

JUNE 2016

CHILD-FRIENDLY SHOPPING CENTRES

IN 8 POLISH AGGLOMERATIONS



Introduction

Colliers International, IQS Sp. z o.o. and the Polish Council of Shopping Centres have conducted an analysis of shopping centres in the largest Polish urban centres in terms of their friendliness towards families with children.

The study included 62 existing shopping centres totalling 3.2 million m² GLA. All projects from 20,000 m² with a minimum of 60 units were analysed, excluding those which are being extended and modernised. The research consisted of two parts – an evaluation by experts from Colliers International and the Polish Council of Shopping Centres using the adopted criteria and surveys conducted by IQS among parents living in selected agglomerations. Selected opinions of parents who took part in the survey have been quoted in the report.

Expert's evaluation covered three areas:

- overall shopping centre characteristics,
- facilities for families with children,
- offering of shops aimed at families.

In the first criterion, the functionality of avenues, lifts, ramps for prams, parking areas (including designated places for families with children), signage in the centre and the child-safety system were rated. The facilities that were assessed included: childcare places, baby changing and feeding rooms, toilets adapted for children, rest areas, cloakrooms, outdoor/indoor fee-free play areas, priority checkouts and the availability of special shopping trolleys. The offering of a centre was evaluated in terms of shops with products for children, cinemas, family entertainment centres and food court area suitable for younger customers.

The anonymous survey was conducted among parents who were asked which shopping centre in the city in their opinion is the friendliest for families with children and what are the selected factors when taking into account shopping with kids. Furthermore, respondents rated the quality of infrastructure for families with children, identified factors improving child safety and also pointed out what in their opinion is missing in shopping centres. Based on the data collected, the ranking of the friendliest shopping centres for families with children in the analysed cities was prepared. The research was based on the CAWI method on a research sample N=948-1,000 among users of the IQS' Internet Panel – inhabitants with children under 12 and those who regularly visit shopping centres in these cities/agglomerations.

We encourage you to read our report!



**POLSKA RADA
CENTRÓW HANDLOWYCH**
POLISH COUNCIL
OF SHOPPING CENTRES



research.**think**forward



WARSAW

An expert's eye

As part of the research, 15 shopping centres totalling over 800,000 m² located in the Warsaw agglomeration were rated. When it comes to the capital city, Colliers experts had an opportunity to observe the changes that have taken place within the last 2 years (from the last edition of the report).

The best shopping centres in the city have a wide offer for families with children including shops with clothing and footwear, toys and accessories, a convenient and diverse restaurant offering, as well as cinema and family entertainment centres, dance schools for children and leisure&entertainment modules. The majority of the leaders in the ranking have well-equipped and clean baby changing and feeding rooms, toilets adapted for children, vending machines with nappies as well as parking spaces designated for families with children wider than standard-sized ones.

In addition, some centres have introduced safety systems (information points, a clear signage system helping visitors navigate around the centre, wristbands for children); rest areas (comfortable sofas, interactive play areas, free access to Wi-Fi, children's book and game rentals) as well as organising various events for families (art classes, competitions, theatre performances).



Source: Colliers International, Galeria Mokotów

VISITED SHOPPING CENTRES

Name	Address	Name	Address
Arkadia	Jana Pawła II 82	Galeria Wileńska	Targowa 72
Atrium Promenada	Ostrobramska 75C	King Cross Praga	Jubilerska 1/3
Atrium Reduta	Jerozolimskie 148	M1 Marki	Piłsudskiego 1, Marki
Atrium Targówek	Głębocka 15	PH Targówek	Malborska 51-53
Blue City	Jerozolimskie 179	Sadyba Best Mall	Powsińska 31
CH Janki	Mszczonowska 3, Raszyn	Wola Park	Górczewska 124
Galeria Bemowo	Powstańców Śląskich 126	Złote Tarasy	Złota 59
Galeria Mokotów	Wolowska 12		

Source: Colliers International

Among the outstanding retail projects, Galeria Mokotów should be mentioned, as it has wide, comfortable parking places (enabling a baby carrier to be removed), easy navigation with a pram or pushchair, plastic wristbands for children with a space for a parent's phone number, as well as first-aid kits (which contain disinfectant, plasters and toilet overlays). Very competent and friendly reception service makes a good impression. The dedicated and nicely managed space for young customers in the restaurant area with tiny tables and chairs is an additional advantage.

Arkadia shopping centre draws attention due to its spacious rest areas and free play areas near the food court. A toy recycling station can be found there, which is unique within the analysed shopping centres. Visitors can leave a toy that they do not need anymore or that is damaged and it will be given "a new life" and sent to children in need.



Source: Colliers International, Arkadia

In terms of its rich entertainment offer Blue City is worth visiting – children will not be bored there. The centre's service is friendly and helpful. Wristbands for children, a free playground slightly older children and a spacious family room are available there.

We welcome the changes that have taken place in Warsaw's shopping centres since we carried out our last research. And so, in M1 Marki a lot of family parking places have been introduced, as well as a spacious and well-maintained room for mothers with children with convenient access for prams and pushchairs. It should be mentioned, that in Złote Tarasy the new, clean family rooms and specially adapted toilets have appeared, although these are a bit too small.

Unfortunately, some projects in the Warsaw market are still characterised by a low quality of infrastructure. They usually lack baby changing and feeding rooms or they are locked with the key kept in the security office. Baby changing tables are placed in ladies' toilets or toilets for the disabled. The cleanliness of sanitary facilities is not satisfying. Furthermore, these centres do not have an interesting offer for families. The lack of information, unpleasant and incompetent service may effectively discourage both parents and children.



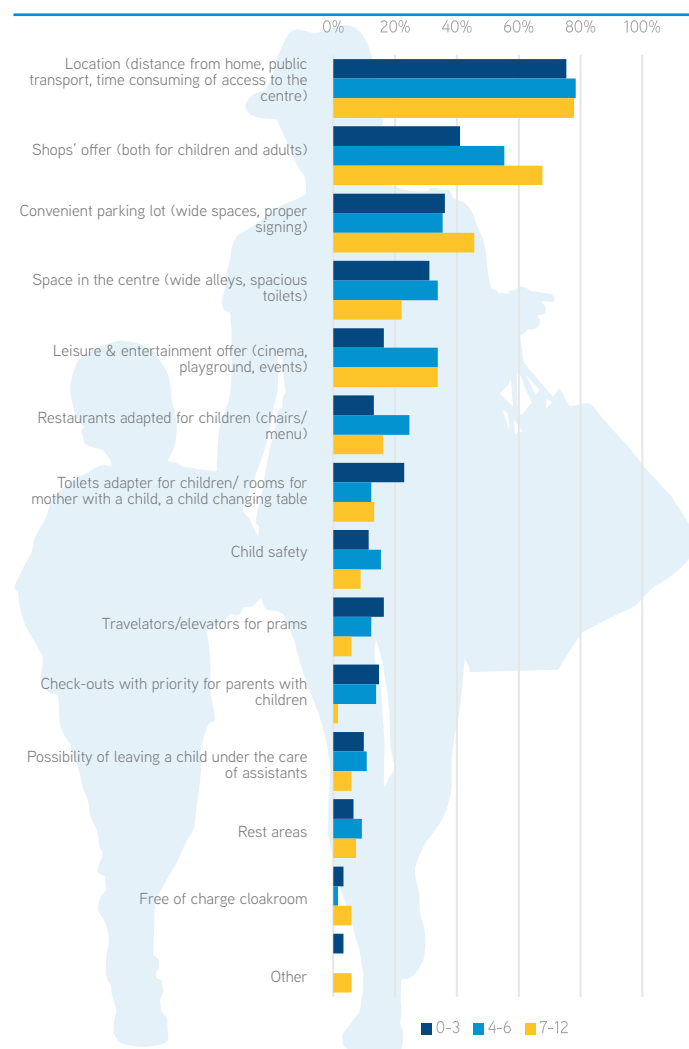
Source: Colliers International, Galeria Mokotów

A parent's eye

Parents in Warsaw who participated in the survey believed that Arkadia is the most child-friendly for children younger than 12 years old, followed by Blue City and Galeria Mokotów.

