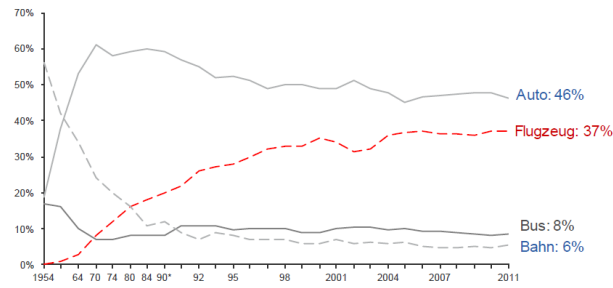




Data from the German
TRAVEL ANALYSIS 2012

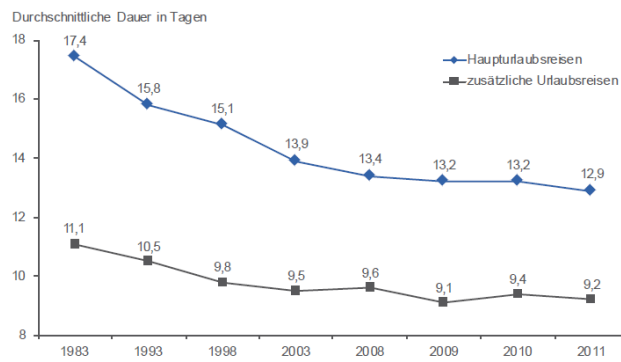
Means of Transport for Holiday Trips 1954-2011



Pkw inkl. Pkw mit Wohnwagen oder Wohnmobil
 Basis: Urlaubsreisen der deutschsprachigen Bevölkerung 14+ Jahre;
 bis 1990 nur alte Bundesländer; bis 2009 nur Deutsche
 Quelle: RA 1954 bis RA 2012 face-to-face

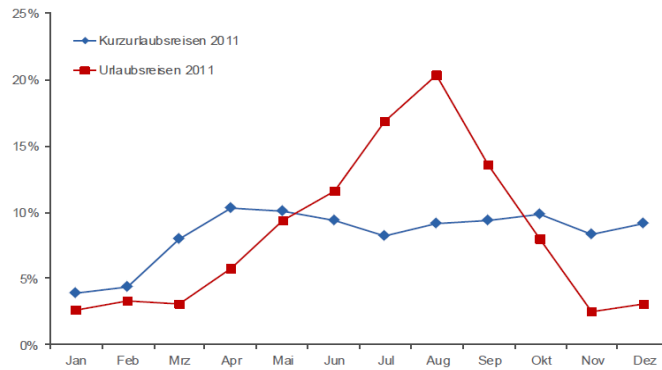
RA ReiseAnalyse
 2012

Duration of holidays



Durchschnittliche Reisedauer aller Urlaubsreisen der Deutschen 2011: 12,0 Tage

Seasonality of Short Trips & Main Vacation Trips



5 Quelle: Deutsche Reiseanalyse 2012

KOHL & PARTNER

Hotel der Zukunft

Die wichtigsten Chancenmärkte
der österreichischen Hotellerie



6

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6 Theses

- 1. **LEISURE & WORK** in transition
- 2. A new understanding of **LUXURY**
- 3. **SELFNESS** & individualisation
- 4. Hotels are **DESTINATIONS**
- 5. Vacation 2.0 starts in the **DIGITAL WORLD**
- 6. **NICHES** as the key for success for hotels

Our guests: New generation of **Creative Tourists**



- High level of education
- Opinion leader
- Manyfold interests also beside the mainstream
- Individual fulfilment

Our guests: **New consumer values – New Luxury**

Higher quality of life.....

- Inspiration (Ambience, Hotel-Community)
- Authenticity
- Privacy
- Sustainability & Green Lifestyle
- Convenience



Flexibel transition zones - Hotel Q, Berlin

Our guests: It's all about creating **new communities**



Community – being connected

Our guests: How much **sustainability** do they want ?



Our guests: Demographic Change

The age group 60 will grow around 10 % between 2010-2030



Same age – same interests?



Hotel der Zukunft

Die wichtigsten Chancenmärkte
der österreichischen Hotellerie

Hotels became private living places....

- ... to inspire me
- ... to be part and create communities
- ... to be active OR
- ... reactivating places to stay in touch with myself
- ... for my new learning experiences
- ... ONLINE or OFFLINE

A PLACE TO BE

and no longer only a place to stay and sleep

New dimension of travel...

~~Where do I want to travel to ?~~

What kind of experiences
can I discover there ?

... has to fit to the „New Individuality“

More themed hotels



**Architecture, Desing, Ambiance
more important than ever before**



Design



Themed



Classic

... but the design has to fit to my client !

