



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

BAZA WIEDZY
INDEKS OBROTÓW PRCH
PRCH TURNOVER INDEX

BAZA WIEDZY
PRCH FOOTFALL
TRENDS

INTRODUCTION TO PRCH DATABASE

PRCH Turnover Index / PRCH Footfall Trends

February 2016



The aims & benefits of PRCH Database:

To provide independent, most representative indexes about the trends in:

- shopping centres' sales turnover in Poland
- footfall trends in shopping centres in Poland

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Benefits for Participants:

- Benchmarking of the existing portfolio of shopping centres
- Additional criteria in decision making process for future development / acquisitions in the regions that your centres are not available
- Point of reference in discussions with tenants and business partners



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PRCH DATABASE

- a systematic **review of the major and most recently available country-level data** about trends in Polish retail industry including PRCH Turnover Index and PRCH Footfall Trends
- **easily available** in one central location extranet.pwc.pl/prch
- **accessible online** with **regular updates** applied
- **representative sample**
- **common definitions applied**
- **quality and accuracy** of every piece of data guarantee
- **security** of data guarantee by PwC BlackBox

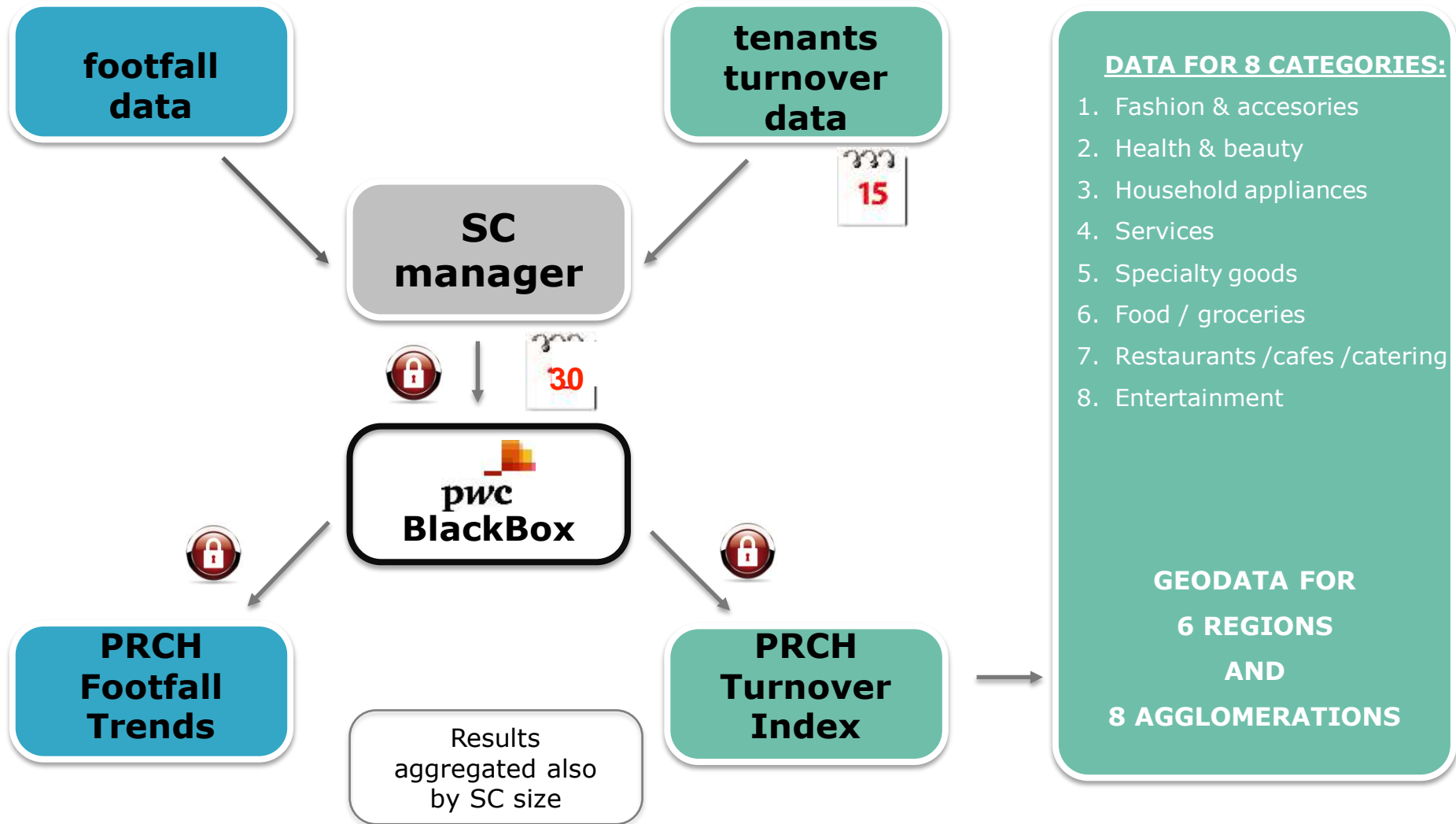
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Biggest benchmark for Polish shopping centers



