

REGIONAL STRATEGIC MARKETING PLAN

PACIFIC –PULLMAN



About Pullman

AS THE NEW KID ON THE BLOCK...

100 YEARS 560 HOTELS

57 YEARS 380 HOTELS

47 YEARS 111 HOTELS

38 YEARS 167 HOTELS

62 YEARS 594 HOTELS

12 YEARS
131 HOTELS

OUR HERITAGE

A DISTINCTIVE BRAND HERITAGE ROOTED
IN ENHANCED PERFORMANCE



“

Entrepreneur and company founder, George Pullman, brought his bold sense of **transformation** to the world of rail travel. His revolutionary rail sleeping cars were designed to maximize aesthetic value, safety and comfort so travelers could arrive in style and **be at their very best**”



Target Audience

Aspirational

Demographics

Demanding fast paced millennials– business is fun and a cool part of life –they claim time and space

The New Entrepreneur

“Someone who travels frequently for business or leisure. They are cosmopolitan – they actively seek out new destinations & different cultures, they’re open-minded.”

Behaviours/Mindset

- Purposeful business human centric work culture workspaces for life
- Bleisure traveler, like to combine business with leisure



Passions

- Progression / Innovation
- New Technology
- Design People / Community

Competitor Brands

- Hilton
- Marriott
- Sheraton
- QT



Target Audience

Actual

*Demographics

Top 3 Countries: Australia (81.5%), New Zealand (8.1%), USA (1.8%)

Top 4 Australian states: NSW/QLD/VIC

Top 4 suburbs: North West Sydney, North Sydney, North Perth, East Melbourne

Top 3 Guest profile: Mid Status Suburban, High status Urban & Low Status Suburban

Market code: Majority are transient & corporate travellers

*Behaviours/Mindset

Booking lead time:

29+ days & 0 – 3 days

Average length of stay: 2.1



Website Insights

Age: 25 – 44 years of age

Location: Top 4: Sydney, Melbourne, Brisbane, Perth

Gender: Female (60.3%) vs Male (30.7%)

Top Interests:

- Travel/Travel Buffs
- News & Politics
- Lifestyles & Hobbies
- Beauty & Wellness



Strengths

- Largest Upscale hotel brand in the Pacific (18 hotels)
- Aspirational target audience similar to actual target audience (Intouch data)
- Growing footprint worldwide – Focus on Pacific Market from Global
- Hotels & resorts in strategic & desirable locations
- Pullman is perceived as a luxurious, well-known legacy brand
- Attractive F&B product across all regions with a number of stand alone restaurants (e.g. Hyde)
- Start of immersive arts roll out at hotels across regions as one of the key differentiator to competitors in 2019
- Strong Brand history (George Pullman)
- Solid growth in brand awareness YOY (+3% last year)

Weaknesses

- Lacks culture and heritage compared to its competitors Hilton, Marriott and Sheraton - young brand (12 years old)
- No tapping into key International markets/lack of exposure for Pacific Hotels in China/US/India
- Large percentage of network is Strata, which means minimal/shared marketing resources across multiple hotels
- Hotels struggle with implementation of brand activations when investments are required – tough market so activations highly ROI driven
- Global activations usually require monetary commitment from hotels for partnerships, design and equipment
- A number of Pullman hotels are resorts, so target audiences vary
- Whilst brand awareness grows YOY, still large gap to key competitors (62% vs 83% Marriott & 95% Hilton, Sheraton 82%)

Opportunities

- New Pullman hotels joining network (Pullman on Swanston, Pullman Laguna Quays Resort, Pullman Trinity Point Resort, Pullman Airport Auckland)
- Global partnership initiatives to strengthen brand differentiation and create noise around brand
- Audiences craving unique lifestyle experience that support health & wellbeing
- Audiences trust/follow influencers (authenticity key) more than brands
- Social connections are key for our audiences especially creating tribe like communities
- Millennials chose brands that support sustainability & community, they want to drive change
- Movement of Smart hotels with connectivity as key feature such as Voice search, Virtual reality, digital check in, robot room service

Threats

- High supply growth next year in cities with Pullman hotels. Melbourne 8.1%, Adelaide 7.9%, Brisbane 2.4%, Perth 13.1, Auckland 10.2%
- Perception of 'hotel restaurants' not as favorable as stand-alone venues leads to revenue & 'personnel challenges
- Growing brands with strong positioning (QT / Ovolo, W Hotels)
- Marketing spend by competitors is higher (Marriott, Hilton & OTAs)
- Market conditions remain challenging in Australia in 2020 with occupancy rates across Australia are projected to drop by 0.5% due to increase in supply

Source: 2018 BEAM Study

1 PULLMAN MEET/PLAY ROLL OUT Jan - Aug

Key Actions:

- Webinars to educate hotel teams
- Mice working group in place to drive the concept
- Sponsorship of 'Meeting on the Green' event in Q1 to showcase the bites on wheels cart & F&B offering to key meeting planners
- Development of dedicated images to support collateral and 'All aboard' site inspections
- Meet/Play roadshow held across Australia to educate meeting planners on concept
- Press Release sent out to media on Meet/Play launch



2 PULLMAN FIJI OPENING Apr - Dec

Key Actions:

- Coordinated TV coverage on Sky, Foxtel and Channel 9
- Media influencer campaign with key destination partners including Fiji Airways, Tourism Fiji, Captain Cook Cruises
- Targeted advertorial campaign to run in leading Mice publications in AU & NZ for cut through with event planners
- Exposure with Tier Media targets including Escape, Fairfax Traveller, CEO Magazine, NZ Herald, Vacations & Travel Magazine, Who Magazine,
- Nine Honey, Out and About with kids, Mice.net, Meeting NewsNZ, Nova Radio Sydney, KIA Ora Magazine NZ

