

ANC SHOPPING CENTER INDEX

FOOTFALL INDEX, TURNOVER INDEX AND VACANCY RATE

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Footfall up from last year, however below the pre-Covid

4,1 %

August Footfall index **vs. 2022** (8/2023)

-7,5 %

August Footfall index **vs. 2019** (8/2023)

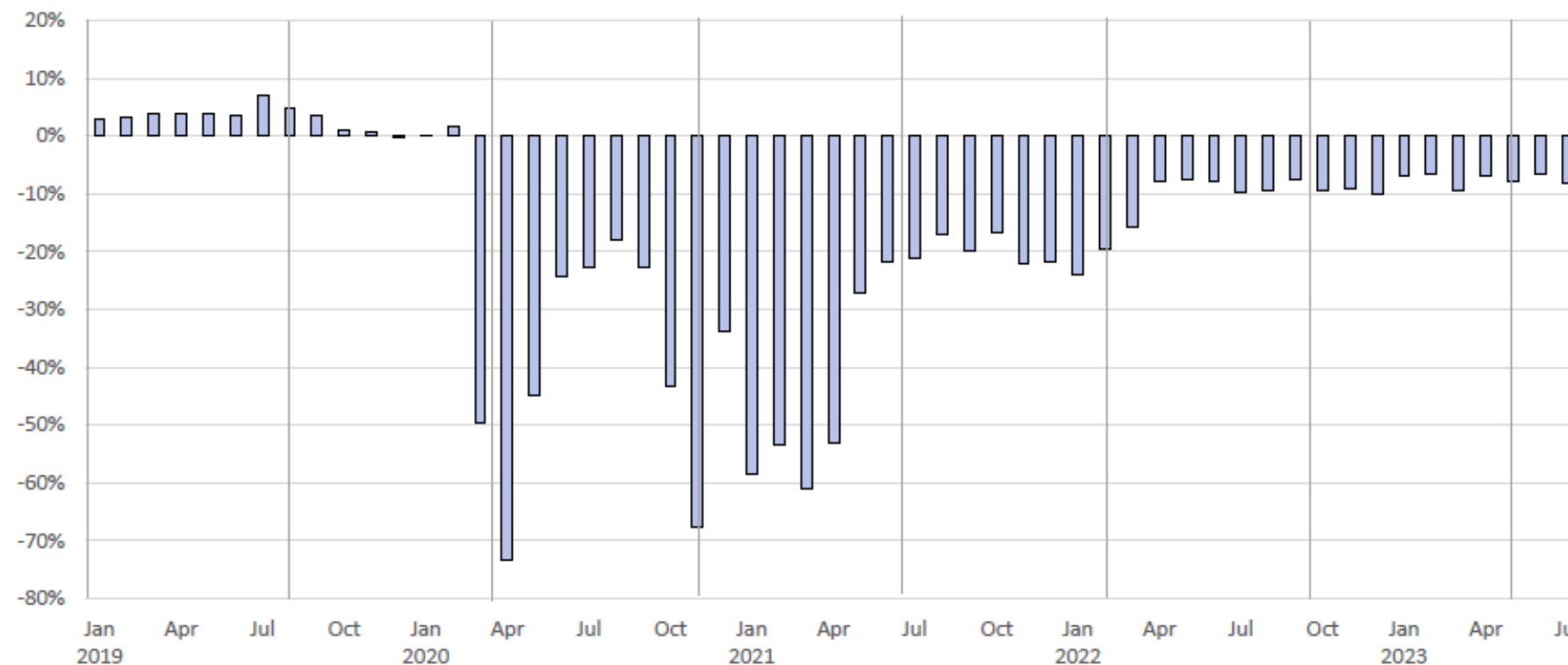
6,0 %

YTD Footfall index **vs. 2022** (8/2023)

-7,5 %

YTD Footfall index **vs. 2019** (8/2023)

Footfall development in a given month (vs. 2019 vs. 2018, further years vs 2019)



