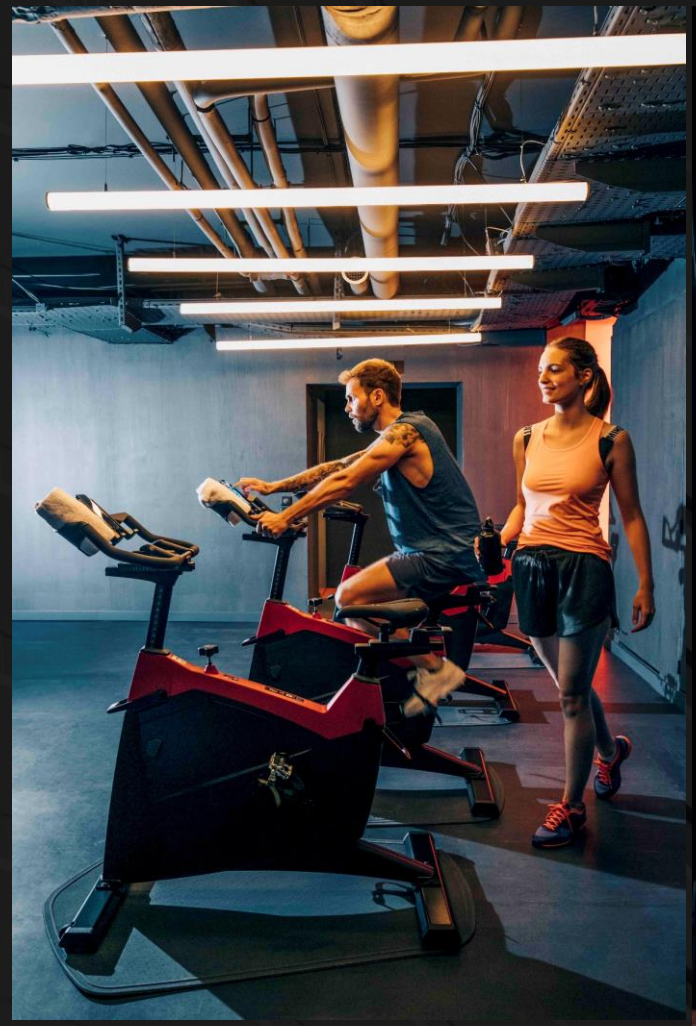
WHY INVEST IN PULLMAN

ACCOR GLOBAL DEVELOPMENT

Q1 2021

pullman
HOTELS AND RESORTS

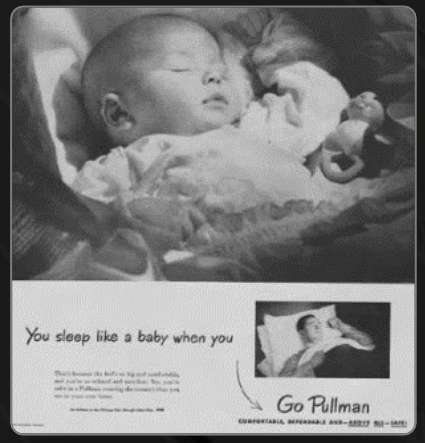
BRAND POSITIONING



STIMULATING HOTELS THAT INSPIRE YOUR MIND AND ENERGIZE YOUR BODY SO YOU CAN PUSH YOUR BOUNDARIES

PIONEERING • STYLISH • ACCOMPLISHED • INVIGORATED

BRAND STORY



PULLMAN HAS ALWAYS SEEN MORE IN TRAVELING

George Pullman was an innovator and entrepreneur on a mission to enrich the world of hospitality. He moved travel experiences forward with comfort, safety and style.

His pioneering and stylish legacy remains at the heart of the Pullman brand today.

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, . . .

PULLMAN BERLIN SCHWEIZERHOF, GERMANY

GROWING MOMENTUM

140 hotel openings in the last 12 years and over 50 openings planned by 2025

Leveraging both business and leisure markets and opportunities

Distinct MICE space programming (HARD) and strong MICE offerings (SOFT)

PULLMAN SUZHOU ZHONGHUI, CHINA

HIGH PERFORMANCE BUSINESS MODEL

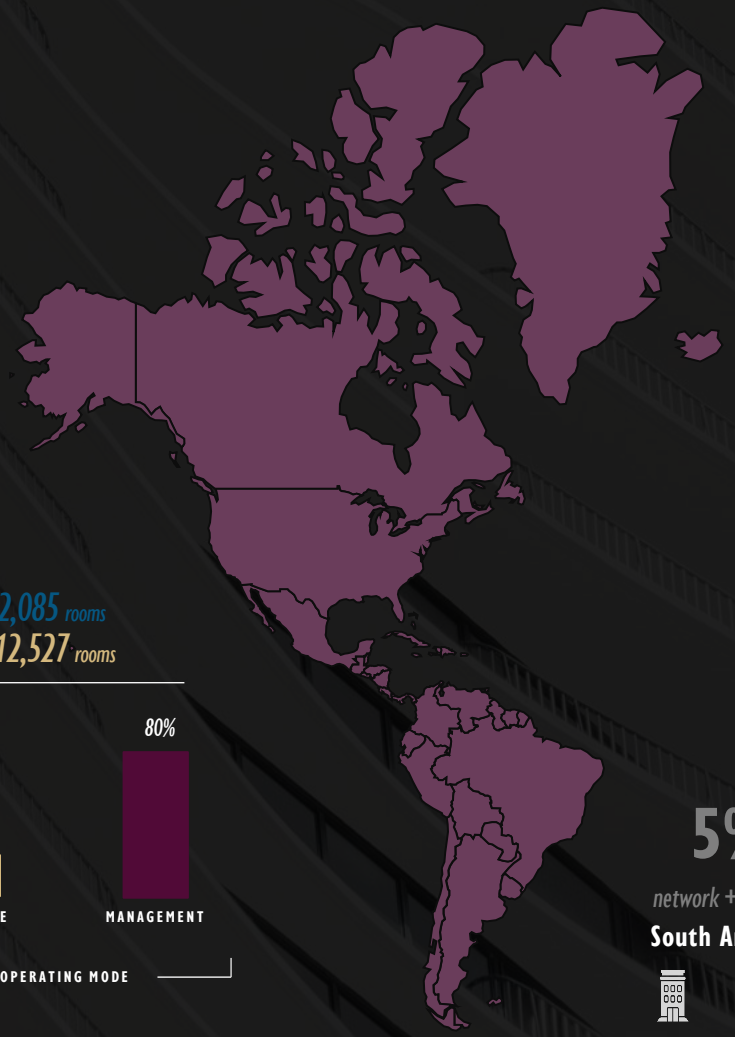
Large number of keys – 300 rooms in average

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

Additional F&B & MICE revenue

PULLMAN DUBAI CREEK CITY CENTRE RESIDENCES, UAE

A GLOBAL FOOTPRINT OF 190 HOTELS OPEN AND IN THE PIPELINE



2%
network + pipeline
North, Central America & Caribbean

3 hotels · 1,262 rooms

7%
network + pipeline
Northern Europe

13 hotels · 3,295 rooms
3 hotels · 619 rooms

8%
network + pipeline
Southern Europe

14 hotels · 4,014 rooms
2 hotels · 422 rooms

23%
network + pipeline
South East Asia

28 hotels · 8,684 rooms
15 hotels · 3,647 rooms

33%
network + pipeline
Greater China

41 hotels · 13,269 rooms
17 hotels · 4,924 rooms

14%
network + pipeline
India, Middle East & Africa

15 hotels · 5,406 rooms
8 hotels · 2,150 rooms

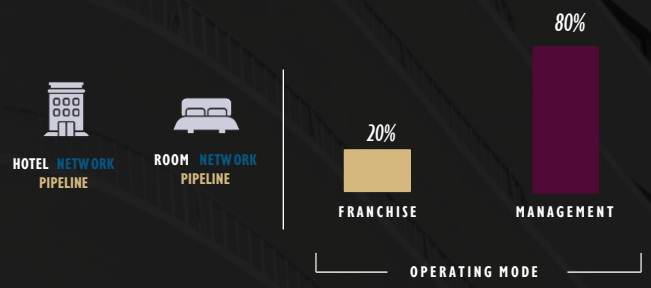
5%
network + pipeline
South America

9 hotels · 2,457 rooms
1 hotel · 237 rooms

8%
network + pipeline
Pacific

20 hotels · 3,698 rooms
2 hotels · 528 rooms

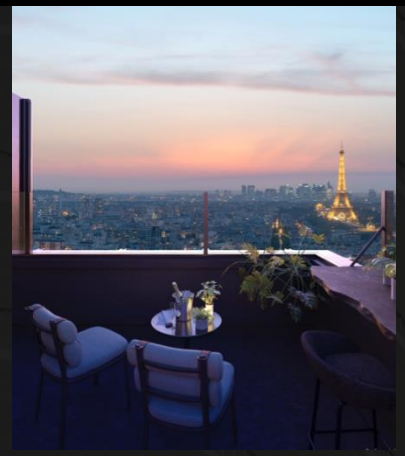
	HOTEL	ROOM
NETWORK	143 hotels	42,085 rooms
PIPELINE	48 hotels	12,527 rooms