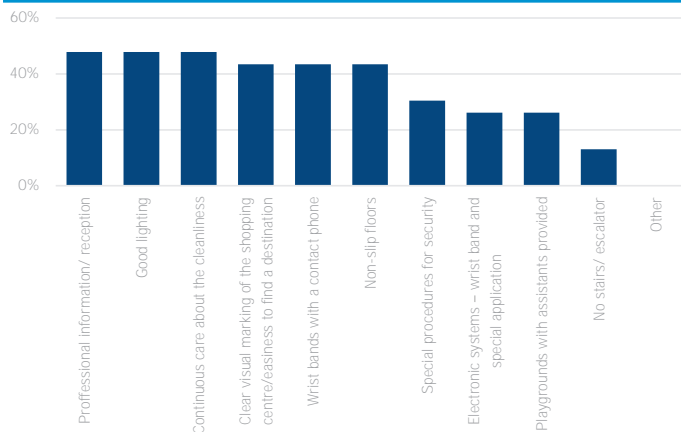
The age of children influences the perception of shopping centres. Arkadia definitely wins among parents of the youngest children – those under 3, with Wola Park in second place. Parents of 4-year-old children chose Blue City. Among parents of the oldest children (7 and older), a high third position was taken by Złote Tarasy which among parents of younger children did not appear in the first three at all.

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016

WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS 2016

Warsaw shopping centres meet parents' needs to a level of 81%. According to our respondents, there is a lack of child-minders as well as larger and better equipped play areas. In most Warsaw shopping centres, parents are bothered by loud music and intensive smell.

Parents' expectations increase with a child's age. In case of parents of children under the age of three the most important for shopping centre to have is changing and feeding rooms, but it is crucial to have both rooms separated (mothers do not want to feed their children in toilets). For parents of children aged 4 to 6 years old, the most important is a child's safety, while for those older than 7 – entertainment, including cinema, is a key.

"...In shopping centres there is a need for large, free-of-charge playgrounds with various attractions, as well as child-minders, restaurants with separate places for families and an interesting menu for children. At weekends, events dedicated to youngsters should be organised. Shops with clothing and toys could be situated near play areas. Wide parking spaces near the entrances, adapted for families with children are also important..."



Source: Colliers International, Blue City



BLUE CITY

2

ARKADIA

1

GALERIA
MOKOTÓW

3



An expert's eye

In Tricity, eight shopping centres totalling 515,000 m² met the criteria of this report. We visited neighbourhood projects and city-centre shopping centres, as well as those on the outskirts of Gdańsk and Gdynia.

In parents' opinion, the advantages of Tricity's retail projects are: being able to move around a centre easily with a pram or pushchair and quite clear signage. Moreover, the vast majority of centres have a rest area and food operators provide priority checkouts. Food courts are well-prepared for the needs of the youngest guests.

Among the centres visited, Galeria Riviera in Gdynia deserves to be mentioned. Apart from convenient and attractive internal navigation, there is a wide retail and leisure offer, modern and well-maintained toilets and family rooms where baby changing tables, bath sinks, microwaves and comfortable chairs are available.

Moreover, Riviera is the only shopping centre in Tricity to provide special wristbands for children where parents' phone number of parents can be written. Additional attractions that are rarely found in Tricity are free, safe play areas located along the main avenues, many events organised on a special stage and a "Kids Club" program, which offers discounts prepared by the centre's business partners.



Source: Colliers International, Centrum Riviera

VISITED SHOPPING CENTRES

Name	Address	Name	Address
Alfa	Kołobrzeska 41c	Galeria Przymorze	Obrońców Wybrzeża 1
Auchan Port Rumia	Grunwaldzka 108	Klif	Zwycięstwa 256
Centrum Riviera	Kazimierza Górskiego 2	Matarnia Park Handlowy	Złota Karczma 26
Galeria Bałtycka	Al. Grunwaldzka 141	Osowa	Spacerowa 48

Source: Colliers International

Auchan Port Rumia offers its guests a very well-equipped play area, which is situated on the deck of a ship located inside the centre. Apart from pay-to-enter play area with professional supervisors, children can play in special free play area. On the other hand, as the only centre in Tricity Park Handlowy Matarnia provides family parking places for its guests. It also offers a free-of-charge large outdoor play area and a playground with an assistant.

In parents' opinion, shopping centres in Tricity are not perfect. The biggest problem are toilets, which are not always clean or child-friendly, and the lack of well-prepared family rooms. Special parking spaces and child-monitoring systems are also lacking. Preparing more rest areas or gardens as well as attractive free-of-charge play areas are worth being considered.

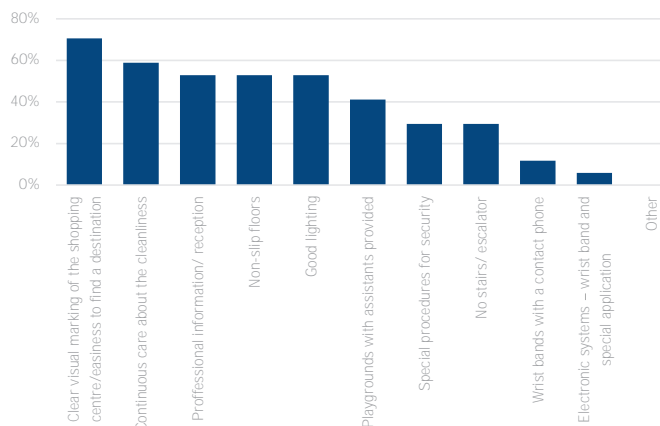
A parent's eye

In Tricity, three shopping centres were mentioned by respondents as child-friendly. These were Matarnia in Gdańsk, Centrum Riviera in Gdynia and Galeria Bałtycka in Gdańsk.

Tricity shopping centres meet the needs of parents with children up to 12 years old to a level of 84%. What makes them less than ideal according to respondents is a lack of better equipped or larger play areas, more interesting attractions for children and parking spaces adapted to families' needs.

The expectations of older children's parents focus mainly on entertainment, safety and the possibility of leaving a child in the care of a child-minder. Parents of the youngest children are mainly interested in functional solutions adapted for children (toilets and feeding rooms).

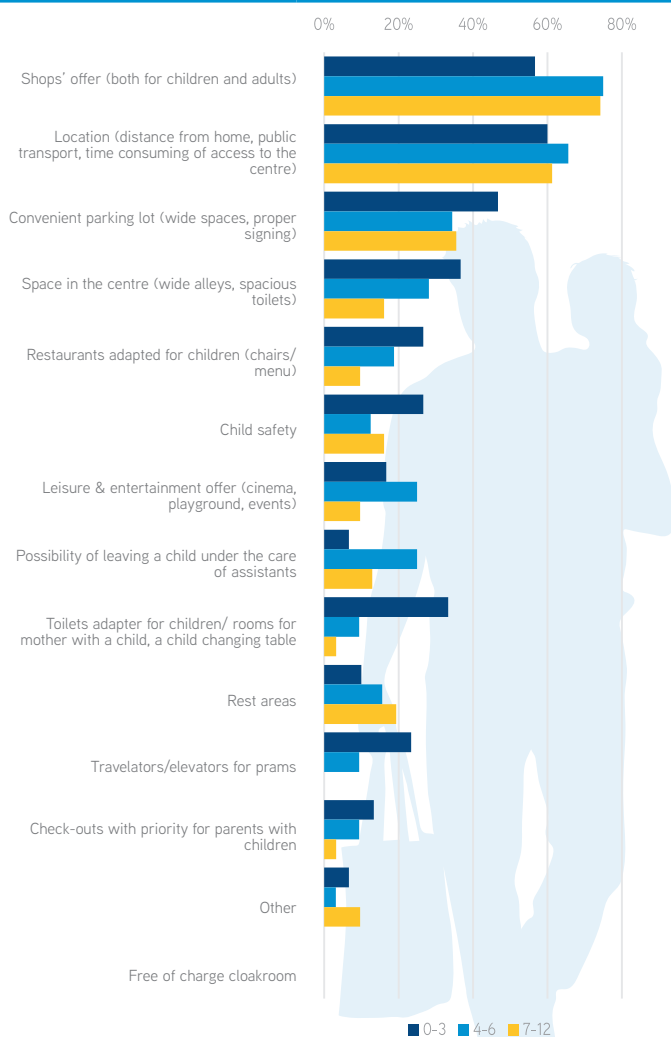
WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS, 2016

“...A shopping centre should have parking spaces adapted for families with children, safe toilets (of a proper height adapted for children), a feeding room for toddlers and young children (isolated and not distracting) and changing rooms. Entertainment and safety at play-areas is necessary. Security should pay attention to children who are alone. Big shops should have check-outs dedicated to families with children...”