Results:

- Advertising reach:
19,292, 292
- Advertising value:
\$522,213
- Publicity Value:
\$1,566, 630



3 PULLMAN IMMERSIVE ART Jan - Dec

Key Actions:

- Hotels within the Pacific have started to host both permanent collections and rotating art exhibitions
- Pullman Sydney Airport highlighted their collaboration with Gilles and Marc as part of their 3rd year anniversary
- Pullman Bunker Bay have three permanent artist zones at the resort featuring art by Derek Glaskin, Martine Perret and Ann Steer
- Pullman Cairns International partnered with Cairns Art Gallery to host Linda Jackson for an exhibition for Loyalty members and industry partners in February

Results:

- Increase in brand awareness and link with contemporary hotels in 2019 Beam Study
- Increase awareness amongst loyalty members & key partners



Global Vision

OUR VISION

We believe today's new entrepreneurs
aspire to be at their personal best
wherever they are

...AND PROVIDES THE NEW ENTREPRENEURS WITH A HOLISTIC COMPETITIVE ADVANTAGE

FITNESS ENERGIZES PRODUCTIVITY



EXERCISE DELIVERS A 72% IMPROVEMENT IN TIME MANAGEMENT AND WORKLOAD COMPLETED

Studies have shown that exercise alters the biology of the brain to make it more malleable and receptive to new information, improving the brain's plasticity and ability to learn

ART ENHANCES CREATIVE THINKING



41% OF EMPLOYEES BELIEVE THAT HAVING ART IN THEIR OFFICE INCREASES THEIR PRODUCTIVITY

Studies show that individuals with a higher openness to aesthetic experiences felt more inspired in their daily lives, and in turn, performed better on creativity tasks

Sources: Identity Realization / Health Ambition

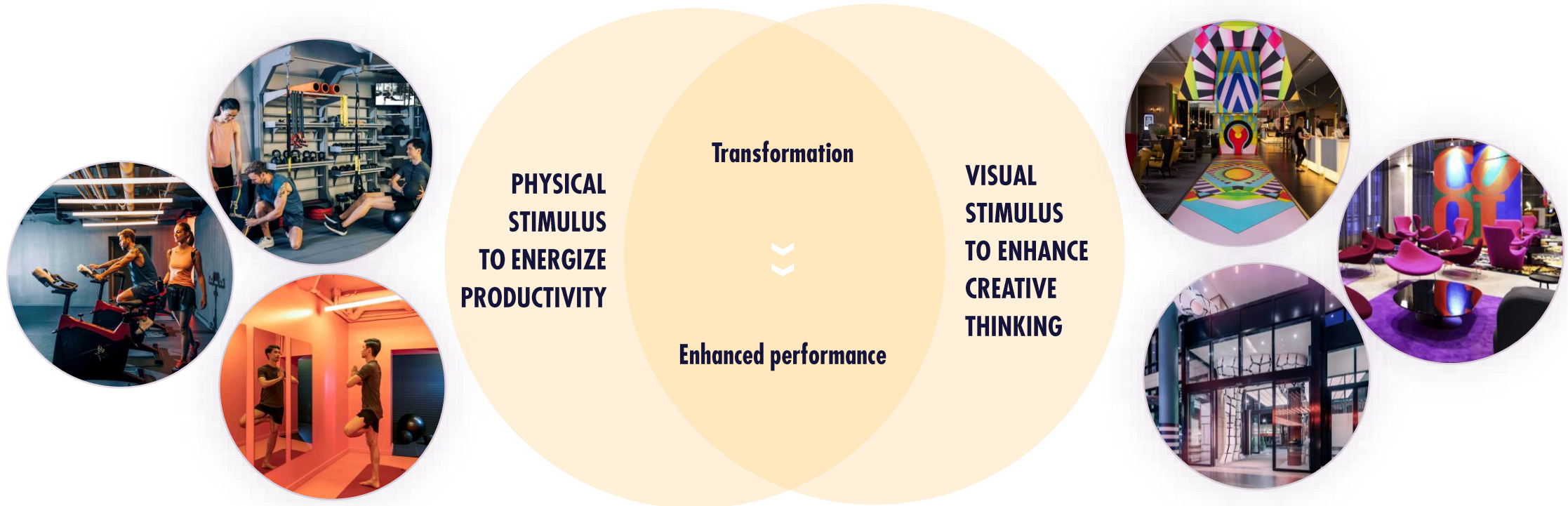


Art & Fitness

Facilitating transformation to enhance performance

Fitness

Art



"BE AT MY PERSONAL BEST"



Fitness Partnership

LES MILLS, FOR A FITTER PLANET

Les Mills is the world's largest creator of choreographed exercise-to-music group fitness classes available at health clubs and online.

Creating life changing innovative fitness experiences powered by science; Les Mills does not want to make people work out. It wants to help people fall in love with fitness so that they want to work out.

