

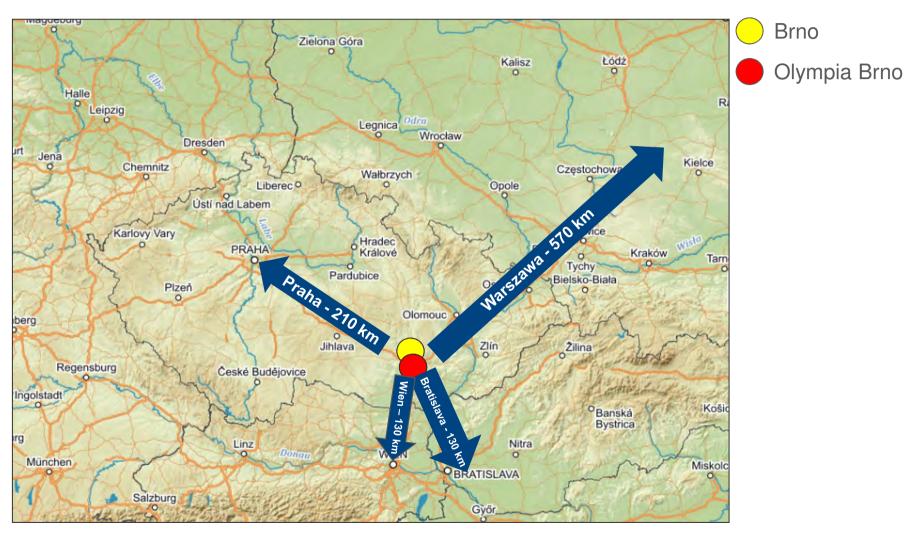
OLYMPIA BRNO

Deutsche EuroShop Real Estate Summer 2017

Brno I 4.9.2017

Location





Location

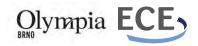




Brno city

Olympia Brno

Key Facts – Macro Economic Data



Catchment area

1.175.222 inhabitants

Population of Brno

377.440* (in addition 80.000

students)

Unemployment rate South Moravia

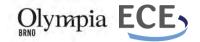
3,60 %*

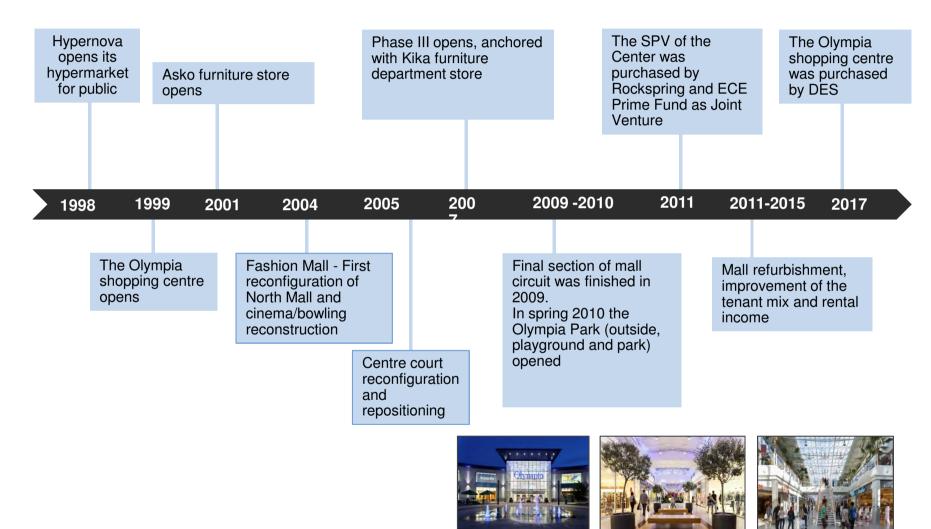
Av. income gross South Moravia

€ 1.000 (CZ: € 1.032)*

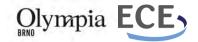
^{*} Czech Statistical Office

Key Facts – Development Phases





Key Facts – Development Facts



200 stores

Total number of car parking spaces = 4.000



Total rental area = 85.000 sq.m.