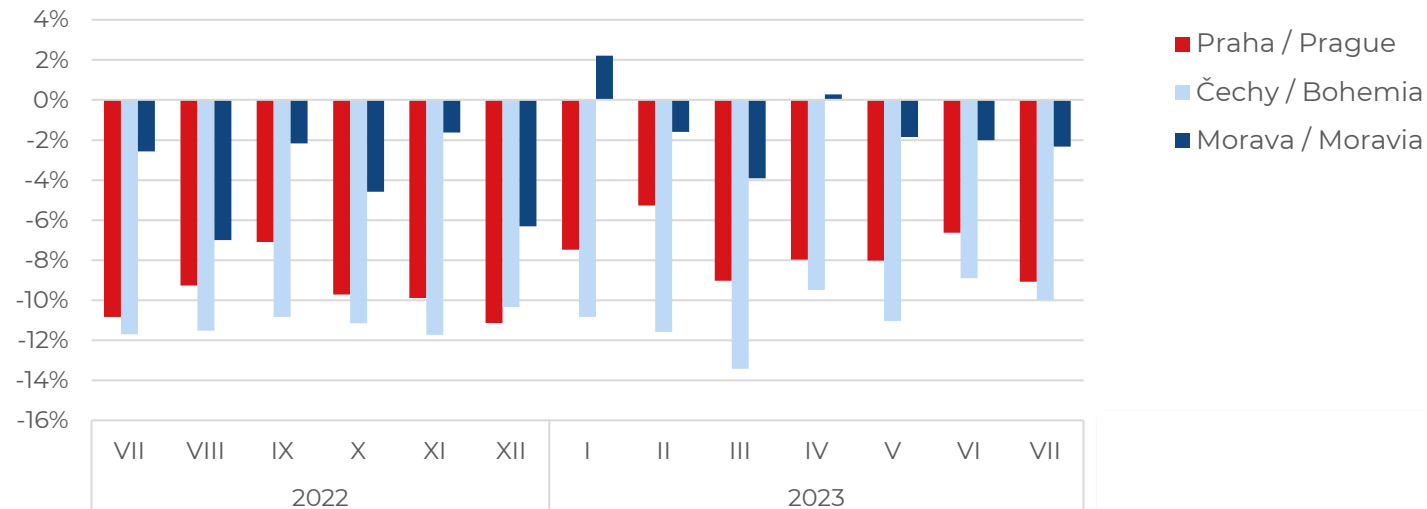
Source:
Shopping centre Index



Moravia and medium-sized SC closest to 2019



Footfall index by location
vs. 2019

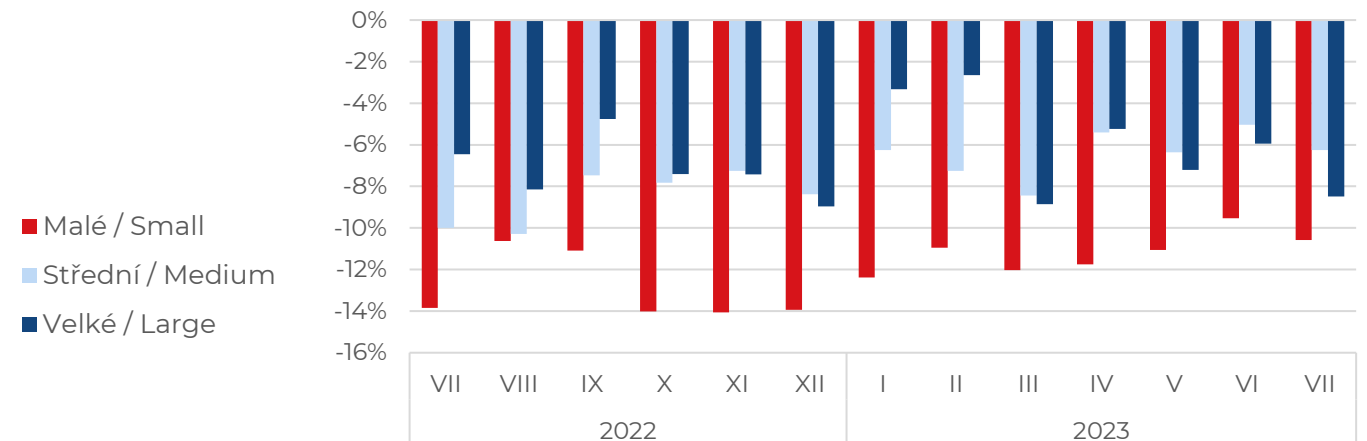


➤ The shopping centres in Moravia and medium-sized projects are the closest to the pre-pandemic levels.

Source:
Shopping centre Index



Footfall index by size
vs. 2019



Turnover up from last year, while significantly higher than H1 2019 in nominal values



21,3 %

YTD Turnover index **vs.**
2019 (1HY 2023)