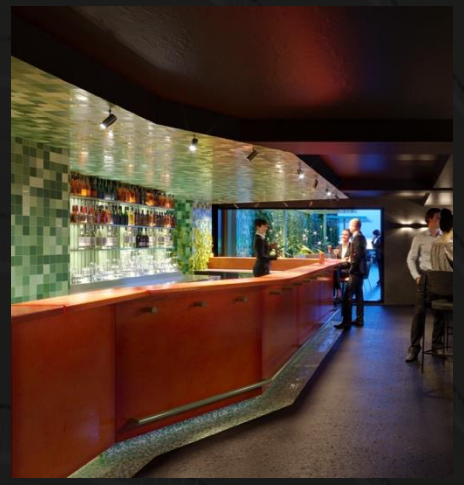


All figures as of end December 2020

Breakdown network + pipeline by region is calculated by number of rooms

PULLMAN BERLIN SCHWEIZERHOF
GERMANY





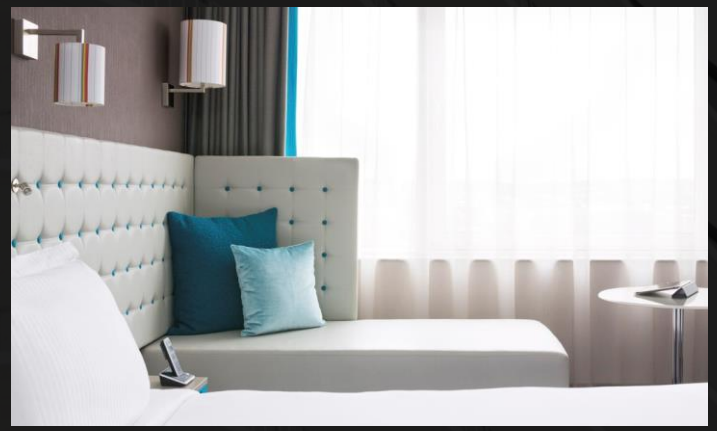
PULLMAN PARIS MONTPARNASSE

FRANCE – reopening June 2021

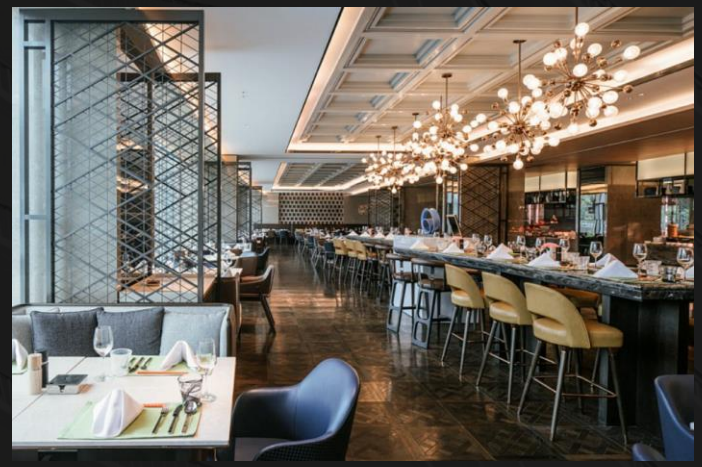
© ailleurs.studio

PULLMAN PARIS BERCY-CENTRE
FRANCE

PULLMAN LONDON ST PANCRAS
UNITED KINGDOM

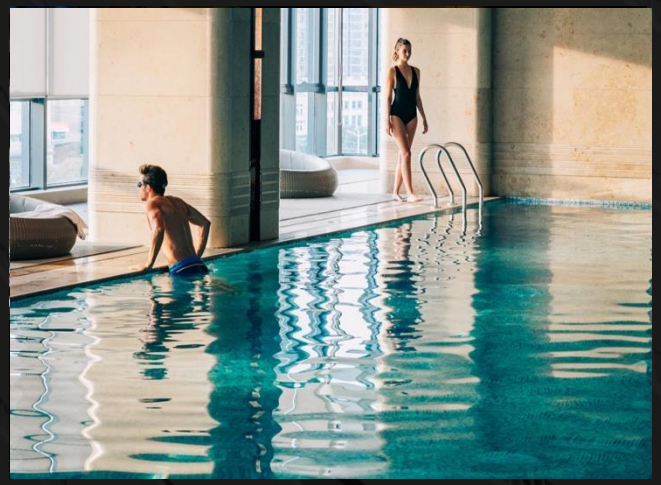


PULLMAN TOKYO TAMACHI
JAPAN



PULLMAN SHANGHAI QINGPU EXCELLENCE

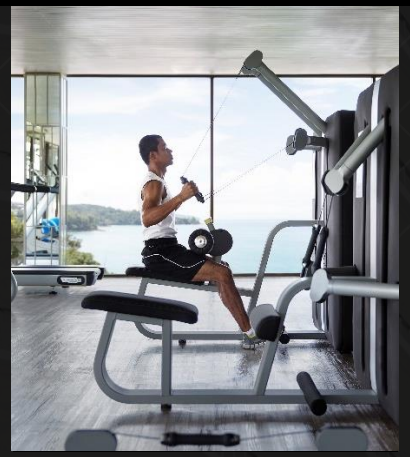
GREATER CHINA



PULLMAN SUZHOU ZHONGHUI
CHINA

CHECK OUT 退房

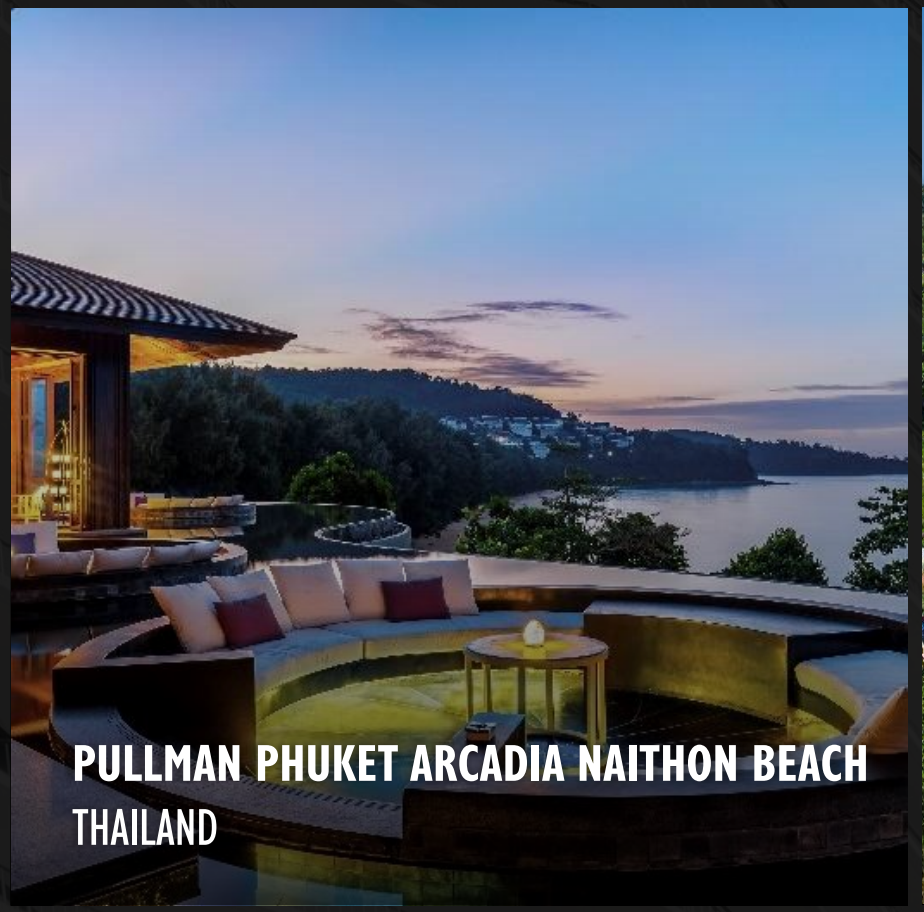
PULLMAN PARK LANE
HONG KONG

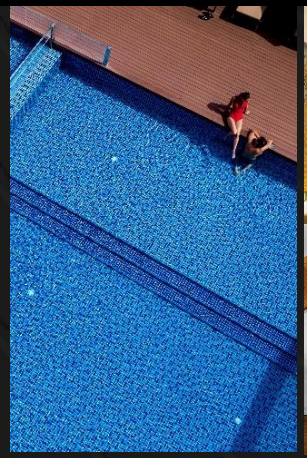


MOVIE NIGHT

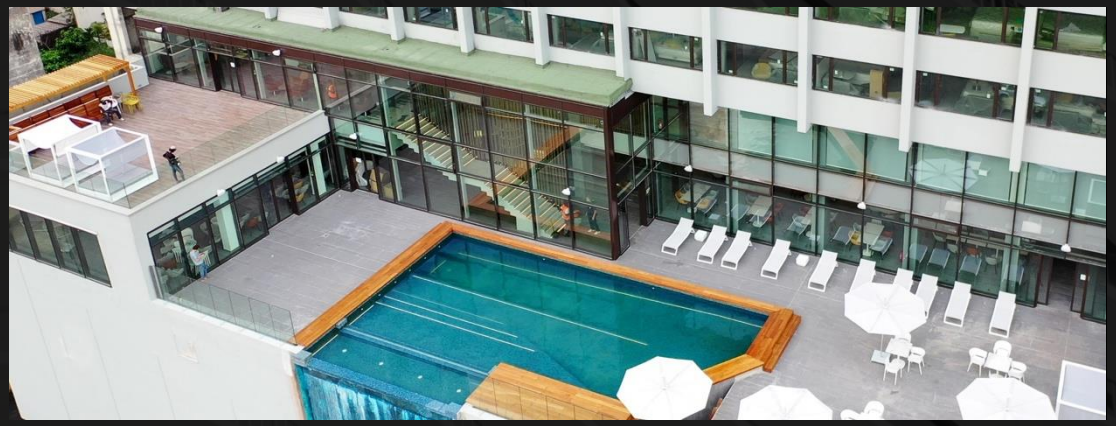
EAT ME
DRINK ME

OUR KITCHEN IS YOUR PLAYGROUND


PULLMAN PHUKET ARCADIA NAITHON BEACH
THAILAND



PULLMAN BANGKOK KING POWER
THAILAND

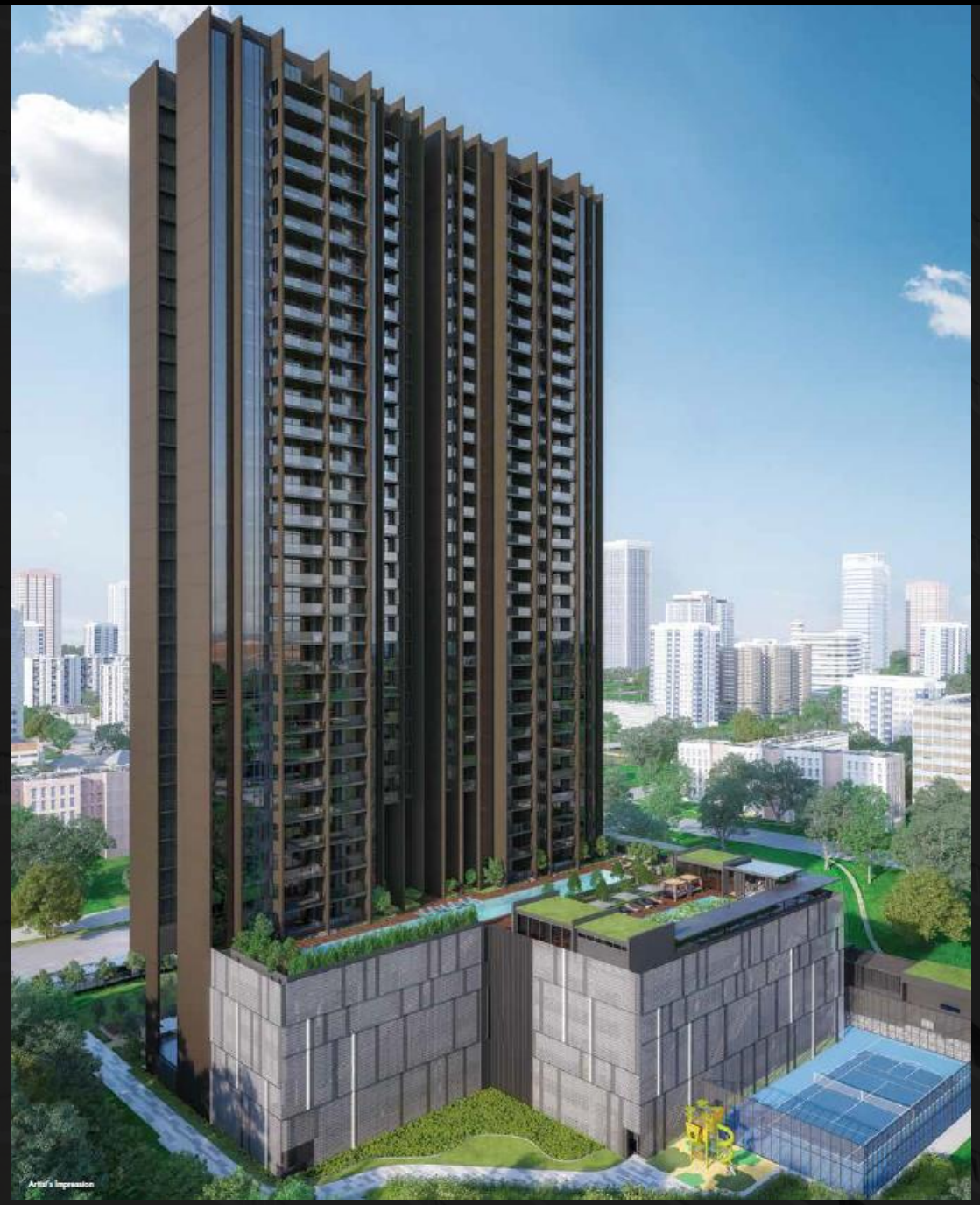


PULLMAN ABIDJAN
IVORY COAST

PULLMAN MALDIVES MAAMUTAA
MALDIVES

PULLMAN PHU QUOC
RESORT
VIETNAM

PULLMAN ROTORUA
NEW ZEALAND

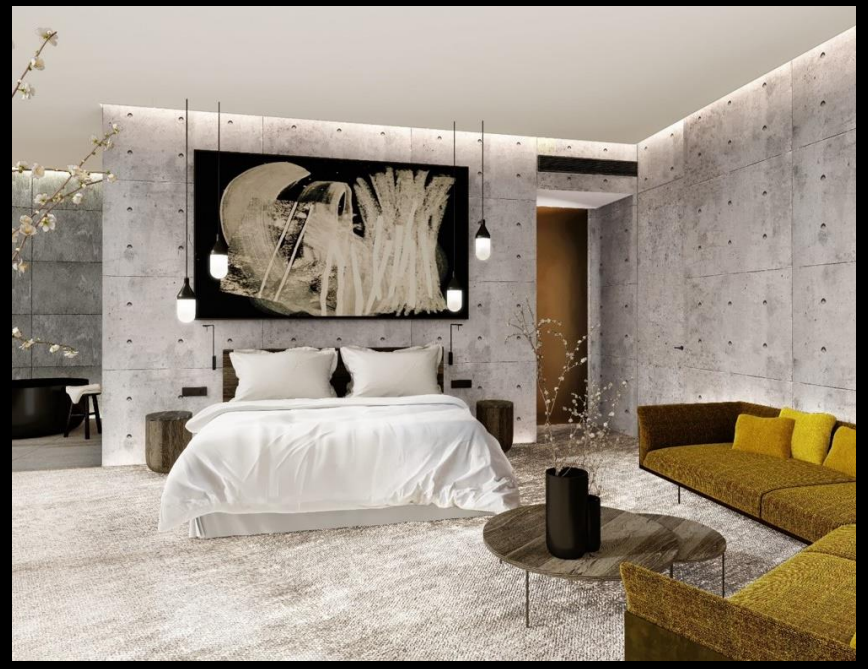


PULLMAN NEWTON RESIDENCIES, SINGAPORE
