



ALWAYS
ONE
STEP
AHEAD

A red, stylized line that starts on the left, loops around the word "ONE", and extends to the right.

APSYS MAKING
CITIES
VIBE

DO TODAY WHAT OTHERS WILL BE DREAMING OF TOMORROW!

The Polish shopping centre market has been characterized by **a systematic increase in supply**, with total GLA in 2018 amounting to in excess of 12 million sq.m – this represents an increase of approximately 2.3 million sq.m since 2013*.

Meanwhile, **consumer expectations and preferences are changing**. The average buyer's priorities are **no longer determined by factors** such as tenant mix or the price of the products offered. Research concerning recommendations confirms that **consumers are interested in positive experiences the most**. As such, the most important aspects from the point of view of the consumer are:

20% personalisation – delivering
a product or a service in accordance
with specific expectations

16% empathy – understanding
customer needs

16% professional and fast service**.

HIGH QUALITY AND WELL-PRESENTED SERVICES THAT MEET CONSUMER EXPECTATIONS CREATE A SHOPPING CENTRE'S ADDED VALUE. THEY SET IT APART FROM OTHER COMPETITORS IN AN ENVIRONMENT OF RETAIL UNIVERSALISATION.

*PRCH Retail Research Forum Report, March 2019.

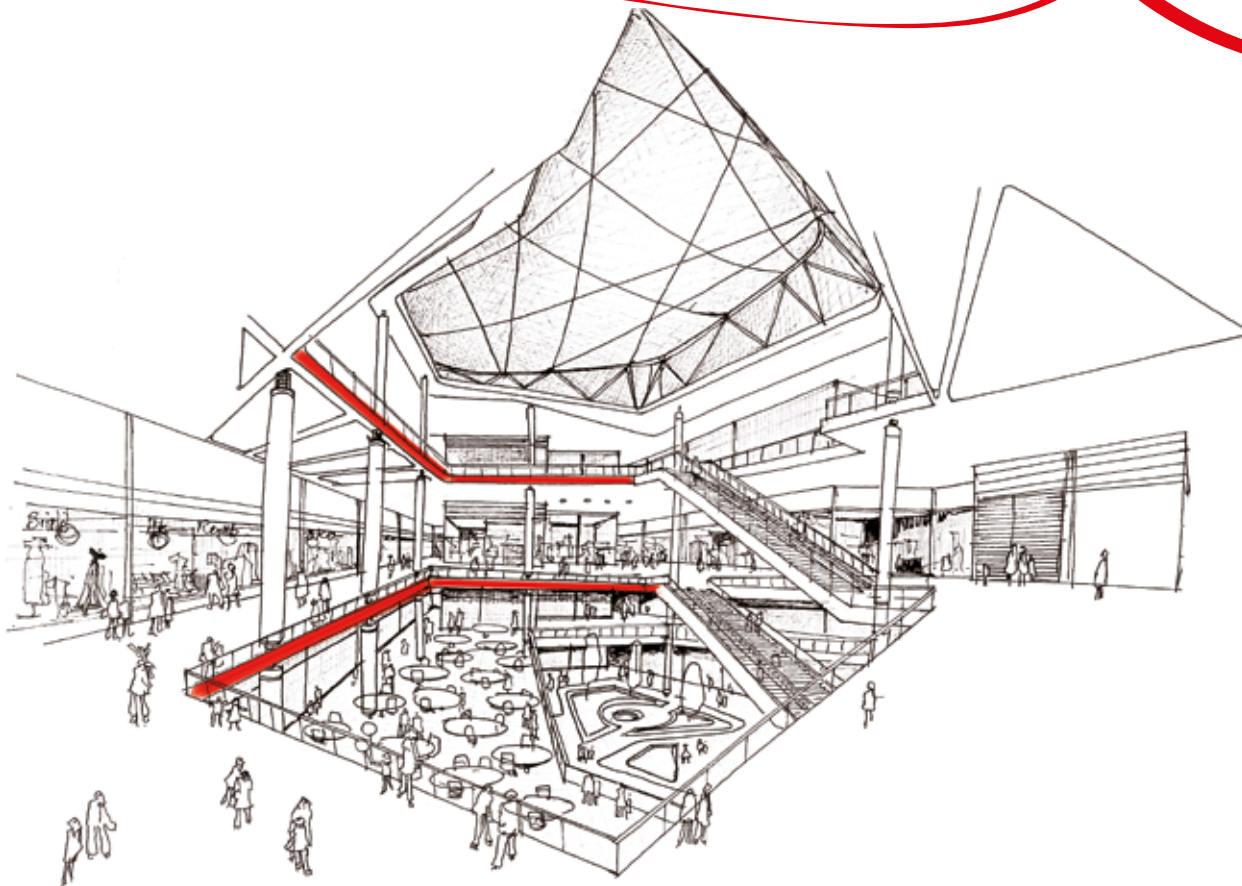
**KPMG report "The [Digital] customer is king", January 2019.