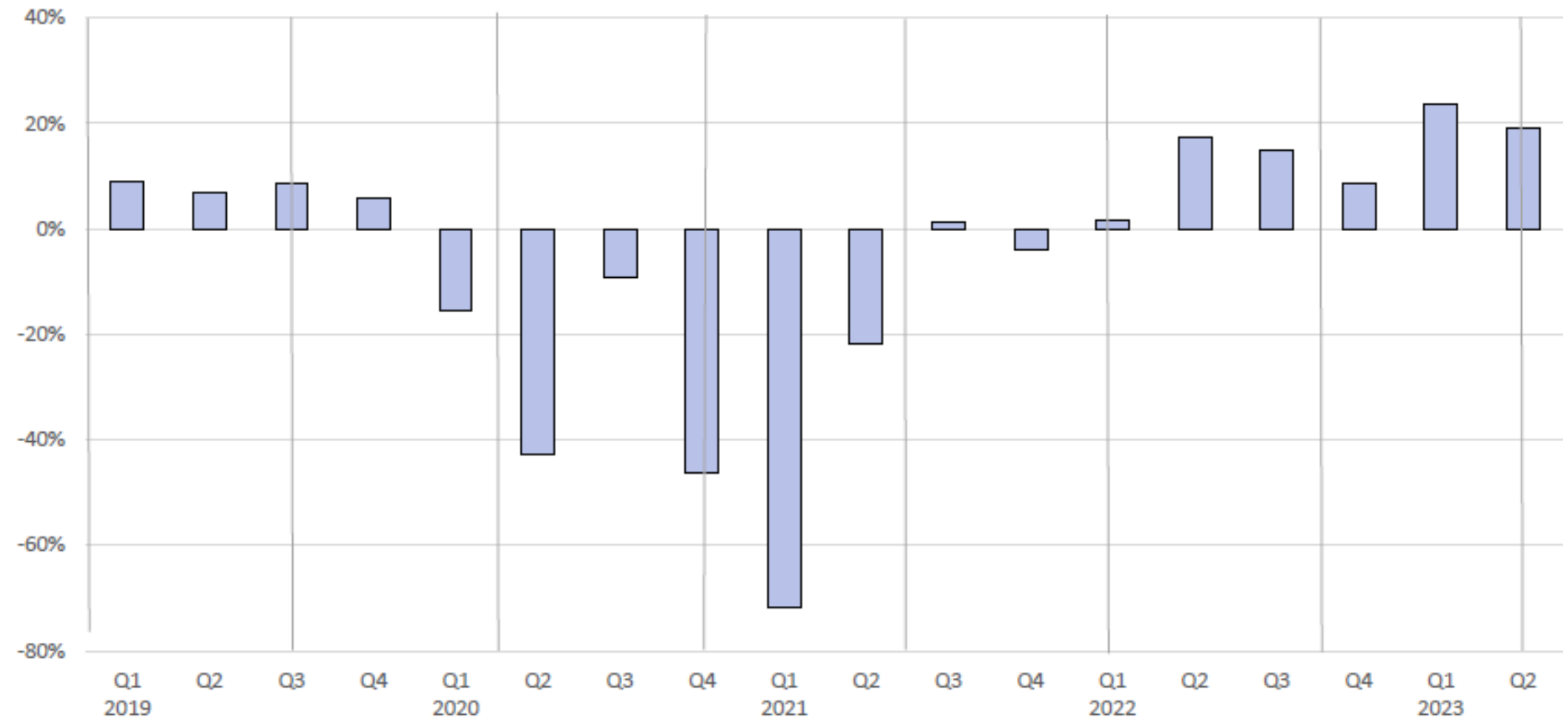
10,3 %

YTD Turnover index **vs.**
2022 (1HY 2023)

