



NewsNetwork

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JUNE 2020



SHOPPING IN THE NEW NORMAL



Evolving into new habits and the new norm.

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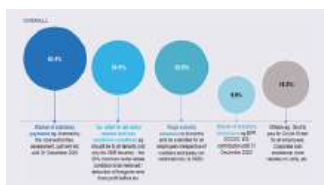
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President's Message



RE-set, RE-boot, RE-focus, and RE-emerge stronger and better!

Dear members,

The whole world, as we know it, has been completely turned around over the past three months, with untold and unimaginable destruction to the global economy and it has certainly been a wild roller-coaster ride for our shopping malls.

As we cautiously navigate the uncharted waters of the Covid-19 pandemic and its devastating repercussions on businesses, we can only attempt to adapt and transform as the circumstances unravel and develop. From the initial restricted form of lockdowns until the current recovery period, most shopping malls have never been entirely closed as we continue to serve our community with essential services.

The authorities certainly did not have any easy decisions, attempting to balance between health priorities and a stalled economy but we are glad that the overall population as well as businesses have generally fared well with compliance of the necessary Standard Operating Procedures. Not surprisingly and out of necessity, we have all suddenly turned into a nation where washing hands and queueing up are the norm, a great improvement from our previous practices.

However, more importantly, all malls have a critical struggle in the attempt to keep cash flows viable over the next few months, with a significantly reduced income coupled with continually increasing operating costs. In addition to electricity discounts, our industry undoubtedly and desperately needs more substantial financial assistance from the government for which, to date, we are still awaiting.

As landlords, malls have been urged to assist tenants with rental relief but this must be concurrent with self-rescue as we all need to share the burden and work jointly in order to revive and survive. Apart from rental adjustments, and more importantly, most malls also work with their tenants to offer marketing assistance and the industry as a whole looks forward to collaborate with related government agencies for nationwide programmes to restart the shopping cycle. Much needed now is shopping tourism from domestic travellers and later on from the international arena as the travel industry recovers.

In every crisis, there are opportunities for change and new prospects so we must always think positive. The entire eco system of the shopping industry situation is in a state of constant change, even more so with this unprecedented pandemic, so the key is for malls to be flexible and adaptable. Online shopping has increased but we are confident that malls will survive and are here to stay. It is not easy to simply replace visiting malls as part of our lifestyle and we are buoyed to note that a new mall opened their doors early this month in Johor Bahru.

Now as we begin the journey of recovery, footfall, although increasing gradually, is still below par but it will probably take until end of this year before we achieve pre-pandemic and pre-Movement Control Order levels.

Just RE-set, RE-boot, RE-focus, and RE-emerge stronger and better!

Thank you.

A handwritten signature in black ink, appearing to read 'Teo Chiang Kok'. The signature is stylized and fluid, with a large loop at the end.

TAN SRI DATO TEO CHIANG KOK
President

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WHAT'S NEW



The newly opened PMP has ample parking for shoppers

Paragon Market Place opens in JB

The new Paragon Market Place (PMP), strategically sited at the commercial area along Jalan Tampoi in Johor Bahru (JB), Johor braves its soft opening on 6 June with 75% occupancy while Malaysia's Conditional Movement Control Order (CMCO) was still on.

It is a joint-venture project between Joland Group and Kuopacific Group with the joint-venture company known as Chempaka Logistik Sdn Bhd.

Joland Group Executive Director Dato' Sri Godwin Tan Pei Poh says although PMP has secured 90% occupancy from its tenants, the remaining retail units will be opening in stages as the CMCO had affected its tenants' fit-out schedule.

In preparation for PMP's opening, Tan assures, "We are strictly adhering to the standard operating procedures imposed by the National Security Council and the local authorities such as Majlis Bandaraya Johor Bahru. They include social distancing and temperature screening to ensure the safety and health of our shoppers, retail partners and employees."

He adds, "We have in total 70 tenants taking up 144 of retail units in our three-

storey building, which has a net lettable area of 157,247 sq ft. Our mall offers a variety of goods, ranging from household items to fashion as well as food and beverages to meet the surrounding communities' daily needs."

They include nearby residential developments such as Kampung Melayu Majidee, Taman Gembira, Kampung Ungku Mohsin, Larkin, Taman Damansara Aliff and Bandar Baru Uda.



PMP's anchor tenant

Apart from its anchor tenant, TF Value-Mart, which occupies 51,156 sq ft of PMP's retail space, Tan says, "We are encouraging both the local small- and medium-sized enterprises (SMEs) and newcomers to join us.

"We hope to boost the local economy and increase employment by opening up such business opportunities to the SMEs."

"We can be accessed via major highways such as the Tebrau Highway, Pasir Gudang Highway, Jalan Skudai and Eastern Dispersal Link, which is 15- minutes drive from the JB City Centre," Tan elaborates.

Besides being located along the Muafakat Johor bus route from Terminal Johor Jaya to Larkin Sentral, the KTM Komuter also passes by our mall, whose façade reflects a railway station, quips PMP Manager Cynthia Lim.

"The mall also provides 700 free parking bays for our shoppers," she adds.

COMING SOON

35th Annual General Meeting

Do look out for the new date for our 35th AGM, originally scheduled on 21 March 2020 and subsequently postponed due to Movement Control Order (MCO) regulations following the Covid-19 pandemic. We do look forward to meet you and to share your experiences of the current shopping mall scenario which has resulted in many new and compulsory SOPs.