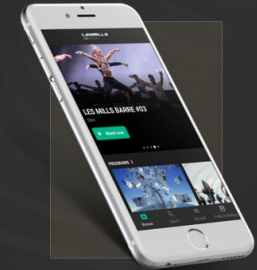
WORLD'S BEST CLASSES, AT ANY TIME OF THE DAY OR NIGHT



LIVE
EXERCISE PROGRAMS



VIRTUAL
GROUP & BIKE CLASSES



ON DEMAND
WORKOUTS

WORLD CLASS FIGURES

+20K
CLUBS

+150K
INSTRUCTORS

+6M
CONSUMERS

10
TOP 10 GLOBAL
FITNESS BRAND

#1

USA
BRAZIL

EUROPE
PACIFIC

↑ CHINA



Validate Global Initiatives

PACIFIC

Global requirement	Observation/Data	Take out	Traffic Light
Develop new brand communication assets	Global Advertising distributed to the network in late 2019 with #upyourgame assets. New guidelines from global can be adapted to be used for any new content creation once rolled out. Timelines to be identified from global. However there is no Pacific lifestyle shoot in the budget for 2020.	Hotels to implement guidelines once rolled out by global. No funds available from Pacific for brand lifestyle shoot.	
Develop & promote distinct design philosophy & arts program	<p>This includes Art at Play, Artist Playground and Pullman Art night (Secret spot), Style. Hotels don't have budget for a full contemporary art collection, therefore need to look at creative ways to introduce these elements and support hotels where we can. The 'secret room' concept manageable</p> <p>Design philosophy will be relevant for new property developments or hotel refurbishments. Existing hotels will struggle with capex for this large design investments.</p> <p>Art at Play items available from Adam Nathaniel Furman are hard to implement in the Pacific in a relevant, timely manner. He is also not known in the Pacific, so I would recommend working with local artists/galleries.</p>	Hotels to work with local art galleries, local partners and upcoming artists to see if there are synergies to host their art of consignment or as an event either on a permanent or rotating basis. Brand team to support with sourcing of partners, Art Night asset production & event support for best executed hotel to stage the September event.	
The Junction at Pullman (creating smart public spaces – connectivity)	These initiatives are capex related and will be hard to further drive locally for existing properties. Incorporation into designs of newly refurbished/newly opening hotels in the network. This will be driven by the development team.	This initiative requires full brief to the development/design team for any new hotel openings in 2019/2020.	
Support implementation of Pullman Meet/Play Mice guidelines	This includes Design, S&M, products & services, FB philosophy. Hotels struggled to fully implement each Mice pillar introduced in 2019. An audit of existing implementations is also needed to ensure consistency of delivery in Q1. Support from brand may be needed to fully implement across entire network. Amplification therefore will be focussed around mid/late 2020 to guarantee delivery.	Support for network needed to fully implement. Amplification of new concept in mid/late year projected to be possible	
Develop & Pilot Power Fitness Concept	The new global partnership with Les Mills is a great right fit locally and could put us in the forefront of our competitors in the sector of health/fitness, especially with Les Mills Virtual Fitness concept. Fitness will no longer be an everyday chore for our guests but a life production. I am predicting to grow brand awareness as well as increase of guest experience with the free trial program on check in as well as usage of the local fitness partners (partners are in every major city). Any major changes to existing fitness equipment at hotel level however won't be feasible, so I would recommend to work with flagship hotels that have upgraded facilities. Any new designs will be driven by the development team for any future openings.	Partnership alignment can easily be rolled out across the Pacific. A PR fitness event on the rooftop will drive hype around the brand and new alignment. Detailed partnership opportunities and paid components to the hotel need to be evaluated when available.	



2020 At a Glance

BRAND	Pullman	PERIOD	1 January – 31 December 2020
RPS	2020 Target	Pacific YTD 2019: 85.74 Target: 85.45	HOTEL NPS
AMBITION	Place the brand on top of the shopping list by providing a playground for guests to perform at their best		
STRATEGIC STATEMENT	Increase awareness of the Pullman brand and its key pillars by 5% amongst the affluent luxury hotel users in the Pacific		
RATIONALE	With a 3% increase YOY 18/19, an exciting global lifestyle programs to be rolled out and new 'Pullman' designed hotels joining the network, a heavy focus on amplifying the new brand pillars & lifestyle experience across the Pacific is necessary to drive a stronger brand awareness in 2020. With a 5% YOY increase, the gap to its main competitors is predicted to close within the next 3.5 years.		
KEY OBJECTIVES	<ol style="list-style-type: none">1. Drive Media coverage at a min. value of \$250,000 via brand via amplification of the key brand pillars (Meet/Play/Immersive art & Power Fitness)2. Support network by implementing brand principles to ensure consistency & brand integrity (ensure LQS target is met)3. Drive 5% increase in direct bookings via influx brand communication & hotel marketing support		
DIRECTIONAL INVESTMENT (\$\$ needed to fulfil this plan)	AUD		



Strategic Plan 2020

Ambition				
Place the brand on top of the shopping list by creating rewarding & entertaining experiences				
KEY OBJECTIVES	STRATEGIC LEVERS	KEY ACTIONS	KPI IMPACT	BUDGET ALLOCATED
Ensure consistency & support hotel implementation of brand principles	Programs	<ul style="list-style-type: none">Meet/Play audit and support of three bottom hotels	AWARENESS/ TACTICAL	AUD
		<ul style="list-style-type: none">Incentivize hotels to create Artist playground concept and work with a local arts partner – support with connecting hotels to the arts scene		AUD
		<ul style="list-style-type: none">LesMills Program roll out to network – development of support tools		AUD
Drive PR & amplify key brand pillars	Communication & Content	<ul style="list-style-type: none">PR event support to showcase a Pullman Arts Night (September) – support with outreach & asset creation	AWARENESS	AUD
		<ul style="list-style-type: none">Rooftop outdoor Fitness event (Pullman Hyde Park) – PR support & video creation – influencer support		AUD
		<ul style="list-style-type: none">Mice content shoot reflecting Meet/Play – choose 3 flagship hotels that successfully implemented the guidelines rolled out		AUD
		<ul style="list-style-type: none">Partnership with relevant bloggers/traditional media to amplify content		
Drive digital exposure & website traffic	Tools & Procedures	<ul style="list-style-type: none">Influencer Marketing tool creation & training for hotels (Global tool roll out Cision)	AWARENESS	AUD
		<ul style="list-style-type: none">2020 e-news & content schedule to ensure brand output to Pacific database & Social Media		
				= AUD



