'open core' for the city of Denizli. Beyond this comparison with Galleria, Üçgen Çarşısı appears as a shopping mall that serves in retail sector.

The existing dynamics and potentials of the city gain importance in decision-making processes concerning the investments of shopping centers. The demographical as well as socio-economic profiles of the city to be invested play an influential role on behalf of the investors. Urban development is directly proportional to increases in population. Population as the source of labour and economy also becomes determining in economic development. With the increases in population, there takes place progress in different branches of economical activity, resulting in rises of employment. In healthily growing cities, the rises in employment rates entail increases of income, betterment of urban facilities and activities, and enhancement in standards of cultural and social life. The literature review involves examination of particularly the demographic profile and gross national product per capita data for the consideration of shopping center investments. Accordingly, during examination of the development of shopping centers, this study has dealed with population, GNP per capita, and export and import statistics per capita, because shopping center investments are preferred in always those cities where expenses of consumption as well as levels of income (per capita) figures are recorded as high.

As such investments for which easy access is of pivotal importance, shopping center investments may result in changes upon transportation system of the region they are within. Since shopping centers that are located at city centers will cause a rise in traffic and pedestrian intensity, there may emerge problems of traffic congestion and alike. Nevertheless, any commercial activity that is clustered at a specific district aids in rising the quality of life at the environs, making itself a center of attraction.

The shopping center must build a harmonious relationship with the inhabitants and the physical circumstances of its region. The Shopping Centers in Denizli (except for EGS Park and Adese) can be regarded as disconnected from the city and the urban styles of life although they appear to be placed directly at the center of the city, a feature that is valid for other cities in Turkey as well. Their architectural design styles remain disharmonious with their close surrounding, conflicting with the urban pattern, challenging the city with their architecture and adopting such an identity that imposes the culture and rules of its own. Even though no investor and local government would intend to have it so, a project with such high levels of investment money and labour inevitably becomes disconnected from the city and its inhabitants.

Whereas they were randomly built in previous periods, comprehensive studies are being held for feasibility analysis of shopping centers, a major trend triggered also by the involvement of foreign investors today. The mentioned analyses are based on professional means of examination ranging from location to target group or from architecture to the functional layout to be provided. For instance, although location may be fine, difficulties of access may cause the shopping center fall into disfavour. Depicted as such, shopping center investments remain quite sensitive.

The number of shopping centers in Turkey is around 250. In the period between 2002 – 2009, there has been a rise by 80%. Despite the fact that this figure would still be low in a comparison to be made with Europe, the mentioned figure seems to go towards the middle point in another comparison on basis of the purchasing power of Turkish population. Yet, it is not possible for having all the shopping centers, including both the existing ones and the ones planned to be opened, be able to succeed. For this reason, the endeavour to create a difference has become manifest in newly-established ones.

On the other hand, those shopping centers that lack any determined strategy cannot work in full capacity or fail to succeed. Examples as such can be given by the demolished Demokrasi Youth Center, the closed Adese and the Üçgen Çarşısı, which does not work in full capacity. With the efforts to solve the problem of Demokrasi Youth Center, the unsuccessful center has been sold, demolished and after having held comprehensive research to bring foreign capital, Forum Çamlık has been built in its place, where the result is quite a success.

In final words, the number of shopping centers in different sizes and typologies at Denizli and Turkey has seen a considerable rise, but in result of this rapid development, all shopping centers have begun to look alike. The question of what kind of a position these buildings of considerable mass will have in the future within the urban pattern of city centers is noteworthy. Whether they will continue receiving great attention as the inevitable parts of our lives or become semi-abandoned and be subject to decay remain to be discussed in this sense. There exist many numbers of shopping centers in USA that are closed, creating problematic areas in the urban environment. Recently, the closed shopping centers tend to be converted into such land uses as museums, libraries or RD (research-development) institutions. With the intention to sustain economic livability of the working shopping centers, the search for new concepts and architectural styles have become widespread, shaping the efforts to create a difference among the similar-looking shopping centers. Problems as such may most probably be valid for our country as well. Even though thematization has been reflected upon newly-established shopping malls, the resultant centers do not appear to provide any successful cases and there also emerge some conversions in some of the malls. This statement can be exemplified by Teras Park, which has been converted into an Outlet Center or by the project of Sümer Park, where the diversity of functions including a hotel, hospital and housing has been added to context of the large-scale project.