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016

MATARNIA

GALERIA
RIVIERA

GALERIA
BAŁTYCKA

2

1

3



KRAKÓW

An expert's eye

The Kraków market is characterised by a wide variety of shopping centres in terms of their location, size and offering. The market includes large downtown retail-entertainment centres, suburban retail complexes and centres in residential areas. For the purpose of this report, Colliers experts visited the seven largest shopping centres, which total approximately 380,000 m². The vast majority are well prepared for the needs of families who plan to do shopping, eat something and spend their free time there.

Kraków shopping centres as standard generally offer baby changing and feeding rooms, well-signed privileged parking places, priority checkouts, trolleys-cars to walk around a centre and chairs for children in the food court area. Coin-operated carousels/vehicles placed on corridors are very popular. It is worth mentioning that a few shopping centres in Kraków participate in the “Friendly place for toddlers” campaign, which is organised by PR Inspiration, Wrota Małopolski and Gazeta Wyborcza in Kraków. The aim of the campaign is to provide information about the needs of the young people.

Among the solutions that drew our experts' attention was the food court area in Galeria Bronowice with its convenient space where parents can have a meal and children can play.



Source: Colliers International, Galeria Kazimierz

VISITED SHOPPING CENTRES

Name	Address	Name	Address
Bonarka City Center	Kamieńskiego 11	Galeria Krakowska	Pawia 5
Carrefour Czyżyny	Medweckiego 2	M1	Al. Pokoju 67
Galeria Bronowice	Stawowa 61	Zakopianka	Zakopiańska 62
Galeria Kazimierz	Podgórska 34		

Source: Colliers International

Galeria Bronowice offers the largest number of baby changing and feeding rooms and a comfortable rest area. Galeria Kazimierz offers interesting outdoor and indoor external playgrounds.

In both Galeria Bronowice and Bonarka shopping centre various attractions are offered mainly for older children, including sport and art activities, exhibitions, film screenings and theatre plays

Similar to other analysed cities, in some shopping centres in Kraków the cleanliness level of sanitary facilities is unsatisfactory (mainly where baby changing tables are placed), and only three projects have special toilets adapted for children.

Most of the existing changing and feeding rooms have electronic lockers and are only opened by security staff upon special request. None of the shopping centres mentioned have a special child-parent monitoring system preventing children from disappearing. There is also a shortage of free play areas or free child-care points where children can be left under supervision while parents go shopping.

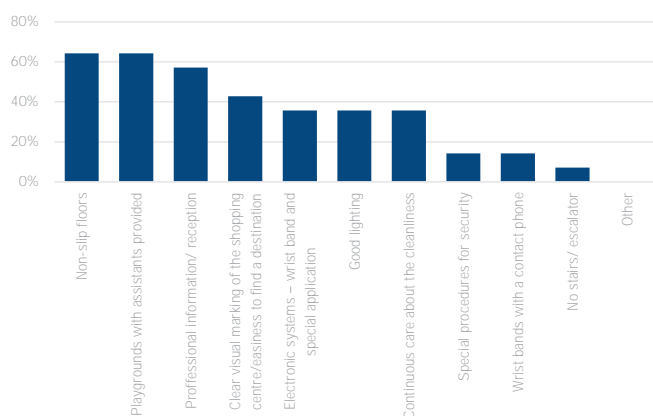
A parent's eye

Bonarka City Centre is considered to be the most child-friendly shopping centre in Kraków, followed by M1 and Galeria Bronowice. Parents of children who are under three, consider (in contrast to parents of the youngest) Galeria Krakowska to be child-friendly.

Similar to situation in Warsaw, parents of children under three consider the availability of special rooms for parents with children to be the most important feature. As children get older, safety and entertainment become more important.

Kraków shopping centres meet the average of 84% of parents' expectations, which is a good result in comparison to other cities. To be ideal, according to respondents, there should be a larger number of attractions for children – play areas (those which already function should be bigger and better equipped). There are some functional-architectural problems in terms of convenience and safety such as wider avenues, larger lifts and a larger number of escalators and platforms.

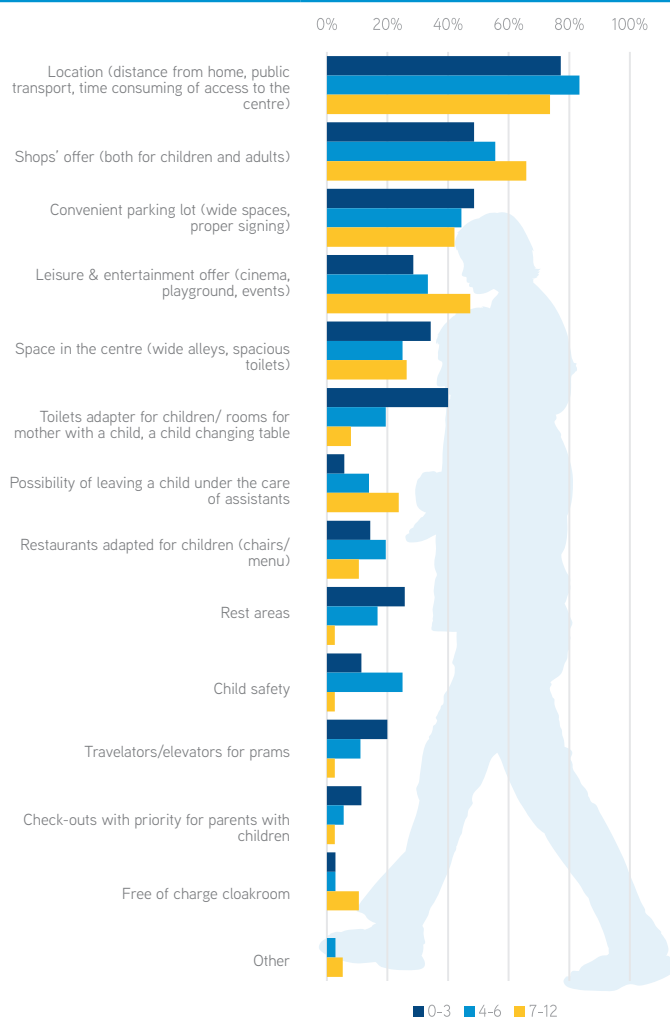
WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS, 2016

“...Child-friendly centres are based on a simple plan with a few information points in case of a child disappearing, free-of-charge cloak-room, free-of-charge play area as well as toilets and a room for parents with children and water distributors...”

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016

BONARKA CITY CENTER

M1

2

1

GALERIA BRONOWICE

3



An expert's eye

There are seven shopping centres in Łódź, which total 410,000 m² and meet the criteria of this report. Shopping centres in Łódź are well prepared for families with children, which is proved by factors such as the location of play areas, the convenience of privileged parking places, the availability and cleanliness of changing and feeding rooms, as well as the ease of moving around centres with a pram or pushchair. The infrastructure quality is not the same in every centre but the general impression is positive.

Ease in finding the way to particular places within a shopping centre (for example an information point or family room) is extremely important to customers. The signage inside retail projects in Łódź for example on information boards or signposts is good. Wide corridors, lifts and escalators allow parents with prams or pushchairs to move around easily. In all analysed shopping centres it is possible to use free or paid (depending on the centre) special trolleys-cars.