Delivery of brand principles that push boundaries

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ENSURE BRAND CONSISTANCY

Programs

DESCRIPTION	To ensure implementation of brand principles rolled out in 2019, the following support is recommended to ensure quality execution:											
	1. Continuous Audit Meet/Play integration & support bottom hotels											
	<ul style="list-style-type: none">Audit with imagery of new activations/follow up activations from 2019 audit and drive implementation with a hotel incentive (winning hotels to be selected for 2020 Mice shoot/part of Media communications going out)											
	2. ‘Secret Spot’ Artist Playground exhibition											
	<ul style="list-style-type: none">Encourage/Support one hotel to engage local arts partners for Artist Playground exhibition (Hotel will be able to host Arts Night ins September – with support from Accor for assets/entertainment/Media support)Determine best “Secret spots” and support with arts scene partnership/concepts e.g. Biennale 2020, Art Gallery											
	3. Les Mills – Fitness Program											
	<ul style="list-style-type: none">Support Program roll out and develop supporting tools to Pacific NetworkHotels can activate Les Mills Partnership in hotels: Online program access for guests (30 day trial), Power Fitness boot camps, live classes for guests/locals combined with F&B experiences & Live events co-hosted by Pullman Fitness ambassador & all stars event											
BUDGET	AUD											
TIMING	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
	★	★		★	★	★			★			

Final Meet/Play
audit

Fitness les Mills
Partnership roll out

‘Secret Spot’
Exhibition



Amplify key brand pillars

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Drive PR & brand awareness

Communication & Content

Maximise brand exposure via activation of:

1. PR Arts Night event to showcase 'Secret room' Artist Playground exhibition

- Event planning/creation of Arts Night branded assets/entertainment/FB guidance
- Communication before/at/after event – Influencer Marketing/Creation of content/Post Media Release/Social media/Brand Ecard circulation
- Hotels can take the opportunity to drive revenue via number of artistic experiences and boost visibility

2. Get Fit – Have fun – Outdoor Power Fitness event

- High energy roof top fitness event to drive brand awareness & launch Fitness Program in the Pacific, co-partnered with Reebok
- One hotel is selected to host the event and has opportunity to launch health focused offerings around Les Mills program
- Hosted by Les Mills regional ambassador
- Ticketed corporate event (exclusive invitation only) with parts of ticket price to go towards a community fund
- One hour fitness program followed by Meet/Play healthy food range to cross promote
- Communication before/at/after event – Influencer Marketing/Creation of content/Post Media Release/Social media/Brand Ecard circulation

3. Meet/Play brand Photoshoot

- Create content for amplification of newly introduced Meet/Play program
- Showcase three key hotels that really embellished the guidelines
- Content to be used across: Pacific brand communication, Hotel corporate communication, Accor Meeting planners communication, Hotel websites

DESCRIPTION

BUDGET

AUD

Meet/Play shoot

Get Fit – Have fun
Power Fitness event

'Secret Spot' Arts
Night

TIMING

JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
			★		★			★			



Drive digital exposure

PACIFIC

Drive digital exposure & website traffic

Tools & procedures

Increase digital exposure of Pacific Hotels via:

1. Developing regular new content calendar/consolidating content for:

- Accor's owned channels (Accor leisure newsletters, Accor Social Media, Global/Asia Pacific newsletters, Pullman Social Media, Accor Meeting Planners newsletter)
- Partnership channels (maximize digital opportunities by Accor's partners)
- ALL digital communication
- Focusing on distributing tactical offers for Pullman need hotels as well as lifestyle brand content

2. Influencer Marketing tool support

- Qualify/quantify Influencer via most effective tools in market (e.g. Cision, Scrunch, Klear, thetightfit)
- Empower/train hotels to utilize tools for a more proactive approach on influencer marketing
- Will strengthen brand content and reach a more relevant target audience
- Will provide tangible reporting on reach and value for owners

AUD

TIMING	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
		★	★	★	★							

Content calendar Influencer tool roll out



Key Milestones Overview 2020

PACIFIC





KEY LEVERS	KEY ACTIONS	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
PROGRAM	Audit Meet/Play												
	'Secret Spot' Exhibition support												
	Les Mills Fitness Program roll out												
CONTENT/PR	PR Arts Event												
	Outdoor Power Fitness Event												
	Meet/Play Brand Photoshoot												
Tools/Procedures	Influencer Marketing tool roll out												
	Content schedule development												



