Forecasting Future Trends in the Global Luxury Hospitality Market

13 November 2013, Fairmont Le Montreux Palace, Montreux, Switzerland, www.hospitalitysummit.com
Philip Camble
Director
Whitebridge Hospitality Ltd
A Journey through Trends in

1. Supply
2. Demand
3. Consumers
4. Design
1. Supply

Trends in Supply
Growth in Number of Luxury Branded Hotels – EMEA

- **Eur 2012**
- **Eur 2013**
- **ME 2012**
- **ME 2013**
- **Afr 2012**
- **Afr 2013**

**1. Supply**

**Growth in Number of Luxury Branded Hotels – EMEA**

- **Hard**
- **Soft**
Growth in Number of Luxury Branded Hotel Rooms – EMEA
1. Supply

Growth in Number of Luxury Branded Hotel Rooms – Europe
Growth in Number of Luxury Branded Hotel Rooms – Africa

- Supply
  - Growth in Number of Luxury Branded Hotel Rooms
Growth in Number of Luxury Branded Hotel Rooms – Mid East

- Om 12: 2,000, Om 13: 4,000
- Qat 12: 6,000, Qat 13: 8,000
- KSA 12: 10,000, KSA 13: 12,000
- UAE 12: 14,000, UAE 13: 16,000
- Oth 12: 18,000, Oth 13: 20,000

Hard
Soft
1. Supply

Pipeline – EMEA

Year

Europe
Middle East
Africa

2014
2015
2016
2017
2018

- 2,000
 4,000
8,000
10,000
12,000
Pipeline – Europe

1. Supply

- Pipeline – Europe

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
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<tr>
<td>W Eur</td>
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</table>
1. Supply

Pipeline – Middle East

- Oman
- Qatar
- KSA
- UAE
- Other

- 2014
- 2015
- 2016
- 2017
- 2018
Pipeline – Africa

<table>
<thead>
<tr>
<th>Area</th>
<th>2014</th>
<th>2015</th>
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</table>
Top 10 Brands – Existing Portfolio

- Kempinski
- Luxury Collection
- Ritz Carlton
- Fairmont
- Four Seasons
- Jumeirah
- Grand Hyatt
- Park Hyatt
- Rocco Forte
- St Regis

2012 rooms vs 2013 rooms

Kempinski: 55
Luxury Collection: 46
Ritz Carlton: 19
Fairmont: 19
Four Seasons: 28
Jumeirah: 17
Grand Hyatt: 8
Park Hyatt: 10
Rocco Forte: 11
St Regis: 8
Top 10 Brands – Size of Pipeline

- Kempinski: 9 rooms
- Luxury Collection: 11 rooms
- Ritz Carlton: 8 rooms
- Fairmont: 4 rooms
- Four Seasons: 8 rooms
- Jumeirah: 4 rooms
- Grand Hyatt: 6 rooms
- Park Hyatt: 4 rooms
- Rocco Forte: 4 rooms
- St Regis: 3 rooms

2012 rooms vs. 2013 rooms
# Most Expensive Hotels in the World

<table>
<thead>
<tr>
<th>Hotel</th>
<th>Location</th>
<th>Branding</th>
<th>Rooms</th>
<th>Rate (US$)</th>
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<tbody>
<tr>
<td>North Island</td>
<td>Seychelles</td>
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<td>11</td>
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<tr>
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<td>Fiji</td>
<td>LHW</td>
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<td>5,040</td>
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<td>15</td>
<td>3,970</td>
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<tr>
<td>Singita Grumeti Reserves</td>
<td>Tanzania</td>
<td>Relais &amp; Chateaux</td>
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<tr>
<td>King Pacific Lodge</td>
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<tr>
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<td>The Wakaya Club &amp; Spa</td>
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<td>Maia Luxury Resort &amp; Spa</td>
<td>Seychelles</td>
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</table>

Source: www.luxury-hotels.com
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Source: www.luxury-hotels.com
# 2012 Best of the Best Award Winners

