



Accor Northern Europe Travel Trends Report

Contents

Introduction	page 3
The Return of travel	page 4
And we want to go to ...	page 5
The New Normal - Health & Safety are Paramount	page 7
The New Normal - Building Back Better	page 9
The New Normal - The return of face to face business	page 11
The New Normal - Technology and the guest	page 12
10 Trends for 2022	page 14
1. Holiday Millionaires	page 15
2. Biophilia	page 16
3. Linger Longer	page 17
4. Crafted Contentment	page 18
5. Solitude	page 19
6. Hybrid Working	page 20
7. City Celebrants	page 21
8. The New Companions Big bubbles, gramping and pets	page 22
9. Hotel Residences	page 23
10. Loyalty	page 24
Wellness Travel	page 25
Design for Lifestyles	page 27
Changing Cities: Hybrid Real Estate & Workspitality	page 30
Inspiring Travel	page 32
Emerging Hot - Where is next for the travel hot list?	page 36

Introduction

Duncan O'Rourke
CEO Accor Northern Europe



Travel and Hospitality is a blessed industry. These words might surprise you after the last two years, but they are true. In 2019, pre-pandemic, 1.3 billion people travelled around the world, a number that had been growing at 4.5% every year for the last two decades. Over the same 20-year period, hotel volume grew at 2% meaning demand out-stripped supply.

We are confident people will travel again for both leisure and business. Our research shows that people are incredibly keen to travel, and on average are planning 3.8 trips in 2022, with an intention to spend, on average, 39% more on travel in 2022 compared to 2019.

Our inaugural Accor Northern Europe Travel Trends Report looks at how Covid has changed our behaviour and how this will influence the way we travel, live, work and play in 2022 and beyond.

Before we look ahead to what's coming I wanted to take a moment to reflect on the transformation of the sector in recent years.

There are roughly 7.7 billion people in the world. Of which 4 billion (55%) live in urban areas today, a figure that is expected to reach 68% by 2050, according to the UN. Pre-pandemic, approximately 15% of the population - 1.3bn - travels.

Our business and industry have been built around that 1.3bn. Traditionally hotels are part of a guest's life just a few times a year. This is where Accor has changed. Today Accor is built for the needs of the 4 billion global urban population, enhancing their lives both when they travel and when they're at home. As such, our business is structured for when you live, work and play.

'Live' is our ever-expanding global hospitality portfolio, from luxury to economy, home-stays to hostels, resorts and lifestyle brands, long-stay to branded residences. It is our core

segment that continues to grow. Live goes beyond hotels, it is a comprehensive offering from one night in a hotel to a lifetime in a residence.

The 'work' and 'play' strands of our business have been built to enhance our guest experience and the experience for our local communities, the 55%, the 4 billion who live in urban areas. These are our neighbours, our communities, those living and working in the towns and cities in which we operate. They might not need a room for the night but they might need something else, a place to sit down with their laptop for a few hours, meet a few friends or colleagues, celebrate significant events or work out in the gym. Hotels provide this at all times of the day.

Some of the ways we do this are discussed in this report, including Accor's growth in Workspitality® and how we design for people's lifestyles. Our loyalty programme, ALL – Accor Live Limitless, is now a lifestyle companion, a way for members to earn and use their points when they dine, go to music festivals, book transportation and much more.

Hospitality extends beyond walls, to spark inspired experiences everywhere. We've developed our entire Accor ecosystem around the changing needs of our guests and acquired businesses to enhance that experience. This is not a trend, this is the core of our business - to extend hospitality to our guests and communities and be part of their daily lives.

This is Accor. We dare to reimagine hospitality not as a place or service, but as infinite connected moments for every aspect of your life. I truly believe hospitality is a blessed industry, ripe with opportunity. Here's to travel and far more in 2022 and beyond.

Duncan O'Rourke
CEO Accor Northern Europe

The Return of travel

Towards the end of last year, and again just days ago, across five European countries - UK, The Netherlands, Germany, Poland and Russia - we surveyed 6,000 people about their travel plans for 2022 and beyond. The results were highly positive. Despite recent setbacks with the Delta and Omicron variants, more than 80% plan to travel in 2022. They want to travel a lot. And after two years of restrictions, they want to spend significant sums. In fact, Accor's research reveals people intend to spend 39% more on travel in 2022 than they did in 2019, with plans for between three and four trips across the year.

