WHY INVEST IN PULLMAN

ACCOR GLOBAL DEVELOPMENT

FEBRUARY 2020

WORK HARD, PLAY HARD

Pullman Hotels & Resorts sets a new tempo in global travel and living, delivering an inspiring, energizing and enriching experience to new entrepreneurs. Pullman welcomes guests with the space they need to focus, work and play. Forward-thinking, hyper-connected and with a passion for art and fitness, Pullman retains the adventurous spirit and open-minded ambition that drove it to become a pioneering travel brand over 150 years ago.

PIONEERING
STYLISH
INVIGORATED
ACCOMPLISHED

POSITIONING VIDEO

BRAND UPSs

LEADING CONTEMPORARY DESIGN HOTEL BRAND

N°1 perceived design brand by guests versus competitors

Most consistent modern styled network in its premium category thanks to it recent dynamic growth with new built openings and major renovations

Distinctive concepts translated across all touch points:
The Junction at Pullman, Artist Playground, MEET/PLAY,…

BRAND UPSs

GROWING MOMENTUM

130 hotel openings in the last 10 years and 50 openings planned until 2030

Leveraging both business and leisure markets and opportunities

Distinct MICE space programming > 1000 sqm minimum (HARD) and strong MICE offerings (SOFT)

BRAND UPSs

HIGH PERFORMANCE BUSINESS MODEL

Large number of keys –
300 rooms in average

Premium positioning in premium locations plus business oriented drive resulting in higher room rates

Additional MICE & F&B revenue

NETWORK & PIPELINE

136 HOTELS

40,068 ROOMS

41 COUNTRIES IN 2019

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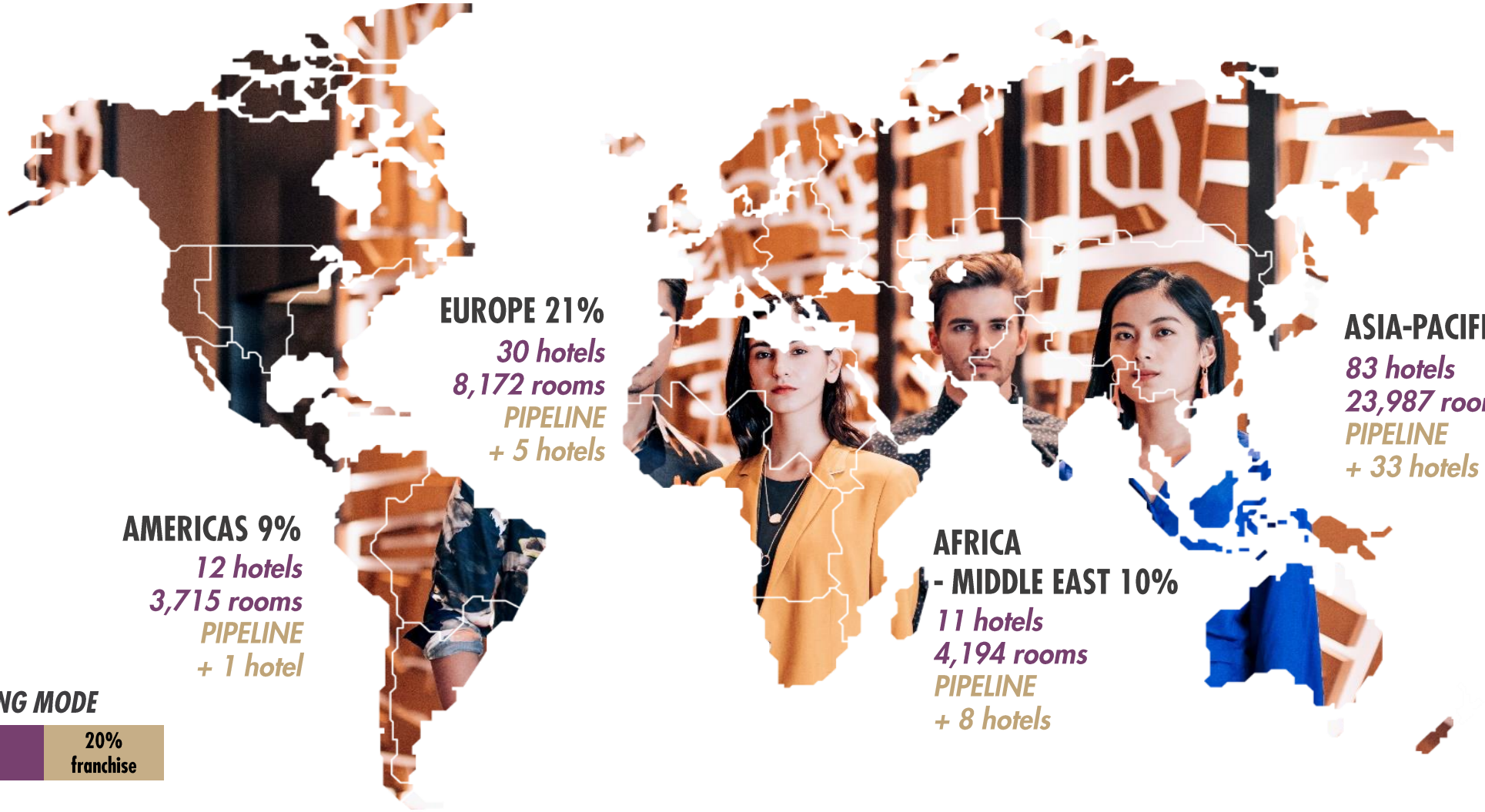
47 NEW HOTELS BY 2024