**New lodging formats – example smart private living
in holiday villages with huts**



New urban design & sustainability

K-STAR Hotel Hamburg
(Opening 2013)

- Urban Design Hotel with 167 rooms and 8 suites
- Green building, LEED certificate
- Spectacular architektur (with Passiv-Energie-Technique)
- Lighting system through its own solarenergie
- Wind turbines produce most of the energy needed

21 Quelle: www.lheg.com

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New urban design & sustainability

aLoft by Starwood

- average room size ca. 24m² (Upscale)
- Self Check-in Terminal
- Self-Service Gastronomie-concept (re: fuel)
- w xyz bar – openLobby area with private lounge atmosphere
- In Europe 2 Hotels

22 Quelle: www.starwoodhotels.com

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New urban budget concept

all seasons by Accor

- Economy-plus-category
- Room size 21 - 24 m²
- Special feel good atmosphere in all public area

23 Quelle: www.accor.com

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New urban budget boutique hotel

hotel concept

citizenM is a hotel driven by one desire: to create affordable luxury for the people.

By "the people," we mean a smart new breed of international traveler, the type of person who doesn't compare the way others might think. This includes the weekenders, the suits, fashion baggers and affair havers. The explorers, adventurers and dreamers. Those who travel the world with big hearts and wide eyes. Those who are motivated and driven by a love of the real world. In short, everyone who is a **mobile citizen of the world.** Most likely, this also means you, dear reader.

Budget Boutiquehotel citizenM

- Self check-in service at Touch Screen Terminals
- Lobby as very functional driven individual lounge
- canteenM – 24-hour Lobby Minibar with cold and warm snacks. In the evening with Cocktails, Champagne and Beer

24 Quelle: www.citizenm.com

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Niche hotels

LOISIUM
WINE
SPA
RESORTS

LOISIUM Wine & Spa Resorts (2 hotels)

Category: 4 Star Superior
84 & 105 Rooms
Langenlois Kampal / NÖ / A
Sout Styria / A
www.loisium.com
Wine Spa & Wellness,
Vinothek, Wine World, Wine
Bar, Gourmet Restaurant,
Vinyards for individual
experiences, conference
center.

Quelle: www.loisium.com

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Location and price are no longer the differentiation criteria – no „more-of-the-same“ hotels - Positioning !!

26 Quelle: Hilton Vienna

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Hotels are DESTINATIONS....

- It's all about the place,
- how can I get inspired there,
- how can I find out about myself there,
- Hotels are plattformen for emotions !
- It's the quality of experiences in our hotels that count !

➔ **NEW OFFERS & PROGRAMS**

It's about emotional programs

DIE
SOMMER
SEITE DES
LOISIUMS

Abtauchen im kristallklaren Pool,
Swing & Chill Laune inmitten der
Weingärten – in unseren Lounge
Chairs, Schwebeliegen & Hängematten.
Kühle Cocktails & Sommer Snacks,
der Geschmack von Eiscreme Lippen
und das Farbenspiel der unter-
gehenden Sonne.



It's about Neighborhood Integration

COSMO

HOTEL PHILOSOPHY
BERLIN
BOOKING CONTACT
IMPRINT
ENGLISH

REWARD
INSPIRE
DESTRESS
EAT
DRINK&DANCE

MO 8°C DI 6°C MI 2°C

→ HOTELBEWERTUNGEN

A MEMBER OF DESIGN HOTELS™

29 Quelle: www.cosmo-hotel.de

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Room Food Style in perfect harmony

Zukunftswort: Österreich – Hotel der Zukunft

Style

Bereits die erste Studie „Hotel der Zukunft“ hat sich mit dem Designrends in der Hotellerie auseinandergesetzt. Eine globale Stilangabe wird dabei zur Herausforderung für jeden Hotelier, der sein Hotel als „besonders“ und „ausragend“ positionieren möchte, denn ob Shanghai, Dubai, New York, Wien, Graz oder Kitzbühel – Hotels ähneln einander doch sehr. Natürlich gibt es gerade in Österreich eine starke Wurzeln der Tradition und somit historisch hergeleitete Hoteltypen, die nicht mit der Welt vergleichbar sind. Und doch wird es nicht reichen, sich nur an der Tradition zu orientieren. Vergessen wir nicht: Jede Tradition hatte einmal ihren Anfang und nicht alles, was Tradition hat, ist für die Zukunft vor Veränderung gefeit. Daher sollte man sich in Zukunft gut überlegen: Will ich Tradition oder Ausbruch? Oder will ich, wie zuvor beschrieben, eine spannende Fusion aus Tradition und Inspiration?

SCHANGHAI, DUBAI, NEW YORK, WIEN, GRAZ ODER KITZBUHTEL – HOTELS ÄHNELN EINANDER DOCH SEHR.

Als Orientierungshilfe geben jedenfalls die schon in der ersten Studie zitierten Styletrends, weshalb wir diese hier nochmals in aller Kürze erwähnen und zur Garteltree von „Room Food Style“ überführen.

30 Quelle: WKO – Hotel der Zukunft 2

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Future Health

- Relaxation as an intimate orchestration – joy escape
- 3 steps for health offers today
 1. health for a better life (personal functionality)
 2. Well – Fitness phase
 3. Creative Health or beeing healthy for happyness

„Future Health“ = new health offers with **SELFNESS** focus !!!

- High grade of differentiation of all Wellness offers
- Soft health – Wellfeeling & enjoyment
- Work & Chill Offers for the creative class
- Bringing privacy to our Spas
- ...but main focus now on growth of my inner self

HOTEL



Hotels have to decide to what extend they want to get involved....