REPORTING SCHEME





DATA SECURITY

PwC Global Technology Solutions & Tax Department developed a tool called BlackBox, which allows users to provide and extract **only aggregated data** under the following circumstances:

- **request access** to the system accepted by PRCH
- **NO data shown per specific** shopping centre, owner, manager or retailer
- **NO requirement to provide any individual** turnover data on tenant-by-tenant basis - tenant turnover data are **aggregated into categories**
- **the rule of 3** – tenant categories are shown in the reports only when consist of data **from minimum 3 Participating Companies**





Monthly reports include:

Excel file with complete historical data
(2008-2016)

- per categories
- per regions & agglomerations

PDF file (~20 pages) with charts & basic tables:

→ contents →

↓ sample charts ↓

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PRCH TURNOVER INDEX

CONTENT OF THE REPORT

1. PRCH Turnover Index – Poland
2. Shopping centers reported
 1. Shopping centres reported as a part of Polish retail market
 2. Eight retail categories: reported GLA and average annual turnover
3. PRCH Turnover Index – per retail category
 1. Fashion & accessories
 2. Health & beauty
 3. Household appliances & accessories
 4. Services
 5. Specialty goods
 6. Foods/groceries/supermarkets
 7. Restaurants/cafes/catering/fast food/food court
 8. Entertainment
4. Turnover Index per NUTS / city agglomeration
 1. By region
 2. By agglomeration
5. About PRCH Turnover Index
 1. Methodology
 2. Definitions of the Turnover Index
 3. Definitions of retail categories in this report
 4. Definitions of NUTS and city agglomerations in this report
 5. List of shopping centres by NUTS and city
 6. About PRCH – Polish Council of Shopping Centres
 7. Administration – PwC
6. Contact & disclaimer

