



retail
outlet
shopping

ROS

ROS RETAIL OUTLET SHOPPING

'BACK TO TRACK' STRATEGY

REVISED CENTRE
MANAGEMENT STRATEGY 2020

20TH MAY 2020



EXECUTIVE SUMMARY 'BACK TO TRACK'

This document outlines the revised corporate centre management approach 2020 after the reopening of the outlet centres managed by ROS Retail Outlet Shopping after the corona lock down.

Objective of this ROS 'back to track' guideline and tool-box is

- to maintain the implemented 'safe shopping' approach in line with the official requirements of each European country or county
- to drive traffic, ASPV and sales by a modern marketing approach
- to create retail excellence on-site
- to intensify brand partner leasing relationship
- to use the available sources in a smart way



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ROS RETAIL OUTLET SHOPPING

ROS CENTRE STATUS

18TH MAY 2020



ROS CENTRE STATUS

9 of 10 centres of the ROS portfolio are open again.

The remaining Designer Outlet Algarve will open on the 1st June according to the Portuguese governmental decision.

The situation is characterized by

- Partly reduced opening hours
- Mask wearing obligations in the store and mall
- Social distance of 1.5 – 2m
- Sanitizer availability
- Customer limitation of 1 person per 10-20 sqm retail space
- Intense Investor relationship
- Strong Brand partner management



ROS CENTRE STATUS

THE REOPENING

ROS Retail Outlet Shopping estimated a reopening from shopping and outlet centres starting from mid of April 2020 with high prevention restrictions set by each European government.

The first outlet reopened in Germany already on the 23rd April, followed by Croatia on 29th April, Poland on 4th May, Budapest and Italy from 18th May.

Brand partners and customers appreciated the implemented 'safe shopping' approach in all the centres. Only the big international brands had their own hygiene concept provided by their HQ.

SHOP REOPENINGS

ROS informed all their brand partners in an early stage about the allowance to reopen based on a press coverage, even if the official decree was not published.

The centres opened in average with 90% of their occupied GLA.

Only a few big international brands like Nike, adidas, Asics and some small store were not ready for the reopening and opened in the first week or are still closed. The catering in some countries is still closed due to legal restrictions.



ROS CENTRE STATUS

RETAIL / MERCHANDISE

The ROS Retail departments made a small brand partner survey, if they would like to reopen with a high discount message or with a regular outlet price message.

The brand partner survey provided a mixed portrait of the situation. The international successful brands reopened with high discount promotions or 3 for 2 actions. Small brands and franchisees would like to protect their margins.

COMPETITION

The outlet and full-price competition was and is relatively slow and soft.

The competition is struggling partly with the execution of the hygiene concept or could not fulfil some obligations. Especially the outlet market leaders were not so flexible and professional as expected.



ROS CENTRE STATUS

MARKETING

Focus of the reopening marketing was a WELCOME BACK / HELLO AGAIN campaign promoted mainly by digital marketing including website, social media and VIP Club newsletter as well as a press release. Due to the weak performance of some centres in the first week we enhanced the discount message with WELCOME BACK OFFERS UP TO -70% and radio.

CENTRE PERFORMANCES

Across the ROS portfolio is a traffic loss of around up to 40%. A conscious shopping behaviour of the customers is driving the ASPV by + 10%. Big winner are the categories sports wear, casual fashion, home, beauty and food.