13,283 NEW ROOMS BY 2024

A WORLWIDE AND AMBITIOUS NETWORK



EUROPE 21%
30 hotels
8,172 rooms
PIPELINE
+ 5 hotels

AMERICAS 9%
12 hotels
3,715 rooms
PIPELINE
+ 1 hotel

ASIA-PACIFIC 60%
83 hotels
23,987 rooms
PIPELINE
+ 33 hotels

AFRICA - MIDDLE EAST 10%
11 hotels
4,194 rooms
PIPELINE
+ 8 hotels

OPERATING MODE

80% management	20% franchise

FLAGSHIPS

PULLMAN PARIS BERCY CENTRE

FRANCE

392 ROOMS

FLAGSHIPS

PULLMAN PARK LANE

HONG KONG

834 ROOMS

FLAGSHIPS

PULLMAN BERLIN SCHWEIZERHOF GERMANY

384 ROOMS

FLAGSHIPS

PULLMAN SUZHOU ZHONGHUI

CHINA

414 ROOMS

FLAGSHIPS

PULLMAN TOKYO TAMACHI

JAPAN

143 ROOMS

PULLMAN PARK LANE, HONG KONG

FLAGSHIPS - RESORTS

PULLMAN PHUKET ARCADIA NAITHON BEACH

THAILAND

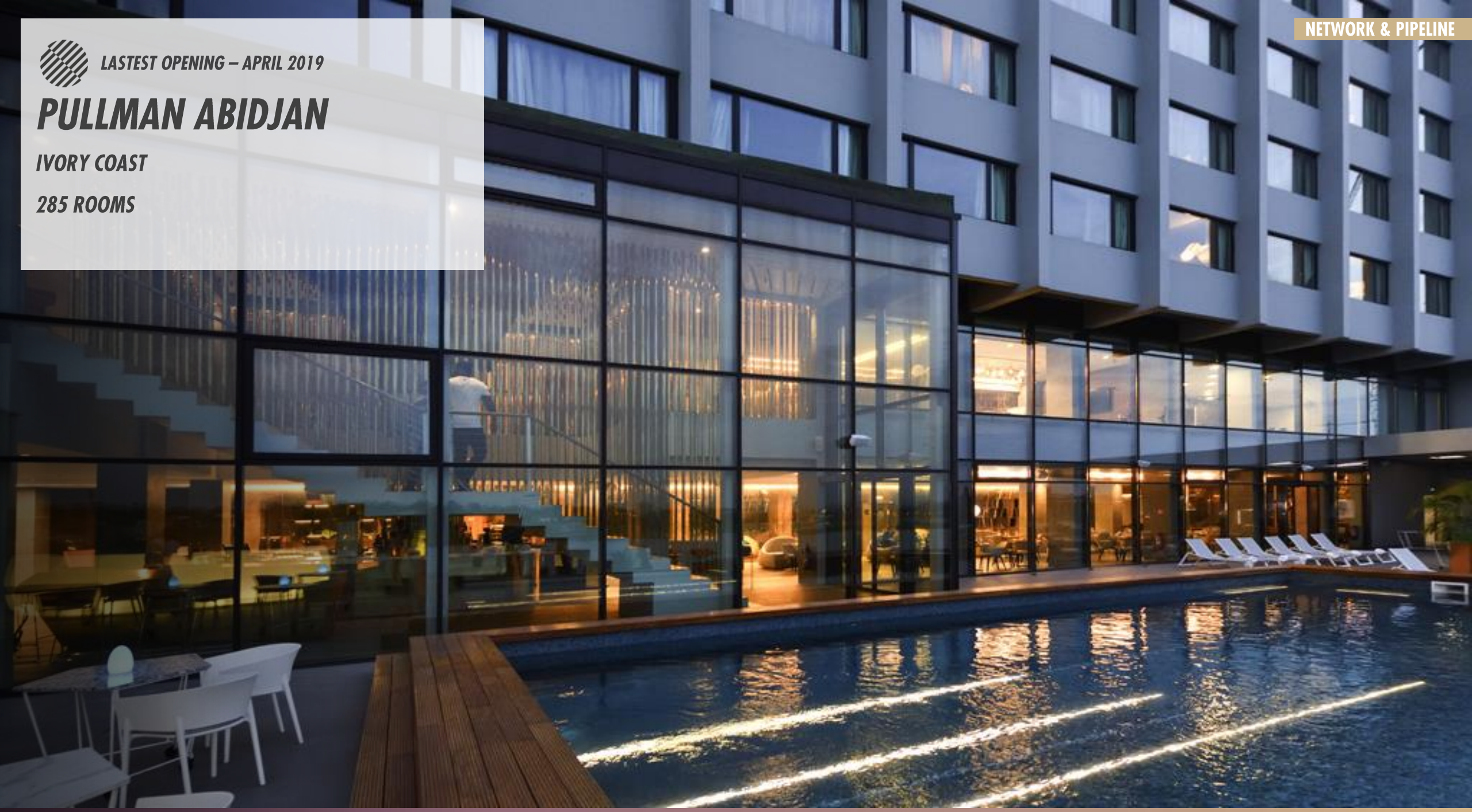
278 ROOMS

LATEST OPENING – FEBUARY 2019

PULLMAN SHANGHAI QINGPU EXCELLENCE

CHINA

292 ROOMS

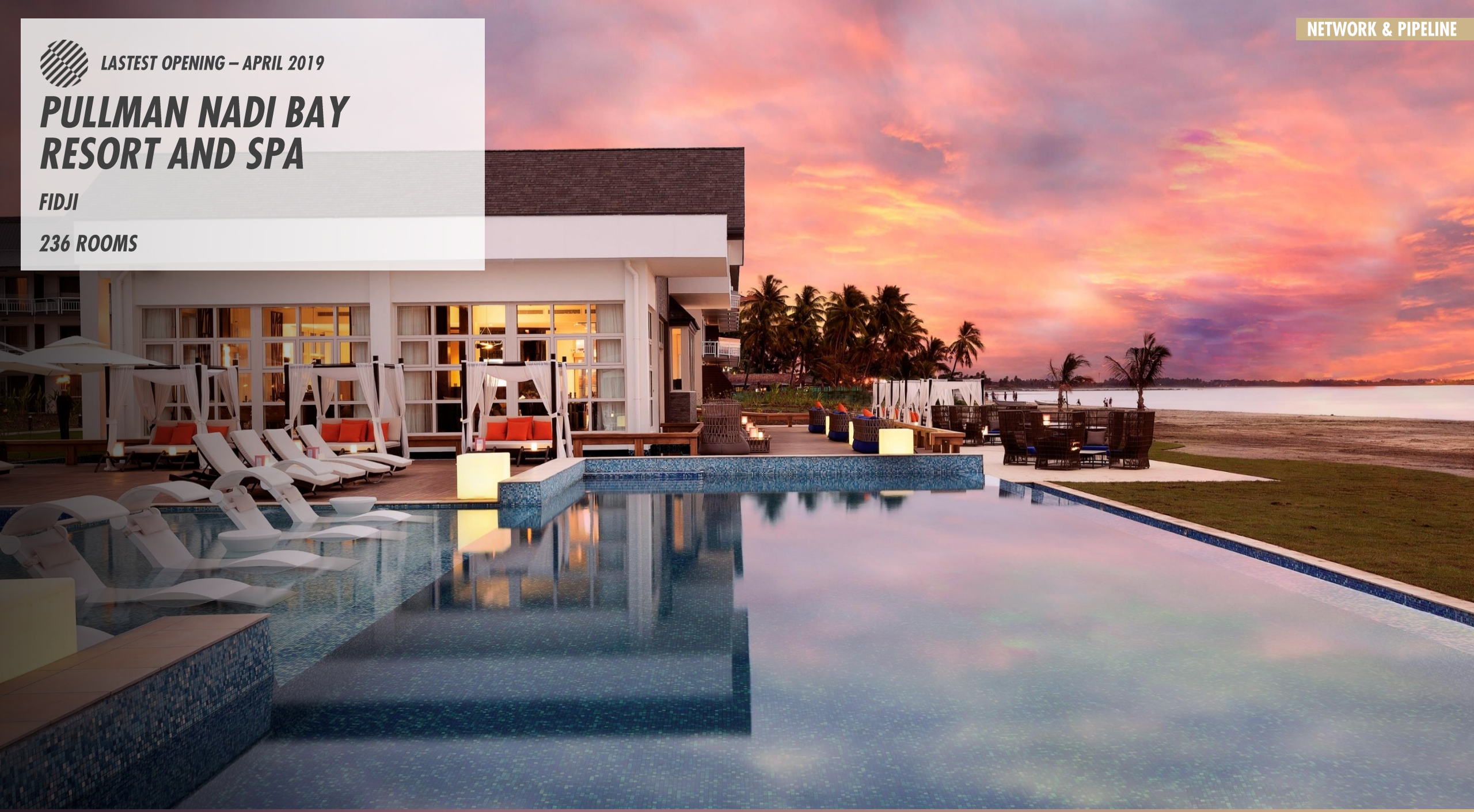


LASTEST OPENING – APRIL 2019

PULLMAN ABIDJAN

IVORY COAST

285 ROOMS



LASTEST OPENING – APRIL 2019

PULLMAN NADI BAY RESORT AND SPA

FIDJI

236 ROOMS

LATEST OPENING – MAY 2019

PULLMAN CIAWI VIMALA HILLS

INDONESIA

236 ROOMS

LATEST OPENING – JULY 2019

PULLMAN CHANGBAISHAN RESORT

CHINA

300 ROOMS

LATEST OPENING – SEPTEMBER 2019

PULLMAN SUZHOU ZHONGHUI

CHINA

414 ROOMS

LATEST OPENING – SEPTEMBER 2019

PULLMAN MAAMUTAA

MALDIVES

122 ROOMS

LATEST OPENING – DECEMBER 2019

PULLMAN MANDALAY

MYANMAR

358 ROOMS

LATEST OPENING – NOVEMBER 2019

PULLMAN HUIZHOU KAISA

CHINA

309 ROOMS

UPCOMING OPENING – DECEMBER 2020

PULLMAN TBILISI TOWER

GEORGIA

228 ROOMS

SECURED PIPELINE OVER 5 YEARS

As of end December 2019

2020

AFRICA & MIDDLE EAST
Pullman Sharjah Canal, UAE

ASIA PACIFIC
Pullman Yueyang Oriental, China
Pullman Hanzhong, China
Pullman Quy Nhon, Vietnam
Pullman Phu Quoc, Vietnam
Pullman Bandung City Centre, Indonesia
Pullman Roturua, New Zealand

EUROPE

Pullman Tbilisi Tower, Georgia

SOUTH AMERICA
Pullman Lima Miraflores, Peru

2021

AFRICA & MIDDLE EAST
Pullman Addis Ababa, Ethiopia
Pullman Airport City Accra, Ghana
Pullman Doha Bridge Towers, Qatar
Pullman Ikoyi, Nigeria

ASIA PACIFIC
Pullman Dali, China
Pullman Fuzhou Shansheng, China
Pullman Shenzhen North Station, China