One of the best shopping centres adapted for children is Manufaktura. It has many attractions for younger and older children such as a cinema, bowling club, gaming centre, climbing wall and dance school, as well as the "Jupi Park" and "Jazda Park". It also offers well equipped internal play areas – users can

VISITED SHOPPING CENTRES

Name	Address	Name	Address
Galeria Łódzka	Piłsudskiego 15/23	Port Łódź	Pabianicka 245
M1	Brzezińska 27/29	Sukcesja	al. Politechniki 5
Manufaktura	Drewnowska 58	Tulipan	Piłsudskiego 94
Pasaż Łódzki	Jana Pawła II 30		

Source: Colliers International

play on mattresses and take advantage of attractive devices. In changing and feeding rooms, special feeding chairs can be found, as well as a microwave, adjusted toilets and a vending machine with nappies and baby food.

Port Łódź also deserves recognition due to quality of the rest area facilities. Apart from spacious and convenient places where visitors can rest for a moment, the shopping centre guarantees free child-care points, play areas (indoor and outdoor), wristbands for children a parent's contact details in case of a child disappears, fun and games, fairytales, colouring books and other attractions. Unavailable in other Łódź shopping centres is the special children's hair salon in Sukcesja. Haircuts for toddlers in special chairs take place in a fun atmosphere with friendly service.

A parent's eye

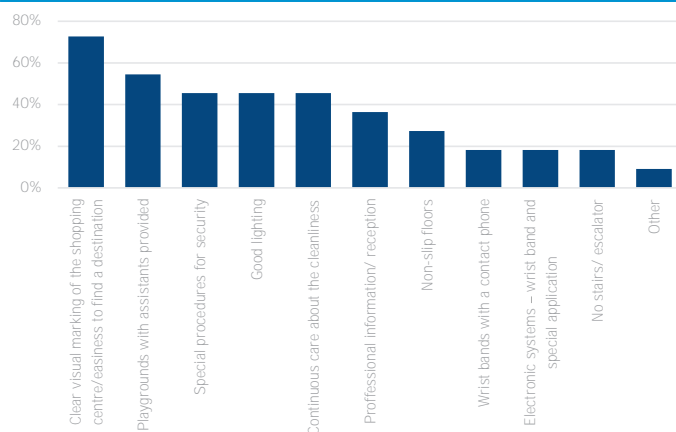
In Łódź, according to respondents, only two shopping centres stand out in terms of friendliness to families with children, namely Manufaktura and Port Łódź – the second one wins among parents with the youngest children. The other shopping centres are far behind these.



Source: Colliers International, Sukcesja

Shopping centres in Łódź meet parents' needs at a level of 87%, which is the best result among the analysed cities. The missing 13% would be made up by having better equipment, larger play areas or mini-kindergartens with child-minders. The respondents would like shopping centres to be places to spend free time to a greater extent or, when necessary, to do shopping quickly. They should provide the option of leaving a child under the care of qualified staff. Parents' needs in Łódź in terms of shopping centres are similar to those of parents in other cities and focus mainly on entertainment for children, safety and solutions adapted for young children's needs (toilets, feeding rooms etc).

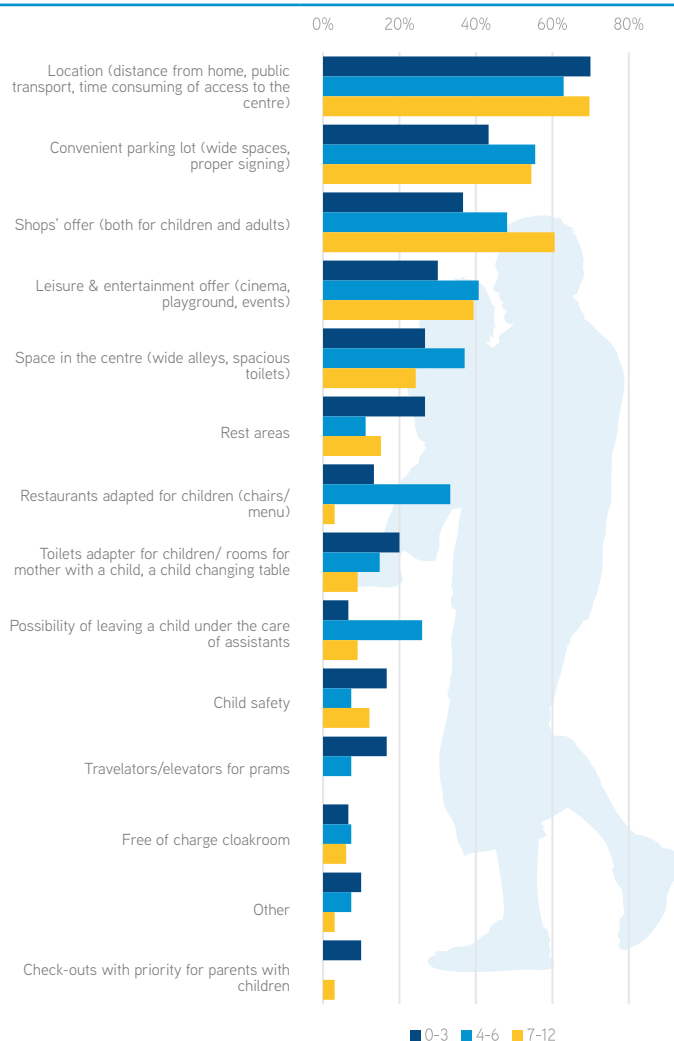
WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS, 2016

"...A child-friendly shopping centre means a lot of space, play areas, events, shops with clothing, restaurants adapted for children (chairs, menu), a large parking areas adapted for families and children, priority check-outs, toilets adapted for children, changing rooms, rest area (benches), attractions e.g. carousels, cars, free-of-charge balloons etc..."

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016

MANUFAKTURA

PORT ŁÓDŹ

2

1

3



WROCLAW

An expert's eye

In the capital of Lower Silesia, ten shopping centres were analysed. The experts visited projects that total over 520,000 m², located in both city centre as well as on its fringe. Special attention was paid to the parts of projects that are most often visited or are the most attractive for the youngest visitors to shopping centres.

Most shopping centres in Wrocław are very well prepared for families with children. Changing and feeding rooms are available in all Wrocław centres, but their number, equipment and cleanliness are not at the same level. The highest standard is offered by Magnolia – a big and spacious family room in which meals can be heated up in a microwave to feed children on comfortable sofas and special toilets adapted for children are available.

The vast majority of projects offer chairs for children in food courts and some restaurants have special children's menus. A common feature in all the centres analysed are coin-operated toys (cars, planes, diggers, animals) on corridors, and some centres have free indoor play areas. Only half of the projects that are located in Wrocław offer privileged parking spaces for families. Unfortunately, rest areas are usually limited to single benches.

While going shopping with a child, apart from a wide offer of clothing and children's accessories shops, parents are chiefly interested in child safety. According to short interviews with information-point staff, only one shopping centre in Wrocław (Aleja Bielany) offers wristbands. In the event of a child



Source: Colliers International, Aleja Bielany

VISITED SHOPPING CENTRES

Name	Address	Name	Address
Aleja Bielany	Czekoladowa 5-22	Korona	Bolesława Krzywoustego 126
Arkady Wrocławskie	Powstańców Śląskich 2-4	Magnolia Park	Legnicka 58
Auchan Bielany	Francuska 6, Bielany Wrocławskie	Marino	Paprotna 7
Borek	Gen. Józefa Hallera 52	Pasaż Grunwaldzki	Pl. Grunwaldzki 22
Galeria Dominikańska	Pl. Dominikański 3	Renoma	Świdnicka 40

Source: Colliers International

becoming lost, their guardian can be easily found from the name written on the wrist band.

Aleja Bielany deserves special mention in terms of its friendliness towards children. It offers free child-care points with professional supervision, TV screens with fairytales in family rooms, well-equipped play areas for children, a cloak-room and priority check-outs.