1 *RESEARCH*



Pacific Competitors

				
BRAND AWARENESS	62%	85%	82%	93%
POSITIONING/MISSION	<p>"Our world is your playground"</p> <p>For global nomads, Pullman hotels serve as the base of operations for inspiration and contact. Its high-end services and technology dismiss the boundaries between leisure and work, providing high-intensity experiences.</p>	<p>"good food and good service at a fair price."</p> <p>"We deliver higher levels of service excellence, create memorable moments and exceed every expectation making brand ambassadors and guests for life."</p>	<p>'Where Actions Speak Louder'</p> <p>consistently exceed our guests' expectations in terms of the products and services we provide to our business and leisure travelers. We strive to create an experience that is responsive to our guests' needs by using the information you entrust us with responsibly.</p>	<p>To be the most hospitable company in the world – by creating heartfelt experiences for Guests, meaningful opportunities for Team Members, high value for Owners and a positive impact in our Communities.</p>
Observation 1 – Brand Plans and Growth	<ul style="list-style-type: none"> • Meet/Play roll out • Growth Development with New openings including Swanston street, Melbourne 2019 and Fiji 2020 • Immersive art design/Fitness program across all hotels 	<p>Marriott International continues to push boundaries, creating new guest experiences which meet the needs of the evolving luxury traveler. Marriott expects to open 50 hotels in the Pacific region by 2020</p>	<p>Robinson of Marriott indicated "60 percent of Sheratons globally are committed to undergo renovation by 2020</p>	<p>Hilton's flagship brand, Hilton Hotels & Resorts, will open in several new locations with seven deals signed so far this year. These properties include two newly signed properties in Melbourne with the 641-room Hilton Melbourne Square and the 244-room Hilton Melbourne Little Queen Street</p>
Observation 2 – Brand funnel 1st/2nd choice	7%	7%	7%	13%

Source: References listed on slide 21

Source: Beam Awareness Study 2018 research conducted by BVA BDRG



F&B Landscape

Pullman F&B Revenue

Brand F&B Revenue	FY ACTUAL YTD	% vs Budget	% vs LY
Total F&B Revenue inc. conferencing	71,435,689	-5.4%	+2.4%
Total F&B Revenue excl. conferencing	44,770,877	-6.1%	+0.5%
Conference revenue	26,664,812	-4.2%	+5.8%
Breakfast revenue	11,308,861	-5.8%	-0.1%
Restaurant revenue (inc. Bfast)	22,381,357	-9.1%	+0.8%
In-room & mini bar revenue	4,658,434	-9.1%	-5.7%
Bar revenue	17,731,086	-1.2%	+1.9%

- Restaurant Revenue is falling behind at -9.1% to target
- In-room & Mini bar is behind same as last year
- Bar Revenue is falling behind vs budget but should strongly pick-up heading into the festive season months.

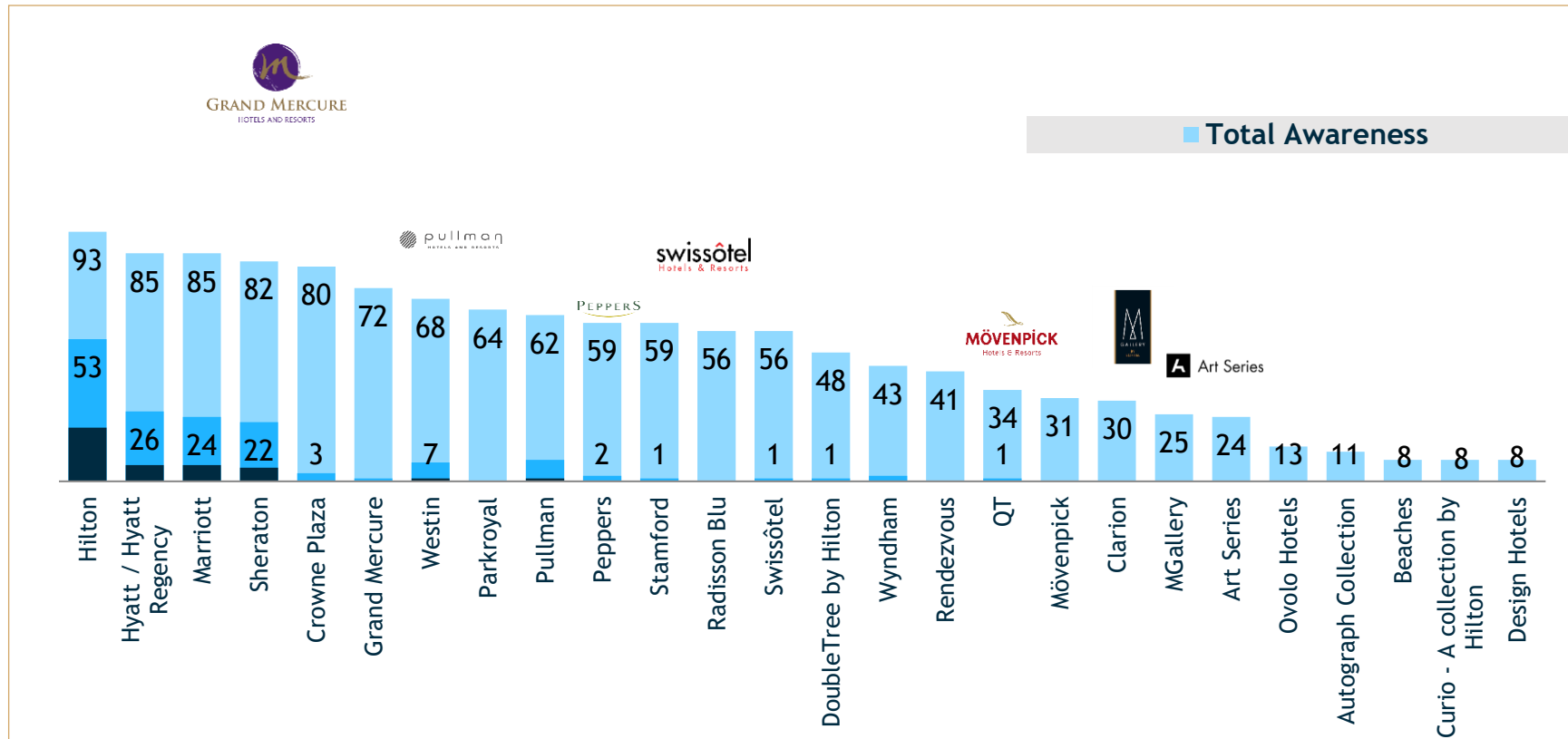
Source: AccorHotels Food & Beverage Financials – July 2019 YTD



Brand Tracking Research

AWARENESS

Question: When thinking of hotels or resorts, which brands or chains come to mind? / Which, if any, of the following accommodation brands are you aware of, even if only by name?