348 ROOMS
OPENING 2023

PULLMAN DOHA WEST BAY, DOHA

468 ROOMS

OPENING 2021



PULLMAN TBILISI TOWER, GEORGIA

227 ROOMS

OPENING 2021

PULLMAN BANDUNG CITY CENTRE, INDONESIA

279 ROOMS

OPENING 2021

A PASSION FOR IMMERSIVE ART AND 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 BATTLES

A live experience where two artists battle it out in front of an audience and against the clock

ARTIST PLAYGROUND YOU ARE ART

An immersive art experience where our guests can become a piece of art themselves

ARTIST PLAYGROUND ART AT PLAY

An artist's designs add a vibrant and subtle touch throughout the guest journey

ARTIST PLAYGROUND CORNER

Temporary art exhibitions of up and coming artists

ARTIST PLAYGROUND ELEVATED

Our featured artist elevates guests' experience in hotel lifts. Year one in Q2 2021 with artist Felipe Pantone (334K followers)

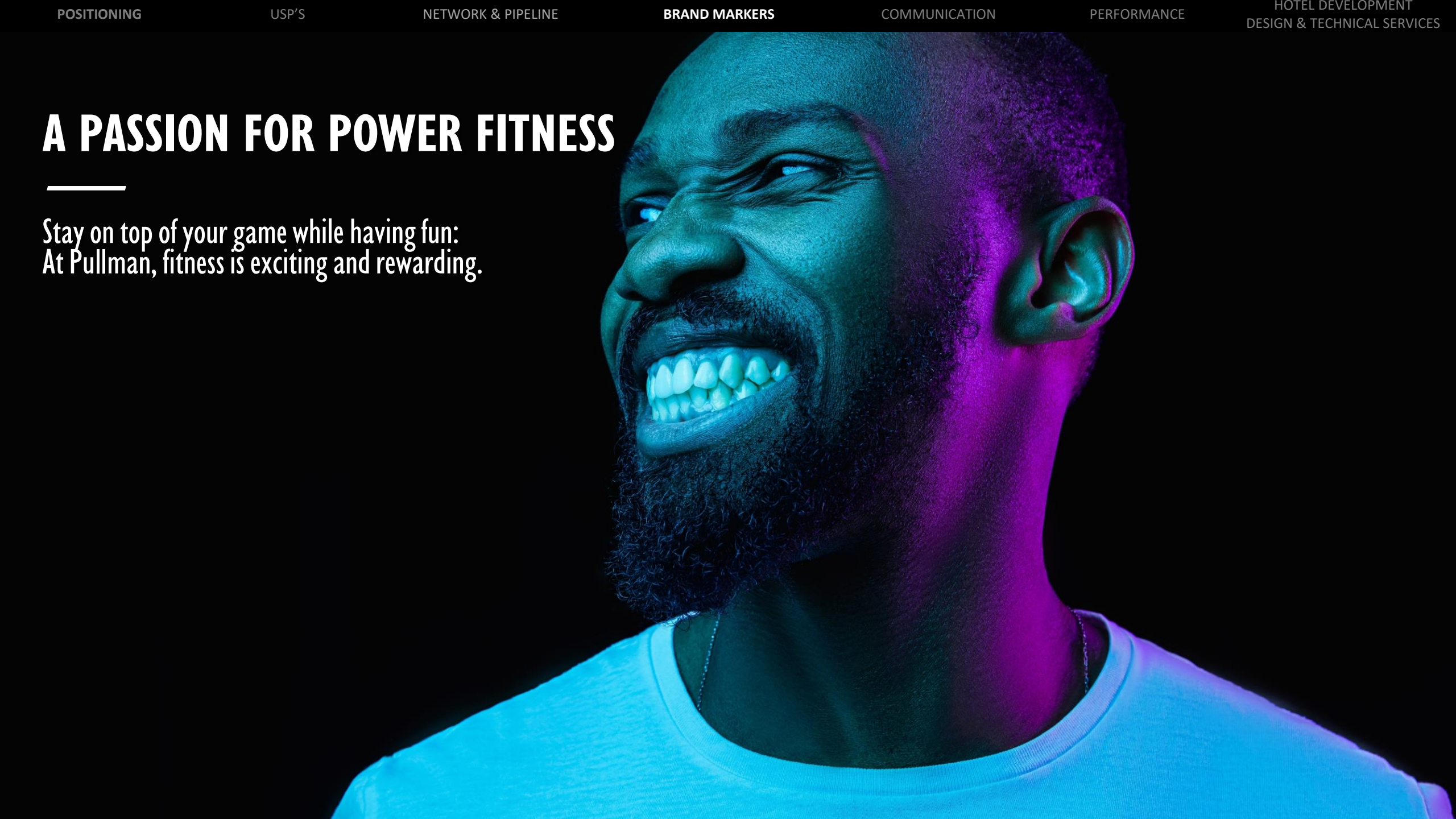
ARTIST PLAYGROUND

ARTIST PLAYGROUND NIGHTS

« Grand Opening » to be used when a new hotel is celebrating its opening;
« Opening Night » to be used for the public unveiling of a major renovation

A PASSION FOR POWER FITNESS

Stay on top of your game while having fun:
At Pullman, fitness is exciting and rewarding.