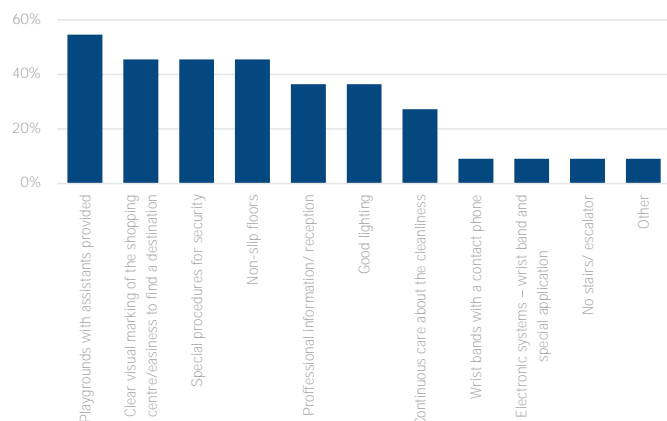
Source: Colliers International, Arkady Wrocławskie

A parent's eye

In Wrocław, Magnolia Park, Aleja Bielany and Pasaż Grunwaldzki according to parents are the most child-friendly. Group of parents with 4 to 6-year-old children also appreciated Auchan Bielany.

Shopping centres in Wrocław meet 81% of the needs of parents with children under twelve. In their opinion, shopping centres have more play areas and more toilets adapted for children as well as family rooms. Parents also need a higher sense of calm (e.g. quieter music, less aggressive advertisements etc). Wrocław's inhabitants expect shopping centres to be safe, provide children with high level entertainment and special facilities for children.

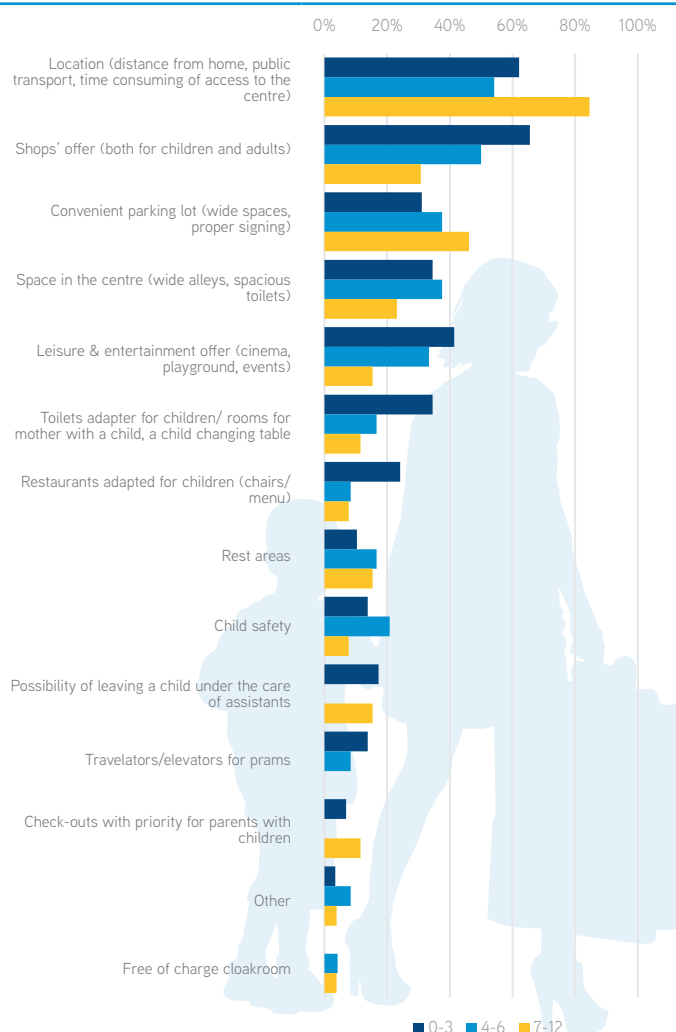
WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS, 2016

“...The ideal shopping centre is ‘green’ with a play area in the fresh air with supervision so that it’s possible to leave a child there, as well as toilets adapted for toddlers (children’s changing tables, a lower urinal), more space and understanding staff...”

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016

MAGNOLIA
PARK

ALEJA
BIELANY

PASAŻ
GRUNWALDZKI

2

1

3



An expert's eye

Shopping centres in Poznań are characterised by a variety of formats and locations – eight retail projects totaling 340,000 m² that meet the criteria of this report were analysed. Most of these centres are equipped with basic facilities for families with young children, including family rooms, play areas and adapted food courts. The quality of the infrastructure and its availability vary depending on the project.

In general, the assessment of Poznań's shopping centres in terms of changing and feeding rooms is positive. In only one project, such a room was not found. It is worth mentioning that most of the specially adapted toilets were opened and did not require calling for security. Food courts are quite well prepared young people. Moreover, internal navigation enables visitors to move around a project easily as well as to change level if needed.

Among the analysed shopping centres, Galeria Malta deserves being mentioned as the leader in terms of facilities for families with children. Apart from well-designed navigation, signage and special parking areas, it also has a very well-equipped



Source: Colliers International, Galeria Malta

VISITED SHOPPING CENTRES

Name	Address	Name	Address
Galeria Malta	Maltańska 1	Panorama	Górecka 30
Galeria Pestka	Al. Solidarności 47	Poznań City Center	Matyi 2
King Cross Marcelin	Bukowska 156	Poznań Plaza	Drużbickiego 2
M1	Szwajcarska 14	Stary Browar	Półwiejska 42

Source: Colliers International

and perfectly maintained changing and feeding room as well as specially adapted toilets for slightly older children – both ladies and gents. Moreover, in Malta there are trolleys-cars, a microwave and adapted tables and chairs with a special play area for children in the food court.

King Cross Marcelin is also worth mentioning. It offers many facilities dedicated to children. Marcelin has a very well-equipped play area called "Whale's island" where both very young and slightly older children can play and for whom lots of workshops and events are organised.

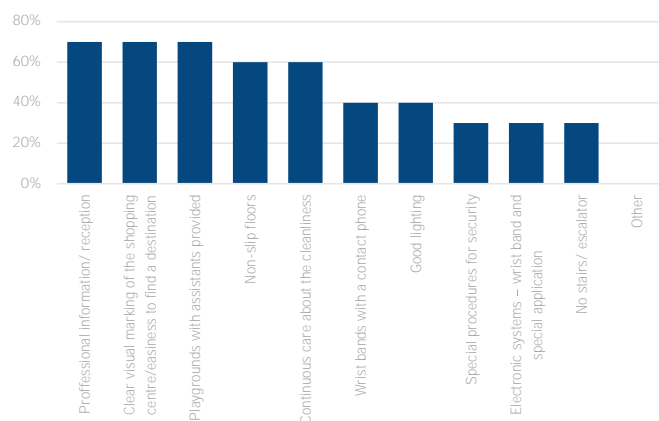
Facilities that are mainly lacking in Poznań's shopping centres are: parking areas designed for families (wider parking places located near the entrances) as well as a child-safety system for children while shopping. Unfortunately, none of the visited shopping centres had solutions that increase children's safety such as wristbands with parents contact number, which are more popular in other cities.

A parent's eye

According to respondents, in Poznań, among the winners of the most child-friendly shopping centres we can find: Galeria Malta, Poznań City Center and King Cross Marcelin. In case of this city, there is a large distribution of votes - there are no leaders (as in Łódź for example).

Shopping centres in Poznań meet the needs of parents with children under twelve at a level of 81%. However, they still lack a greater number of play-areas. Parents needs focus mainly on entertainment for children, safety and convenient parking. Respondents expect more interesting attractions for older children, safety for toddlers and more convenience for parents with prams and pushchairs.