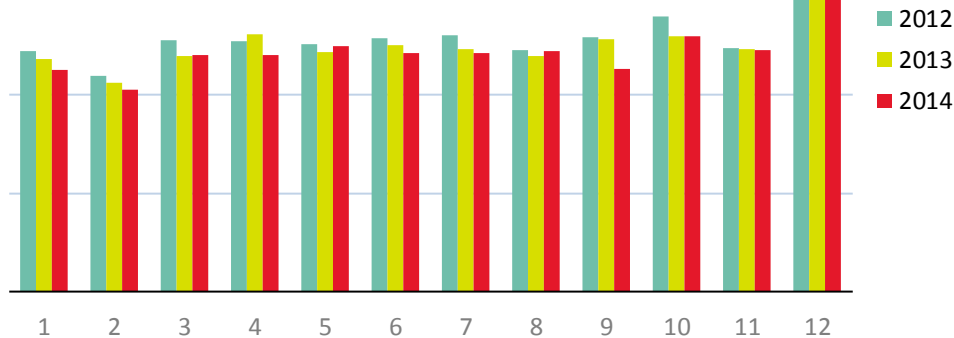


VISUAL PRESENTATION OF DATA

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PRCH TURNOVER INDEX

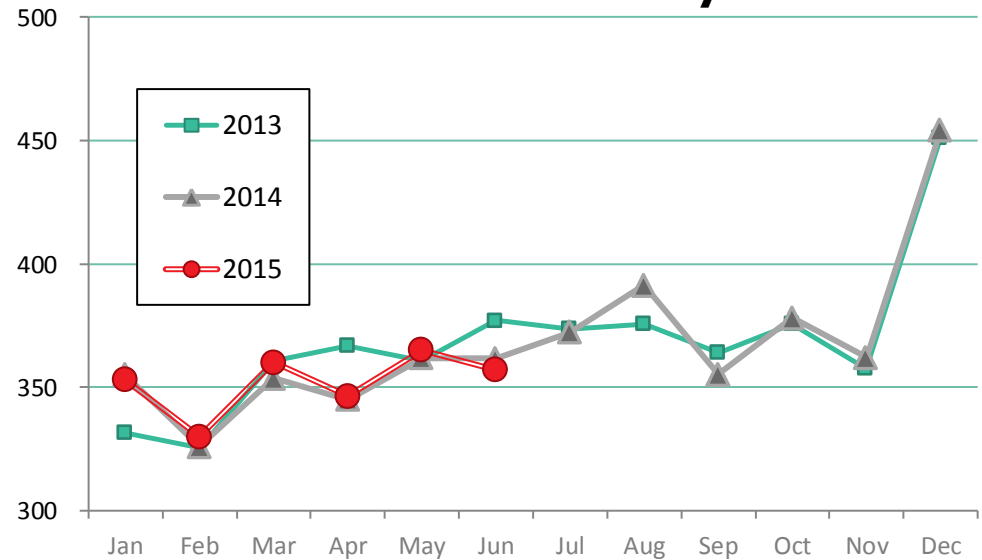
PRCH Turnover Index: Poland, All retail categories

93* shopping centres included in