POWER FITNESS FUELED BY LES MILLS

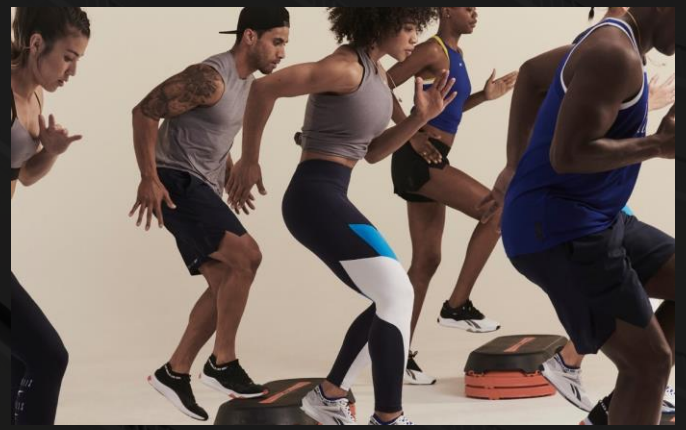
Make Pullman the first boutique fitness hotel brand, with around the clock innovative fitness classes; and unleash the power of the Power Fitness community

AMBASSADORS PROGRAM

A global social media campaign to cast and follow the Pullman Fitness Squad

Launched on Pullman's official Instagram channel to cast 6 Ambassadors – one per region – to be the faces of the partnership.

POWER FITNESS IN OUR HOTELS



A unique mix of Virtual and Live fitness classes for a unique competitive advantage

- Les Mills Virtual Studios
- Les Mills Virtual Bikes
- Power Fitness boot camps and Live classes led by the Pullman Fitness Squad

FITNESS ON DEMAND

A generous offer to energize our guests

30-day free access to Les Mills On Demand: premium online fitness videos that can be used during and post hotel stay.

55 hotels in 2020. Entire network by 2021.

A PASSION FOR HAPPENING F&B

Pullman serves up fresh F&B concepts that are flavorful and fuel performance – any place, any time.

SMART INTERACTIONS

Our services and technology are powered to perform, seamless and in-tune with today's new entrepreneurs.