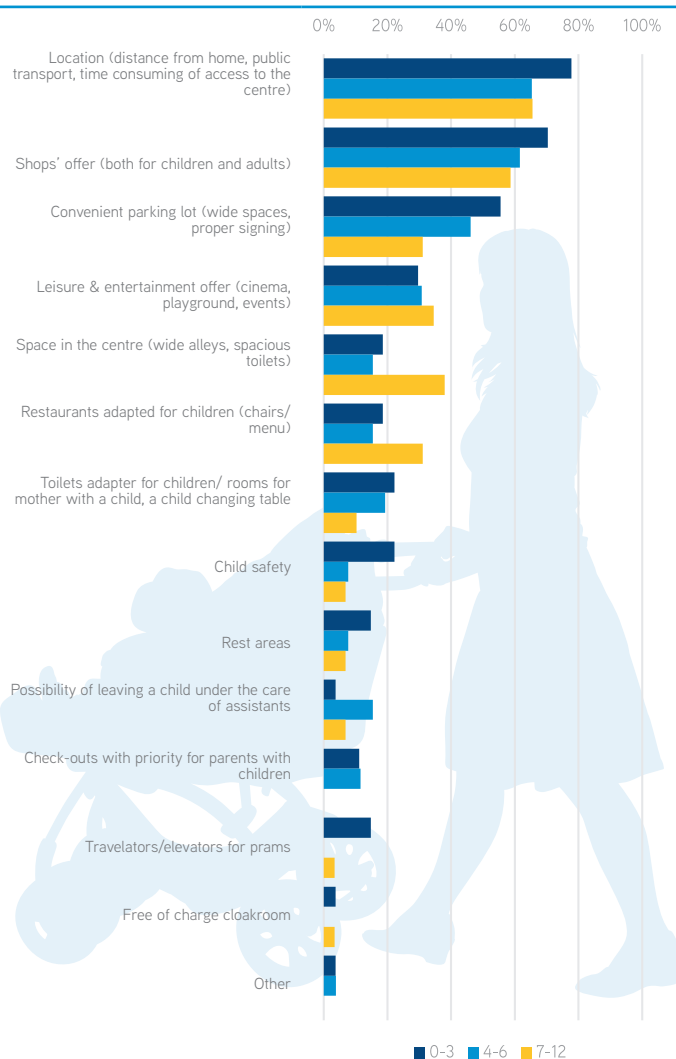
WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS, 2016

“...There should be more available places for mothers where you can change and breast-feed your baby. It would be great if there was a place to leave your child with a child-minder. There should be wider corridors and child-adopted restarants. The music should be more peaceful and quieter because children – mainly younger ones – are also calmer...”

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016



POZNAŃ
CITY CENTER

2

GALERIA
MALTA

1

KING CROSS
MARCELIN

3



SZCZECIN

An expert's eye

In Szczecin, our experts visited four shopping centres which total 143,000 m², including three located in the city centre. The infrastructure offered by centres in Szczecin for families with children are at a basic standard – changing and feeding rooms or baby changing tables in toilets, chairs adapted for children in the food court, wide corridors, lifts and escalators, clear signage (screens, information boards) and priority checkouts.

Among the visited shopping centres, Galaxy is worth mentioning. Convenient and well-signed parking spaces for families with children, a huge rest area near the fountain and trolley-cars for moving around with children can be found there. Older children can spend their time in the cinema, play area and bowling club.

Ster shopping centre implemented an interesting idea in the food court, where a play area is surrounded by a high counter where parents can eat their meal. Situated in the centre, it is attractive for children and visible for parents. Ster regularly organises educational-artistic events for children as part of the "Toddlers' Theatre Academy".

Many things need to be improved in Szczecin's shopping centres. Not all projects have special parking places for families with children and a free-of-charge play area as well as a crèche.



Source: Colliers International

VISITED SHOPPING CENTRES

Name	Address	Name	Address
Galaxy	Wyzwolenia 18/20	Ster	Ku Stońcu 67
Kaskada	Niepodległości 36	Turzyn	Bohaterów Warszawy 42

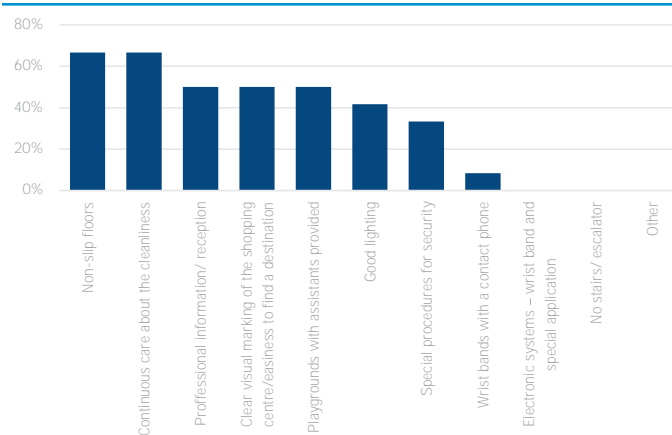
Source: Colliers International

There is lack of toilets adapted for children and places where children can be fed and changed in good conditions. None of the shopping centres have advanced procedures in the case of a child disappearing. The offer for families is also unattractive and is limited mainly to shops with children's equipment and play areas.

A parent's eye

According to respondents, the most child-friendly shopping centres in the city are Galaxy and Kaskada. Other shopping centers remain far behind these ones in the opinion of parents of both small children and those slightly older.

WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS, 2016

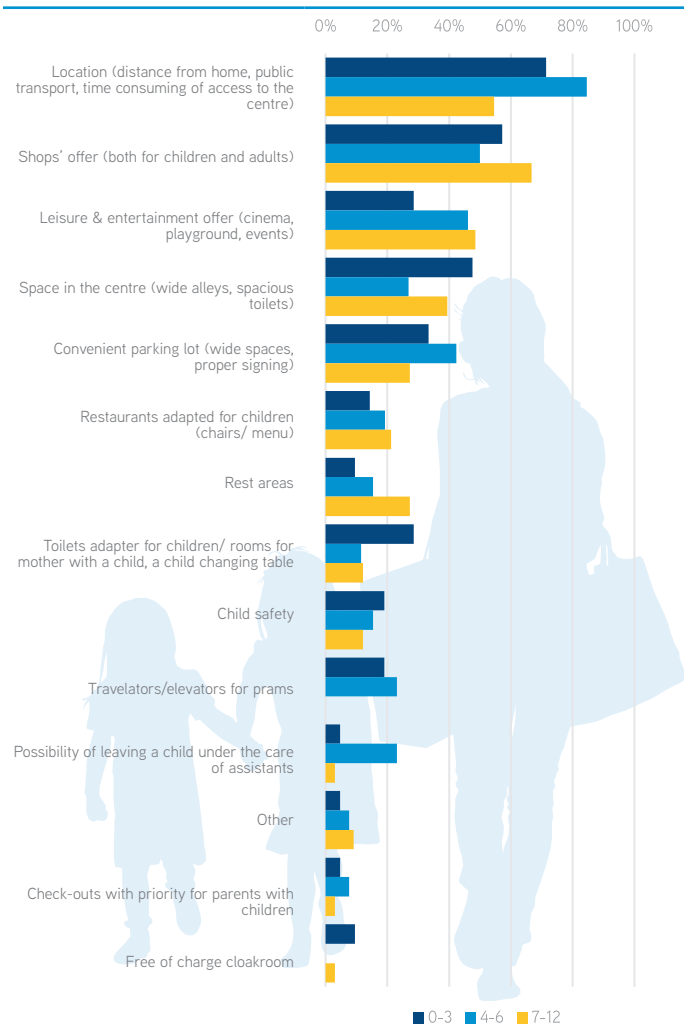
Shopping centres in Szczecin meet parents' (who have children under twelve) needs to the greatest extent – 83%. There is a lack of large, well-equipped play areas that would combine the idea of going to shopping centres and spending free time with children. For Szczecin's inhabitants, child-friendly shopping centres should be safe, offer entertainment to children and have special facilities (rooms) for parents with children.

“...In shopping centres, the restaurant offer for children should be improved. It is important that cafes have places to sit with children, places to run – and they should be safe (for sure it is possible to predict running children while designing a centre!). Ordinary eating places are needed (not only fast food restaurants) as well as kiosks with ice cream or cakes/pastries and some points with beverages are absolutely necessary. The best solution is to have free-standing stalls with free-of-charge water distributors...”



Source: Colliers International

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016





KATOWICE

An expert's eye

In Katowice we visited three shopping centres that total 180,000 m² and offer their services to both city inhabitants and whole agglomerations. Due to their size and positioning in the market, these shopping centres have an offer and facilities for children.

In all projects, changing and feeding rooms can be found and a special mention should be given to Galeria Katowicka (where the rooms are very well-equipped). All centres have toilets adapted for toddlers, baby chairs in the food court, lifts and escalators as well as clear signage and a rest area with playgrounds.

There is a special mobile application with navigation which allows visitors to easily move around Galeria Katowicka. Apart from the cinema and playgrounds, there is an area called Project Higher Level, where culture and education themed stalls aimed at children (e.g. in April 2016 science experiments for children were organised by the Eugeniusz Centre for Science and Fun) can be found.