- 62% of affluent and engaged luxury hotel users are aware of Pullman in the Pacific
- Increase of 3% YOY
- Whilst the brand is growing awareness rapidly (16% in 2016), the gap is still large to its main competitors



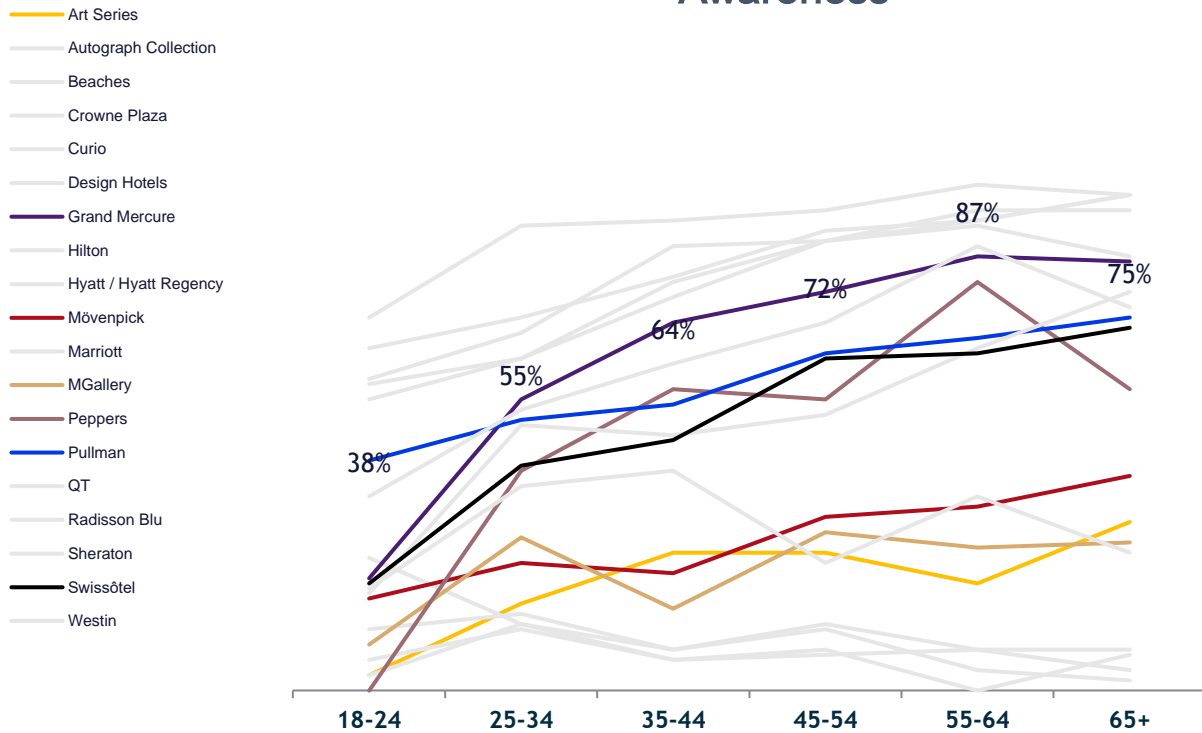
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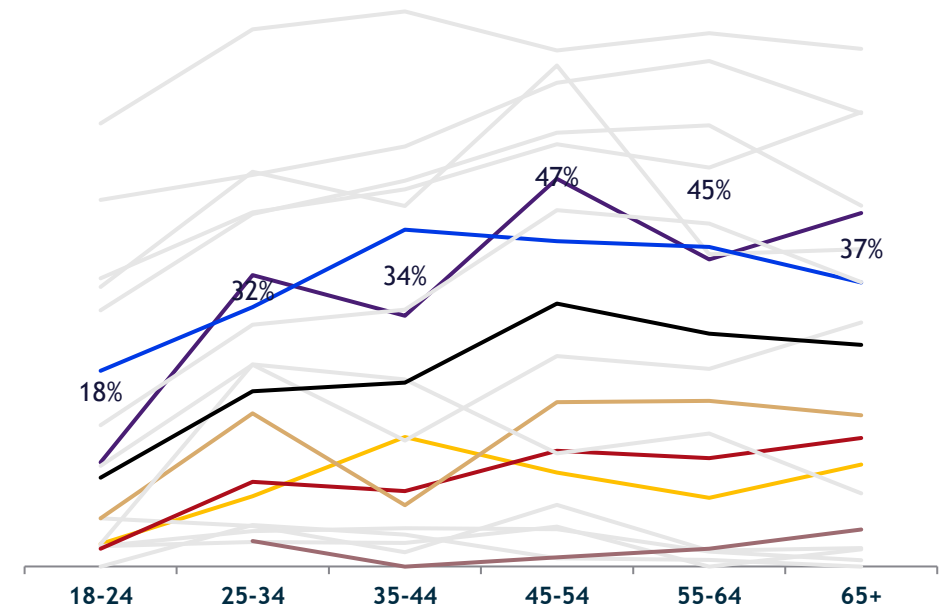
Question: Thinking of the types of accommodation that you are allowed to use and assuming they were all available and equally convenient in their location, which would be your first and second choice for a business/leisure stay? / Which other brands would you be pleased to use for either business or leisure?