WATCH OUT for our VIRTUAL Teh Tarik Talks!

Yes, we are carrying on and going virtual for our talks including "virtual teh tarik" which means you would need to provide your own teh tarik :). With our new model of bringing fresh ideas to the mall industry, members will be able to join in the online platform with multiple complimentary registrations.

Watch out for our announcements for the following topics which will be on board soon:

23 June One Mall One Registration for Multiple Stores Check-ins

To improve the shopping experience at malls and to adapt to the new normal with ease, ServeDeck has introduced a ONE MALL ONE REGISTRATION solution for check-ins at multiple stores. The manual processes of recording and monitoring customers' and tenants' data inclusive of body temperature are digitalised, with specific reports auto differentiated as customers, tenants or staff. This will certainly eliminate the hassle of multiple temperature checks etc for shoppers at the same mall so they can engage in more productive retail therapy. Keeping communities safe at the malls!

8 July Enhance Your SOPs with Disinfection Stations

Disinfection Stations can be used as an added preventive measure to stop the spread of deadly viruses in the new normal. Simple, safe and easy to use for both staff and shoppers, they provide 360 degree total body disinfection as compared to sanitising our hands only. With the extra protection and prevention from contracting virus infection, they will build confidence on hygiene and sanitation so the public can shop with confidence and peace of mind.

21 July Building The Mall of the Future in the New Normal

Our speaker will be Mr Tim Liew, a serial entrepreneur/speaker with over 16 years of experience in the retail design industry and co-founder of Visata Creative Sdn Bhd, who will share design trends to ensure that brick-and-mortar presence stays fresh and up-to-date to meet customers' needs, as well as complying with current social distancing requirements. This TTT will also cover the current challenges faced by mall owners.

Regional Meetings 2020

Out of necessity and expediency, we are now following the current trend of having online meetings, especially for members outside the Klang Valley. Several regional meetings have been planned as usual for 2020, and we had our inaugural online and combined meeting for Sarawak and Sabah malls on 21 May. It was a fruitful meeting where, with online accessibility, we could also share regional updates from the Northern and Southern regions together with malls in East Malaysia in one go - altogether in one big happy family!

Of course, the hot topic was the negative impact of Covid-19 and the MCO/CMCO on shopping malls, and as we all felt all along, we are much encouraged to know that a recent online survey reinforced the fact that Malaysians felt "malls are here to stay!"



Meeting attendees included PPK President, Tan Sri Teo Chiang Kok, VP1 Phang Sau Lian, members from Kuching, Kota Kinabalu, Sandakan, Klang Valley and of course, our regional representatives, Sarawak's Datin Christine Ling, Sabah's David Lau, Zahayu Shima from Johor and Peter Chan from Penang. While we miss the local food and camaraderie amongst fellow industry practitioners, this may be the way to go in the new normal of organising meetings.

Peeking a little forward, our next regional meetings will be as follows (subject to confirmation):

July	Northern Region
November	Southern Region

INDUSTRY NEWS

Music Rights Malaysia (MRM)

MRM has announced to member malls that they will undergo a members' voluntary winding-up exercise as part of a corporate restructuring exercise to be undertaken by them. As PPKM has a current agreement with them until 31 December 2023, we have advised members to put on hold MRM's request for mutual termination of malls' individual agreements pending further verification by our legal advisors. Together with the joint 'user group' comprising other like-minded developers, hoteliers and retailers, we have appealed to the authorities to retain a single entity for music copyrights and will keep members informed of future developments.

Certification Course in Shopping Mall Management

Due to the current circumstances, we have taken the difficult decision to postpone all our courses in shopping mall management until next year. Therefore, all candidates who have completed Part 1 & 2 of the various modules and are eligible to undertake Part 3 will now be automatically accorded an extension of 12 months, ie their eligibility period will now be 48 months (instead of 36 months). So do keep safe and well, we shall see you again in April 2021.

PPKM AWARDS 2020 for ★ 'BEST EXPERIENTIAL MARKETING'

We very much regret to inform that due to the extenuating and unprecedented circumstances of the ongoing global pandemic and the recent MCO/CMCO whereby malls are unable to organise their usual marketing events and promotions, we have no alternative but to discontinue the above for 2020.

Needless to say that Covid-19 has badly disrupted all on-going programmes but with the way to recovery being open under the Recovery MCO from 10 June, we are hopeful that the situation will improve from third quarter of this year and to carry on with the PPKM Awards next year. Looking forward to work with our members on this event again in 2021!

Shopping and Retail Post MCO/CMCO

By Ir. YL Lum



On March 16, 2020, Malaysia's Prime Minister made an announcement to implement 14 days of Movement Control Order (MCO) but 48 hours later, this was subsequently extended thrice until 3 May 2020, a totally unprecedented government order as a prevention and control of Covid-19. This was followed by the Conditional MCO until 9 June which all resulted in a devastating impact on the economy and sociological well-being of the country in whole new ways - it shocked the entire system.

Buy More

In the beginning, the news prompted many to start hoarding up on daily essentials - overnight, supermarkets and convenience stores suddenly had booming business and literally ran out of supplies of most things - from dairy products to toilet paper. The panic buying extended from brick-and-mortar to online stores. The frenzy was mainly founded on the fact that a large population of Malaysians had never experienced anything close to MCO (the closest thing to it was the curfew during May 13, 1969). Added to the confusion over the extent of the "lockdown", people just went on buying "everything", that resulted in sudden shortage of food supplies from the rack. "Empty racks" visuals and posts in social media further induced fear amongst consumers to even buy and hoard more without checking if they can fit so much groceries inside their own refrigerators. After this fiasco, most Malaysians have now become more tech savvy at buying online; besides this, many would be more efficient and much more savvy to know when to buy things in the right quantities and the right timing to minimise leaving the house and exposing themselves to the virus. And most

importantly, more men now learned to buy groceries and finally, started to read expiry dates.