Beach holidays top the wish list for travel in 2022 with 33% planning sun and sand. City breaks (26%) are expected to return strongly as the desire for cosmopolitan culture returns. The rewinding of mindful travel continues, heightened by Omicron. Research pre Omicron indicated one in five (20%) sought country escapes, but the recent pandemic surge resulted in an increased desire for nature, with 30% of travellers seeking holidays in nature in 2022.

Omicron has also doubled our desire to explore our own country – at the end of 2021 just 14% of travellers were planning staycations and at the start of 2022 that number has doubled to 28%. Overall 25% of respondents are more likely to staycation as a result of Omicron.

Also, after two challenging years, 14% of those polled are planning all-out luxury, the trip of a lifetime, to make up for all the lost travel in the pandemic years.

Almost half (48%) agreed with the phrase: "Leisure travel is important for my work life balance", a notable mind-set shift that has seen people the world over re-address their priorities and seek more from how they spend their time.

People want to travel, they also want to be safe and are now adjusting to the fact that the two can go together. Reassurance is a must for travel in 2022 and beyond.

And we want to go to ...

Just over half (55%) of those we surveyed in the UK, Netherlands, Germany, Poland and Russia want to stay in Europe in 2022. The three most desirable destinations within Europe are seen as Italy (36%), Spain (30%) and Greece (28%), all of them offering an enticing combination of shorter flight times, warm climate, coastlines, family-friendly food, fashion and culture but there is also strong interest in other areas of Europe.

When asked about worldwide destinations to visit this year, Europe still scores extremely highly but the USA and Thailand also feature. And we expect more long-haul travel in 2023 and beyond.

"More than 80% plan travel in 2022, and are willing to spend 39% more on travel this year."

Top countries in Europe travellers would most like to explore:

- 36% - Italy
- 30% - Spain
- 28% - Greece
- 24% - France
- 21% - UK / Croatia (tied)
- 20% - Portugal / Germany (tied)
- 15% - Ireland
- 14% - Austria
- 12% - Denmark
- 10% - Poland / Russia (tied)

Top 10 destinations in the world to visit in 2022:

- 23% - Italy
- 21% - Spain
- 18% - Greece
- 16% - France
- 13% - Germany / USA (tied)
- 12% - United Kingdom / Croatia (tied)
- 11% - Portugal
- 10% - Thailand

The New Normal

Health & Safety are Paramount



“As a result of our rapid response to the pandemic, Accor became the first major hotel group to announce that it was recognised as meeting and surpassing UK Primary Authority assured advice on health and safety measures relating to COVID-19. Today guests want to have a guarantee on cleanliness. It is their primary concern and an expected requirement whenever they travel. Accor addressed these concerns and provided standards that can be benchmarked, by launching a unique global cleanliness and prevention label: ALLSAFE, representing some of the most stringent cleaning standards and operational procedures in the hospitality world, going beyond many national government’s minimal viable requirements, to ensure guest and staff safety, all verified by a third-party auditor.”

Richard Short
Vice President - Health and Security
Accor Northern Europe

Of those we surveyed, 31% want clearer health and safety standards and 30% want more flexibility on changes to bookings. In fact, nearly one in five (19%) would be willing to pay more for a hotel room if it had a recognised cleanliness initiative award or designation. Technology will also play a significant role, 23% expect more contactless payment options and 17% want an increase in hotel technology solutions such as WhatsApp customer service.

At Accor, protecting and taking care of others is at the heart of what we do, and with the pioneering ALLSAFE programme we have established some of the most stringent cleaning standards and operational procedures in the hospitality world. The extensive protocols were established with Bureau Veritas, a world leader in testing, inspection of certification, and

each hotel participating in the scheme is audited independently by a third-party environmental health expert, providing a vital layer of reassurance to the travel community.

In return, guests receive hospital-graderoom disinfection, deep cleaning of all upholstery and carpets, with bedding washed and treated at high temperatures and antiviral cleaning products used in all properties. There are facilities for temperature checks, appropriate partitioning and the strict observance of national regulations such as social distancing. It also includes contactless and contact-light check-in and check-out facilities and payment options. Hotel employees are health and temperature checked and have all undergone comprehensive safety and hygiene training.