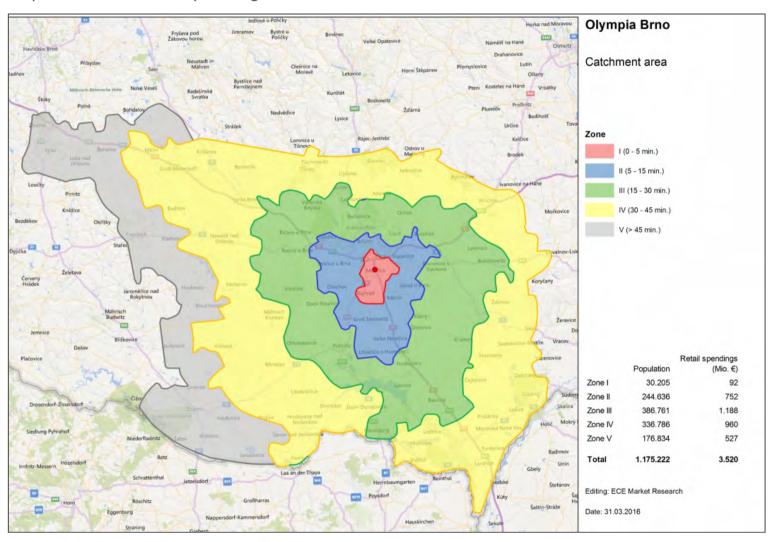
Total developer's area (incl. Olympia Park) = 350.000 sq.m.

Working opportunities = 1.000

Catchment Area – Dates and Facts

Olympia ECE

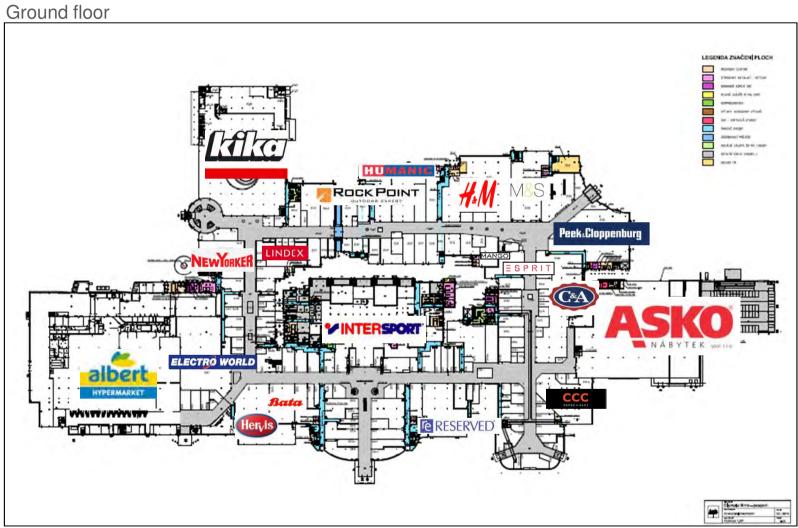
Population and retail spending



Population and retail spending

Mall Guide (Shopping Mall)

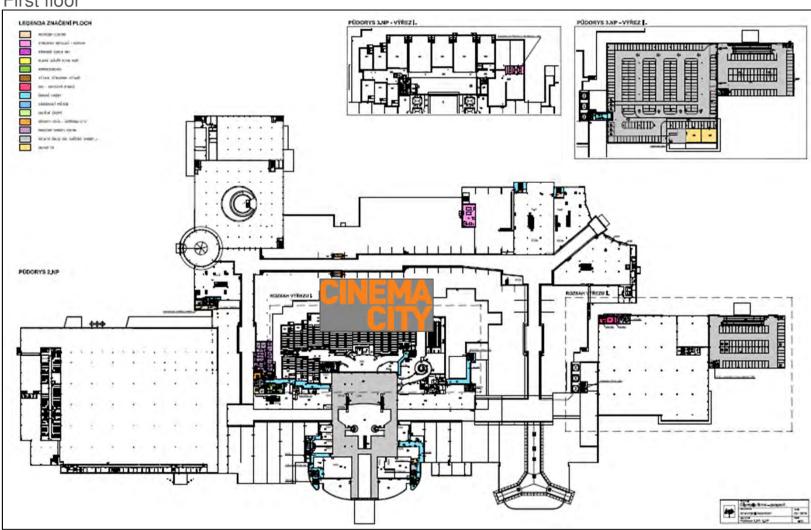




Mall Guide



First floor



Competition Overview





- Olympia Brno
- Galerie Vaňkovka (37,000 sqm, 132 Shops)
- 2 Avion Shopping Park (60,410 sqm; 66 Shop incl. Ikea, potential extension +15,000 sqm 10-15 shops)
- 3 SC Futurum (28,000 sqm; 65 Shops)
- 4 Královo Pole (21,000 sqm; 79 Shops)
- 5 Campus Square (20,000 sqm; 57 Shops)
- 6 Tesco (20,000 sqm)
- 7 Retail park Modřice (65,000 sqm, currently Decathlon, Möbelix and XXXLutz only)

Potential new sizable retail projects:

- 8 Aupark I+II (71,000 sqm, under development since 15+ years)
- 9 Galerie Dornych (current Tesco, approx. 35,000 sqm)

Galerie Vaňkovka



Leasable Area: 37.000 sqm

No. of Shops: 132

Anchors: P&C, C&A, H&M, Hervis, Albert, New Yorker, Bershka, Pull&Bear, Stradivarius,

Reserved, Humanic

No. of Shopping Floors: 2

No. of Parking Spaces: 1.000

Opening: 2005

Owner: HGA

Managing co.: ECE Projektmanagement Praha, s.r.o.