Grocers & Logistics

Empty racks automatically trigger the upper stream in the supply chain to expedite production and that, too, went along with more efficient and aggressive logistic flow. With the MCO and CMCO in place, shops, warehouses and delivery personnel are very much restricted in the usual flexibilities that they used to enjoy in the past. This prompted further synergies among stakeholders in the supply chain to modularise the groceries in packages, market them online and have them delivered to consumers' homes or some pre-designated pick-up points. This is not new, but has become vital under the MCO/CMCO period, making it an effective means for grocers to go online.

Grab, Panda & Lazada and more

Besides the medical personnel frontliners, these delivery services are the heroes during this MCO/CMCO period, keeping the blood flowing in the city. Meals, merchandise and even some daily essentials are still able to be transacted in the market place and we are very much thankful to this new era of e-hailing and e-delivery services. Life still goes on, though not perfectly, but still, things keep moving instead of being at a standstill. Traditional eateries and cuisine such as hawker food, roast duck, even steamboat, too are forced to go online, modularise their offerings and sell online bundles within the delivery mechanism.

Hawkers & Coffee Shops

On the first day of the MCO, hawkers at coffee shops remained open, except they only do "da-bao" (take-away), without any sit-in dining. Aunties and uncles donned their masks and carried on preparing their curry laksa and kuay teow soup in the usual manner; the customers walked in and took their food packs along with their daily dose of coffee, except in the form of "ikat-tepi". Without having the hassle to clean up the crockery and utensils, that is a whole new experience by many traditional

hawkers, maybe an unusual relief in the few decades of their hawker's lives, too. People are still trying to get used to this new lifestyle of morning take-away for their usual breakfast session and having their roti canai supper or dinner at home without being physically present at the mamak stalls.

Restaurants & Bubble Tea

There are mixed experiences amongst the mainstream restaurants. The ones primarily selling the dine-in experience would be very much disrupted, and overheads on staffing and real estate could be detrimental. For those who already had menus suitable for take-out or online, they still carried on business as usual more easily, except that they had to acclimatise themselves to the new dine-in vs take-out ratio of 0%:100% instead of the normal 15%:85%.

Everyone from factories, distributors to consumers in the whole supply chain is still learning to adapt and change in order to stay in business during this MCO/CMCO period. Whilst no one is sure when this will be over, many during this period have learned to supply, shop and deliver goods via online and we are all compelled to be tech savvy in order to get things that we want while staying at home. Traditional suppliers are now compelled to work with new forms of e-logistic partners and payment gateways in order to sell their goods and accept e-payments instead of cash. Some ask, now that more shoppers have gotten used to shop online, will that impact the brick-and-mortar shopping estates once this MCO/CMCO is over?

According to an online survey organised by The EdgeProp in April/May to gauge consumers' perception towards shopping malls, it is heartening to note that 82% of the respondents still want them. Shopping trends have definitely changed since the onset of the global pandemic but one thing for sure, malls will evolve yet again to keep up with their shoppers' preferences. The impact of Covid-19 will see a definitive shake-up and big changes for retail and shopping malls, with many current players being forced to leave the industry for more reasons than one. Even as we are now in the recovery stage, we are still unable to see through the crystal ball, but to touch our hearts, the very first thing many may want to do right after the MCO is to drive over to our favourite mall and sit down there to have a coffee for in the end, we are all social beings.

Shopping in the New Normal

Covid-19 is a historic global tragedy still in the making, upending and shaking up the whole world as we know it. For those of us working in shopping malls, the business of malls will never be the same again, indeed our entire lives will never go back to the previous 'normal', so it is best if we all adapt to the new normal as fast as possible.

The shock waves started to hit our industry as the Movement Control Order (MCO) was announced effective from 18 March when all non-essential services had to close. Movement was severely curtailed but malls remained open, albeit partially, only for essential services like groceries, food & beverage and later on, hardware etc. This resulted in several malls without these essentials having no option but to close, including even those who deemed it impractical to maintain almost the entire mall's operations for only a small percentage of businesses. As it turned out, the MCO was eventually extended until shopping malls could open more fully from 4 May 2020 under Conditional MCO (CMCO) and here we are today under the Recovery MCO (RMCO) stage.

To enable malls to open for business, there were a whole plethora of Standing Operating Procedures (SOPs) which require strict compliance by mall management, tenants' shops as well as shoppers for the immediate next few months and much longer. All parties have been most understanding with their close cooperation and collaboration so that malls and shops can carry on businesses in a safe environment, enabling shoppers to shop with peace of mind.

Standing Operating Procedures (SOPs)

We share a pictorial collage of how shopping is now being practised in malls, evolving into new habits and new norms.



To manage the required SOPs of temperature checks, hand sanitisation and contact tracing, malls have introduced multiple ways of compliance from basic manual procedures, hand sanitation and thermal scanning to technology involving in-house proprietary apps with QR codes which reduce the hassle of checking in for the same procedures at multiple shops within the mall



To eliminate crowding, social distancing markings are put in place at concourse seats, customer service counters, ATMs and car park payment kiosks



With social distancing in mind, the new normal for shoppers now involves queues, queues and queues but for the inveterate shopper, it's fine, even if it is only for groceries and other essentials!