However, and crucially, in an industry first, ALLSAFE goes beyond just cleaning and hygiene, it also addresses potential concerns for travellers should they feel unwell when they reach their destination. Guests across the 5,200 Accor hotels worldwide can access free telemedicine consultations and AXA's extensive medical networks with tens of thousands of vetted medical professionals, allowing hotels to make referrals for guests based on their specific language or medical needs should an issue arise.

This level of reassurance is now an expectation, it is part of everyday life in hotels and the role of the hotel team to make guests feel safe and at home.



Top ten changes consumers want to see part of post-pandemic travel:

- 31% - Clearer health and sanitary standards**
- 30% - More flexibility on changes to bookings**
- 28% - Clearer cancellation policies**
- 23% - More contactless payment options**
- 22% - Fewer people in tourist hotspots**
- 17% - An increase in hotel technology**
- 17% - Less interaction with other holidaymakers**
- 16% - Less air travel**
- 16% - A bigger drive to booking holidays online**
- 10% - A new way of tipping waiters or others, without leaving cash**

The New Normal Building Back Better



“We don’t advertise to our guests that we use paints that absorb CO2, or about other design measures that make a room simply better to stay in. These features weren’t requested by guests or owners; it’s just us thinking about the future.”

Federico Toresi
Global Vice President Design
Luxury & Premium Brands

Compared to 12 months ago, 69% of travellers say they are more aware of climate change and sustainability challenges. One in five (20%) would also be willing to pay more for a holiday if the operator providing the holiday had provable green or carbon neutral credentials.

Climate action lies at the core of Accor’s vision and business model. The group is acutely aware of the climate emergency and the actions needed to avoid the worst impacts of climate change. Accor is committed to carbon reduction and is adapting business activities to align with climate science, create solutions, and meet the expectations of teams, guests, owners, investors and partners.

Accor aims to be a global beacon on sustainability issues and has recently made salient commitments and formed partnerships to reduce its environmental footprint. To name but a few, in March 2021, Accor was the first major international hotel group to set long-term science-based targets to reduce its carbon emissions in line with the 1.5°C ambition of the Paris Agreement. In November 2021, COP26 saw Accor pledge to ban single-use plastic for guests by the end of 2022 and achieve net zero emissions by 2050, the first international hotel group to do so. In the same month, Accor, and the 13 other members of the Sustainable Hospitality Alliance, announced a new Pathway to Net Positive Hospitality, an initiative supported by the World Travel & Tourism Council. These commitments build on a decade of groundwork in sustainability from Planet 21, which Accor started in 2011.

Guests might appreciate an absence of plastic straws and stirrers and presence of eco-friendly toiletries but, as a result of Planet 21, Accor's commitment has strong foundations, from energy-saving lamps to wastewater treatment and recycling programmes.

Food waste is an industry-wide problem which Accor is actively working to address. Hotels in the Netherlands are using scanner technology developed by the Dutch start-up Orbisk. "From looking at how people are using the buffet and informing the kitchen, we are looking at a 20-25% reduction in wastage," says Toresi. Accor has also saved hundreds of thousands of meals from going to waste thanks to a partnership with food waste app, Too Good to Go.

Accor strives to source food more responsibly, using, where possible local and seasonal products and working with suppliers to support and

strengthen the entire supply chain including the social, environmental and economic impact. Cutting food miles and creating local employment are also key areas of focus, and over 1,200 Accor properties have their own vegetable gardens on-site. Opened in August 2021, Accor's first greet hotel in Darmstadt, Germany, sources food from local providers served on crockery bought at nearby flea markets, incorporating furniture designs by craftspeople upcycling found objects.

"We think in 5-10 years' time you will not be mining metal to create a lamp and will instead use bioluminescence to light a space. We can use seagrass panels to clad and we have access to 3D printed walls, made from recycled materials with biopolymers that already exist," adds Toresi.

The New Normal

The return of face to face business



"Covid-19 has demonstrated remote working is not less effective, for many productivity has increased. But for many leaders, the detrimental impact of remote working on culture, team dynamics and workplace relationships must be weighed against any increase in productivity. This balance will be addressed in 2022. Colleagues and clients will reconnect with a better understanding of the true power of both technology and face to face contact. Organisations will adjust to a model that suits their needs but we don't expect a one-size-fits all approach. It will be a truly hybrid response, a legacy of a pandemic that has reminded us of the very real value of face to face contact."