Pullman Suzhou Taicang, China
Pullman Auckland Airport, New Zealand

EUROPE
Pullman Gorni Okol Hotel Resort Golf & Spa, Bulgaria

2022 & MORE

AFRICA & MIDDLE EAST
Pullman Accra Platinium Plaza, Ghana

ASIA PACIFIC
Pullman Jiaxing Pinghu Excellence, China
Pullman Fuxian Lake Resort, China
Pullman Ninh Binh, Vietnam

IMMERSIVE ART & DESIGN

Enjoy art & design in living spaces rather than museums and shops: at Pullman, art & design surround you in a fresh modern, and inspiring way.

ARTIST PLAYGROUND

Let art spark your creativity. Not to mention your curiosity. The Artist Playground by Pullman promises fresh experiences every time you visit. This dedicated art corner in our hotels immerses you into the vibrant local culture, art, design and photography scenes – in the most unexpected of ways.

BRAND PROGRAMS: ARTNIGHT

Our world is your playground, especially during the exclusive Artnight by Pullman. The signature event brings to life our spaces and unique work/play dynamic through cutting-edge contemporary art and design, live DJs and art-inspired cocktails.

POWER FITNESS

Stay on top of your game while having fun: at Pullman, fitness is exciting and rewarding. Our holistic approach to wellbeing focuses on the four pillars of health: sleep, food, sport and spa.

SARAH HOEY WELLBEING PROGRAM

Pullman is strengthening its commitment to wellbeing with a program designed to help travelers adopt a healthier lifestyle

This holistic approach was developed in collaboration with Pullman's Wellness Coach, Sarah Hoey

It is based on the four universal pillars of health: SLEEP, FOOD, SPORT and SPA

HAPPENING F&B

Our restaurants and bars are designed around the local community, in a true restaurateur mindset. The key words are excellence, simplicity, authenticity. Add into the mix an entertaining twist and genuine care, you have the recipe for success.

THE JUNCTION AT PULLMAN

More than just a place to check in, eat and plug in, the Junction at Pullman is a vibrant and happening destination. There's space for you to work, create and connect. A fresh take on the lobby experience, this dynamic social hub presents opportunities for you to play – around every corner.