For food delivery services, there are designated waiting areas for delivery riders where social distancing is enforced and this minimises riders' close contact with shoppers



At the back-of-house, M&E technicians have enhanced cleaning and sanitation practices for air-conditioning equipment and mechanical ventilation. Using disinfectants and chemical treatment, this ensures a circulation of healthier air quality



The Personal Touch: Social distancing officers remind shoppers in the mall to maintain social distancing



The use of lifts and escalators is also regulated by social distancing principles and are re-configured to keep shoppers at least 1 meter apart. So when you tread onto the escalator - no holding hands, just count 1-2-3 steps



Washrooms are disinfected regularly and deep cleansed after operating hours. The number of shoppers visiting the washrooms is controlled and there is a sweet reminder on the recommended way to wash hands



To encourage contactless transactions, shoppers can order, pay online and just pick up their merchandise from designated stations – an added convenience for shoppers in a hurry



Most events at malls' concourse areas have been put on hold except for community-based ones like blood donation drives, which were greatly needed especially during the fasting month just past



Awareness and mutual collaboration are central in promoting and maintaining hygiene and cleanliness, both essential to combat infections



Time for creative solutions – check out this very novel idea of placing mannequins to lessen available seats at the common area ... with fashion items for advertisement at the same time!

Apps, Apps and More Apps

There is a whole slew of apps and QR codes out there, so shoppers are spoilt for choice to the extent of mild confusion. All these apps have been developed for contact tracing with 1 Utama being the first mall to launch their proprietary Health QR App for staff, shoppers and tenants. Once users have their temperatures checked at the malls' entrance, they complete the online health declaration form and receive a Green QR Code which is recognised by shops in the mall. Other malls' apps work similarly, with Mid Valley Megamall offering shoppers a Day Pass. For other malls, there are vendors out there who have developed generic apps which may be used in malls and other buildings.

MySejahtera is the first Covid-19 monitoring app in the country developed by the government where users can perform health self-assessment and keep tabs on information and statistics on the pandemic.

They then developed MyTrace to complement MySejahtera, tracing contact persons who are close to another app user who is Covid-19 positive. The government's third app is Gerak Malaysia, essentially used for interstate movements. In view of all these, having a smart mobile phone is more essential than ever.

Other government authorities have also introduced their own apps like Dewan Bandaraya Kuala Lumpur (DBKL)'s KLStep; Selangor state government's SELangkah and Penang's PgCare. SabahTrace operates in Sabah and Sarawak has two apps, CovidTrace and Qmunity.

Patterns of Change

Recent statistics show that consumer purchase patterns have changed radically since MCO started, with the majority spending on essential food and household items. This means that retailers need to adapt and adopt new business strategies and refocus their directions in order to recover and survive, ultimately impacting

on the tenant mix in malls. There are already several well-known overseas retailers that have gone into administration, signaling alarm bells and definite changes in future tenancy mix.

For shopping malls and retail in the new normal, operational changes now include the heightened use of contactless transactions, discontinuation of free taste samplings, make-up trials and fittings for fashion wear. There is also reduction in capacity necessitated by social distancing and density of congregations, leading to businesses becoming less viable due to decrease in footfall and sales volume.

On the plus side, we will see more advanced use of technology and Artificial Intelligence (AI) for example for robot patrols in security and other relevant operational areas.

The only constant in shopping malls is change with both malls and shoppers evolving yet again to accommodate the new normal!

Photos credits: 1 Utama; City Mall, Kota Kinabalu; fahrenheit88; Sunway Malls; The Spring, Kuching

Online Webinars

Following the new normal of online events, our affiliate members from Knight-Frank Malaysia Sdn Bhd and Stratos Consulting Group organised a series of webinars dubbed as Frank Talk! with our collaboration.

27 APRIL | EPISODE #1: Back to Business!

The first session explored how Malaysian malls will get back to business after the MCO in consideration of enhanced health SOPs and the next major shift in the mall concept.



Clockwise L to R from top left corner:

- Tan Sri Teo Chiang Kok, PPKM President/Director, 1 Utama Shopping Centre
- Tina Leong, Managing Director, Stratos Consulting Group
- Moderator: Ben Ooi, Associate Director of Retail Consultancy, Knight Frank Malaysia
- Yuen May Chee, Associate Director, Knight Frank Property Management for Sungei Wang, The Shore and Jesselton Mall
- Kan Ky-Vern, Executive Director, DPulse Shopping Mall

6 MAY | EPISODE #2: Post Covid Lockdown Reality in China & UAE Malls

How are things really happening for malls in China and the United Arab Emirates as they respond, recover and reinvent themselves? In Dubai, we learnt there are new limits on trading hours and shoppers which included a cap of 30% capacity while footfall at Parkview Green is still in recovery mode but increasing on a daily basis.



Clockwise L to R from top left corner:

- Ashish J., Head of Leasing & Mall Operations, First Choice Commercial Brokers LLC, UAE
- Moderator: Tina Leong, Managing Director, Stratos Consulting Group
- Larry Xu, Sales & Marketing General Manager, Parkview Green FangCaoDi Beijing
- Ben Ooi, Associate Director of Retail Consultancy, Knight Frank Malaysia

For those who have missed the above, you may still access the video link here for both Episodes #1 and #2 : <https://bit.ly/2VUPOM4>

1 JUNE | The Breakfast Grille

PPKM President Tan Sri Teo Chiang Kok was recently interviewed on air with BFM Radio together with Datuk Seri Garry Chua, President of Malaysia Retail Chain Association. Topics discussed included the current challenges of shopping malls and retailers and how both mall management and retailers are coping with the compulsory Standard Operating Procedures of doing business. The session also explored what more needs to be done to help the industry to recover and survive in the new normal and what the future has in store.