We challenge the status quo to create better places for people to work and play. Our vibrant, sensory and flexible MEET/PLAY spaces have a unique design approach that fuels creativity, encourages interaction, fosters well-being and unlocks new opportunities for the curious and ambitious.

MICE MEET/PLAY CONCEPT

PULLMAN HEARTISTS MINDSET

83%

EMPLOYEE ENGAGEMENT SCORE FY 2019 +2PTS vs FY 2018

OPEN MINDED

We are boundary pushers, we never settle for the obvious. Our curiosity challenges the status quo

FORWARD THINKING

We are purposeful Heartists, we empower change and inspire our guests

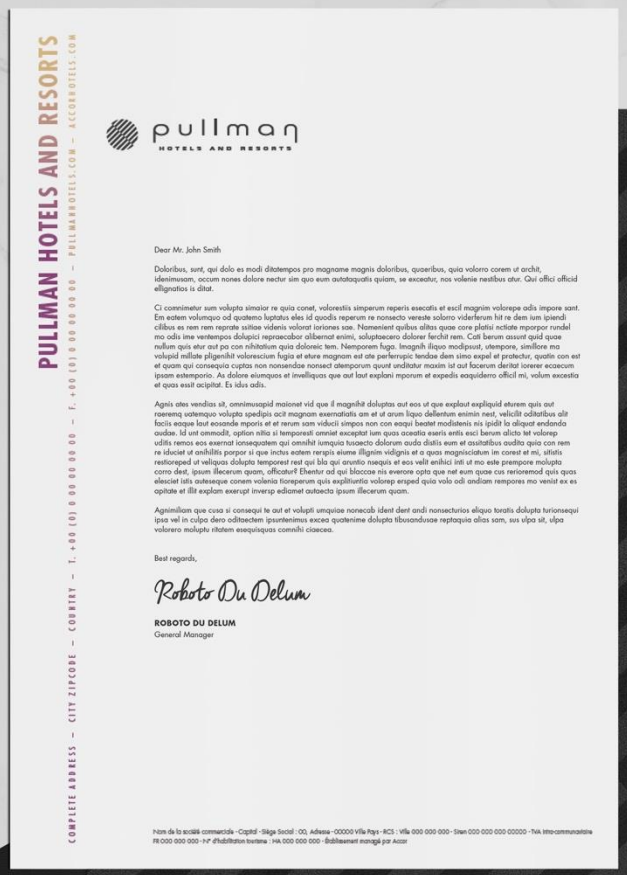
DRIVE

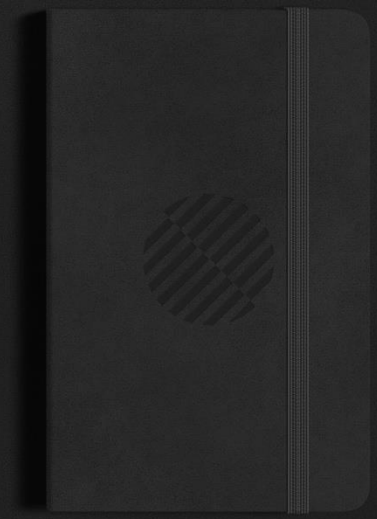
Our drive makes change happen

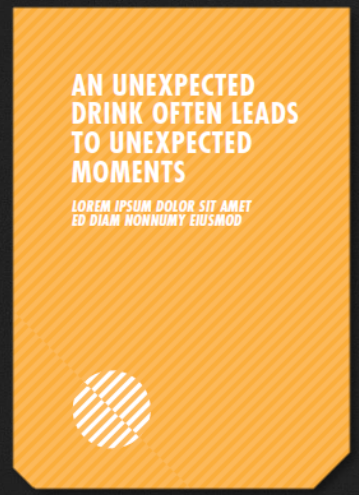
VISUAL IDENTITY

The visual identity transmits the fundamental values of the brand.

Two options for City Hotels and Resorts.







Download Pullman Graphic Guidelines

SOCIAL MEDIA KEY FIGURES 2020

5 PLATFORMS

BRAND AND HOTELS

2.5M FOLLOWERS

+9% VS 2019

3.8M POST INTERACTIONS

+60% VS 2019

2.4M POST ENGAGEMENT

+37% VS 2019

Download Pullman Social Media Playbook

200 AWARDS A YEAR IN AVERAGE

PRESENTING ORGANIZATION/PUBLICATION	AWARD NAME	HOTEL NAME
Agoda	Agoda's 2020 Customer Review Award	Pullman Tokyo Tamachi, Japan
		Pullman Luang Prabang, Laos
Booking.com	Traveller Review Awards 2020	Pullman Lima San Isidro, Peru
		Pullman Sydney Airport, Australia
Haute Grandeur Global Hotel Awards 2020	Best Business Hotel in Vietnam	Pullman Saigon Centre, Vietnam
SkyTrax	Best Airport Hotel Australia & Pacific	Pullman Sydney Airport, Australia
Travel & Hospitality Awards	Business Hotel of the Year	Pullman Liverpool, United Kingdom
		Pullman Tokyo Tamachi, Japan
		Pullman São Paulo Ibirapuera, Brazil
		Pullman Lima San Isidro, Peru
Tripadvisor	2020 Traveller's Choice Award	Pullman Eindhoven Cocagne, The Netherlands
		Pullman Sydney Airport, Australia
		Pullman Magenta Shores Resort, Australia
		Pullman Reef Hotel Casino, Australia
		Pullman Saigon Centre, Vietnam
World Luxury Award	World Luxury Award	Pullman Kinshasa, Congo
		Pullman Lubumbashi, Congo
World Travel Awards	Europe's Leading Family & Wellness Resort 2020	Pullman Timi Ama Sardegna, Italy
	Europe's Leading Hotel & Spa 2020	

PULLMAN X PSG CAMPAIGN

INFLUENCER STRATEGY

DISCOVER THE "BEHIND THE SCENE" OF THE CAMPAIGN THROUGH THE ARTISTIC EYE OF BROOKLYN BECKAM

- A last name worth $1billion
- Inherently connected to the world of soccer
- Huge on social media: 12M followers among which many celebrities
- An up-and-coming artist (photo and videographer) with a unique and modern touch

Download

PULLMAN X PSG CAMPAIGN

EXECUTIVE SUMMARY

OVERALL SOCIAL MEDIA RESULTS

Pullman + ALL + PSG + B. Beckham + regional social media plans – Total media budget 63K€

Number of posts
+135
From August 3rd to 31st 2020

Reach
47.7M
X 3 vs target

Engagement
460K

Video views
19M
X 2.5 vs target

ADDITIONAL KPIs

Release views & hits
78K

PR potential audience
1.3B

Website visitors
49K
+40% vs July 2020

E-card Opening rate
35.4%
+10.8% vs August 2019

pullman HOTELS AND RESORTS

BREAKING RESULTS

40%

BRAND AWARENESS

Already well-known in key markets among affluent travelers.

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

66%

BRAND PERCEPTION

Pullman is considered as cosmopolitan brand.