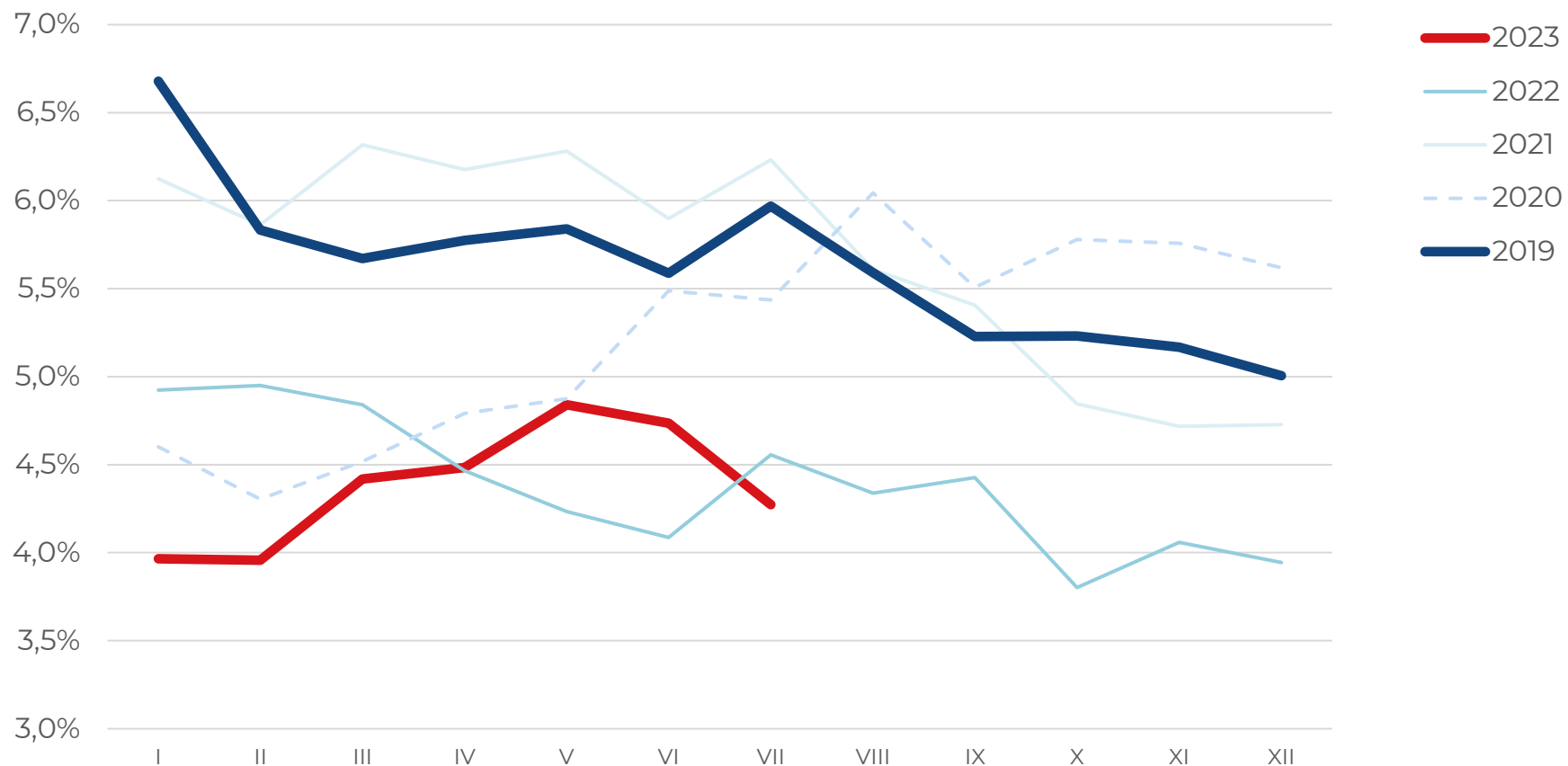
Source:
Shopping centre Index



Turnover index – year-on-year development by quarters
(vs. 2019 vs. 2018, further years vs 2019)



Vacancy rate lower by 1.5% from 2019 and recently below 4,3%



- Since Q4 2021, the vacancy rate keeps quite low, oscillating between 4-5% of unoccupied leasable space.
- Currently it reaches 4,0% in Prague and Bohemian regions, while 5,1% in Moravia.