Avion Shopping Park Brno

Olympia ECE

Leasable Area: 60.410 sqm

No. of Shops: 66

Anchors: Ikea, Electro World, Siko, Tesco, Datart, Jysk, Sportisimo, H&M

No. of Shopping Floors: 1

No. of Parking Spaces: 2.500 (for free)

1998 Opening:

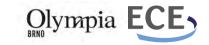
Owner: **Inter Ikea Centre Czech Republic**

Managing co.: **Inter Ikea Centre Czech Republic**





Avion Shopping Park Brno





SC Futurum



Leasable Area: 28.000 sqm

No. of Shops: 65

Anchors: Tesco, Okay Elektro, Jena, Sportisimo, CCC, Bambule, Gate, Pepco, Takko, Kik,

Reno

No. of Shopping Floors: 2

No. of Parking Spaces: 1.500 (for free)

Opening: 2001

Owner: **Atrium**





SC Futurum



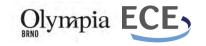
Ground floor



First floor



Královo Pole



Leasable Area: 21.000 sqm

No. of Shops: 79

Anchors: Tesco, Sportisimo, Bata, Reserved, Okay Electro, Deichmann, CCC, Bambule

No. of Shopping Floors: 2

No. of Parking Spaces: 862 (for free)

Opening: 2004

Owner: CPI (since 08/2017)





Královo Pole



Ground floor



Campus Square

Olympia ECE

Leasable Area: 20.000 sqm

No. of Shops: 57

Anchors: Tesco, Hervis, CCC, New Yorker, Marks&Spencer, Humanic, Takko

No. of Shopping Floors: 2

No. of Parking Spaces: 260 outdoor (for free for the first three hours),

360 indoor (for free for first 3 hours)

Opening: 2008

Owner: CBRE s.r.o.

Managing co.: CBRE s.r.o.

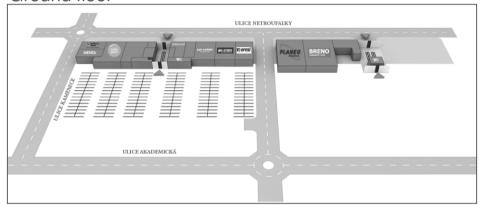




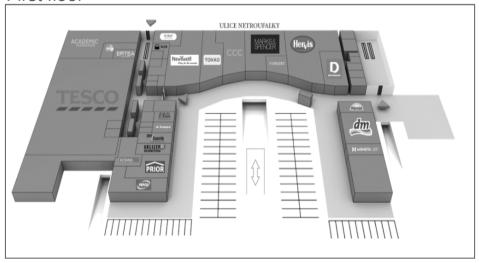
Campus Square



Ground floor



First floor



Tesco – Department Store

Leasable Area: 20.000 sqm

No. of Shops: 65

Anchors: Tesco

No. of Parking Spaces: 363

Opening: Department Store from 1981

Owner: Crestyl (since 08/2017)







Retail Park Modřice



Developer: CTP

Land plot: 255.900 sqm

Total floor area: 65.450 sqm

No. of parking spaces: approx. 3.000

Anchor tenants: sports and leisure retailer

home furnishings store,

hypermarket,

DIY provider,

Current situation: Decathlon opened in 9/2014, Möbelix opened in 12/2016,

XXXLutz opened 5/2017. Opposite to Olympia, will strengthen the

Olympia location.

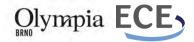






IMPLEMENTATION OF MARKETING ACTIVITIES

Typical Customer



Fashion remains the main target of shopping

Lives in a household of 3 people or more (59 %)

Woman 50%

82.0 % of visitors use restaurants and cafés in the Olympia centre

In 81 %, the customer is younger than 49, mostly 20 - 39 (55 %)

New Yorker, H&M, Peek & Cloppenburg and Bambule are four most popular shops in the Olympia centre



80 % of our customers arrive from the catchment zones under 30 minutes of travel time.

57% of all customers are oriented for first class shopping, good services, fast and usefull shopping and high fun factor - entertaiment.

The monthly net income of the household: less than €1,500 (20 %), €1,500 to €2,500 (42 %), more than € 2,500 (22 %)

In 42 %, the customer visits OCB at least once a month, and in 64 %, he or she stays in the centre for more than 2 hours







THANK YOU FOR YOUR ATTENTION