the reporting scheme (Jan'16)



BAZA WIEDZY
PRCH FOOTFALL
TRENDS

PRCH Footfall Trends: dynamics



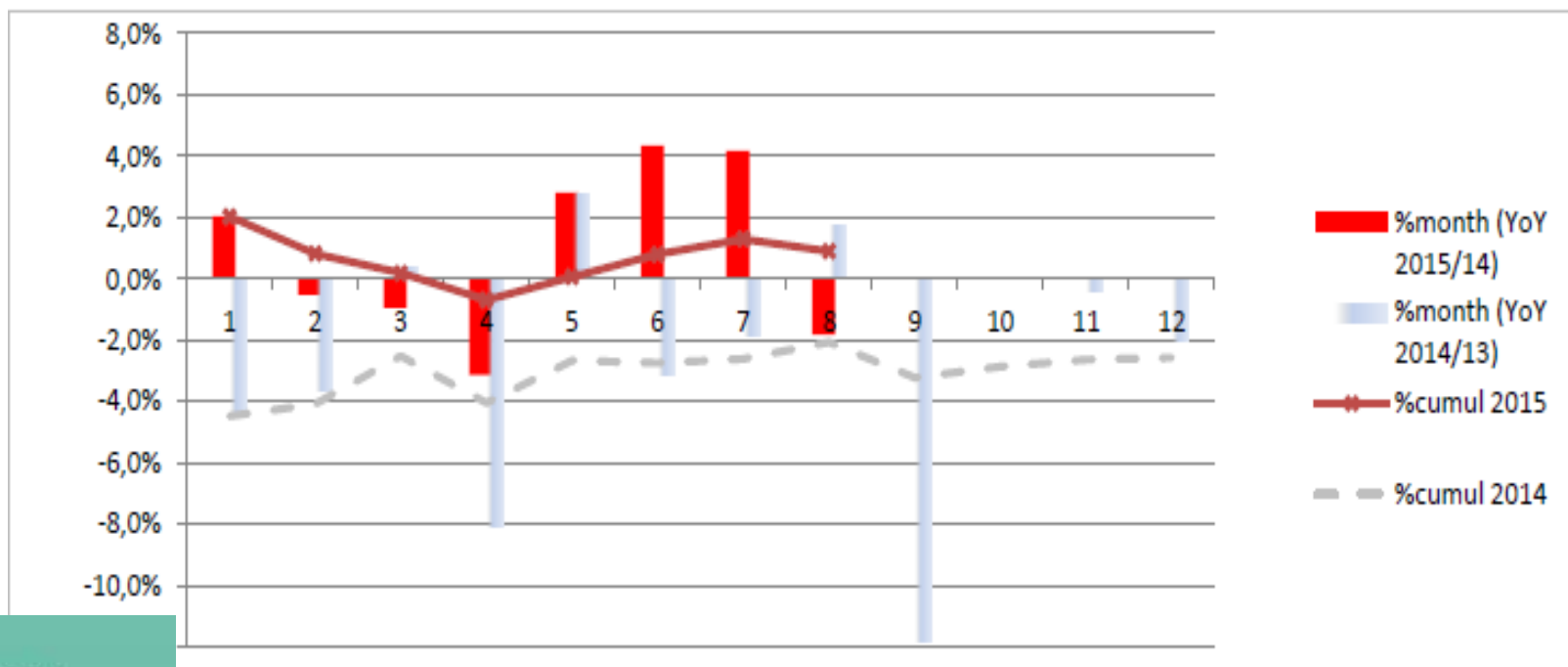
Since January 2016 edition the results of both indexes are also split by center size – presented for small&medium and large centers separately