Hotel der Zukunft
 Die wichtigsten Chancenmärkte der österreichischen Hotellerie

The DIGITAL WORLD

- 2010 – 90 billion online revenue from travel
- 31 % of all accommodation bookings were done ONLINE
- In A 44,6 % of those bookings were done by agers between 55 to 64

But there is a gap between the WWW and the Internet !!

- 51 % use Peer-to-Peer contacts or video downloads
- only 20 % if the time is used for surfing homepages

Dramatic change of behaviour !!

- Information needed within seconds
- Mobile Internet = communication, information, real time & playful

34 Quelle: WKO – Hotel der Zukunft 2

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Digitainment....

The image shows a lifestyle scene with a glass of beer, a smartphone, and a croissant. The smartphone screen displays a grid of app icons including MobileFiles, Evernote, fring, Wikipanion, Twinkle, Pixelpipe, Qype Radar, Last.fm, Shazam, and WordPress. The dock at the bottom contains icons for Telefon, Safari, Mail, and Kalender (showing Saturday 17). The background features a stylized pink robot head graphic.

35 Quelle: WKO – Hotel der Zukunft 2

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Digital world and its users have to be understood thoroughly and are a driving force in our business

obsessed WITH facebook.

AS OF 2011, THERE ARE 500,000,000 ACTIVE FACEBOOK USERS. APPROX. 1 IN EVERY 13 PEOPLE ON EARTH. HALF OF THEM ARE LOGGED IN ON ANY GIVEN DAY.

48% OF 18 TO 34 YEAR OLDS CHECK FACEBOOK RIGHT WHEN THEY WAKE UP...

ABOUT 28% CHECK THEIR FACEBOOK ON THEIR SMART PHONES BEFORE GETTING OUT OF BED.

THE 35+ DEMOGRAPHIC NOW REPRESENTS MORE THAN 30% OF THE ENTIRE USERBASE.

THE 18-24 (COLLEGE) DEMOGRAPHIC GREW THE FASTEST AT 74% IN ONE YEAR.

LIKING "DRUGS" IS UP 1131.9% THIS YEAR.

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Our guests: Need for new types of segmentation



New Lifestyle formats

Using the E-Milieus as a qualitative target group model

1 Higher	Conservatives 5%	Establisheds 10% ✓	Post Materialists 10% ✓	Modern Performers 9% ✓
2 Middle	Traditionals 14%	GDR-Nostalgics 6%	Modern Mainstream 16% ✓	Experimentalists 8% ✓
3 Lower		Consum Materialists 11% (✓)	Hedonists 11% ✓	
Social Status	A Tradition Sense of Duty and Order	B Modernisation Individualisation, Self-actualisation, Pleasure	C Re-orientation Multiple Options, Experimentation, Paradoxes	

© Sinus Sociovision 2005

Positioning and Profiling is a must!



What is my hotel's profile and position ???

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FUTURE SUCCESS.....

- Differentiation & experiences need strong **individual hotel concepts**
- **Emotion** sells
- **Niches** are often the right answer
- Product development as an ongoing **process**
- Know & understand my **guests** better than ever before
- **Understanding the digital** world and new lifestyles
- **Transparency** is increasing (feedback community)
- Managing **change** is the key for success

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Hotel der Zukunft

Die wichtigsten Chancenmärkte
der österreichischen Hotellerie

Thank you very much
for your kind attention

Susanne Kraus Winkler

www.hotelderzukunft.at

www.loisium.com

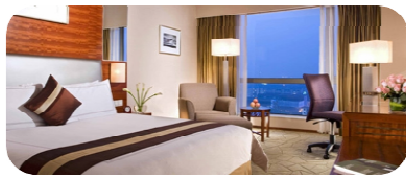
www.kohl.at

41

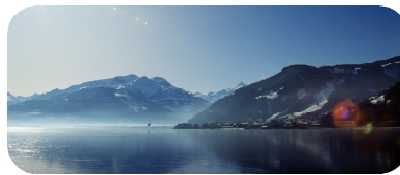
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Die 4 Geschäftsfelder von Kohl & Partner

Hotellerie & Gastronomie



Destinationsentwicklung



Touristische Infrastruktur



Seminare & Trainings



Bilderquelle: Kohl & Partner
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Wer wir sind



- Unabhängiges und international tätiges Beratungsunternehmen, spezialisiert auf die Hotel- und Tourismuswirtschaft
- Führendes Tourismusberatungsunternehmen in Österreich mit mehr als 30 Jahren Erfahrung
- 12 Büros in neun Ländern (Österreich, Deutschland, Schweiz, Italien, Ungarn, Rumänien, Bulgarien, Mazedonien und Albanien)
- Internationales Team von über 40 Experten

Ansprechpartner Kohl & Partner Wien



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Studium am Fachhochschulstudiengang für Tourismus-Management MODUL in Wien. Nach dem Studium zwei Jahre bei Austrian Airlines sowie zwei Jahre als Senior Consultant bei der SynGroup Unternehmensberatung.

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Seit Jänner 2002 Senior Partnerin bei Kohl & Partner