AT YOUR
SERVICE
CLIENT COMFORT
PROGRAMME

AT YOUR SERVICE

In 2018 Apsys Polska implemented an innovative programme standardising and improving mall services called At Your Service. The programme is a pioneering tool on the shopping centre market that shapes the customer experience area. Extensive and high-quality consumer services strengthen clients' loyalty and create positive emotions connected with a location.

CLIENT FIRST



Today's consumers are more and more sensible. They know what they want and exercise their right to choose products from a very competitive market. **Just one bad experience is sufficient to discourage every third customer from using a brand*.**

At Apsys, a professional team of experts has been behind the creation of the programme that keep consumer needs in mind. **All Apsys centres receive a systematic customer service level assessment as part of the At Your Service programme.**

APSYS LAB

The At Your Service programme is an initiative of Apsys Lab – an internal incubator and a platform for innovation that brings together multidisciplinary teams to channel their expertise, open minds and experience. Focused on discovering new, innovative solutions, this team looks at shopping centres as emotive places that can surprise, inspire and create positive experiences. Challenging the status quo, the team's objective is to find the solutions for tomorrow to turn operations into stimulating centres that are considered to be "Iconic Places".

*PWC Report, "Experience is everything: Here's how to get it right", 2018.

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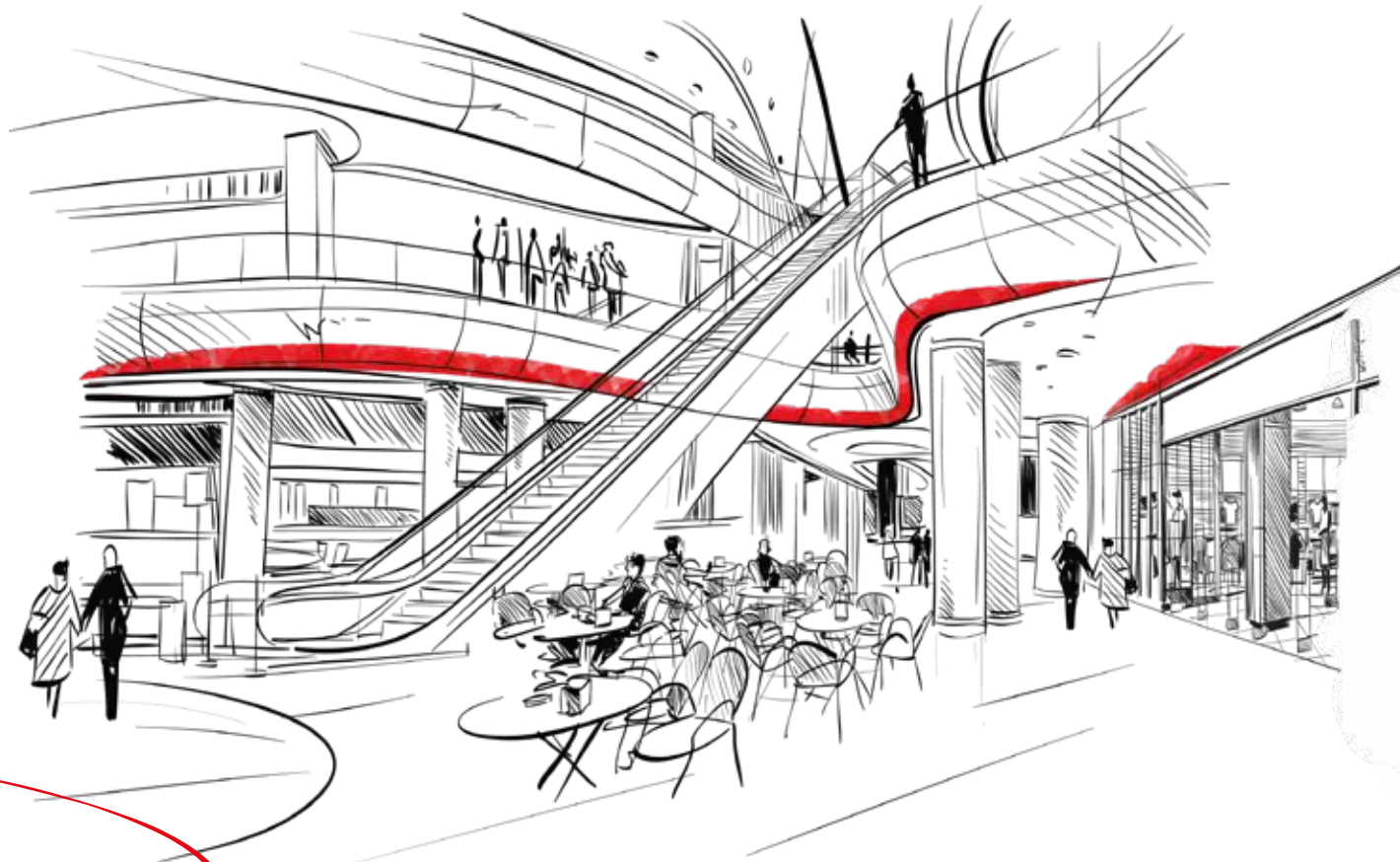
KEY TASKS OF THE AT YOUR SERVICE PROGRAMME

- introduce the widest possible range of services tailored to customer needs and expectations
- standardise customer services in malls to enable their comprehensive and objective verification
- continuously develop new and improve current service levels
- build a genuine competitive advantage
- maintain openness in the face of changing market conditions and customer expectations
- motivate and improve shopping centre management





REFINED METHODOLOGY



AT YOUR
SERVICE
CLIENT COMFORT
PROGRAMME

The At Your Service programme catalogued **over 60 services** and facilities that can be offered by a centre and its individual tenants. **Each of those** services was then thoroughly analysed in terms of availability, quality and information. The process resulted in a research tool – **questionnaire containing over 600 items**, which is the basis of the audit carried out by behavioral psychology professionals. The audit's results are used to prepare further improvement guidelines for management teams.