Awareness & Consideration by age profile

Awareness



Consideration (Base : All travellers)



Source: Beam Awareness Study 2018 research conducted by BVA BDRC



Pullman Analysis of 2019

KEY AREAS		COMMENTARY		LESSONS LEARNT																
HOTEL NPS / RPS (RESULTS VS TARGET)	Australia	New Zealand																		
	<ul style="list-style-type: none">2019 RPS target = 85.62RPS September 2018 = 86.23RPS YTD 2019 = 85.78	<ul style="list-style-type: none">2019 RPS target = 84RPS September 2018 = 84.28RPS YTD = 85.93		<ul style="list-style-type: none">RPS reached above target in September 2018 and continued to grow strong in NZ, dropping slightly in Australia.Both projections for Australia and NZ are on track to exceed target expectations for 2019.																
KEY BUSINESS METRICS:																				
- DIGITAL YTD	<table><tr><th>Web Revenue/Rooms</th><th>YTD (Sep 2019)</th><th>LY (Sep 2018)</th></tr><tr><td>Direct Web Rooms</td><td>113,401 (+8.2)</td><td>104,182</td></tr><tr><td>Direct Web Revenue</td><td>28,669,831 (+13%)</td><td>24,740,579</td></tr><tr><td>Indirect Web Rooms</td><td>125,346 (+15.5%)</td><td>105,839</td></tr><tr><td>Indirect Web Revenue</td><td>30,619,604 (+15.2%)</td><td>25,950,392</td></tr></table>			Web Revenue/Rooms	YTD (Sep 2019)	LY (Sep 2018)	Direct Web Rooms	113,401 (+8.2)	104,182	Direct Web Revenue	28,669,831 (+13%)	24,740,579	Indirect Web Rooms	125,346 (+15.5%)	105,839	Indirect Web Revenue	30,619,604 (+15.2%)	25,950,392	<ul style="list-style-type: none">Continue to grow and strengthen Direct Web Room bookings.Direct web revenue and rooms is strong, showing a good click through result of owned channels and solid brand awareness.	
Web Revenue/Rooms	YTD (Sep 2019)	LY (Sep 2018)																		
Direct Web Rooms	113,401 (+8.2)	104,182																		
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- KEY MARKET UPDATE:																				
Strong results for Pullman RPS, showing a positive RPS to target. Direct bookings are strong and revenue is high compared to indirect. It's important to continue to grow the brand strength of the Pullman through activations in 2020 and continue to grow direct bookings for the brand through influencers and Owned Channels.																				



External Research

Trends in the industry and premium hotels

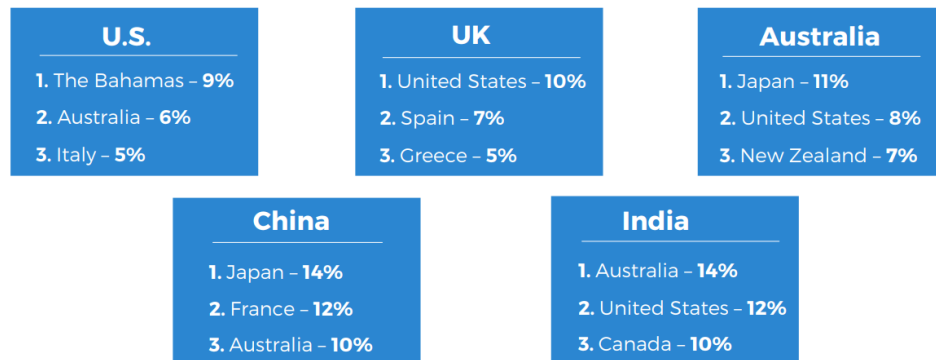
Hotel Industry Trends

- It is becoming critical to personalize and tailor the services to the needs and preferences of the travellers
- Incorporating wellness into travels is trending
- Travellers want to improve physical and emotional wellbeing when traveling
- Travellers want to experience the authentic way of life in the location they visit
- The hospitality industry is increasingly focused on making commitments to sustainability
- Almost two thirds of travellers (60%) experiences are now valued higher than material possessions, 2019 will see travellers packing in many different and authentic experiences.

Destinations Most Want to Visit Next:

The international destinations Millennial/Gen Z most want to visit next run the gamut, from those in the same region, to those further away from their home country.

Top 3 countries Millennial/Gen Z most want to visit for their next international leisure trip:



Premium Hotels

- High supply growth next year in cities with Pullman hotels. Melbourne 8.1%, Adelaide 7.9%, Brisbane 2.4%, Perth 13.1, Auckland 10.2% (gives an opportunity to grow and strengthen the brand heritage and culture to break away from the new hotel market).
- Food Tourism Experiences grow in popularity (locally in the area or something happening within the hotel)
- Wine tastings and dining out at a restaurant that serves local food is trending
- Affluent travellers use Social media for trip inspiration and/or planning
- 79% of people surveyed want to dine at a restaurant that serves local food when traveling
- The three keys of a lifestyle hotel are creativity, innovation, and social connections (creative design, innovative ideas, and sharing their life on social media).
- Social connections are often a primary draw in the lifestyle hotel industry, which puts an emphasis on creating a tribe aesthetic
- Two thirds of Gen z travellers are undecided when they start planning a trip
- Wellness tourism is now a \$639 billion market
- Travellers are looking to enjoy the peace and quiet of peaceful accommodation options, longer stays, private dining, exclusive use of pools or garden areas and private guided tours.
- Local transportation companies often collaborate with hotels. Hotel management should look into transportation like limos and rental cars. Taking that extra step for your guests will increase repeat visits and better online reviews.