Silesia City Center boasts the largest Smyk in the city, the “Jupi Park” play area, a cinema and a summer garden situated on the roof (open in the summer). In 3 Stawy shopping centre parents who want to do shopping fast can leave their children in the “U Misia” play area. There are also many cosy places to have a rest.



Source: Colliers International, 3 Stawy

VISITED SHOPPING CENTRES

Name	Address	Name	Address
3 Stawy	Pułaskiego 60	Silesia City Center	Chorzowska 107
Galeria Katowicka	3 Maja 30		

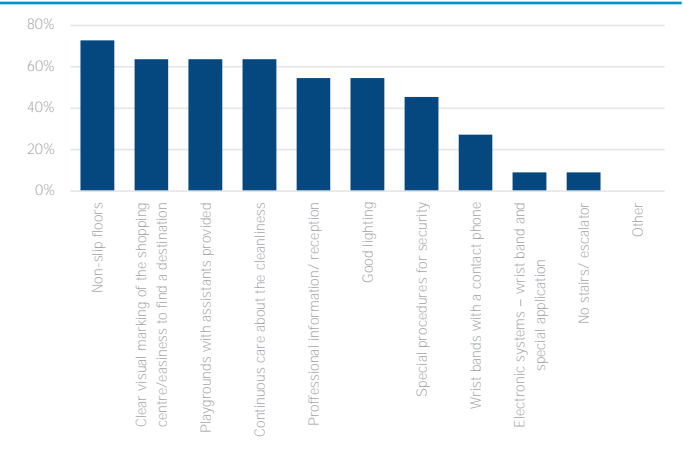
Source: Colliers International

Unfriendly parking areas with a limited number of privileged spaces are the main drawback in Katowice’s shopping centres. In the big centres, a good support for parents would be free-of-charge childcare where children can be left under supervision, trolley-cars enabling fast movement around a centre and more priority check-outs with better location. Also, cloakrooms, useful mainly in winter are located inconveniently if there are any at all. The Katowice shopping centres do not have an advanced child-safety systems protecting against children disappearing.

A parent's eye

In Katowice, Silesia City Center, Galeria Katowicka and 3 Stawy are considered to be the most child-friendly.

WHAT FEATURES MAKE THE SHOPPING CENTRE SAFE FOR CHILDREN?



Source: IQS, 2016

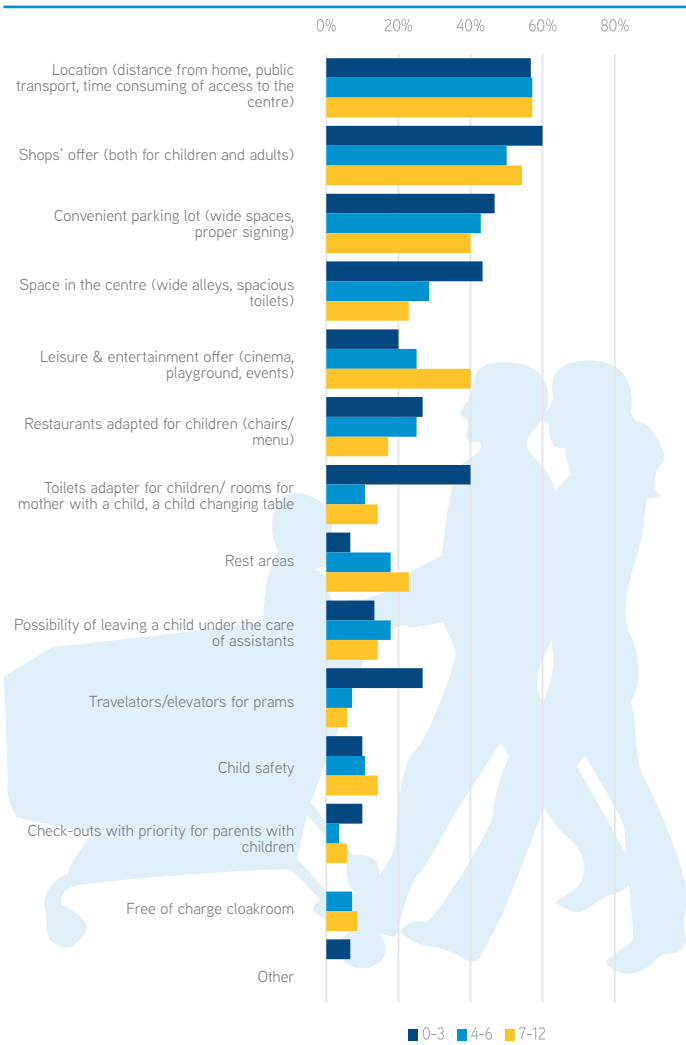
Generally speaking, Katowice's shopping centres were assessed by our respondents quite highly as they meet parents' expectations at a level of 82.5%. The rating could be higher with better equipped and larger play areas. Parents' expectations in Katowice are similar to parents in Kraków and Warsaw – for parents of children aged 0-3 toilets adapted for children, rooms for mothers with children and changing tables and for older children entertainment (cinema, play areas, events) as well as safety are important.

“...The building should have wide, well-lit and marked corridors. Along the avenues there should be special points (maybe lantern-shaped?) where a child can ask for help. Additionally, security guards should pay attention to wandering children as it is possible that they are looking for their guardians and do not know what to do...”

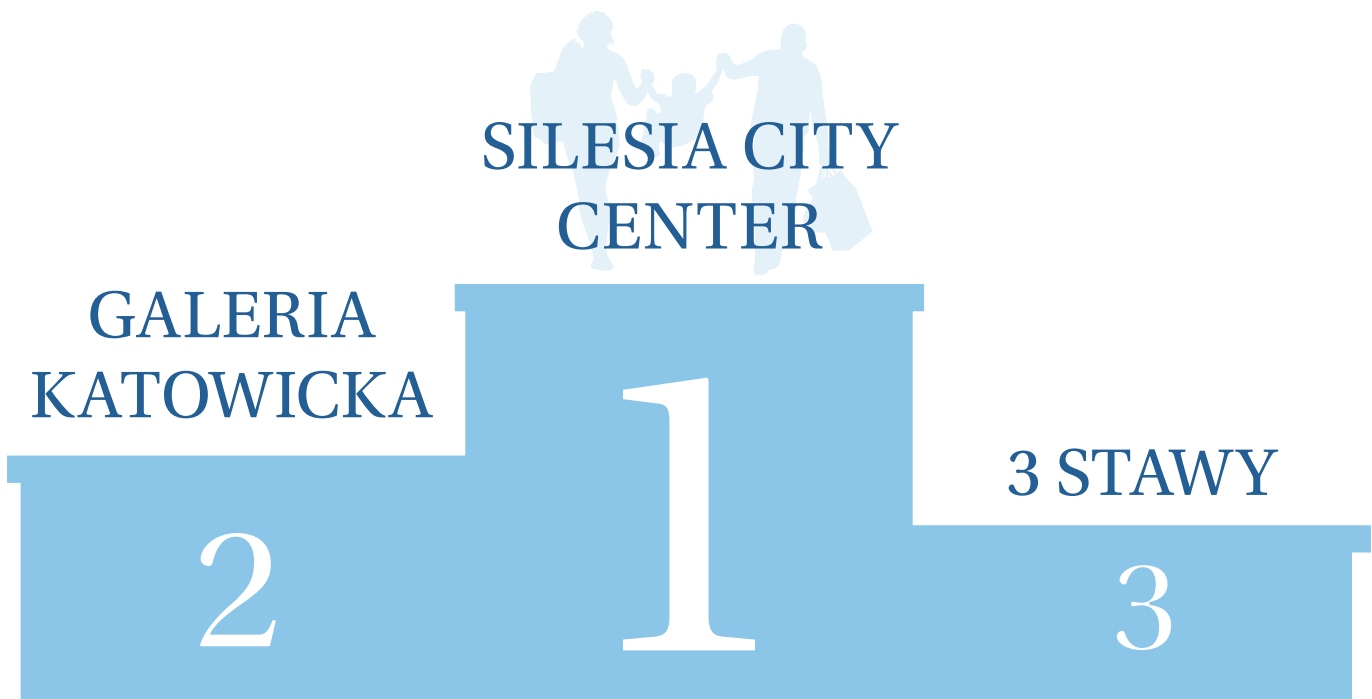


Source: Colliers International

WHAT IS DECISIVE WHILE CHOOSING A PARTICULAR SHOPPING CENTRE TO GO SHOPPING WITH A CHILD? BY CHILDREN AGE.