PULLMAN PORTER

DISCREET RECEPTION

MESSAGE BOARD

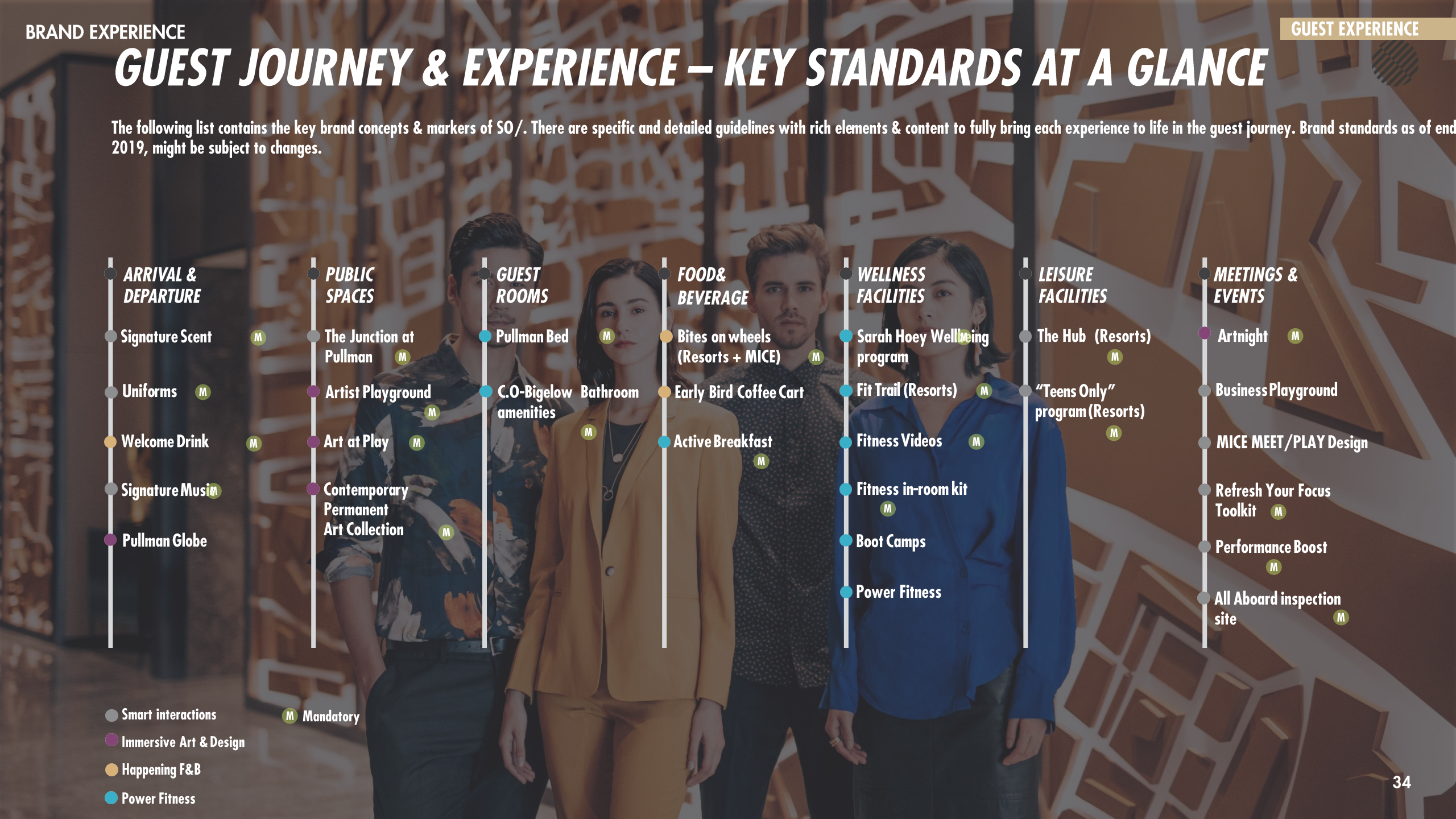
FOOD AND BEVERAGE

SMART INTERACTIONS

Our services and technologies are in-tune with todays zeitgeist and always available; so you can manage your pace of life, your own way, and be connected to your surroundings seamlessly and effortlessly.

GUEST JOURNEY & EXPERIENCE – KEY STANDARDS AT A GLANCE

The following list contains the key brand concepts & markers of SO/. There are specific and detailed guidelines with rich elements & content to fully bring each experience to life in the guest journey. Brand standards as of end 2019, might be subject to changes.



ARRIVAL & DEPARTURE

- Signature Scent M
- Uniforms M
- Welcome Drink M
- Signature Musi M
- Pullman Globe

PUBLIC SPACES

- The Junction at Pullman M
- Artist Playground M
- Art at Play M
- Contemporary Permanent Art Collection M

GUEST ROOMS

- Pullman Bed M
- C.O-Bigelow Bathroom amenities M

FOOD& BEVERAGE

- Bites on wheels (Resorts + MICE) M
- Early Bird Coffee Cart
- Active Breakfast M

WELLNESS FACILITIES

- Sarah Hoey Wellbeing program
- Fit Trail (Resorts) M
- Fitness Videos M
- Fitness in-room kit M
- Boot Camps
- Power Fitness

LEISURE FACILITIES

- The Hub (Resorts) M
- "Teens Only" program (Resorts) M

MEETINGS & EVENTS

- Artnight M
- Business Playground
- MICE MEET/PLAY Design
- Refresh Your Focus Toolkit M
- Performance Boost M
- All Aboard inspection site M

Smart interactions

Immersive Art & Design

Happening F&B

Power Fitness

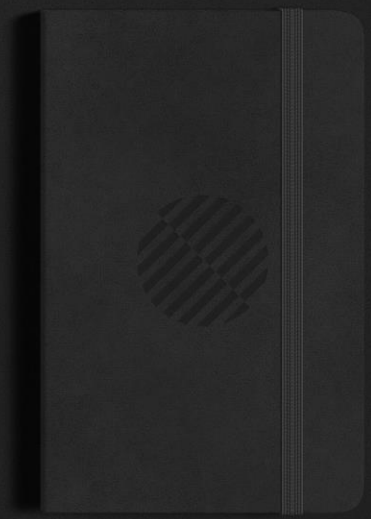
M Mandatory

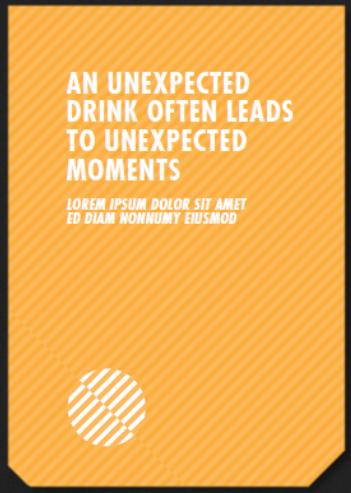
"WE GO THE EXTRA
MILE SO OUR GUESTS
CAN BE AT THEIR
PERSONAL BEST"

DYNAMIC EXPRESSIVE

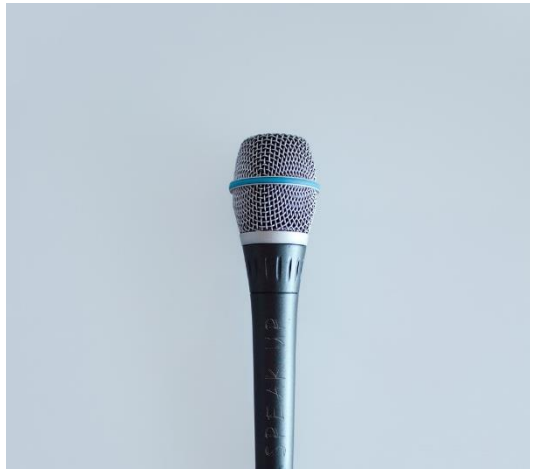
The visual identity transmits the fundamental values of the brand.
It expresses the positive duality of the Work Hard/ Play Hard concept.