Furthermore, it becomes manifest that shopping centers in Turkey will tend to become specialized in parallel to having attained a difference in their identity. This process is to involve a comprehensive analysis for the correct selection of location and of concept prior to carrying on with the investment, in turn leading to proliferation of successful shopping centers. Then with the rise of competition among similar investments, these newly-invested shopping centers may sustain themselves as establishments of different functions. With regard to the existing malls, on the other hand, those which succeed in getting specialized in different fields and keeping their steady stream of potential customers, may as well continue on with their activities.

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APPENDIX A

THE INTERVIEWS

1) Celal PEKDEMİR, The owner of Pekdemir Shopping Center, 03.05.2010.

2) Selda KILINÇ, The director of Teras Park Outlet Center, 04.05.2010.

3) Hakan ALTUNTAŞ, The menagement of Forum Çamlık Shopping Center, 06.05.2010.

4) The old menager of Üçgen Çarşısı Enver ÖZDOĞAN and menager Cemil SEVİNCEK of Üçgen Çarşısı 07.05.2010.

APPENDIX B

THE SHOPPING CENTERS IN TURKEY

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
THEMATIC (FOCUS ON ENTERTAINMENT)	Milta Bodrum Marina	1999	Muğla	2,000	25
	Mayadrom	1998	İstanbul	2,956	28
	Kadir Has Children Center	2000	İstanbul	17,500	46
	1000A Decoration Center	2003	İstanbul	8,500	65
	Adres İstanbul Decoration Cent.	2005	İstanbul	5,800	45
OUTLET (THEMATIC)	212 İstanbul Power outlet	2009	İstanbul	70,000	180
	Deposite	2008	İstanbul	60,000	160
	Starcity	2010	İstanbul	44,000	153
	Neo Plus	2007	Eskişehir	36,000	112
	Truva Shopping Center (Outlet)	2005	Konya	20.608	136
	Olivium Outlet Center	2000	İstanbul	33,560	136
	Laips Outlet	2009	Gaziantep	30,000	
	İzmit Outlet Center	1997	İzmit	28,777	45
	Deepo Outlet Center	2004	Antalya	18,000	80
	Üstün Decocity	2008	Ankara	17,000	80
	Optimum Outlet Center	2004	Ankara	16,314	65
	Millenium Outlet Park Batıkent	2005	Ankara	15,500	87
	Vialife	2009	Ankara	15,000	50
	Susurluk	2006	Balıkesir	15,000	30
	Black Outlet Şişli	2008	İstanbul	11,400	63
	Park Bornova	2004	İzmir	11,000	50
	Avantaj Outlet Center	1997	Tekirdağ	10,750	23
	Espri Outlet Center.	2008	İstanbul	10,000	77
	Muğla Outletpark	2010	Muğla	8,950	14
	Pendik Park Outlet	2008	İstanbul	8,000	50
	Ege Outlet 2	2004	İzmir	7,500	15
	Selway Outlet	2006	İzmir	7,200	32
	Colony Outlet ve Lifestyle	2005	İstanbul	7,000	51
	Sivas Park	2008	Sivas	6,500	45

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
VERY LARGE	ANKAmall	1999	Ankara	106,480	302
	CEPA Shopping Center	2007	Ankara	73,242	194
	Antares Shopping Center - Etlik	2007	Ankara	112,000	200
	Cevahir Shopping and Entertainment Center	2005	İstanbul	117,972	330
	İstinye Park	2007	İstanbul	84,000	291
	Forum İstanbul	2008	İstanbul	175,000	305
	Forum Antalya	2009	Antalya	110,000	
LARGE	Bilkent Center Shopping Center	1998	Ankara	47,350	22
	Kentpark	2010	Ankara	80,000	206
	Gordion	2009	Ankara	50,000	165
	Panora Shopping Center - Oran	2007	Ankara	60,000	
	As Merkez	2001	Bursa	44,000	77
	Korupark	2007	Bursa	74,580	196
	TerasPark	2007	Denizli	47,500	130
	Sanko Shopping Center	2009	Gaziantep	57,223	185
	Viaport	2008	İstanbul	66,000	156
	Doğuş Power Center	2006	İstanbul	42,144	33
	Capacity Shopping Centers	2007	İstanbul	40,845	175
	Meydan Shopping Center	2007	İstanbul	70,000	-
	Profilo Shopping Center	1998	İstanbul	40,800	207
	Flat Ofis Shopping Center	2009	İstanbul	63,000	22
	KuleSite Shopping Center	2004	Konya	45,246	56
	Malatya Park	2009	Malatya	47,000	157
	Optimum Shopping Center	2008	İstanbul	46,000	154
	CarrefourSA Sh. C. İçerenköy	1996	İstanbul	42,210	140
	CarrefourSA Shopping Center	1993	İstanbul	47,250	129
	Carrefour Shopping Center Ümraniye	2000	İstanbul	60,630	87
	Galleria Shopping Center	1987	İstanbul	42,974	149
	Forum Ankara	2008	Ankara	80,000	142
	Forum Trabzon	2008	Trabzon	42,000	163
	Forum Shopping Center	2007	Mersin	64,250	200
	Forum Bornova	2006	İzmir	67,000	128
	Forum Kayseri	2006	Kayseri	65,000	
	M1 Tepe Shopping Center	2000	Adana	60,753	45