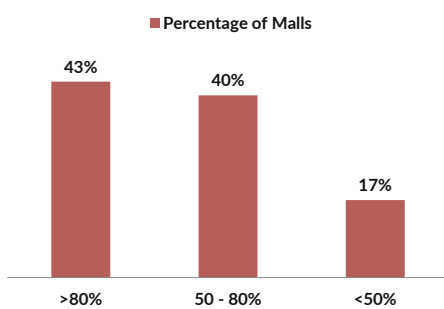
For those who missed it, you can catch up with the podcast here: <https://www.bfm.my/podcast/morning-run/the-breakfast-grille/retailers-big-and-small-are-suffering-plead-for-more-govt-help>

21 MAY | The Covid-19 Learning Experience with China Malls

Senior PPKM representatives recently had an invaluable learning experience with China mall industry practitioners from Beijing, Wuhan and Shanghai, learning about their action plan and strategic planning for restarting the economy and shopping malls. These included giveaway shopping vouchers and live streaming sales including for luxury brands with celebrities.

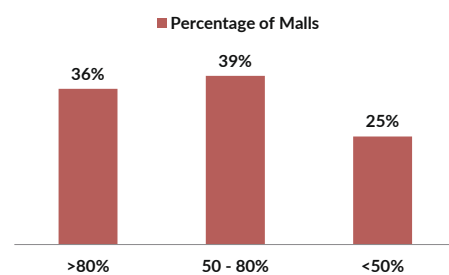
Key statistics of the China mall industry during their Covid-19 experience from March – April 2020 include the following:

Decrease in Average Sales



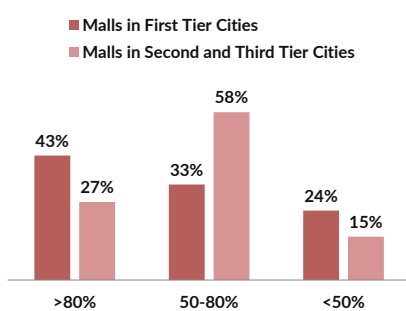
Decrease in Average Sales	% of Malls
> 80%	43%
50 - 80%	40%
< 50%	17%

Decrease in Average Rental Income



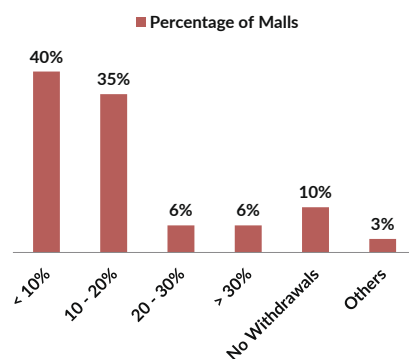
Decrease in Average Rental Income	% of Malls
> 80%	36%
50 - 80%	39%
< 50%	25%

Decrease in Footfall



Decrease in Footfall	Malls in First Tier Cities	Malls in Second and Third Tier Cities
> 80%	43%	27%
50 - 80%	33%	58%
< 50%	24%	15%

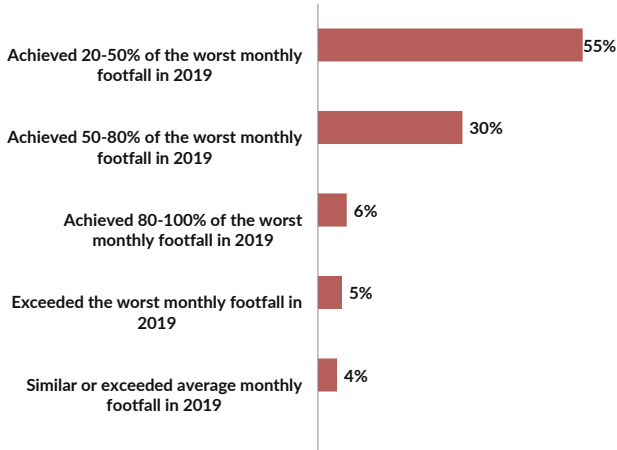
Tenancy Withdrawals (excluding expired tenancies)



Tenancy Withdrawals (excluding expired tenancies)	% of Malls
< 10%	40%
10 - 20%	35%
20 - 30%	6%
> 30%	6%
No Withdrawals	10%
Others	3%

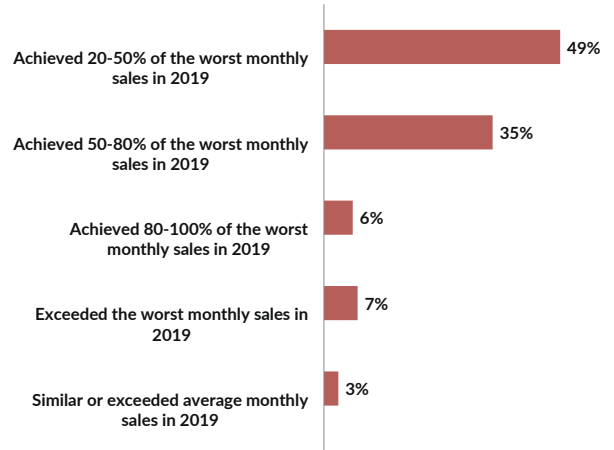
Footfall

■ Percentage of Malls



Sales

■ Percentage of Malls



Footfall	% of Malls
Similar or exceeded average monthly footfall in 2019	4%
Exceeded the worst monthly footfall in 2019	5%
Achieved 80-100% of the worst monthly footfall in 2019	6%
Achieved 50-80% of the worst monthly footfall in 2019	30%
Achieved 20-50% of the worst monthly footfall in 2019	55%