Source: IQS, 2016



Offer for families with children in analysed shopping centres



What does an administrator do when a child gets lost in a shopping centre?

... "the administrator's basic tasks are providing safety to a child and handing them over to the parents. A parent who's child is missing should contact security staff as soon as possible to enable them to pass the information about the missing child to the administrator, remaining security posts and monitoring centre staff."

Monitoring staff start their search using cameras located in the object and then stream the information through the sound system. If a child is not found within a few minutes, the administrator informs the police who are obligated to join the search for the missing child. Such situations happen relatively rarely.

Some shopping centres offer children free-of-charge wrist bands on which a parent's telephone number can be written. This solution helps to shorten the time when a child remains away from their parents and gives the children a priceless sense of comfort..."

Grzegorz Jamroziak, Director of Retail Property Management, Colliers International

Do the owners of shopping centres measure the youngest clients' satisfaction?

... "Shopping centers more often appreciate the importance of information coming directly from clients. They want to understand their clients' motivation and needs, but rarely focus on specific groups of customers."

We observe the changes in the approach of shopping centres to consumers, which results, inter alia, in the need to define the target groups more accurately. In the future we expect a greater interest in research on clients of a specific profile, including eg. the needs of parents.

If you visit the shopping centre with your child, we know that when a child is bored, tired, grumbling she/he can effectively complicate doing shopping. The spatial layout, the offer, security, the possibility to spend time in an interesting way ... so many factors

influence the comfort of visiting the shopping centre. We, parents, know this and often take into account the opinion of children, choosing a shopping centre. And what do the shopping centres know about it? ... "

Agnieszka Kowalewska, Research Manager, IQS

What attractions for families with children have you met in shopping centres in other countries?

... "The Westfield shopping center in London for example is a city within a city, and inside world just for kids can be found. KidZania is a very interesting project that on the surface of almost 7,000 m² it offers extremely realistic replica of a city for the youngest."

At the entrance to the zone, children receive electronic wrist bands so parents can be sure that they are safe. During this time, children whose age ranges between 4 and 14 can try out to work in a number of different professions starting from a surgeon, fireman, policeman, salesman ending with a stylist, for which they receive remuneration in the kidZos currency, to spend on campus.

London KidZania is one of several such educational attractions in the world ... "

Radosław Knap, General Director, Polish Council of Shopping Centres



Conclusion

Our conclusions after visiting over 60 shopping centres in terms of their friendliness towards parents with children are rather positive. It is clear that both owners and managers of centres think about their youngest customers and do their best to implement various solutions that meet children's needs. Some of these solutions are capital-intensive investments and others need little financial outlay thanks to cooperation with other companies and institutions.

Irrespective of whether the investment is big or small, it is always worth considering how to implement a particular solution. Will a locked changing and feeding room opened only on special request by a security guard meet with a good response from customers? How to find a proper employee in an emergency situation? Changing tables in toilets for the disabled is a mistake – it is difficult to keep them clean. Mothers prefer to change their babies on a bench in a corridor and will not use this room when they want to feed them. The same comment may be made for all sanitary facilities sanitary – if they are not clean and easily accessible, even toilets and bath sinks placed on a lower level specially for the youngest do not improve the standard. It is important to remember that not only mothers but also fathers take children shopping – toilets should be adapted for in both ladies and gents.

The ease of moving around a centre with a pram or pushchair is an important aspect for parents. Not every shopping centre has an elevator that allows a parent to enter and exit it easily with a pram. How is it possible for a mother with a child to enter a shopping centre through a revolving door that is too small with badly set motion sensor? Many shopping centres have invested in electronic navigation through their centre but do they have an option for “navigation with a pram”? It is also difficult to move with a pram when the number of temporary stalls are not adjusted to the width of avenues. A good solution for parents with children, mainly in big shopping centres in the winter season, are cloakrooms, which unfortunately are often far away from the main entrance or are weakly sign-posted. It is difficult to understand why, mainly in case of large scale projects that have very spacious common areas, there is a lack of a rest area with a small play-area and comfortable sofas for parents.

Getting out of the car with baby carrier or a child seat is far easier when we can take advantage of special wide parking space. Separate and well-marked places for families with children is an example of an investment that needs little financial investment. Preparing procedures and training for security and information staff about how to help families with children also needs little money.

In summary, we would like to mention a few simple ideas that improve parents' comfort while shopping with children that we observed during our visits. The most comfortable changing and feeding room was big (it was possible to enter with a pram), colorful and consisted of two rooms – a toilet adapted for children and a room with a changing table, bath sink, microwave, vending machine with nappies and baby food, comfortable sofa and TV screen as well as a small table with chairs, crayons and books.

Although we did not see an electronic application for monitoring children in any of the shopping centres we visited, a few of them offered attractive wristbands with a space for a parent's contact details. In one of the projects it was possible to obtain a basic first aid kit.

In the best visited food court there is a safe play area for children where parents eating their meals are able to observe their children. When a child is hungry it is possible to order something from the children's menu and sit them at a children's table. The passages between tables are wide enough for prams and pushchairs. The cities we visited have shopping centres whose offer is not limited to shops with children's equipment, cinema and play areas. In some of the projects there are also theatre performances, educational and artistic events, children's clubs, libraries, reading rooms and sports and gaming areas. The uniqueness of the offer is an advantage.

We hope that our observations will inspire you!

Contacts



Dominika Jędrak

Director
Research and Consultancy Services
dominika.jedrak@colliers.com
+48 666 819 242



Katarzyna Michnikowska

Senior Analyst
Research and Consultancy Services
katarzyna.michnikowska@colliers.com
+48 607 559 587



Maciej Kotowski

Junior Analyst
Research and Consultancy Services
maciej.kotowski@colliers.com
+48 882 014 509



**POLSKA RADA
CENTRÓW HANDLOWYCH**
POLISH COUNCIL
OF SHOPPING CENTRES



Radostaw Knap

General Director
Polska Rada Centrów Handlowych
rknap@prch.org.pl
+48 512 402 291



research.**think**forward



Agnieszka Kowalewska

Research Manager
IQS Sp. z o.o.
agnieszka.kowalewska@grupaiqs.pl
+48 781 720 103

RetailMAP[®]

OUR SEARCH TOOL

OUR KNOWLEDGE

MAP OF HIGH STREETS
AND SHOPPING CENTRES

Are you considering entering the market, planning to develop your chain or restructure it? Do you need data on shopping centres or high streets in Poland? Has a specific retail location sparked your interest? Visit RetailMAP to get the information you want or speak to one of our retail experts: +48 22 331 78 00.

www.retailmap.pl



Accelerating success.



IQS
research.
think
forward
grupaiqs.pl

**Wiele
innych
narzędzi**
które
tworzymy
w IQS

**Świat
Młodych™**
12 lat pracy
z Millennialami

AdWave™
diagnoza
reklam

PackScan™
pomiar siły
opakowania



PRCH RETAIL AWARDS — 2016 —

ZGŁOŚ SWÓJ PROJEKT:

- CENTRUM HANDLOWE
- SIEĆ HANDLOWĄ
- KAMPANIĘ MARKETINGOWĄ

ZAWALCZ O NAJWAŻNIEJSZE TROFEA W BRANŻY

WIĘCEJ INFORMACJI:
PRCH.ORG.PL

ORGANIZATOR:
Polska Rada Centrów Handlowych
ul. Nowogrodzka 50 lok. 448
00-695 Warszawa
+48 22 629 23 81
+48 519 075 037
retailawards@prch.org.pl



**POLSKA RADA
CENTRÓW HANDLOWYCH**
POLISH COUNCIL
OF SHOPPING CENTRES