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<th>Branding</th>
<th>Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Achievement in Design</td>
<td>Park Hyatt Sydney (Australia)</td>
<td>Hyatt</td>
<td>155</td>
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<tr>
<td>Best Culinary Experience</td>
<td>Mandarin Oriental Paris (France) <em>Sur Mesure</em></td>
<td>Mandarin Oriental</td>
<td>138</td>
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<tr>
<td>Best Bar</td>
<td>Montage Beverly Hills (USA) £10</td>
<td>Montage</td>
<td>203</td>
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<tr>
<td>Best Family Program</td>
<td>Four Seasons Resort Punta Mita (Mexico)</td>
<td>Four Seasons</td>
<td>140</td>
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<tr>
<td>Best Spa</td>
<td>Le Royal Monceau – Raffles (France) <em>Spa My Blend by Clarins</em></td>
<td>Fairmont-Raffles</td>
<td>149</td>
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<td>Most Innovative Guest Experience</td>
<td>Las Ventanas al Paraiso (Mexico) Challenge the Chef</td>
<td>Rosewood</td>
<td>71</td>
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<tr>
<td>Most Socially Responsible</td>
<td>Lefay Resort &amp; Spa (Italy)</td>
<td>LHW/SLH</td>
<td>90</td>
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<tr>
<td>One to Watch</td>
<td>Amanruya (Turkey)</td>
<td>Aman Resorts</td>
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<td>Hotelier of the Year</td>
<td>Villa d’Este (Italy) Snr Danilo Zucchetti</td>
<td>LHW</td>
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<tr>
<td>Hotel of the Year</td>
<td>The Beverly Hills Hotel (USA)</td>
<td>Dorchester Collection</td>
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Source: Virtuoso Awards
1. Supply

2012 Best of the Best Award Winners – Park Hyatt Sydney
2012 Best of the Best Award Winners – Park Hyatt Sydney
1. Supply

2012 Best of the Best Award Winners – Le Royal Monceau

Spa My Blend by Clarins

- 1,500 sqm
- 23m pool
- Fitness room
- Multiple relaxation areas
- Access from all floors
- Personally tailored products
2012 Best of the Best Award Winners – Lefay Resort & Spa

1. Supply

Architecture
- Morphological integration
- Heat Insulation

Energy Saving
- Biomass plant
- Micro-turbines cogen. plant
- Absorption cooling system

Water Saving
- Rainwater collection
- Laundry management

Waste Management
1. Supply

2012 Best of the Best Award Winners – Lefay Resort & Spa

Social Responsibility

- Human resources
  - Training
  - Career paths
- Quality accommodation
- Accountability

- Local Community Support
  - PR activities
  - Coop. with local associations

- Supply Chain Management
  - Int’l certification standards
  - 70% are “KM 0”
2. Demand

Trends in Demand
Trends in Demand

STR Global

- Hotel Performance Database
  - 46,000 hotels globally
  - ADR + occupancy reports
  - P&L reports
  - Pipeline reports
  - Forecasting

- Hotel Monitor
  - EMEA
  - LAC
  - AP
Demand v Supply Across EMEA (2011-YTD 9.13)
2. Demand

RevPAR Premium (US$, YTD 9.13)

[Graph showing RevPAR Premium for Luxury and Up-Upscale categories across countries: France, Germany, UK]
2. Demand

Domestic Germany
RevPAR Premium (US$, YTD 9.13)

- Luxury
- Up-Upscale

Countries: Egypt, Mauritius, South Africa, UAE
2. Demand

RevPAR Premium (YTD 9.13)
RevPAR Premium (US$, YTD 9.13)

- **Luxury**
- **Up-Upscale**

Cities:
- Berlin
- Cairo
- Dubai
- London
- Paris
RevPAR Premium (YTD 9.13)

- Berlin
- Cairo
- Dubai
- London
- Paris

Percentage comparison with base case.
Amazing Paris
Amazing Paris
2. Demand

Is Luxury Worth It?