Sales	% of Malls
Similar or exceeded average monthly sales in 2019	3%
Exceeded the worst monthly sales in 2019	7%
Achieved 80-100% of the worst monthly sales in 2019	6%
Achieved 50-80% of the worst monthly sales in 2019	35%
Achieved 20-50% of the worst monthly sales in 2019	49%

The participants included the following:



L to R 1st row:

- Yang Wen Ting, World City Wuhan
- Rachael Tai, Knight Frank Malaysia (coordinator)
- Jia Yao Yong, Yue Xing Group

L to R 2nd row:

- Eunice, Knight Frank Malaysia (coordinator)
- Victor Guo, Mall China
- Tan Sri Teo Chiang Kok, President, PPKM/1 Utama Shopping Centre

L to R 3rd row:

- Low Shu Yik, Stratos Consulting Group
- Song Ruo Jia, Xing Dong Run Group
- William Tang, Assistant Treasurer, PPKM/Mall of Malaysia

L to R 4th row:

- Phang Sau Lian, Vice President 1, PPKM/Sunway Malls
- YL Lum, Committee, PPKM (moderator)

For the above, this was conducted in Mandarin, but the key takeaways have been translated here: <http://ppkm.org.my/wp-content/uploads/2020/06/Key-Takeaways-The-Covid-19-Learning-Experience-with-China-Malls.pdf>

As we begin heading back to normalcy following the Covid-19 outbreak, many Malaysian malls still face the pressure of weathering out the storms from the movement control order (MCO). To support shopping malls in Malaysia, PPK Malaysia, together with Stratos Consulting Group (Stratos), ran a survey to gather relevant data that may assist in furthering dialogues for additional government aid.

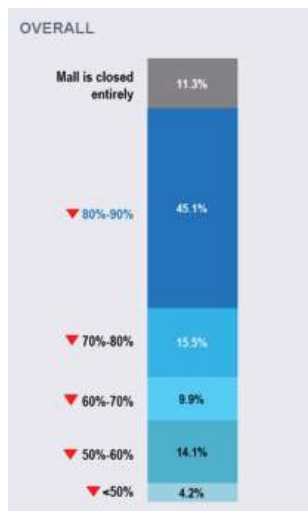
A total of 71 malls across Malaysia participated, with the majority located in Klang Valley and suburban areas. This survey, which ran from 5 to 13 May, included a fair representation of neighbourhood malls, mid-market and upper mid-malls. A large proportion of participating malls sampled had a net lettable area (NLA) of less than 1,000,000 square feet.

Respondent Profile of Participating Malls



With the implementation of the MCO from 18 March, malls were drilled down to just providing essential shopping services. As a result, **45% of the malls** experienced a **dramatic 80% to 90% drop in shopper footfall** compared to six months before the MCO. This drop was seen to be relatively consistent across various shopping mall sizes.

Footfall decrease during MCO



To cushion the economic crisis, the Malaysian government came up with a series of stimulus packages totalling RM260 billion. However, only 14% of the malls found the stimulus package to be quite helpful while approximately **52% felt that it was predominantly unhelpful**. As a result, PPKM was quick to appeal for additional financial relief from the government on behalf of shopping malls, supported by the survey respondents, with **63%** asking for a **waiver of statutory payments**, and **over 50%** requesting for **unconditional tax relief for rental rebates**, and **extended wage subsidies for all levels of employees**.

The Impact of MCO on Shopping Malls

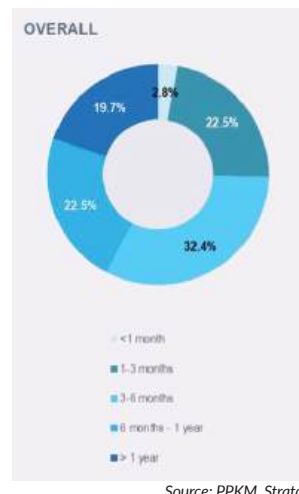
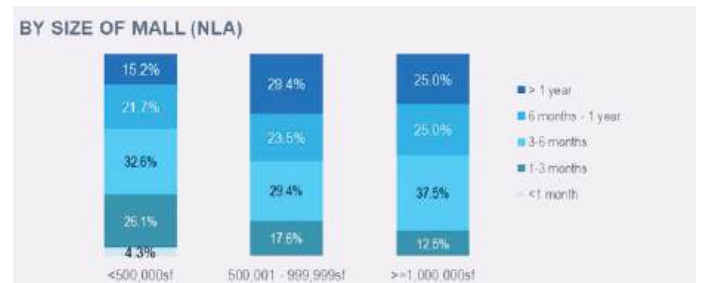
June 2020

Types of Financial Relief Requested by Malls



With limited cash flow, smaller malls especially found it difficult to preserve cash flow while maintaining their workforce during the MCO. In fact, **22.5% of the malls could sustain their current cash flow for only one to three months**, whilst **a third could sustain for an additional three to six months**. Overall, **less than half (42%)** had sufficient cash reserves to persist beyond six months.