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SERVICE AND FACILITY CATEGORISATION

MORE THAN 60 SERVICES AND FACILITIES HAVE BEEN SYSTEMATISED
AND DIVIDED INTO SIX MAIN GROUPS.



ATTRACTIVENESS OF THE SHOPPING CENTRE

This includes the ease of access and proper wayfinding, the centre's appearance, aesthetics, cleanliness, as well as an evaluation of the security and facility maintenance staff.



FOR CUSTOMERS ARRIVING BY CAR

Convenient centre access and easy parking have a major impact on customer satisfaction levels. Facilities for cyclists and the disabled provide additional value.



FOR FAMILIES WITH CHILDREN

Children are very demanding customers. Facilities such as changing and feeding rooms, playgrounds, identity wristbands, prams for tired kids or children's restaurant amenities often determine which centre will be chosen by families.



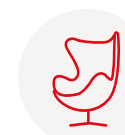
SHOPPING FACILITIES

Loyalty programmes are key to building emotional bonds with customers. With the growing popularity of e-commerce, it is vital to introduce innovative technological improvements that streamline transactions and combine online and bricks-and-mortar shopping worlds.



INFORMATION IN THE SHOPPING CENTRE

Proper wayfinding, the information provided by centre employees, and the depth of information that appears on virtual platforms are all key criteria. Equally important is the intuitiveness and depth of the website and mobile applications, all of which can make a customer's visit easier.



FOR A WIDE RANGE OF CUSTOMERS

A shopping centre is not just a place designed to satisfy a customer's shopping needs. It has become a community hub and a centre of social meetings, recreation and services, hence the presence of relaxation and work zones, post offices or custom tailoring studios.

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THE HIGHEST SERVICE STANDARDS



The At Your Service programme differentiates centres managed by Apsys Polska from the competition and guarantees consumers a uniformly high-quality experience. **Must-have factors**, segmented for each centre category, include services and facilities a centre must guarantee consumers at an appropriate level.

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THE POWER OF PROFESSIONALISM

To account for dynamic market changes, growing technological development and shifting customer expectations, At Your Service periodically evaluates its operational environment as well as its own assumptions. Centres undergo annual audits verifying the scope and range of services in order to add innovative elements and dispense with the outdated ones.

To avoid any bias, an external consumer research firm conducts the audit and assessment stage. This **synergy of expertise, knowledge and experience** between Apsys Lab and the specialized agency ensures the programme's objectivity and reliability.

CERTIFICATES

Centres receive one of four certificates in the assessment: gold, silver or bronze for those that achieved a high score and a certificate of being audited for others.



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OBJECTIVITY GUARANTEED



At Your Service assures the objective assessment of the customer services delivered in all centres managed by Apsys Polska, regardless of their size, offer or location. The programme distinguishes three segments by centre's entertainment and restaurant offer availability.



COMFORT

Centres with a limited gastronomy offer and no entertainment facilities. Customer service approach focused on quality, not on quantity.



PREMIUM STANDARD

Centres with a well-developed gastronomy sector and a basic entertainment offer. Customer services allow interactions between the clients and the mall.



GOLDEN STANDARD

The latest generation of centres with an extensive gastronomy and entertainment offer, with a wide range of customer services, including premium ones.

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CLIENT-ORIENTED APPROACH

Apsys Polska defines specialized tools to achieve the highest quality of management. At Your Service programme quantifies this quality assessment, facilitating consistency and continued improvement through a customer service-oriented management model. Participation in the research process also has an educational purpose for management teams; it highlights the importance of service standardisation and enables the development of strategies to improve efficiency and effectiveness in customer experience management. The certificate received by a centre is a confirmation of the quality offered, i.e. its potential to create a customer's "need" to return to the centre many times.



ICONIC PLACES




APSYS GROUP

Apsys is one of the leading operators in the shopping centre industry in Poland and France. The company was established in 1996 and operates as an investor, developer, leasing agent, project manager and property manager. It creates innovative, built-to-suit projects accounting for specific location characteristics, social context and the natural environment. The largest Apsys' projects in Poland include Manufaktura in Łódź and Posnania in Poznań.

At Your Service is an original programme implemented in all shopping centres managed by Apsys Polska. It is an innovative research tool to standardise, improve customer service quality and to enhance customer experience. Thanks to the assessment, shopping malls managed by Apsys Polska meet the needs of modern customers and the aspirations of tenants.

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