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
LARGE	M1 Tepe Gaziantep	1999	Gaziantep	51,700	60
	M1 Konya	2003	Konya	47,600	62
	M1 Meydan Merter	2009	İstanbul	44,600	50
	M1 Tepe Shopping Center	2000	İstanbul	41,000	42
	M1 Merkez Shopping Center	2002	Konya	47,200	56
	Tepe Nautilus	2002	İstanbul	51,770	117
	Maxi City Silivri	1997	İstanbul	49,186	207
	Maxi City	1998	İstanbul	45,000	36
	Özdilek Park Shopping Center	2009	Antalya	41,000	124
	212 İstanbul Power outlet	2009	İstanbul	70,000	180
	Starcity	2010	İstanbul	44,000	153
	Deposite	2008	İstanbul	60,000	160
MEDIUM	Acity	2008	Ankara	25,000	121
	Armada Shopping Center	2002	Ankara	32,000	161
	Karum Shopping Center	1991	Ankara	24,000	145
	365 Shopping Center	2008	Ankara	29,000	109
	KC Göksu Shopping Center -	2006	Ankara	35,365	129
	ALANYUM Shopping Center	2007	Antalya	27,000	43
	Kent Meydanı	2008	Bursa	25.511	96
	XL MALL AS Merkez	2001	Bursa	34,600	81
	Zafer Plaza	1999	Bursa	20,850	120
	Parkshop	2008	Sakarya	21,400	50
	SümerPark	2009	Denizli	35,232	
	Neo Marin	2009	İstanbul	36,000	150
	NEO AVM	2007	Eskişehir	35,890	120
	Espark AVM	2007	Eskişehir	40,000	140
	Armonipark	2008	İstanbul	23,056	85
	AIRPORT Shopping Center	2007	İstanbul	32,000	120
	Akmerkez	1993	İstanbul	34,600	246
	Beylicium Shopping Center	2005	İstanbul	20,000	128
	Capitol Carousel Shop. and Ent.	1993	İstanbul	31,000	140
	Carousel Shop. and Ent. Center	1995	İstanbul	24,400	110
	Kanyon Shopping Center	2006	İstanbul	37,500	160
	Metrocity	2003	İstanbul	32,638	141

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
MEDIUM	Ataköy Plus	2010	İstanbul	25,000	130
	Pendorya	2009	İstanbul	31,000	135
	World Atlantis	2008	İstanbul	22,000	122
	Palladium	2008	İstanbul	38,500	165
	İYAŞ Park	2010	İsparta	30,000	140
	Kayseri Park	2006	Kayseri	25,152	120
	Kale Center	2007	İstanbul	26,341	120
	Oasis	1998	Muğla	24,000	145
	Ereylin	2006	Zonguldak	26,000	50
	Historia	2008	İstanbul	20,000	77
	Aymerkez	2002	İstanbul	24,000	
	CarrefourSA Shopping Center	1998	Adana	31,628	46
	CarrefourSA Shopping Center	2001	bursa	33,946	108
	CarrefourSA Shopping Center	2001	Ankara	20,234	58
	CarrefourSA Shopping Center	2003	İstanbul	25,030	141
	CarrefourSA Haramidere	2001	İstanbul	22,663	50
	CarrefourSA Maltepe Park	2005	İstanbul	30,500	106
	CarrefourSA Shopping Center	2001	İzmir	37,695	75
	Galleria Adana	1994	Adana	30,718	624
	Forum Aydın	2008	Aydın	29,234	116
	ForumÇamlık	2008	Denizli	34,000	89
	Forum Gaziantep	2009	Gaziantep	39,000	
	Forum kapadokya	2009	Nevşehir	25,000	80
	5M Migros Shopping Center	2001	Antalya	33,024	103
	Beylikdüzü Migros Shop. Cent.	1997	İstanbul	33,000	105
	EGS Park	1997	Denizli	23,000	43
	EGS Park Mavişehir	1999	İzmir	27,000	120
	EGE PARK(EGS Park-1999)	2005	İzmir	22,000	120
	Kipa Shopping Center	2007	İzmir	20,992	65
	Kam-Kipa Shopping Center	1999	İzmir	29,539	91
	M1Kartal Shopping Center	2000	İstanbul	38,130	51
	Beylikdüzü Markacity	2007	İstanbul	26,022	
	Olivium Outlet Center	2000	İstanbul	33,560	136
	İzmit Outlet Center	1997	İzmit	28,777	45
	Laips Outlet	2009	Gaziantep	30,000	
	Truva Shopping Center (Outlet)	2005	Konya	20.608	136
	Neo Plus	2007	Eskişehir	36,000	112