How Many Months can Malls Sustain their Cash Flow?

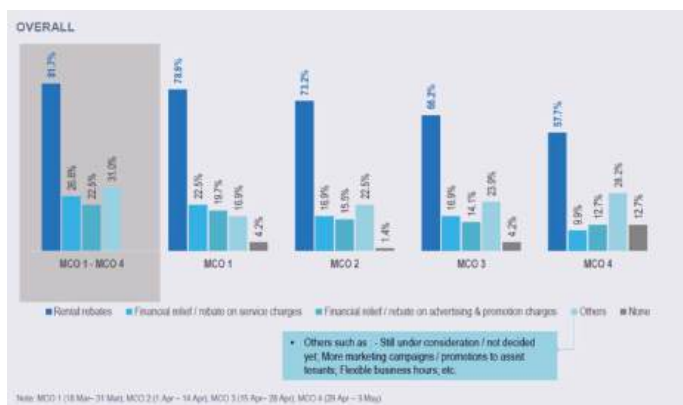


From this survey, other notable suggestions from respondent malls included clearer standard operating procedures (SOPs) for malls and tenants from the government, more rebates and subsidies on utility, rental subsidies from government, financial assistance to landlords, etc. In general, the consensus from malls is that there is still a substantial need for improvement in the government's assistance to support the recovery and sustainability of malls in Malaysia.

To assist their non-essential services tenants, many of whom were obligated to cease operations during the MCO period, the majority or 81% of the mall operators were found to have granted or intended to grant rebates on rental. Although rental rebates gradually declined over the MCO phases, more than 50% of mall operators were still providing or intended to provide rental relief towards the final phase of the MCO. Notably, this declining trend throughout the MCO phases paralleled with the trend of relief granted for service, advertising and promotion charges.

A lesser 27% had provided or intended to offer rebates on service charges. Most malls still incurred costs such as electricity, lighting, manpower for security and housekeeping during the MCO as they had to keep it open for essential trades such as groceries, F&B and pharmacies. Another 22.5% had provided or intend to offer rebates on advertising and promotion charges during the MCO.

Relief that Malls have Given or Intended to Give



Source: PPKM, Stratos

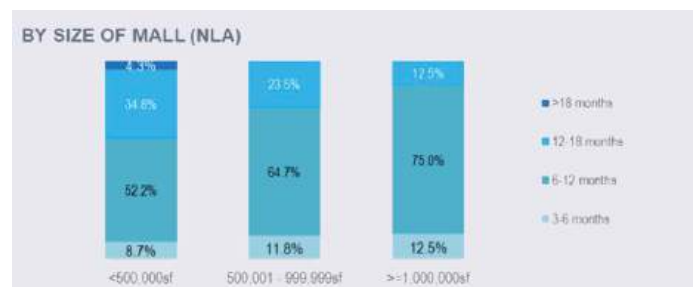
A substantial 64% of the mall operators waived rental (100% rebate) for their non-essential tenants during the 1st phase of MCO (18 to 31 March), whilst 35% to 40% continued doing so until May.

When asked about the spread of relief provided to tenants, approximately 28% were willing to give rebates across the board while the majority (53.5%) gave rebates according to business categories, and another 18% decided on a case-to-case basis.

Apart from rebates, several malls granted tenants with more flexible operating hours and assistance in marketing campaigns to assist the many tenants who had been heavily impacted by the MCO. Many allowed tenants to start business operations later, after 10 am in the morning.

Although many are hopeful for an accelerated resumption of businesses, more than half of the shopping malls thought that it would take six to twelve months before businesses returned to normal after the MCO is lifted. This was again consistent across several regions and various mall sizes. However, about 39% of the smaller malls expected businesses to return to normal only after a year or more. Many malls foresee a gestation period before a full recovery can begin to take place which is why the support from government is vital in speeding the recovery of malls.

When will Shopping Malls Return back to Normal?



Source: PPKM, Stratos



Source: PPKM, Stratos

To conclude, it is certainly disheartening to see the effects of the MCO on malls and their respective tenants but it remains a necessity to ensure the safety and health of the people and our nation. As restrictions begin to lift, malls need all the support they can get to recover from their loss. Retailers and mall operators need to work together to think of more mutually agreeable solutions while our government needs to continue their efforts to help malls overcome these difficult times. Of course, the

current efforts are not without weight; however, more can be and should be done to support malls in weathering out the storms from the MCO.

The above report is prepared by Stratos Consulting Group (Stratos), PPKM's market research partner.

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Asosiasi Pengelola Pusat Belanja Indonesia (APBBI)
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 British Council of Shopping Centres (BCSC)
 Building Management Association of Malaysia (BMAM)
 Council of Asian Shopping Centers (CASC)
 Dewan Bandaraya Kuala Lumpur (DBKL)
 Eastern Regional Organisation for Planning & Human Settlements (EAROPH), Malaysia
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 Hong Kong Trade Development Council
 Institute of Shopping Center Management Ltd (ISCM), Hong Kong
 International Council of Shopping Centers (ICSC)
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Japan Council of Shopping Centers (JCSC)
 Korea Building Owners & Managers Association (KBOMA)
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 Taiwan Council of Shopping Centers (TCSC)
 The Associated Chinese Chambers of Commerce and Industry of Malaysia (ACCCIM)
 The Malaysian Society of Association Executives (MSAE)
 The Institute of Engineers, Malaysia (IEM)
 Tourism Malaysia