Two options for City Hotels and Resorts.





COMMUNICATION PLATFORM



GLOBAL COMMUNICATION CAMPAIGN

Our world is your playground

ADVERTISING VIDEO

PULLMAN MAGAZINE

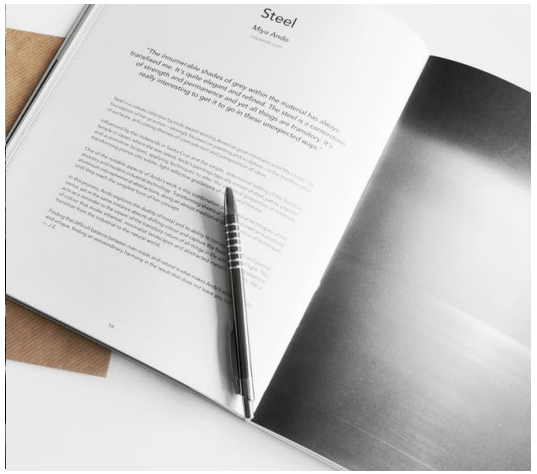
7M potential reach per year

TONE OF VOICE

Bold, Smart, Fun

SOCIAL MEDIA & WEBSITE

- 300,000 followers on all social media channels
- +43K followers 2019 vs 2018
- 4,000,000 interactions encouraged by more 1,000 posts



BRAND AWARDS

193 PROMINENT AWARDS IES, INCLUDING :

World Luxury Hotel Award - Luxury New Hotel
Pullman Tokyo Tamachi

SkyTrax 2019 World Airport Awards – Best Airport Hotel in the Pacific
Pullman Brisbane Airport

International Hotel Awards 2019 – Luxury Hotel City
Pullman Jakarta Central Park

Travel & Leisure – Best Family Resort
Pullman Oceanview Sanya Bay Resort & Spa

China Tourism and Hotel Awards – Best MICE Hotel 2019
Pullman Kaifeng Jianye

World Luxury Hotel Awards 2019 – Best luxury Vietnam Beach Resort
Pullman Danang Beach Resort

World Travel Awards for Europe's Leading Hotel & Spa 2019
Pullman Timi Ama Sardegna

11 Haute Grandeur Global Excellence Awards

BREAKING RESULTS

BRAND AWARENESS

50%

Already well-known in key markets among affluent travelers total awareness among affluent travelers

Our objective is to grow our brand awarness by 2-3 points

BRAND PERCEPTION

66%

Pullman is considered as cosmopolitan brand.

2/3 of the Pullman guests associate the brand with contemporary design.

Excellent F&B (breakfast, bar) and a modern style / design are the main distinctive attributes spontaneously quoted by frequent guests

Our objective is to capitalize on the fact that root link of Pullman have a positive image of travel/luxury

BRAND MARGIN

€49

Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative

Our objective is to increase this price premium

REPUTATION PERFORMANCE

87,9%

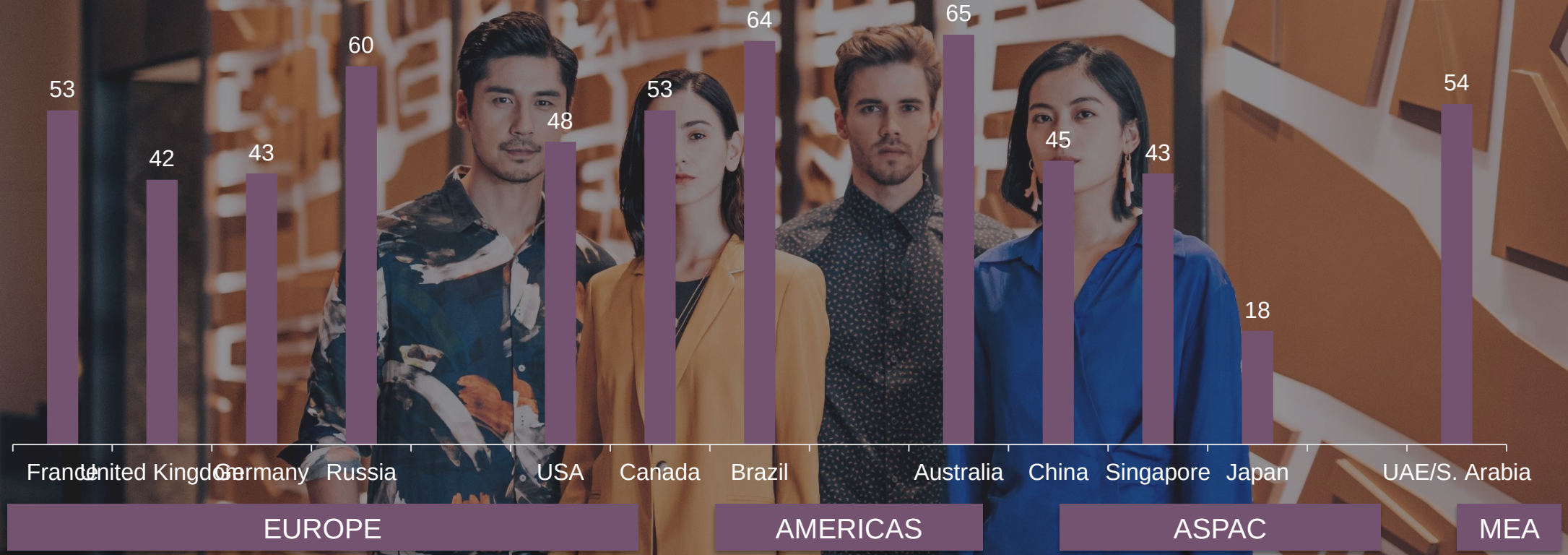
The Reputation Performance Score measures the overall hotel online reputation based on several sources: Guest Satisfaction Survey (GSS & Net Promoter Score), Trip Advisor, Booking, Ctrip etc. It is the most representative hotel's reputation KPI, requires at least 100 guests' feedback and give positive reputation score out of 100%

Our objective is to exceed 90% in 2020

BRAND AWARENESS (%)

Source: BEAM - Brand Equity & Awareness Monitoring December 2019
Base: Affluent & Luxury hotel users = users having spent at least 1 stay in a luxury hotel over the last 12 months, 6 nights + in any type of paid-for accommodation, top 30% income within country

BRAND MARGIN (€)