[Bar chart showing percentage increase in demand for luxury properties in various countries and cities, with France, Paris, and Germany leading, followed by the UK, Egypt, and Dubai.]
2. Demand

ADR Premium – City v Resort (US$, YTD 9.13)

- Madrid
- Marbella
- Paris
- Cannes
- Cairo
- Red Sea Resorts
- Dubai City
- Dubai Beach
2. Demand

Few Luxury Red Sea Resorts
2. Demand

ADR Premium (YTD 9.13)

- Madrid v Marbella
- Paris v Cannes
- Cairo v Red Sea
- Dubai City v Beach

Bar chart showing percentage differences.
2. Demand

Dubai Beach Dominates
2. Demand

RevPAR Growth (YTD 9.12 v YTD 9.13)
Consumer Trends
Trends in Consumer Behaviour

High Level Trends

- Are you a HENRY?
3. Consumers

Trends in Consumer Behaviour

High Level Trends

- HENRY – High Earner, Not Rich Yet
  - Financially vulnerable
  - Falling home prices
  - Income gains below inflation
  - Unemployment
  - Recession and cash preservation
  - In 2006-2007 spent perceived wealth, not spending their real income

- Potential impact of the HENRYs
  - 10x more HENRYs than ultra-affluent individuals
  - 18% of US population
  - 40% of total spend
3. Consumers

Trends in Consumer Behaviour

Source: Bains & Co
The Chinese are Here

![Diagram: Buying handbags by the dozen]

Luxury-goods market by consumer nationality, %

- **1995**
  - Chinese: 0%
  - European: 5%
  - American: 12%
  - Japanese: 15%
  - Other Asian: 10%
  - Rest of world: 20%

- **2012**
  - Chinese: 25%
  - European: 20%
  - American: 25%
  - Japanese: 30%
  - Other Asian: 15%
  - Rest of world: 20%

*Source: Bain & Company*
The Luxury Chinese Top Threes

Preferred Leisure Pursuits
1. Travel
2. Reading
3. Tea tasting

Preferred Sports
1. Swimming
2. Golf
3. Mountaineering

Preferred Source of Information
1. Internet
2. Word of mouth
3. Magazines

Hotel Selection Criteria
1. Location
2. Brand awareness
3. Service

Main Distribution Channels
1. Domestic travel agent
2. Local business partner
3. Direct consumer booking

Reasons for Booking
1. Shopping
2. Culture
3. Local cuisine
3. Consumers

The Luxury Chinese Preferences

<table>
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<tr>
<th>Hotel</th>
<th>Preference Score</th>
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<td>Hilton</td>
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<td>Peninsula</td>
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<td>Sheraton</td>
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<td>Grand Hyatt</td>
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<td>Ritz Carlton</td>
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<td>Park Hyatt</td>
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<td>Marriott</td>
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<td>Singapore</td>
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<td>Australia</td>
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<td>Dubai</td>
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<td>Germany</td>
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<td>Maldives</td>
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</tbody>
</table>
Trends in Consumer Behaviour

Plan for Future Success

- Global luxury market will be 5x larger in 2025 compared to 2005
- Get ready for “Luxury 2.0”
  - Superior Customer Experience (word of mouth promoters, maintain constant drum-beat of the new)
  - Flawless Retail Management (more compelling engagement to wow the luxury traveller, inviting and personalised services)
  - People Excellence (invest in staff training and development)
The Generation Game

<table>
<thead>
<tr>
<th>Generation</th>
<th>Year of Birth</th>
<th>Other Names</th>
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<tr>
<td>GI</td>
<td>1925 - 1945</td>
<td>Traditional Conservatives Silent</td>
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<td>Baby Boomers</td>
<td>1946 - 1964</td>
<td>Boomer Me Generation</td>
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<tr>
<td>Generation X</td>
<td>1965 - 1980</td>
<td>Xers 13\textsuperscript{th} Generation</td>
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</tbody>
</table>
3. Consumers