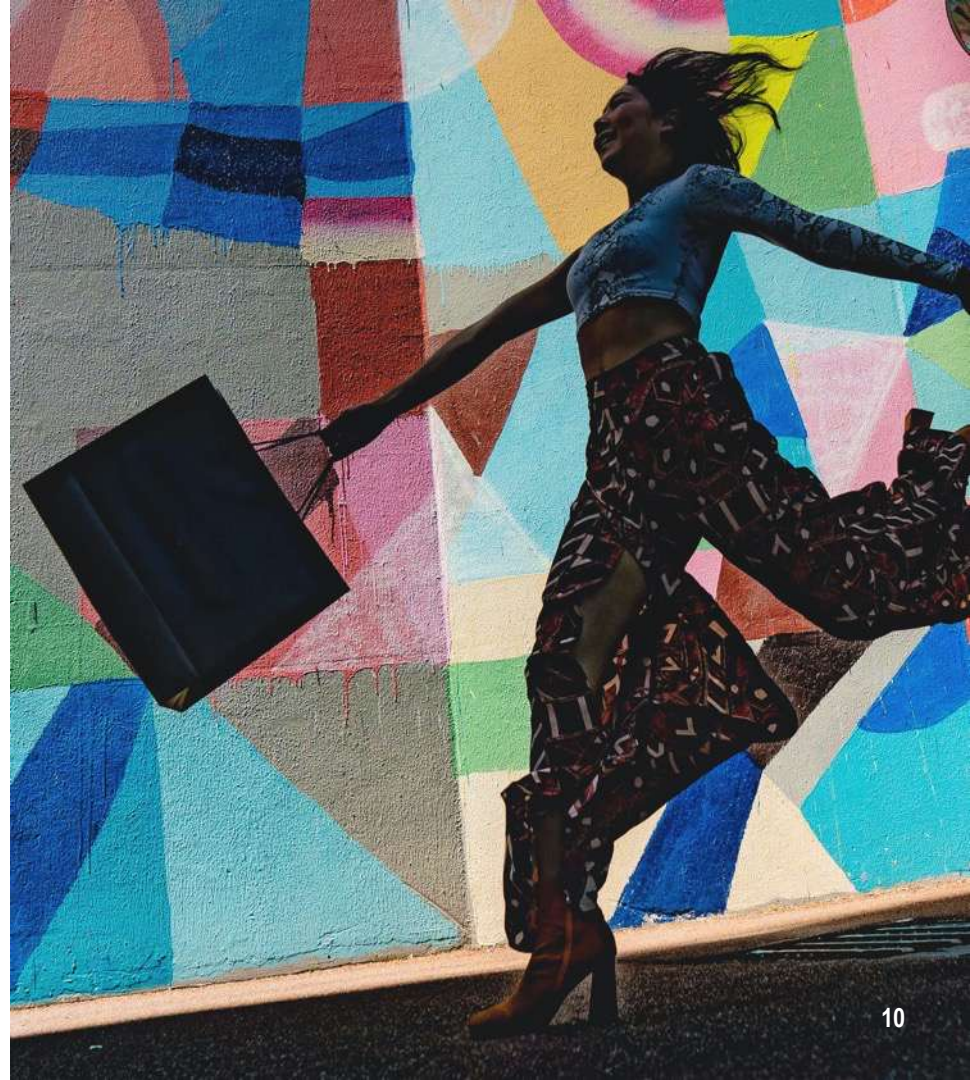


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GENERAL

'BACK TO TRACK' Strategy

Revised strategic guidelines till end of 2020 to bring the centres 'back to track' as soon as possible

- Keep the savings from the corona lock down in marketing and service charges till end of April
- Maintain the 'safe shopping' approach to fulfil the legal obligations for centre operations
- Understand the individual situation of the brand partners and support their store operations
- Permanent analysis of centre performance, shopping behaviour and competition landscape
- Smart marketing approach to use the available marketing budget more wisely and in consideration of stronger digital media usage by target groups
- Revision of marketing calendar due to the continuing assembly ban
- Solidarity and responsible behaviour for customer, employees and further stakeholders

'back to track' strategy

LEASING	RETAIL	FACILITY	MARKETING
BRAND PARTNER MANAGEMENT	RETAIL SUPPORT	LEGAL OBLIGATIONS PER COUNTRY	MARKETING SUPPORT
<i>Focus</i> <ul style="list-style-type: none">• Communication• Relationship Management• Risk Tenant• Pop-up stores	<i>Focus</i> <ul style="list-style-type: none">• Shop Safe Shopping Support• Store Operation Support	<i>Focus</i> <ul style="list-style-type: none">• Centre Safe Shopping	<i>Focus</i> <ul style="list-style-type: none">• Communication• POS• Digital Marketing• Radio• Revised Marketing calendar

Maintain #safeshopping experience in your centre

- Maintain the safe shopping approach in your centre by reordering masks and disinfection liquid etc. in line with the official obligations by the country or county
- Review, revise and renew specific hygiene measures - think long-term
- Identification and optimization of security & cleaning staff upgrade
- Detailed check of individual centre measures regarding air conditioning, fountains, kids playground, benches etc.