Karelle Lamouche
Chief Commercial Officer, Accor Northern Europe

While video conferencing was key in the pandemic, business leaders think face-to-face meetings result in more deals signed and increased revenue. A recent study by Accor of business professionals revealed that almost a third (30%) said they found it difficult not being able to see another person's body language and nonverbal cues whereas, over a year, they expect to make an average of 23% more deals and 25% more revenue if they are able to meet face-to-face.

Digital solutions are here to stay but this year will mark the return of face-to-face meetings. Technology is a powerful tool but it will never replace the importance of the human touch in business. We live in a digital age, accelerated by Covid, and while digital is powerful, face-to-face is valuable, economically and psychologically.

The need to connect will be strong and businesses will gravitate towards each other to reconnect in person. As a result, we predict the growth in four major meeting trends:

Hybrid Meetings: Combining virtual and "physical" in-person participation across multiple locations, facilitated by Accor's ALL CONNECT partnership with Microsoft Teams

Closing Meetings: Face-to-face closing meetings will surge as foundations built digitally come to fruition in closing meetings to get the deal done.

Culture Meetings: After potentially two years of separation, people will come back together to build teams and company culture.

Leadership Meetings: Small meetings will be big - boards and senior figures will come back together to strategise.

The New Normal Technology and the guest



"Technology is an intrinsically important part of our business, but only where it enhances the ability of hotel teams to provide great service and create memorable experiences, which, at the end of the day, is what really matters. Our everyday lives are augmented by technology and today that continues in our hotels. We want to enable guests to get what they want in our hotels in the way that most conveniently fits with their everyday behaviour. It is a technology that has our guests at the heart of it."

Luc Gesvret
SVP Loyalty & Partnership, Guest Experience
and ALL Accor Live Limitless, Accor Northern Europe

As such, next time you check into an Accor hotel you may recognise the team but there may be no welcome desk or any scripted response to guests arriving. "We said to the team "You're going to have to come out from that desk and be yourself, to connect with guests person to person," and the teams embraced this. They are people-people," says Gesvret. "We are using our best asset, our people, to reinvent how we approach customer service and we're using the latest technology to enable this."

The ibis Styles London Gloucester Road (London) was the first of seven pilots in Northern Europe to offer contactless options throughout the guest journey: online check in, a digital key, 'Accor Key', activated through the ALL app, secure payment (Pay by Link), catering (Click Pay Collect) and guest relations via WhatsApp throughout the stay.

"We know that in this changing world, our guests want more safety and opportunity to maintain social distancing, to have a contact-light experience, so having technology at their fingertips that they can own and manage comes at a perfect time. It is a technology that has our guests at the heart of it," says Elizabeth Ludovici, SVP Customer Technology, Accor Northern Europe. "Technology is part of our daily lives and is now fully part of our hotel experience – and with this important step, we give our guests the opportunity to adapt their hotel stay according to their preferences."



"Sometimes in your travel experience, there is very little added value in doing it in person," says Gesvret. "In the room service order, you're calling someone downstairs, they're pretty busy and there can be language barriers. Ordering online also allows guests to more efficiently order in their own languages." Gesvret also says that customers are increasingly using WhatsApp to keep in touch pre, during and post stay - particularly in the UK market.

Technology also allows hotels to personalise their approach for each guest, with full GDPR compliance. "We personalise how we interact with our clients" says Gesvret. "If we know that you mainly go to ski resorts with

Accor, we're not going to talk to you about food and wine in Barcelona!" Preferences can also be carried from property to property. "It is very important for this client to be close to the lift, far from the lift or have these types of pillows. That allows us to ease their stay."

Despite this move to digital, human interaction will remain as integral as ever. "Digitalisation is an enabler to develop a different guest experience. People told us "ease my experience," explains Luc Gesvret. "They're not saying 'digitalise my experience'. This reflects our long-held belief that business is best when it uses technology to empower staff, not to replace them."

10 Trends for 2022 and beyond

In 2022, the power of travel to relax and soothe is sorely needed but 22% say their travelling priorities will be different post-pandemic. When you look closely, it's clear that Covid has accelerated some trends such as workations while pivoting and aligning others.