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
SMALL	Keyf-i divan	2009	Ankara	8,490	34
	Elvankent Planet AVM	2005	Ankara	12,000	
	Ankuva	1997	Ankara	5,000	71
	Arcadium	2003	Ankara	15,000	83
	Asya PARK	2007	İstanbul	7,500	
	Atakule	1989	Ankara	10,543	90
	FTZ Shopping Center	2003	Ankara	7,000	42
	Akkapark	2006	Ankara	9,500	80
	Mesa Plaza	1999	Ankara	14,000	40
	Plaza Shopping Center,	2005	Ankara	6,500	25
	Laura Shopping Center	2004	Antalya	10,065	76
	Beysu Park	2008	ankara	11,500	30
	White World Center	2005	Antalya	18,000	60
	Yaylada Balıkesir	2007	Balıkesir	15,000	75
	Olivecity- Edremit	2007	Balıkesir	9,341	60
	Meridyen Shopping Center,	2000	Bursa	7000	50
	Nilpark	2009	Bursa	12,000	45
	Pekdemir Lifestyle Center	2006	Denizli	9,000	
	Mega Center Shopping Center	2002	Diyarbakır	14,520	52
	Karun	2003	Uşak	7,500	30
	Ermerkez	2003	Erzincan	12,600	30
	G-CITY Shopping Center	2006	Giresun	5,500	34
	Sabah Center Shop. and Entert.	2002	Giresun	10,600	21
	Akvaryum	2005	İstanbul	10,960	72
	Selenyum	2009	İstanbul	5,000	
	KC Şehri Bazaar	2008	İstanbul	13,601	176
	Hayat Park	2008	İstanbul	12,000	55
	Aquarium Shopping Center	2006	İstanbul	10,234	63
	Atirus Shopping Center	2005	İstanbul	11,000	80
	Atrium Shopping Center	1989	İstanbul	11,232	193
	Fly Inn Shop.and Lifestyle Cen.	2004	İstanbul	12,508	91
	Mesa Studio Plaza	2003	İstanbul	6,240	21
	Paradise Shop.and Entert. Cent.	2005	İstanbul	9,838	91
	Town Center	2003	İstanbul	12,000	50
	Metro Port	2008	İstanbul	15,420	100

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
SMALL	Ncity	2006	İzmit	17,500	62
	Kemer Mall	2007	İstanbul	6,000	52
	Onel Shopping Center	2006	Karabük	6,000	52
	Parkway	2008	İstanbul	8,500	85
	Prestige Mall	2007	İstanbul	12,000	52
	Fox city	2007	İstanbul	18,588	72
	Zeyland Shop. and Ent. Center	2008	Afyon	7,200	64
	Babil Shopping – Life. Center	2007	Diyarbakır	19,400	66
	Sunway	2008	İstanbul	5,000	50
	Verde	2009	İstanbul	10,000	125
	Agora	2002	İzmir	13,500	80
	Konak Pier	2004	İzmir	13,500	47
	Palmiye Shopping Center	2003	İzmir	10,053	108
	NCITY AVM	2006	İzmit	17,500	60
	Dolphin Center	2004	İzmit	6,500	46
	Barutçuoğlu Shopping Center	2006	Kastamonu	10,036	85
	İpeksaray Kayseri	2006	Kayseri	12,000	50
	Karacan Point Center	2004	Muğla	14,000	40
	Port Bodrum Yalıkavak	2004	Muğla	5,143	76
	Solaris Shopping Center	2001	Muğla	3,172	20
	Yeşilyurt Shopping Center	2006	Samsun	15,000	67
	Orion Shopping Center	1999	Tekirdağ	16,538	79
	Mirapark Shopping Center	2005	Trabzon	5,500	45
	Dedeman Demirpark AVM	2009	Zonguldak	18,000	69
	Marinavista	2007	Mersin	8,000	40
	Safran	2008	İstanbul	9,000	48
	Mozaik Park	2008	Şanlıurfa	15,000	57
	MKM Shopping Center	2005	İstanbul	14,000	16
	Misland	2008	Malatya	15,000	91
	Lyra	2008	Antalya	9,000	60
	G-City	2006	Giresun	5,500	34
	Becikoğlu	2000	Bolu	7,600	40
	CarrefourSA Shopping Center	2001	Ankara	15,769	57
	Carrefour Shop. Cent. B.Evler	2009	İstanbul	19,000	54
	CarrefourSA Shopping Center	2000	İzmit	10,937	29