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

Excellent F&B (breakfast, bar) is also spontaneously quoted by frequent guests

Our objective is to capitalize on Pullman's roots which have a positive image of travel/luxury

€49

BRAND MARGIN

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

87.9%

BRAND RPS

The Reputation Performance Score measures the overall hotel online reputation based on several sources: Guest Satisfaction Survey, 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%

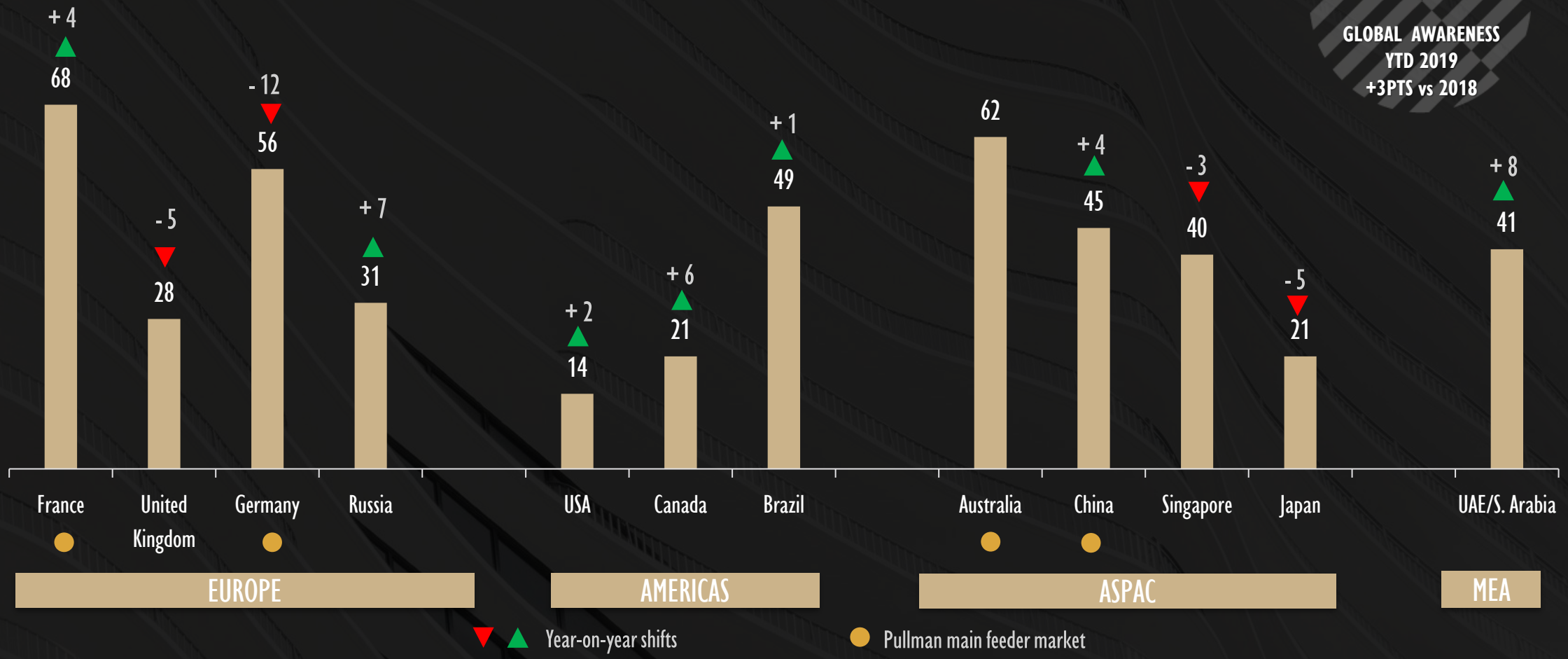
Our objective is to exceed 90% in 2021

Official figures as of end 2019

BRAND AWARENESS (%)

40%

GLOBAL AWARENESS YTD 2019 +3PTS vs 2018

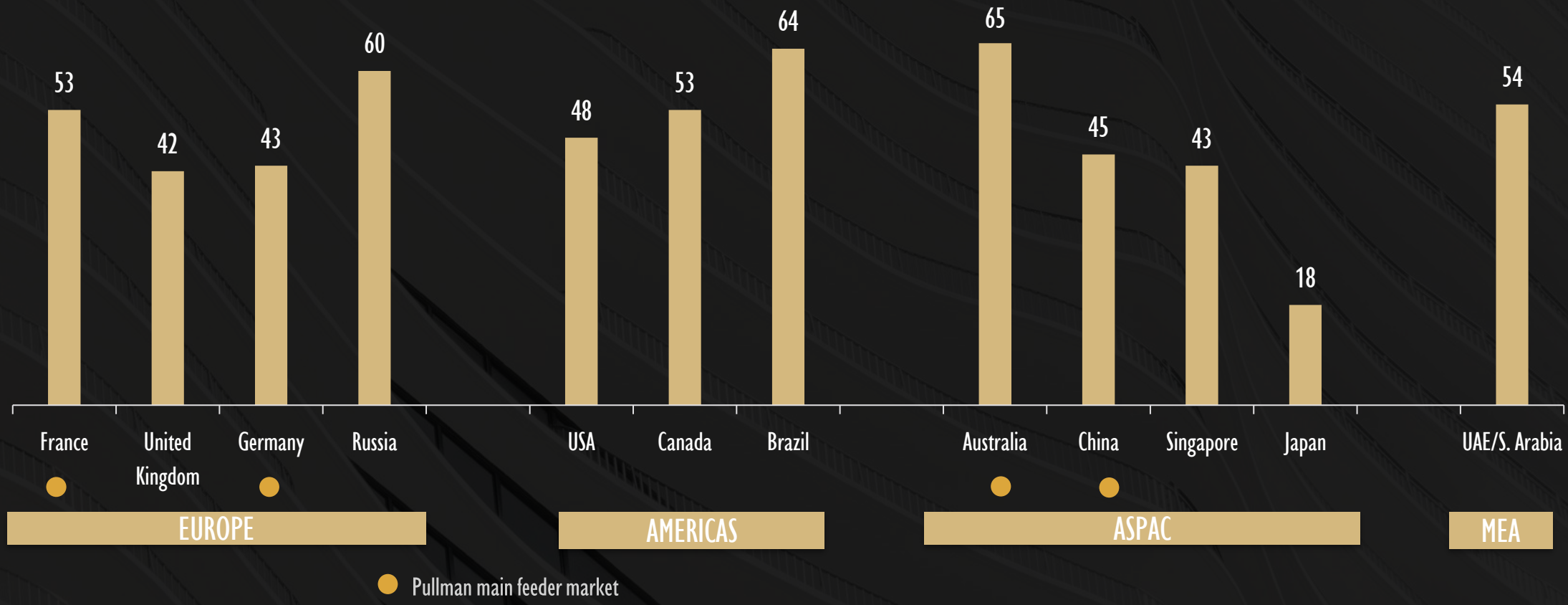


Source: BEAM - Brand Equity & Awareness Monitoring December 2019

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

Official figures as of end 2019

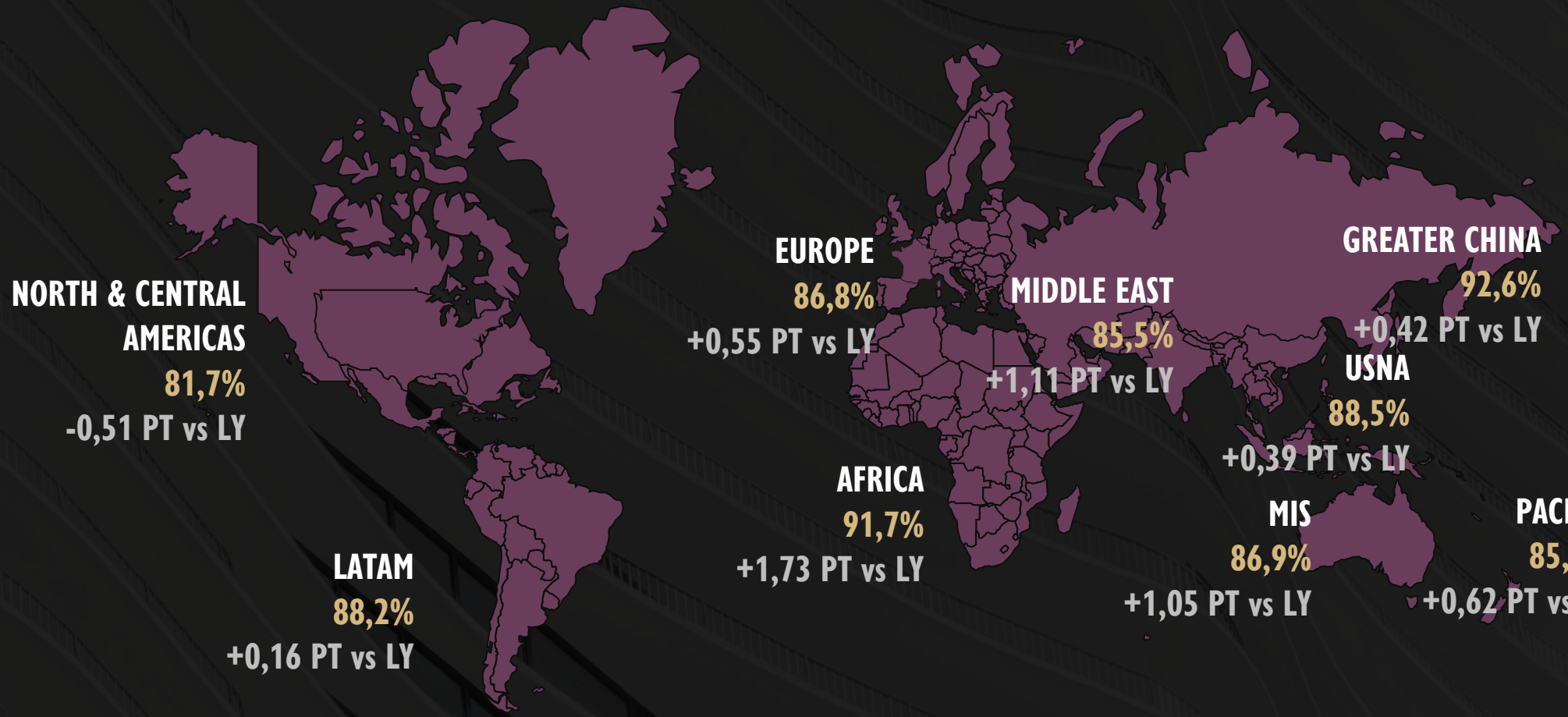
BRAND MARGIN (€)



