BRAND POSITIONING

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

PIONEERING • STYLISH • ACCOMPLISHED • INVIGORATED
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 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, . . .
GROWING MOMENTUM

145 hotel openings in the last 14 years and nearly 50 openings planned by 2027

Leveraging both business and leisure markets and opportunities

Distinct MICE space programming (HARD) and strong MICE offerings (SOFT)
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
A GLOBAL FOOTPRINT OF OVER 190 HOTELS OPEN AND IN THE PIPELINE

- **North, Central America & Caribbean**: 2% network + pipeline, 3 hotels, 1,262 rooms
- **Northern Europe**: 9% network + pipeline, 13 hotels, 3,296 rooms
- **Southern Europe**: 9% network + pipeline, 13 hotels, 3,296 rooms
- **South America**: 5% network + pipeline, 16 hotels, 5,727 rooms
- **India, Middle East & Africa**: 11% network + pipeline, 17 hotels, 4,838 rooms
- **Greater China**: 30% network + pipeline, 28 hotels, 8,833 rooms
- **South East Asia**: 21% network + pipeline, 21 hotels, 13,373 rooms
- **Pacific**: 11% network + pipeline, 19 hotels, 3,433 rooms

All figures as of end November 2021. Breakdown network + pipeline by region is calculated by number of rooms.
PULLMAN BERLIN SCHWEIZERHOF
GERMANY
PULLMAN LIVERPOOL
UNITED KINGDOM

POSITIONING
USPS
LATEST OPENING
BRAND MARKERS
COMMUNICATION
PERFORMANCE
HOTEL DEVELOPMENT
DESIGN & TECHNICAL SERVICES
PULLMAN XIAGING PINGHU
CHINA
Pullman Lima Miraflores
Peru
PULLMAN DOHA WEST BAY, DOHA

468 ROOMS

OPENING 2022
POSITIONING

USP'S

PIPELINE

BRAND MARKERS

COMMUNICATION

PERFORMANCE

HOTEL DEVELOPMENT

DESIGN & TECHNICAL SERVICES

PULLMAN ORCHARD SINGAPORE

SINGAPORE

OPENING 2022
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.
POWER FITNESS

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

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.
SOCIAL MEDIA KEY FIGURES 2021

- **5 PLATFORMS**
- **330+K FOLLOWERS**
- **28M REACH** (+60% vs 2019)
- **5.7M POST ENGAGEMENT** (+130% vs 2019)

Download Pullman Social Media Playbook
DISCOVER THE “BEHIND THE SCENE” OF THE CAMPAIGN THROUGH THE ARTISTIC EYE OF BROOKLYN BECKAM

- A last name worth $1 billion
- 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
EXECUTIVE SUMMARY

PULLMAN X PSG CAMPAIGN

OVERALL SOCIAL MEDIA RESULTS

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

Number of posts +135
Reach 47.7M
Engagement 460K
Video views 19M

- From August 3rd to 31st 2020
- X 3 vs target
- X 2.5 vs target

ADDITIONAL KPIs

Release views & hits 78K
PR potential audience 1.3B
Website visitors 49K
E-card Opening rate 35.4%

- +40% vs July 2020
- +10.8% vs August 2019

From August 3rd to 31st 2020

E-card Opening rate
BREAKING RESULTS

40%
BRAND AWARENESS
Already well-known in key markets among affluent travelers.

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

Official figures as of end 2019

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

88%
BRAND RPS
The Reputation Performance Score measures the overall hotel online reputation based on several sources: Guest Satisfaction Survey, TripAdvisor, 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

66%
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

€49
CENTRAL BRAND DELIVERY POWERED BY ACCOR

PREMIUM BRANDS (ROOM NIGHT BASED)

- OTA: 18%
- B2B GLOBAL SALES (incl. GDS): 25%
- ALL.ACCOR.COM, BRANDS.COM, VOICE: 12%
- LOYALTY DIRECT HOTEL: 6%

Focus Web (ACCOR WEB + WEB PARTNER):
- 2,3M Room Nights
- €335M Room Revenue

Official figures as of end 2019
DIRECT BOOKINGS: ACCOR DIGITAL PLATFORM

1 MULTIBRAND PORTAL
ALL.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.COM

Official figures as of end 2019
DIRECT BOOKINGS: ACCOR LOYALTY PROGRAM

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

- 73M Loyalty members worldwide
- 37% Loyalty contribution rate in RN
- x 3.6 Members stay twice more than non-members

THE MOST GLOBAL LOYALTY PROGRAM

- 73M Loyalty members worldwide
- 37% Loyalty contribution rate in RN
- x 3.6 Members stay twice more than non-members

Official figures as of end 2019
## DEVELOPMENT CRITERIA

### Development & programming

<table>
<thead>
<tr>
<th></th>
<th>AAA ULTRA CITY CENTER LOCATION, HISTORIC CONVERSION</th>
<th>WORLDWIDE</th>
<th>PRIME LOCATIONS</th>
<th>SECONDARY LOCATIONS</th>
<th>AIRPORTS &amp; SUBURBS</th>
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</thead>
<tbody>
<tr>
<td><strong>HOTEL</strong></td>
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| **RESORT**           |                                                     |           |                 |                     |                     |

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| **ROOM AVERAGE SIZE** | -15%/-20% of worldwide                                | 30 – 36 sqm   |                 |                     |                     |
| **TGFA / ROOM**      | 60 – 90 sqm                                           | 75 – 110 sqm  |                 |                     |                     |
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### FOOD & BEVERAGE

- Locally Relevant Restaurant,
- 1 Destination Bar,
- Active Breakfast & Early Bird Coffee Cart,
- Bites-on-Wheels (for resorts)

### WELL-BEING

- Spa
- Fitness Centre
- Swimming pool

### MEETINGS

- Sarah Hoey fitness program and minimum 2 treatment rooms
- The Junction
- Generous ballroom & meeting space > 1,000 sqm
- Artist Playground
- The Hub and Teens Only Program (Resorts Only)
THANK YOU