MEMBERSHIP 2020

CORPORATE MEMBERS

1 Utama Shopping Centre
1MK Mall
1Shamelin Shopping Mall
3 Damansara
Alam Sentral Plaza
Alor Star Mall
Aman Central
Amcorp Mall
Amerin Mall
Atria Shopping Gallery
avenue K
Bangsar Shopping Centre
Batu Pahat Mall
BBCC
Berjaya Megamall
Berjaya Times Square Kuala Lumpur
Berjaya Waterfront Complex
BMC Mall
Central i-City Shopping Centre
Central Market
Central Square Sungai Petani
Centre Point Sabah
Centro
Cheras LeisureMall
Citta Mall
City Mall
Cityone Megamall
Damen Mall
Datum Jelatik Mall
Dayabumi
DC Mall
Design Village Outlet
Dpulze Shopping Centre
e @ Curve
East Coast Mall
Eastern Mall
EkoCheras Mall
Empire Shopping Gallery
Encorp Strand Mall
Endah Parade
fahrenheit 88
First World Plaza
Freeport A'Famosa Outlet
Galleria@Kotaraya
Gamuda Walk
gateway@klia2
Genting Highlands Premium Outlets
Giant Hypermarket Bandar Kinrara
Giant Hypermarket Banting
Giant Hypermarket Batu Caves
Giant Hypermarket Bayan Baru
Giant Hypermarket Cheras
Giant Hypermarket Kemuning
Utama
Giant Hypermarket Klang
Giant Hypermarket Klang Sentral
Giant Hypermarket Kota Damansara
Giant Hypermarket Kuala Terengganu
Giant Hypermarket Kuantan
Giant Hypermarket Plentong
Giant Hypermarket Putra Heights
Giant Hypermarket Senawang
Giant Hypermarket Seri Kembangan
Giant Hypermarket Shah Alam
Giant Hypermarket Subang Jaya
Giant Hypermarket Taiping
Giant Hypermarket Tampoi
Giant Hypermarket Ulu Klang
Giant Mall Kelana Jaya
Giant Superstore Tunjung
Giant Setapak
Giant Superstore Jerteh
Giant Superstore Kangar
Giant Superstore Kuala Pilah
Giant Superstore Prima Saujana (Kajang)
Glo Damansara
GM Klang Wholesale City
Grand Merdeka Mall
Great Eastern Mall
Green Heights Mall
Gurney Paragon
Gurney Plaza
Harbour Mall Sandakan
Hartamas Shopping Centre
Imago, KK Times Square
Intermark Mall
IOI City Mall
IOI Mall Bandar Putra Kulai
IOI Mall Puchong
IPC Shopping Centre
Ipoh Parade
Island Plaza
ITCC Mall
Jaya Shopping Centre
Jetty Point Duty Free Complex
Johor Bahru City Square

Johor Bahru City Square
Office Tower
Johor Premium Outlets
KB Mall
KL East Mall
KL Gateway Mall
Klang Parade
Kluang Mall
Kompleks Bukit Jambul
Kompleks Metro Point
Kompleks Mutiara
Kompleks Nafas Mall
Kompleks Star Parade
Kompleks Tun Abdul Razak (KOMTAR)
Kota Raya Complex
KSL Esplanade Mall
KTCC Mall
Kuantan Parade
KWC Fashion Mall
Kulim Central
Langkawi Fair Shopping Mall
Lot 10
M3 Mall
Mahkota Parade, Melaka
Maju Junction Mall
Melawati Mall
Mesamall
Mid Point Shopping Complex
Mid Valley Megamall
Mid Valley Southkey
Mitsui Outlet Park KLIA
MyTown Shopping Centre
New World Park
Nexus Bangsar South
Nu Sentral
Pandan Kapital
Paradigm Mall
Paradigm Mall Johor Bahru
Paragon Market Place
Paragon Point Shopping Centre
Pasarnya Komuniti @ Mart
Kempas
Pavilion Kuala Lumpur
Paya Bunga Square (PB Square)
Pearl Point Shopping Mall
Pelangi Leisure Mall
Perling Mall
Pernama Kompleks Mutiara
Armada
Pertama Complex
Plaza Angsana
Plaza Low Yat
Plaza Merdeka
Plaza Metro Kajang
Plaza Pelangi
Plaza Salak Park 'SPARK'
Plaza Shah Alam
Prangin Mall
Publika Shopping Gallery
R&F Mall Johor Bahru
Riverwalk Village
Queensbay Mall
Quill City Mall
RCMC Sdn Bhd
SACC Mall
Sarakw Plaza
SB Mall
Segamat Central Shopping Centre
Sejati Walk
Semua House
Seremban Prima
Setapak Central
Setia City Mall
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Straits Quay Retail Marina
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Sunway Carnival Mall
Sunway Citrine Hub
Sunway Giza Mall
Sunway Putra Mall
Sunway Pyramid
Sunway Velocity
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Suria Sabah Shopping Mall
Sutera Mall
Taiping Mall
Tasek Central
Terminal Larkin Sentra
Terminal One Shopping Centre
The Curve
The Exchange TRX
The Linc
The Gardens Mall
The Main Place
The Mines
The Shore Shopping Gallery

The Spring
tHe Spring Bintulu
The Starling
The Summit Subang USJ
The Waterfront @ Parkcity
The Wet
Toppen Shopping Centre
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CMAM
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CMM
Certified Mall Manager