1. Holiday Millionaires

If they have the cash, people - after two years of restrictions - want to splash it. On average, travellers intend to spend 37.4% more on travel in 2022 while 14% are looking for 'all-out' luxury in 2022. Unwilling to compromise, this group will be happy to spend more for dream destinations, signature suites and expansive villas. The aim is to have fun and live luxuriously on holiday even if they lack €1m in liquid assets to do the same in their ordinary lives. Echoing the freedom we imagine multi-millionaires feel all the time, ultra-all-inclusives will play their part in this sense of largess as people finally have that long-awaited holiday.

There's also a strong sense of nostalgia in this trend; with both road trips in classic cars and luxed-up rail journeys increasingly popular. Next year, with gleaming rail stock, restaurants and sleeper cabins, and interiors harking back to the 1960s and 70s, the Orient Express La Dolce Vita will have six trains with routes across Europe, from Rome to Paris, Istanbul and Split. Rome will be the key to unlocking unforgettable travel; in 2024 the first Orient Express hotel, the Minerva, will open in its historic Pantheon district.

2. Biophilia

In the survey, sustainability and a trip's impact on the planet was a deciding factor for 87%. Biophilia - the love of nature, the sounds of waves, the rustle of tree leaves, cloud-watching and the feeling of sand between the toes - can be seen as a mix of achievement and philanthourist commitment. We want to spend time in pristine nature, we want to take our children there and we want it to be around for our children's children. Our survey shows that a countryside escape (20%), lakeside (12%) and rural solitude (10%) has significant appeal. Wildbeing escapes have never been more popular: either solo or with friends or family, the chance to have unfettered access to the kind of landscape only

seen on screensavers in recent years. As the British naturalist Sir David Attenborough says "No one will protect what they don't care about; and no one will care about what they have never experienced." Guests will seek out hotels that share this sense of caring. Some examples of the new mindset: saltwater swimming pools will become default options in coastal areas, travellers will seek out natural spas such as the thermal spas of Széchenyi, Budapest and Miskolctapolca, Miskolc, both in Hungary, the freshwater springs of Pamukkale, Turkey and the ancient Thermae Bath Spa in Bath, England.

3. Linger Longer

The recuperative role travel plays in our lives was clearly demonstrated by the 67% of those surveyed who felt "being somewhere different enables me to clear my head and restore some order in my life", while 66% agreed that "one of my biggest priorities when going on holiday is boosting my mental wellbeing and leaving my stresses behind".

People want - and believe - that they will take longer trips to help them deal with the mental and physical exhaustion caused by Covid. Once we arrive at our chosen destination, we will stay there as long as we can, albeit with the potential trade-off that we might do a little work occasionally to achieve this.

4. Crafted Contentment

Wellbeing escapes have never been more popular: either solo or with friends or family. Many of the participants in our survey expressed interest that their destination might offer self-improvement in some way or reach that mythical 'flow' state where we are completely absorbed. This is particularly true in the Russian market where up to 81% of consumers agreed with the phrase "I would like to go on a holiday where I learn something or feel like I've 'bettered' myself". Craft classes are increasingly popular when on holiday, in part to aid mindfulness. In the study 42% agreed "I would like to go on a holiday which enabled me to practice mindfulness". Mindfulness apps and podcasts have surged in popularity. CALM, a long-term partner of Novotel, achieved double unicorn status in 2021, now valued at more than 2 billion USD.

5. Solitude

What was called self-care during the height of the pandemic will evolve to include travel in 2022. It might be a short solo trip as a way of temporarily shedding household responsibilities, recharging your batteries and finally reading the new paperback - all without guilt. Alongside this, hotels will increasingly make adjustments that make solo travellers feel comfortable about staying alone, from non-intimidating lobby bars, club rooms and events, including micro-festivals and live music or classes. There's an element of "Des voyages désorganisés" to this trend, it incorporates impromptu last minute trips, the perfect riposte to months of having to painstakingly assemble everything. Whatever the choice of escape, "me time" will rank higher than ever in 2022.

6. Hybrid Working

Accor's general population research in Northern Europe indicated 1 in 10 plan to extend their holidays by working abroad in 2022 and 53% agreed with the statement: 'I love the freedom of working from anywhere'.

A destination that incorporates the ability to work is a growing trend, both as a work-life-balance tactic and an incentive that might help companies retain key talent for the future. Private schools are increasingly incorporating hybrid learning into their curriculum, which allows families to temporarily relocate anywhere in the world, without children missing out on education. When this generation grows up, it will see being able to combine serious study next to a beautiful tropical beach as the norm.