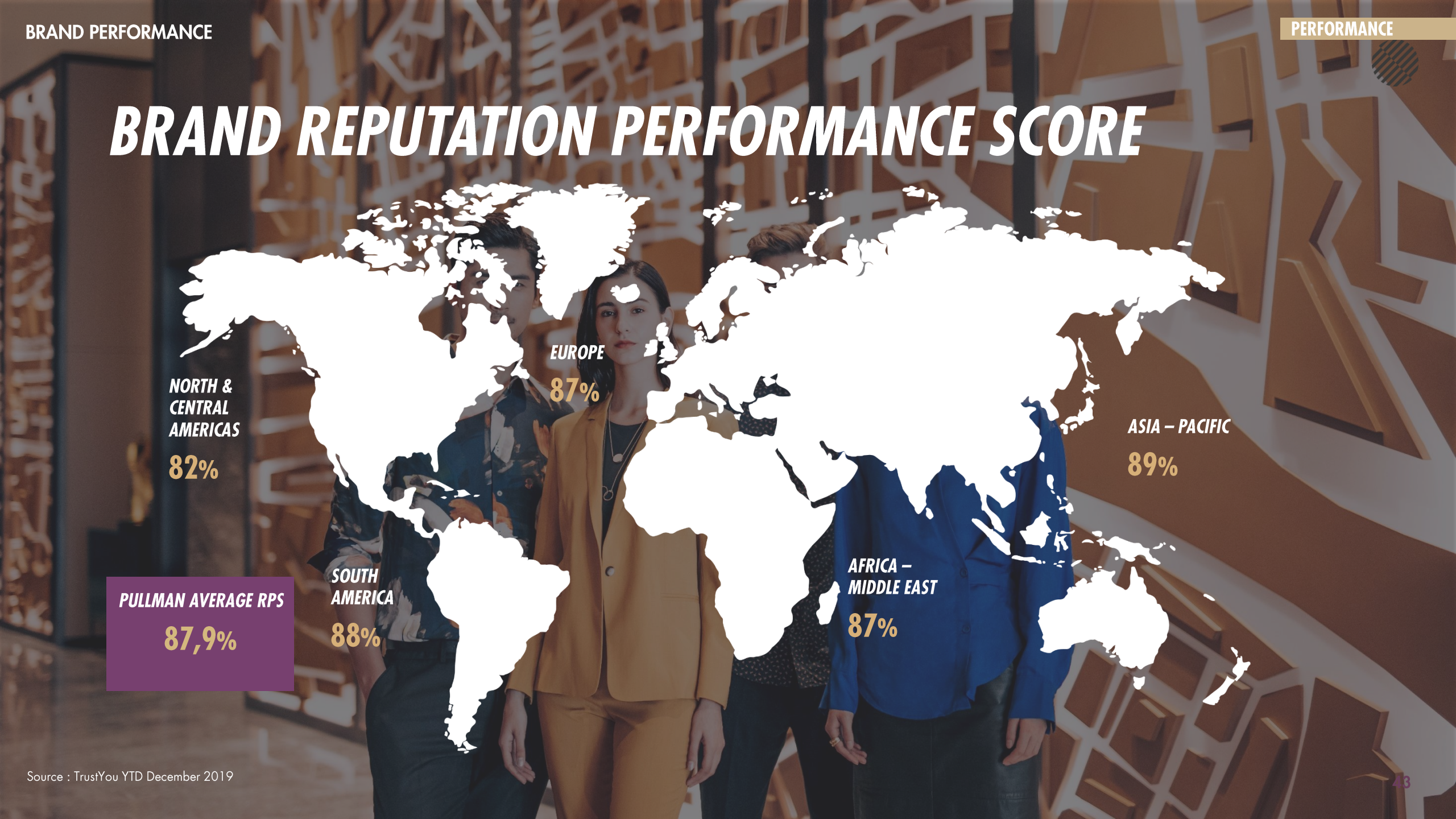


BRAND MARGIN® IN €

Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative. A Brand Margin® of 10€ means that « Consumers think it is worth paying on average 10€ more per night to stay with brand X compared to an unbranded equivalent ». Base: people having stayed in paid-for accommodation in the last 12 months and somewhat/very familiar with the brand