External Research

THIRD EXAMPLE

Smart Hotels

- Allowing guests to control the heating or air conditioning from their phone, or turn on the TV by giving a voice command to a smart speaker or use their own devices and accounts on entertainment platforms.
- With VR guests will be able to have a virtual tour, transported through the VR headset to your reception area, dining area, kitchen, amenities, and to their rooms where they would stay. Your hotel can showcase its features, or promote events and upcoming attractions.
- Millennials (extremely tech savvy) are expected to make up 50% of global travellers by 2020.
- Voice Search - “Smart hubs” can be included in hotel rooms and allow customers to adjust the room temperature and lighting levels in order to utilize entertainment devices. It Allow customers to make requests for room service, to reserve a table at a property’s restaurant, find out about the weather (during their trip) or information about the area they are staying.
- Many travellers seem to prefer technology to human beings—they want to check-in digitally and don’t mind if a robot delivers room service.

Health & Wellness

- Growing trends in health and wellness include lighting that energizes, air purification, yoga spaces, in-room exercise equipment and even vitamin-infused shower water.
- Providing coffee and tea that is organic, free from chemicals and less acidic puts your property ahead of the game.
- A trend for healthy food and drinks in hotels, catering services and even holiday as well, with healthier room service options, as well as healthier drinks sold behind bars.
- Travellers want to experience genuine, local & fresh dishes, with an added focus on supporting small and independent businesses.
- Travellers crave authenticity in their travelling and dining experience, and supporting local community is so “in” right now.

Sustainability

- Restaurants promoting their vegetarian and vegan options, through to hotels that make use of smart light bulbs and smart heating to save energy.
- Within the accommodation sector, there are also decisions to be made about using more sustainable materials for things like towels and bed sheets (capitalise on creating **smart rooms** for a small extra fee).
- From the removal of plastic straws in restaurants & bars to room lighting that switches off automatically when leaving – sustainability is without a doubt the hottest trend in 2019.

Bleisure Trips

- ‘Bleisure’ is the name given to trips which combine business travel with leisure activities, and it is increasingly popular, especially among the millennial generation. As an example, a traveller may initially visit a location to attend a business meeting or conference, but then extend their stay to turn it into a holiday.
- Millennials that travel for work are opting to stay a little longer either side of the trip to experience the cities at their leisure – not just through the window of a hotel room between meetings.
- 60% of business trips are now bleisure trips



Wellbeing is booming

Industry has reached a record high at **\$3.4 trillion***

83% of travel advisors say consumers will pay a premium for access to healthy products

FITNESS IS THE WORLD'S BIGGEST SPORT

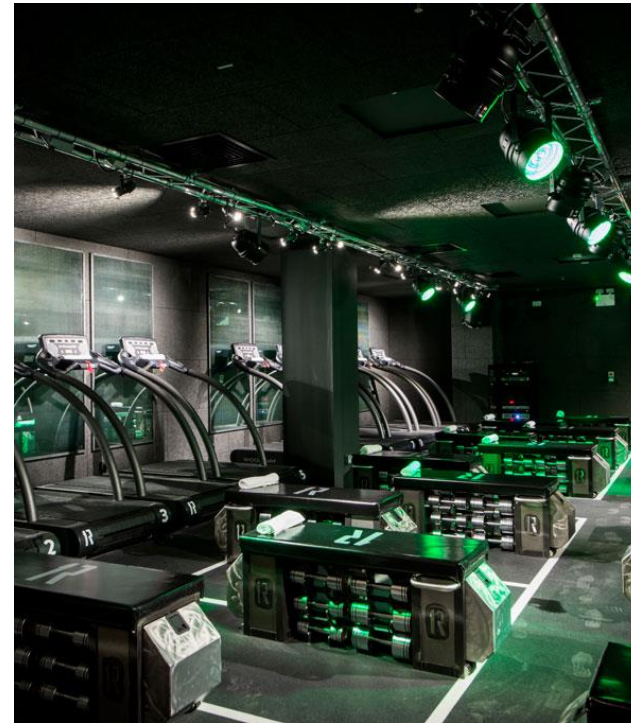
81% Millennials exercise vs. 61% Baby Boomers*

60% Millennials view their health as the most important thing in their lives***

BOUTIQUE FITNESS STUDIOS ARE ROCKETING

42% of the market*

+100% yearly increase*



***Well-being Study 2017 by Accor Hotel

** Spafinder, 2015 State of Wellness Travel Report

*Nielsen Global consumer fitness survey



Brand Objectives 2020

AUSTRALIA

1

Summary of Brand Plans

- Bullet list
- Bullet list
- Bullet list
- Bullet list

BUDGET: \$XXXX

2

Summary of Brand Plans

- Bullet list
- Bullet list
- Bullet list
- Bullet list

BUDGET: \$XXXX

3

Summary of Brand Plans

- Bullet list
- Bullet list
- Bullet list
- Bullet list

BUDGET: \$XXXX





RAFFLES \ ORIENT EXPRESS \ BANYAN TREE \ DELANO \ SOFITEL LEGEND \ FAIRMONT \ SLS \ SO \ SOFITEL \ THE HOUSE OF ORIGINALS
RIXOS \ ONEFINESTAY \ MANTIS \ MGALLERY \ 21C \ ART SERIES \ MONDRIAN \ PULLMAN \ SWISSÔTEL \ ANGSANA
25HOURS \ HYDE \ MÖVENPICK \ GRAND MERCURE \ PEPPERS \ THE SEBEL \ MANTRA \ NOVOTEL \ MERCURE \ ADAGIO
MAMA SHELTER \ TRIBE \ BREAKFREE \ IBIS \ IBIS STYLES \ IBIS BUDGET \ JO&JOE \ HOTELF1