Hotels are increasingly building long-stay offerings, especially villas, into their projects. At the end of 2020, Accor launched <https://apartmentsandvillas.accor.com/> for those planning extended stays with the space to both work and play (or work while the family play).

In urban areas, Lockdown Leavers departed cities for space and countryside during the pandemic. They will head back to the office periodically but also stay overnight, especially when the price of an overnight hotel stay is comparable with travelling home at peak time on the train. This commute and stay trend is one of many signs of a growth in Hybrid Real Estate (see page 30) which will see commercial real-estate reimaged for mixed use, resulting in buildings that contain office space, hotels and retail.

7. City Celebrants

After two years of a pandemic that has seen cities become more sparse, significant numbers want to be surrounded by people, architecture and experiences – to feel part of human life again. City breaks are expected to boom in 2022, already a quarter of travellers (26%) are planning trips this year, a yearning for art, architecture and cultural events. After two years of social and cultural isolation, many now seek social immersion, to be surrounded by people, culture and experiences. They want choice and spontaneity, with hotels that feel both distinctive and part of the neighbourhood, where their own research can be augmented by suggestions from a plugged-in staff. Brands like Mama Shelter and Mercure epitomise this.

8. The New Companions

Big bubbles, gramping and pets

We are in a new era of companionship. In 2022, we want to catch up with far-flung friends and families and remember why we love the ones we have shared lockdowns with. Early bookings indicate very high demand for larger private homes and villas. So are group bookings for hotels, with shared and interlocking rooms and facilities that help people have both group experiences and privacy. Island buy-outs came to the fore in 2021, with Raffles Maldives Meradhoo famously offering a buy-out of the entire resort and also opening the Raffles Royal Residence, a vast residence of up to six bedrooms on an unblemished stretch of the resort's blissful Beach Island.

We also forecast a growth in Gramping - grandparents taking their grandchildren on holiday without their parents. Not only does this offset the expense of childcare during the summer holidays but it also allows grandparents to enjoy longer, more meaningful interactions with the children they have missed so much, while housekeeping and catering are taken care of. Multi-generational travel, often seeing three generations of the same family, continues to boom amongst travellers.

Naturally some trips will not be complete without the family pet in tow.

According to data, 2.1m young adults aged 24-35 got a lockdown pet. A dog bed and treats will greet many dog-lovers on check-in this year; at the luxury end, pets will even be able to enjoy special menus, massages and grooming sessions during their hotel stay.

9. Hotel Residences

The service, amenities and facilities which are so integral to great hotels, are now transforming home ownership. The branded residences category is rapidly expanding, having proven appealing to affluent clients around the globe. Savills International Development Consultancy has charted their growth at 230% in the last decade while Frank Knight's Global Buyer Survey in 2021 put the figure willing to pay a premium for a branded hotel residence at 39%.

This year, in London, when Raffles London at The OWO opens, alongside the 120 rooms and suites, there will be 85 residences - the first Raffles-branded residences in the UK and Europe. A combination of exclusivity, flexibility and luxury, both guests and residents can access Raffles London's 11 restaurants and bars, fitness and spa facilities and magnificent grand ballroom, while residents also have their own dedicated garden, screening room, wellness spaces and more, all served by Raffles' gracious and intuitive staff. The Raffles Residences are the chance to own a piece of British history in the former Old War Office, an ultra-prime location in Whitehall with views across Horse Guards Parade and St James' Park towards Buckingham Palace, Downing St and Westminster.

"For more than 20 years, Accor has provided branded residential experiences for homeowners, achieving a delicate balance between privacy and exclusivity on one hand, and the services and amenities they love on a 24/7 basis on the other," explains Jeff Tisdall, Senior Vice-President Development, Residential and Extended Stay, Accor.

"Residential markets generally, and branded residences in particular, have proven very resilient even during the Covid years," says Tisdall. "The global shift towards remote work brought on by the pandemic is also making second homes and vacation properties more appealing for those who now have more flexibility in terms of how and where they work."

10.Loyalty

Everyone wants to belong; from streaming services and social media to being recognised in our local coffee shop. If we are loyal it's nice to see it returned and especially nice if those rewards can feel personal. "We wanted to move away from a loyalty programme to be a travel companion" says Luc Gesvret. "We provide assistance for members. Not only hotel accommodation needs, but also entertainment, hobbies, leisure, mobility and financial services."