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

Official figures as of end 2019

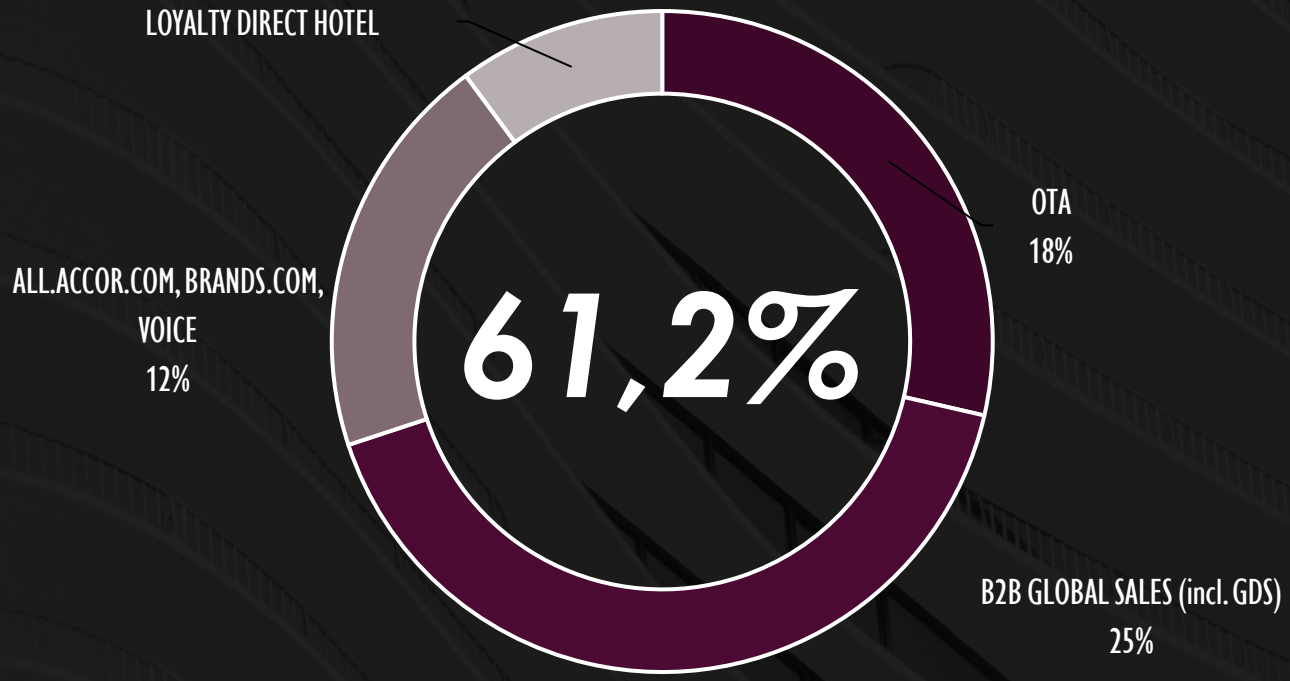
GLOBAL AVERAGE REPUTATION PERFORMANCE SCORE 87,9%



Official figures as of end 2019

CENTRAL BRAND DELIVERY POWERED BY ACCOR

PREMIUM BRANDS (ROOM NIGHT BASED)



FOCUS WEB
(ACCOR WEB + WEB PARTNER)

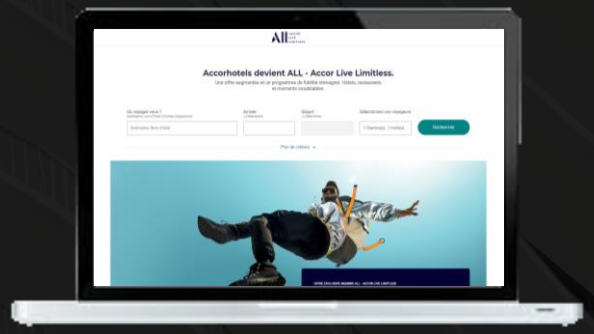
2,3M ROOM NIGHTS

€335M ROOM REVENUE

Official figures as of end 2019

NEW BOOKING ENGINE & APP

1 MULTIBRAND PORTAL
ALL.ACCOR.COM



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

NEW in 2020:
- **All Safe label visibility** on digital experience to rest-assure guests during the pandemic
- Launch of **Apartment & Villas** website dedicated to Branded Residences and Extended Stay hotels

+

1 LIFESTYLE COMPANION APP
ACCOR ALL

- **> 50%** Mobile and App visits
- **1** Download every minute
- **> 4,3/5** app ratings

iOS: 4,5/5 & Android: 4,3/5

+

18 BRAND.COM WEBSITES

- **PULLMAN.COM** plugged to **ALL.ACCOR.COM**

Official figures as of end 2019

NEW LOYALTY PROGRAM

ALL ACCOR LIVE LIMITLESS

THE ONLY LIFESTYLE LOYALTY PROGRAM

NEW LIFESTYLE & AUGMENTED HOSPITALITY FRAMEWORK

OFFERING EXTENDED OPPORTUNITIES
TO EARN & REDEEM POINTS

NEW BENEFITS

- **38** Brands and +
- **Suite Night Upgrade**
- **F&B** outside a stay

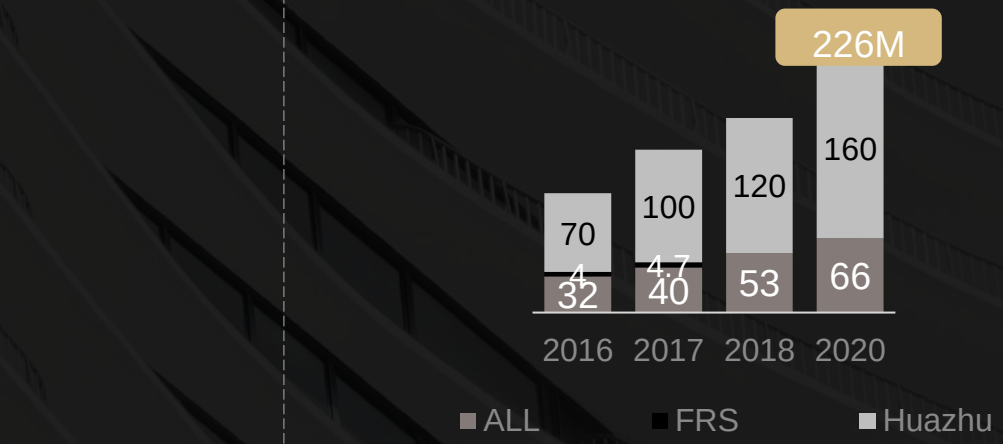
NEW PARTNERSHIPS

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

+

THE FAST GROWING LOYALTY PROGRAM

- **68M** Loyalty members worldwide
- **37%** Loyalty contribution rate in RN
- **x 3,6** Members stay twice more than non-members