The Generation Game – GI

Birth Year
1925-1945

Values
● Conformism
● Thrift
● Maturity

Work-Related Values
● Obedience
● Loyalty
● Obligation
● Security
The Generation Game – Baby Boomers

**Birth Year**
1946-1964

**Values**
- Idealism
- Creativity
- Tolerance
- Freedom

**Work-Related Values**
- Workaholism
- Criticism
- Innovation
The Generation Game – Generation X

**Birth Year**
1965-1980

**Values**
- Individualism
- Scepticism
- Flexibility

**Work-Related Values**
- Learning
- Entrepreneurial
- Spirit
- Materialism
3. Consumers

The Generation Game – Generation Y

Birth Year
1981-2000s

Values
- Moralism
- Confidence
- Positivity
- Environmental Consciousness

Work-Related Values
- Passion
- Balance
- Security
- Leisure
Design Trends
Focus of Generation Y

Characteristics

- Carry 3-4 mobile devices
- Face-to-face communication less important
- Loud voice that carries quickly over social media
- Less emphasis on individual more on teams
- Will work any time, any where, thus merging work and play
Focus of Generation Y

Characteristics

- Want to be engaged and have personal experience – soft branding?
- Instant gratification
- Brand loyalty less important
- More individual experiences
- Will spend more time in a hotel, must feel a connection
- Want to share something cool and unique
- The cooker-cutter hotel look is out
- Something they can share on Twitter – stimulation!
Trends in Design

Design Responses – Lobby

- Communal table in the lobby
- Lobby now a social networking and work area away from the office
- Self-check-in
- Interactive tech walls
- Want to be alone together, large public space with access to bar, music and food
4. Design

Trends in Design

Design Responses – Rooms

- Rooms need to be multi-functional and flexible – GY likes to move stuff around
- Power outlets in key locations
- Is the desk dead? – people work on their beds
- Nightstands becoming smaller (wall-mounted lights, no alarm, no telephone)
- High speed WIFI everywhere and free
Trends in Design

Design Responses – Other

- Designer beers and books by locals
- Green – gym equipment that can charge your devices
- Create the bridge between physical and digital (Burberry)
- Conversion of old buildings rather than new build provides stimulation and history for Twitter-sphere
4. Design

Trends in Design
Trends in Design

2 Barcelona, SPAIN
A trip to Barcelona will stimulate your senses, from the beautiful Gaudi architecture to the tantalising tapas. Mingle with the locals at the markets or feel the sand between your toes at the city’s beautiful beaches.
4. Design

Trends in Design

Find and keep the things you love.

Four Seasons Hotels and Resorts
Four Seasons Hotels and Resorts Pinterest board. Travel, food, and fashion you have to see to believe. Follow us for up-to-the-pin Four Seasons favourites.

Wish You Were Here...
Around the World by Private...
Best of City
Pin-a-Pumpkin
Fall Fashion Lookbook
Four Seasons Taste Truck
Think Pink
TASTE: Savory Treats
TASTE: Sweet Treats
TASTE Happy Hour
TASTE: One Ingredient, Thre...
4. Design

Trends in Design
The Thief, Oslo

Design Ideas

- Project pop star faces onto pillows
- Suites designed by pop groups
- 118 rooms
- Design Hotels
The Hostel Box

Design Ideas

- Hostel luxury
- Aimed at Millennials
- Enhanced privacy
- Bunk type box
- Higher quality
- Good common areas
- Wifi
- Charge points
- Energy efficiency
- Social networking sites
4. Design

Who is Setting New Standards?

Brands with Go!

- CitizenM
- W Hotels
- Tryp by Wyndham – partnered with social media app Lobby friend
- Holiday Inn – Active Lobby Concept
- Element – seeking all LEED
- Sydney’s 1888 Hotel – smartphone photographer’s heaven
- Jane
- Midmarket hotels more responsive and innovative that luxury!
- Edition
- Facebook page and a website no longer enough
Trends in Design

Roof Top Gardens
4. Design

£750
Philip Camble
Director
Whitebridge Hospitality Ltd