Support of brand partners by providing the best conditions

- Support of tenants to return to normality regarding queueing systems, clothes quarantine, clothes steaming, fitting room and POS materials
- Special approach for F&B operator
- Intensify brand partner relationship to support their sales
e.g. VIP voucher, Pop-up store, POS materials
- Support regarding team re-recruitment



MARKETING

Drive traffic, ASPV and sales by a modern marketing mix

GENERAL

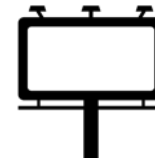
- Usage of 70-80% of the original planned marketing budget from reopening
- Automatic savings by cancellation of events due to the assembly ban across Europe
- Improve media mix:
 - Shift from classic to digital media
 - Outdoor media only during summer holidays
- Individual marketing approach in consideration of the increasing easing of corona obligations, opening of borders and competition landscape
- Please grab arising opportunities e.g. booming national tourism, opening of shop refurbishments, food court opening etc.

UMBRELLA CAMPAIGN RECOMMENDATION

- Welcome back offers up to 70% off – till end of May 2020
- Summer Sale up to 80% off – from June till July 2020
- Happy Final Sale up to 80% - August 2020

CATEGORY PROMOTIONS

- New Arrivals – August 2020
- Back to school – August 2020



DIGITAL MARKETING

Improve website communication, functions and content

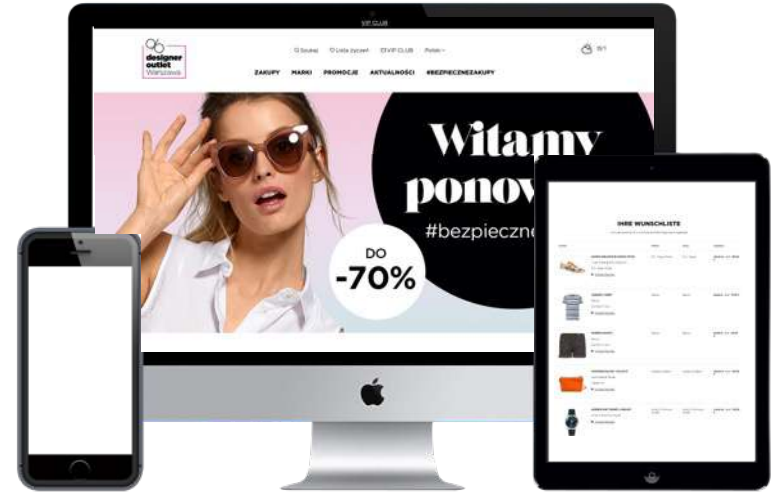
- Improve safe shopping communication
 - FAQ – Frequent asked question
 - Safe shopping icon
 - Highlight all services
- Editorial upgrade of the website
 - Trends
 - Editor's Pick
 - Personal Shopping

Enhance Digital advertising

- SEO/SEM
- Programmatic advertising campaigns (Geotargeting)
- Social media ads (Facebook, YouTube, Instagram)

Usage of loyal customers in our VIP CLUB

- Email Marketing
- Make the VIP club more attractive
- Upgrade with a log-in area and additional incentives
- Special offers
- Conversion of fans and followers in VIP club members



DIGITAL MARKETING

Social media content - More video, stories, lives streams, animations and entertainment

Content

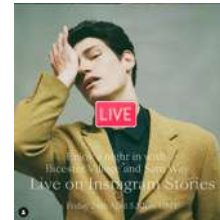
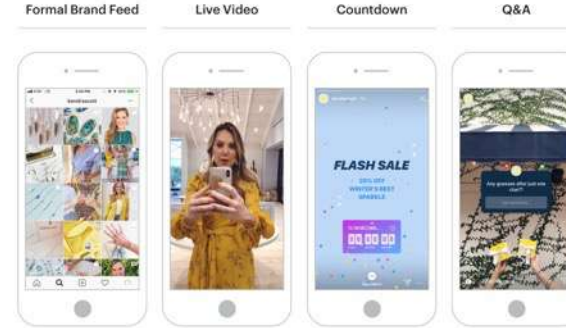
- 'The new joy of outlet shopping' video with more focus on great brands for great prices and a little bit of safe shopping with bloggers & influencers or safe shopping from a dog perspective
- Brands
- Wishlist function contest
- Fashion SALE
- Brand of the week
- Fashion Style Tips
- Shopping Haul
- Quotes

Interactions

- Get your money back challenge
- Surprise shopping – give a purchase for free to socially less advantage groups in times of short-time-work

On-site stimulation

- On-site communication
- Selfie points



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A stylized barcode graphic where the vertical bars vary in height and width, creating a rhythmic pattern. The letters 'ROS' are integrated into the lower portion of the bars.

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