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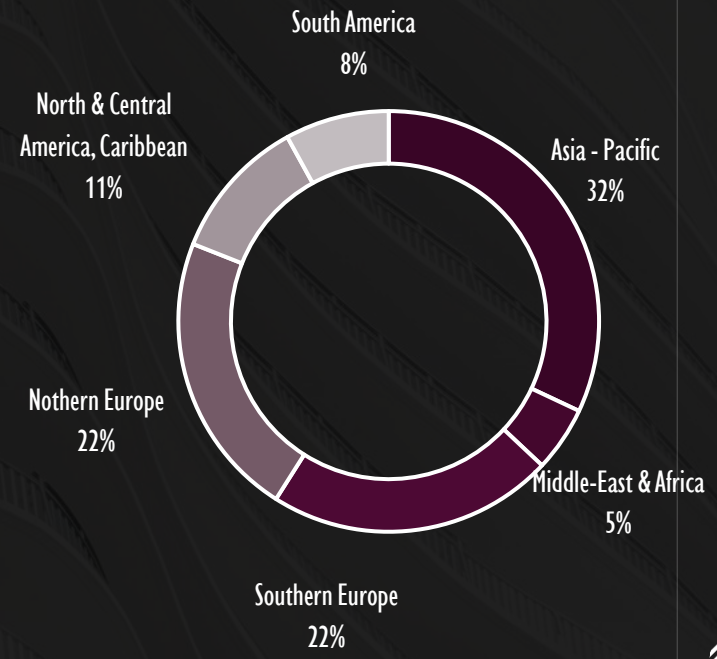
THE MOST GLOBAL LOYALTY PROGRAM



Official figures as of end 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

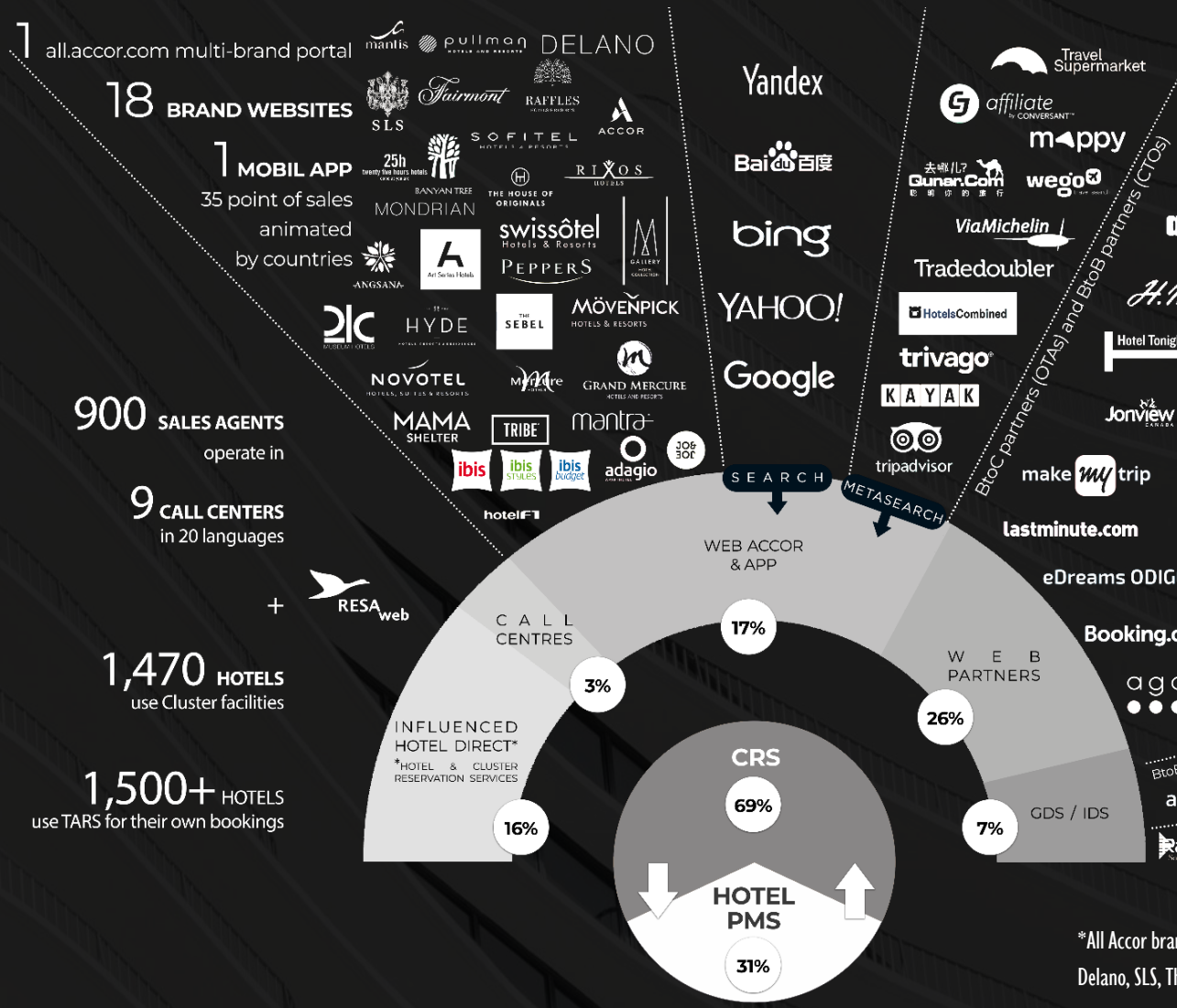
900 SALES AGENTS operate in

9 CALL CENTERS in 20 languages

+

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

Official figures as of end 2019

DEVELOPMENT CRITERIA

DEVELOPMENT & PROGRAMMING

		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	•		

GUEST JOURNEY & EXPERIENCE — KEY STANDARDS AT A GLANCE

The following list contains the key brand concepts & markers of Pullman as of end 2020 (might be subject to changes).
There are specific and detailed guidelines with rich elements & content to fully bring each experience to life in the guest journey.

ARRIVAL & DEPARTURE

- Signature Scent
- Uniforms M
- Signature Music M
- Welcome Drink (Resorts) M

PUBLIC SPACES

- The Junction at Pullman concept M
- Artist Playground programs M

GUEST ROOMS

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

FOOD & BEVERAGE

- Bites on wheels (Resorts + MICE) M
- Active Breakfast M
- MICE banquet menu

WELLNESS FACILITIES

- Power Fitness concept M
- Fit Trail (Resorts) M
- Les Mills On Demand M
- Fitness in-room kit M
- Boot Camps Fueled by Les Mills

LEISURE FACILITIES

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

MEETINGS & EVENTS

- MICE MEET/PLAY concept M

Smart interactions
Immersive Art & Design
Happening F&B
Power Fitness
M Mandatory

DESIGN & TECHNICAL SERVICES GUIDELINES*

ALL TECHNICAL DOCUMENTS ARE AVAILABLE AFTER NHCSA IS SIGNED

PULLMAN LIVING DESIGN BRIEF
Can be used before HCSA is signed

PULLMAN RESIDENCES DESIGN BRIEF
Can be used before HCSA is signed

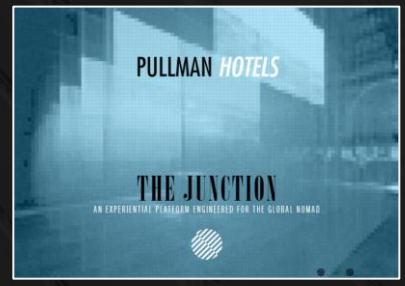
PULLMAN STYLE BOOK
Can be used before HCSA is signed

PULLMAN DESIGN BRIEF
Can be used before HCSA is signed

PULLMAN ART AT PLAY
PULLMAN PERMANENT ART COLLECTION,
PULLMAN ARTIST PLAYGROUND GUIDELINES
Can be used after HCSA is signed

PULLMAN FIT, PULLMAN SPA,
PULLMAN RESORT ARCHITECTURE & ZONING,
PULLMAN POWER FITNESS CONCEPT GUIDELINES
Can be used after HCSA is signed

PULLMAN MICE GUIDELINES
Can be used after HCSA is signed



PULLMAN THE JUNCTION
Can be used after HCSA is signed

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

THANK YOU

pullman
HOTELS AND RESORTS