Brand Margin ® in €. Traveller representative
Figures as of end 2019

BRAND REPUTATION PERFORMANCE SCORE



PULLMAN AVERAGE RPS

87,9%

Source : TrustYou YTD December 2019

ACCOR DISTRIBUTION SOLUTION*

Accor offers > 110 global distribution partnerships at best market conditions

1 all.accor.com multi-brand portal

18 BRAND WEBSITES

1 MOBIL APP
35 point of sales animated by countries

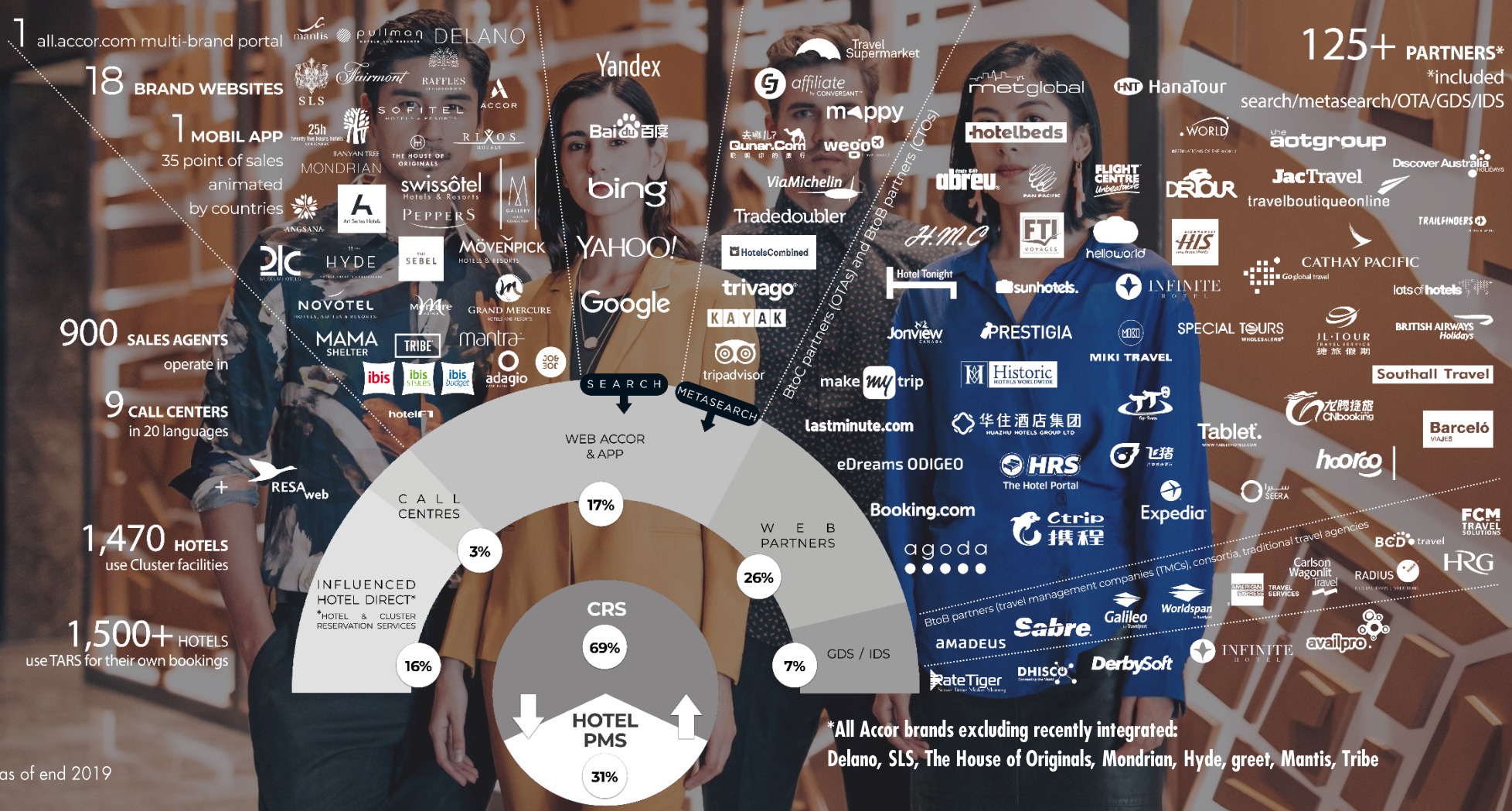
900 SALES AGENTS operate in

9 CALL CENTERS in 20 languages

+ RESAweb

1,470 HOTELS use Cluster facilities

1,500+ HOTELS use TARS for their own bookings



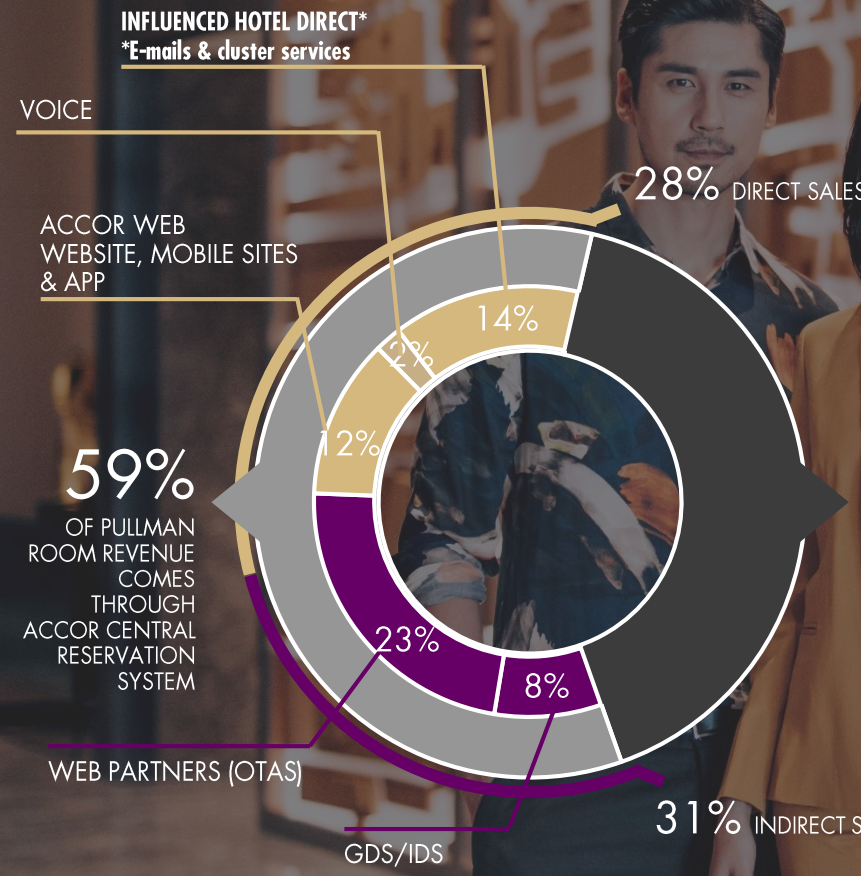
125+ PARTNERS*
*included search/metasearch/OTA/GDS/IDS

*All Accor brands excluding recently integrated:
Delano, SLS, The House of Originals, Mondrian, Hyde, greet, Mantis, Tribe

Source : CRS Official figures as of end 2019

ACCOR DISTRIBUTION PERFORMANCE

FOR LUXURY & PREMIUM BRANDS *(Room Revenue based)*



FOCUS WEB
(ACCOR WEB + WEB PARTNER)