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
SMALL	CarrefourSA Shopping Center	2003	Mersin	12,236	35
	CarrefourSA Shopping Center	1998	Adana	17,539	42
	Galleria Ankara	1995	Ankara	7,771	103
	Diyar Galeria Shopping Center	2001	Diyarbakır	13,500	60
	Diyarbakır Migros	1998	diyarbakır	9,000	
	Afra Shopping Center	1996	Konya	9,000	44
	Afra Shopping Center	2005	Samsun	14,452	57
	Afra Shopping Center	1999	Malatya	11,251	47
	Afra Shopping Center	2004	Aksaray	11,500	
	Afra Shopping Center	2002	Malatya	8,000	6
	Kipa AVM Kuşadası	2007	Aydın	3,495	31
	Kipa AVM (TESCO)	2006	Aydın	2,135	29
	Kipa Avm Edirne	2007	Edirne	5,555	38
	Kipa Shopping Center	2006	Konya	14,884	54
	Kipa Shopping Center	1999	İzmir	17,619	102
	TESCO Kipa AVM	2003	ÇANAKK	15,000	
	Kipa Shopping Center Silivri	2008	İstanbul	9,500	28
	Kipa Avm Salihli	2008	İzmir	9,500	33
	KİPA Shopping Center	2006	Antalya	9,300	41
	KİPA Shopping CenterMersin	2008	Mersin	35,000	-
	Real Shopping Center	2006	Antalya	14,810	18
	real Shopping CenterBeylikdüzü	2007	İstanbul	14,800	13
	Real Shopping Center	2000	Bursa	20,440	26
	Real Shopping Center	2000	İzmit	19,750	25
	Maxi City (Çengelköy)	2003	İstanbul	13,500	61
	Maxi City (İstinye)	2003	İstanbul	11,000	19
	Özdilek İzmir Shopping Center	2001	İzmir	20,000	
	Özdilek Afyon Shopping Center	1996	Afyon	12,000	
	SHE MALL, Medical Park Hospital Shopping Center	2008	Antalya	10,500	72
	Markacity Shopping Center	2008	İstanbul	18,000	67
	Millenium Outlet Park Batıkent	2005	Ankara	15,500	87
	Optimum Outlet Center	2004	Ankara	16,314	65
	Deepo Outlet Center	2004	Antalya	18,000	80

	SHOPPING CENTERS	CONSTRUCTION YEAR	CITY	LEASABLE AREA	NUMBER OF SHOPS
SMALL	Espri Outlet Center.	2008	İstanbul	10,000	77
	Colony Outlet ve Lif. Center	2005	İstanbul	7,000	51
	Avantaj Outlet Center	1997	Tekirdağ	10,750	23
	Park Bornova	2004	İzmir	11,000	50
	Selway Outlet	2006	İzmir	7,200	32
	Ege Outlet 2	2004	İzmir	7,500	15
	Muğla Outletpark	2010	Muğla	8,950	14
	Pendik Park Outlet	2008	İstanbul	8,000	50
	Sivas Park	2008	Sivas	6,500	45
	Black Outlet Şişli	2008	İstanbul	11,400	63
	Vialife	2009	Ankara	15,000	50
	Üstün Decocity	2008	Ankara	17,000	80
	Susurluk	2006	Balıkesir	15,000	30

APPENDIX C

INCOME LEVELS IN TURKEY

Income Levels	Turkey Population Ratio
High	10,9
High-Middle	11,1
Middle	20,6
Lower-Middle	21,1
Lower	36,2

(Source: TUIK Official Website, 2010)