- In small centres it lies at around 3% while in the large ones at 6% on average.

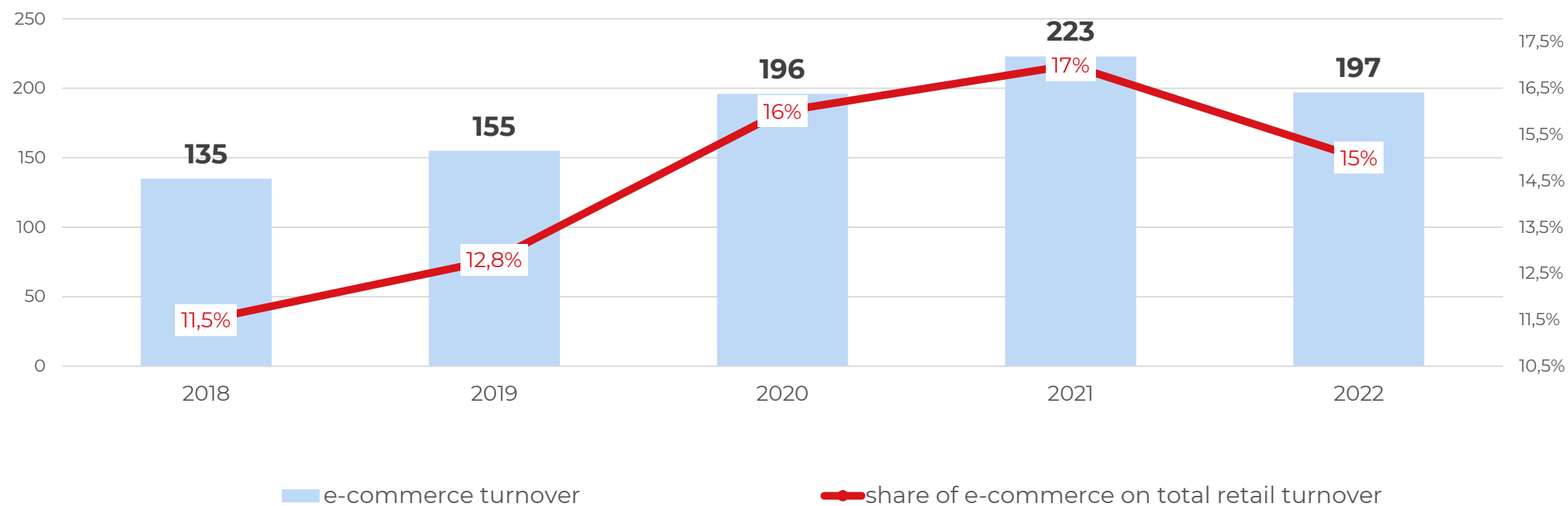
Source:
Shopping centre Index



On-line 1st time decreased, customers almost back to off-line



Development of Czech e-commerce turnover and its share on total retail turnover
(turnover in CZK billion, share in %)



Source: APEK, Heureka.cz