35%

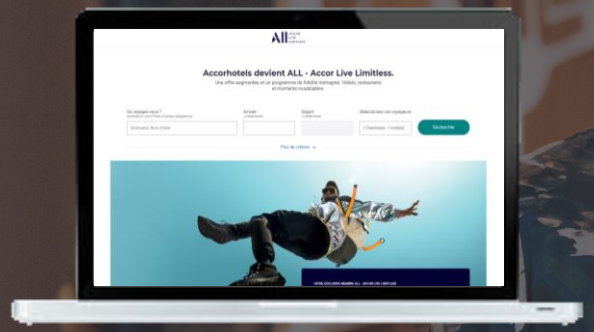
2M ROOM NIGHT

€335M ROOM REVENUE

Source : CRS Official figures as of end 2018

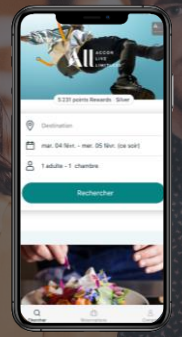
NEW BOOKING ENGINE & APP

1 MULTIBRAND PORTAL
ALL.ACCOR.COM



- **300M** Website + App visits
- **2,200** Destinations
- **18** Languages

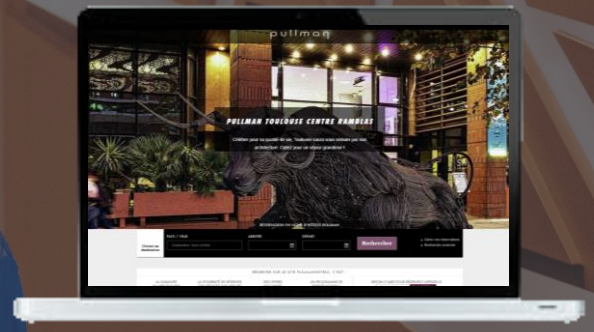
1 LIFESTYLE COMPANION APP



- **56%** Mobile and app visits*
- **1** Download every minute

*year 2019 + from dec 2019-to Mid Feb 2020, since launch of ALL

18 BRAND.COM WEBSITES



- Plugged to ALL.ACCOR.COM

Source : Official figures as of end 2019

NEW LOYALTY PROGRAM

THE ONLY LIFESTYLE LOYALTY PROGRAM

ALL.ACCOR.COM

NEW LIMITLESS EXPERIENCES AND EXTENDED OPPORTUNITIES
TO EARN & REDEEM POINTS

NEW BENEFITS

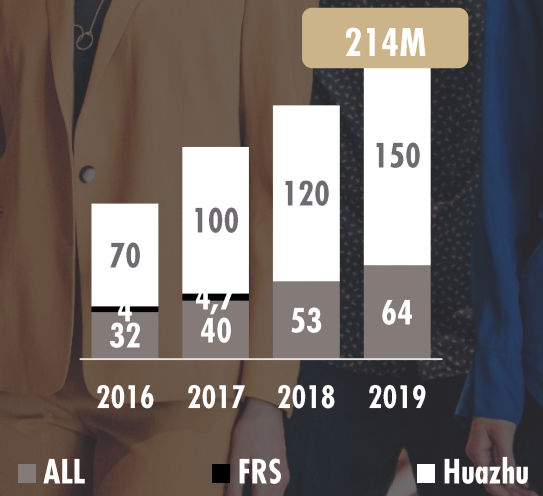
- 2 New tiers (diamond & limitless hidden tier)
- 34 Brands and +
- Suite Night Upgrade
- F&B outside a stay

NEW PARTNERSHIPS

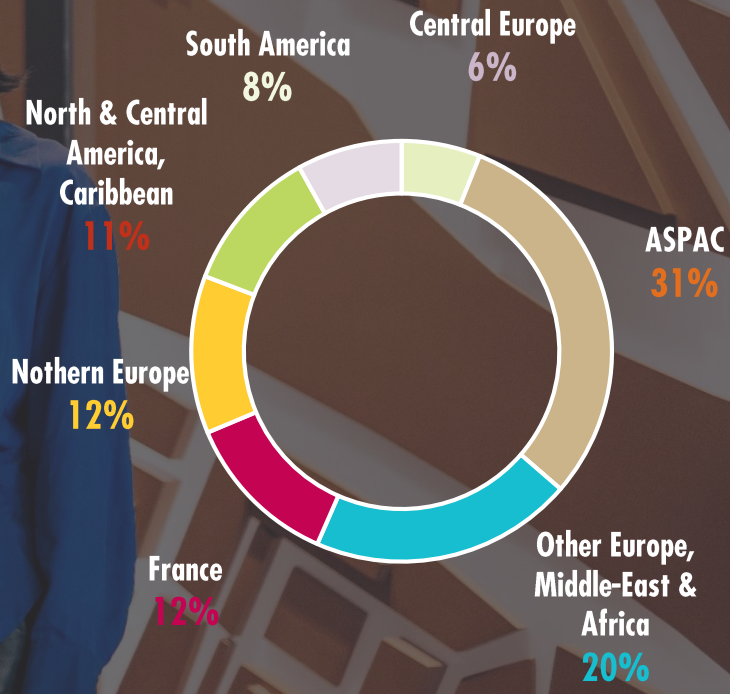
- PSG – Games / Net media value +€200m to ALL
- AEG – Worldwide arenas & festivals
- IMG – Taste festivals

THE FAST GROWING LOYALTY PROGRAM

- 64M Loyalty members worldwide
- 31% Loyalty contribution rate
- X 2 Members stay twice more
- X 2 Members spend twice more



THE MOST GLOBAL LOYALTY PROGRAM



Source : Official figures as of end 2019

APPENDIX

COMPETITION

DEVELOPMENT CRITERIA

PROGRAMMING & DEVELOPMENT

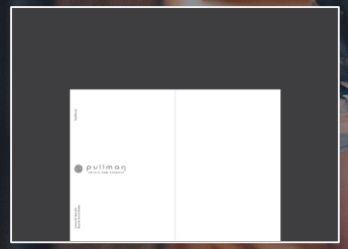
		AAA ULTRA CITY CENTER LOCATION, HISTORIC CONVERSION	WORLDWIDE
HOTEL	RECOMMENDED NUMBER OF ROOMS	200 keys and +	200 – 450 keys
	ROOM AVERAGE SIZE	-15%/-20% of worldwide	30 – 36 sqm
	TGFA / ROOM	60 – 90 sqm	75 – 110 sqm
RESORT	RECOMMENDED NUMBER OF ROOMS	150 keys and +	200 – 450 keys
	ROOM AVERAGE SIZE	-15%/-20% of worldwide	36 – 42 sqm + balcony
	TGFA / ROOM	75 – 110 sqm	82 – 120 sqm
FOOD & BEVERAGE		Locally Relevant Restaurant, 1 Destination Bar, Active Breakfast & Early Bird Coffee Cart, Bites-on-Wheels (for resorts)	
WELL-BEING		Spa(1) Fitness Centre(1) Swimming pool(1) Sarah Hoey fitness program and minimum 2 treatment rooms	
MEETINGS		The Junction Generous ballroom & meeting space > 1,000 sqm Artist Playground The Hub and Teens Only Program (Resorts Only)	

	PRIME LOCATIONS	SECONDARY LOCATIONS	AIRPORTS SUBURBS
INTERNATIONAL CAPITALS KEY CITIES & RESORTS	●	●	●
MAJOR DOMESTIC DESTINATIONS	●		
OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS	●		

DESIGN & TECHNICAL SERVICES

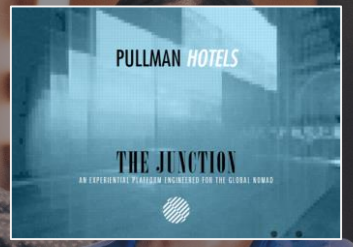
All technical documents are available after NHCSA is signed

PULLMAN DESIGN BRIEF
Can be used before HCSA is signed



PULLMAN STYLE BOOK
Can be used before HCSA is signed

PULLMAN CONSTRUCTION & RENOVATION STANDARDS
Can be used after HCSA is signed



PULLMAN THE JUNCTION
Can be used after HCSA is signed

PULLMAN MICE GUIDELINES
Can be used after HCSA is signed

PULLMAN FIT, PULLMAN SPA,
PULLMAN RESORT ARCHITECTURE & ZONING
Can be used after HCSA is signed

PULLMAN ART AT PLAY
PULLMAN PERMANENT ART COLLECTION
Can be used after HCSA is signed

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