VISUAL PRESENTATION OF DATA

- Year-on-Year and cumulative Year-to-Date changes

Graph 1.2. Turnover Index – Poland, all retail categories, Year-on-year change 2015/14 change and cumulative YoY change 2015/14 compared with 2014/13

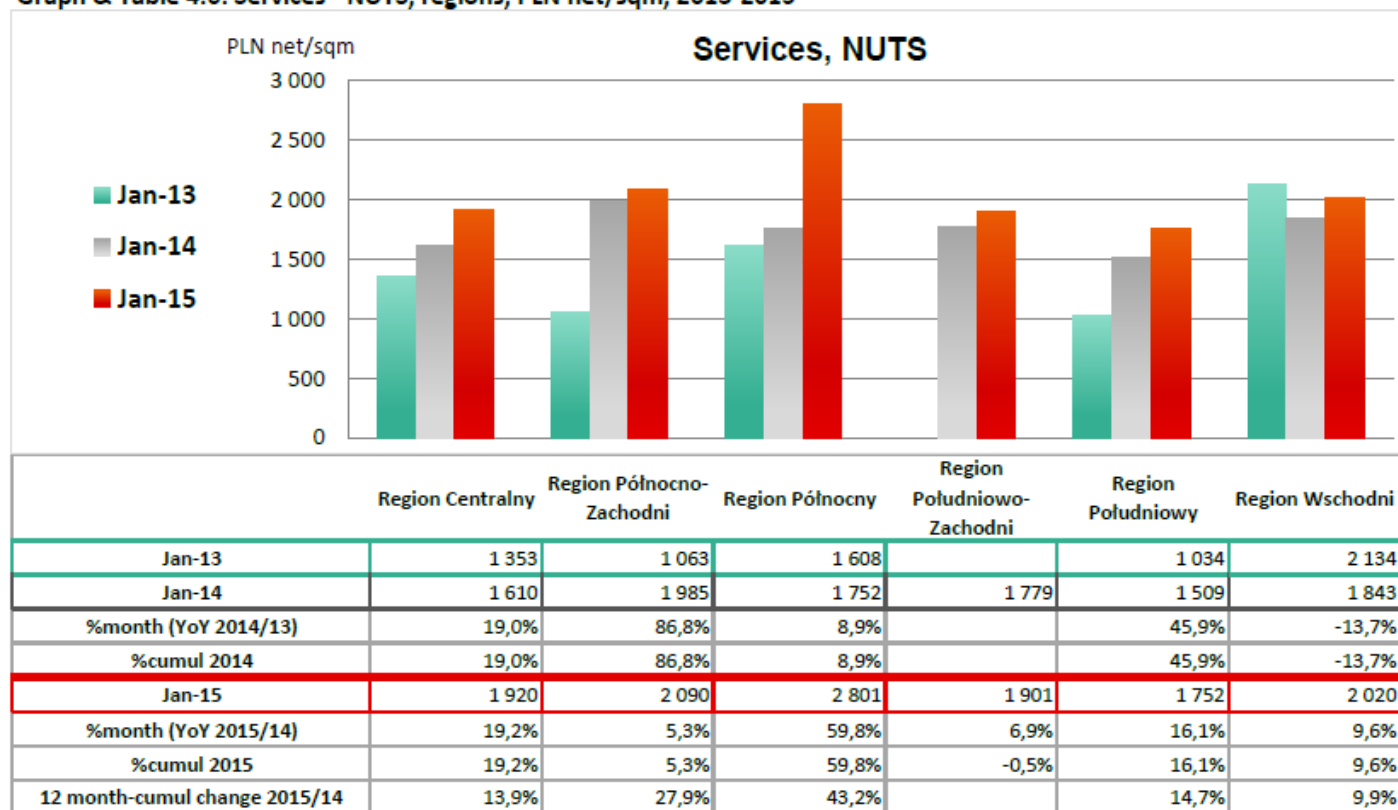




VISUAL PRESENTATION OF DATA

- Average monthly turnover values – per 8 categories in 6 regions and 6 agglomerations

Graph & Table 4.6. Services - NUTS, regions, PLN net/sqm, 2013-2015





TERMS & CONDITION

I. Formal:

- Signature of the PRCH Database General Conditions + Accession Agreement
- Classification of tenants to PRCH Turnover Index categories (provided by PRCH)
- Input of historical data into PwC BlackBox

II. Operational:

PRCH Turnover Index:

- Aggregating monthly tenants turnover data into 8 specific categories
- Submitting reports online to PwC BlackBox at <https://extranet.pwc.pl/prch> till the end of a following month

PRCH Footfall Trends:

- Submitting monthly footfall counts to PwC BlackBox till 20th day of a following month

III. Financial:

Monthly lump sum of 1300 PLN net per Company (reporting includes whole portfolio of centers)



PRCH DATABASE PARTICIPANTS

Participants of the Project reporting the portfolio of shopping centres for Poland:

1. Immochan - Auchan Polska sp. z o.o.
2. IKEA Centres Polska S.A.
3. Apsys Management sp z o.o.
4. Metro Properties sp. z o.o.
5. Echo Investment S.A.
6. Klepierre Management Polska sp. z o.o.
7. Unibail-Rodamco Polska sp. z o.o.
8. AEW Europe (PAIGE Investment sp. z o.o.)
9. Cushman & Wakefield Polska sp. z o.o.
10. CBRE Global Investors Poland sp. z o.o.
11. Colliers International Poland sp. z o.o.
12. Forum Gliwice sp. z o.o.
13. Mayland Real Estate sp. z o.o.
14. Valad Next sp. z o.o.
15. Atrium Poland Real Estate Management





Comparison of benefits:

	Full PRCH Database Report (for Participants reporting data)	Monthly Brief for all PRCH Members
Current YoY & YTD results	✓	✓
Charts for general indexes	✓	✓
Complete historical data in Excel files	✓	—
Statistics of market coverage: Shopping centres reported as a part of Polish retail market	✓	✓
Eight retail categories: total reported GLA and average annual turnover	✓	—
Turnover Index in retail categories overview	✓	✓
Turnover Index in retail categories per 6 regions	✓	—
Turnover Index in categories per 8 agglomerations	✓	—
PRCH Turnover Index by shopping centre size	✓	—
PRCH Footfall Trends by shopping centre size	✓	—
List of shopping centres reported	✓	—
Downloadable for verified users from secure external server	✓	—
Monthly cost 1300 PLN	✓	—
For all (and only) PRCH Members	—	✓



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**JOIN the PRCH Database project
now and get detailed reports
and benchmarks next month!**