Gesvret describes ALL: Accor Live Limitless as a supportive lifestyle ecosystem. "If you go to a bar you can get points, if you go to a shop you can get points, and you can use them in restaurants or to check into a hotel." Recent partnerships include Karhoo who can organise transport whether or not you're an overnight guest, and a partnership with BNP Paribas and Visa to launch a new payment card, the ALL - VISA.



Trends analysis in depth Wellness Travel



"Covid has accelerated health and wellness trends – technology and digitisation, nutrition, preventative processes and mental health. We haven't really unpicked the emotional and physical impact of the pandemic, but we do know that there is a far greater understanding of the need to embrace and 'own' our own health and wellbeing. Today the pull of wellbeing is a very, very strong aspiration."

Emlyn Brown
Accor Global Head of Wellbeing

From high end gyms like Third Place (London) enticing customers with the latest equipment and classes, social fitness trends like Bear Grylls and Park Run plus online fitness during lockdown, our approach to keeping active has changed in the last few years.

"There are a lot more people exercising and working out, whether as business travellers or on holiday," explains Brown. "With Gen Y, 65-75% of them exercise at least two times a week. A Les Mills class, 1Rebel, Gymbox, or whatever else, are fun, high end design, dynamic, creative and communal. They create a very strong tribe - it's the younger generation's nightclub, their hangout, their primary social activity."

The wider concept of wellness has seen similar shifts, from meditation's move to the mainstream and increasing numbers of people choosing plant-based food.

Add in a growing awareness of the importance of sleep and hotels have an exciting and pivotal role in delivering and maintaining wellness practices. As well as restaurants and room service having increased plant-based options, minibars and room menus will add healthier options and embrace customisation.

Says Brown, "what we're seeing now is a democratisation of wellness. It used to be considered a practice or indulgence of the wealthy, now it is, rightly, part of everyone's lifestyles. Gen Y and Z consider it the absolute norm. It's the indulgent pampering, the daily routines and the exceptional wellness experiences. Hospitality has an opportunity to cater for it all. True luxury is not just about what you do, it's about how you feel."

Here are just some of the ways we see Accor's hotels incorporate wellness trends.

- **Spas, serenity and community:**

Spas will break out from their cloistered confines and be as much about the setting as treatments, opening up to incorporate yoga gardens and outdoor relaxation areas, whether in urban or country areas, with herb gardens and meditation zones. As they become community resources, urban hotels will give local residents membership or day access to spa and fitness facilities, including swimming pools and classes, with treatments, all ensuring hotels become centres of the community - part of our Live / Work / Play commitment.

- **Wellness on Demand:**

Covid has brought fitness to private homes and hotels can do the same too. Fitness on-demand is booming and fits in well to the potential disruption of workout routines caused particularly by business travel. The Pullman brand has started providing digital content to its guests through a partnership with Les Mills, making Pullman the first boutique fitness hotel brand with innovative around-the-clock fitness classes.

- **Gear Up:**

Fitness equipment is often bulky and people like travelling light. The Fairmont Fit gear-lending programme has been making it easy for guests to get to the gym for 15 years. In the new Fairmont Windsor Park – the UK's newest luxury spa and wellness hotel with a holistic and transformational wellness facility spanning 2,500 square meters across two floors - the hotel is expanding to include Hyperice, the uber-slick percussive massage tool that guests can use in their rooms - or the gym - throughout their stay.

- **Room to relax:**

A hotel's accommodation plays a key role in wellness. At Raffles, emotional wellbeing incorporates feng shui'd design and architecture as well as food that aims to minimise jetlag while 'rituals for serenity' includes a butler assisted pillow menu, aromatherapy oils, sand timers, bath menus and snacks for restful sleep. While other brands including Novotel provide apps such as CALM to ensure guests feel relaxed and rested.

- **Sleep well:**

Sleep has to be central - after all, over half (52%) agree that 'catching up on lost sleep is important to me when going away on holiday'. It's not just beds and rooms with purified air, soundproofing and blackout blinds, but also experts dispensing advice and podcasts. Sleep is a central factor of wellbeing, with more and more services and products to help us sleep better – the growing market of sleep aids is set to reach \$101.9 billion in 2023.

Design for Lifestyles



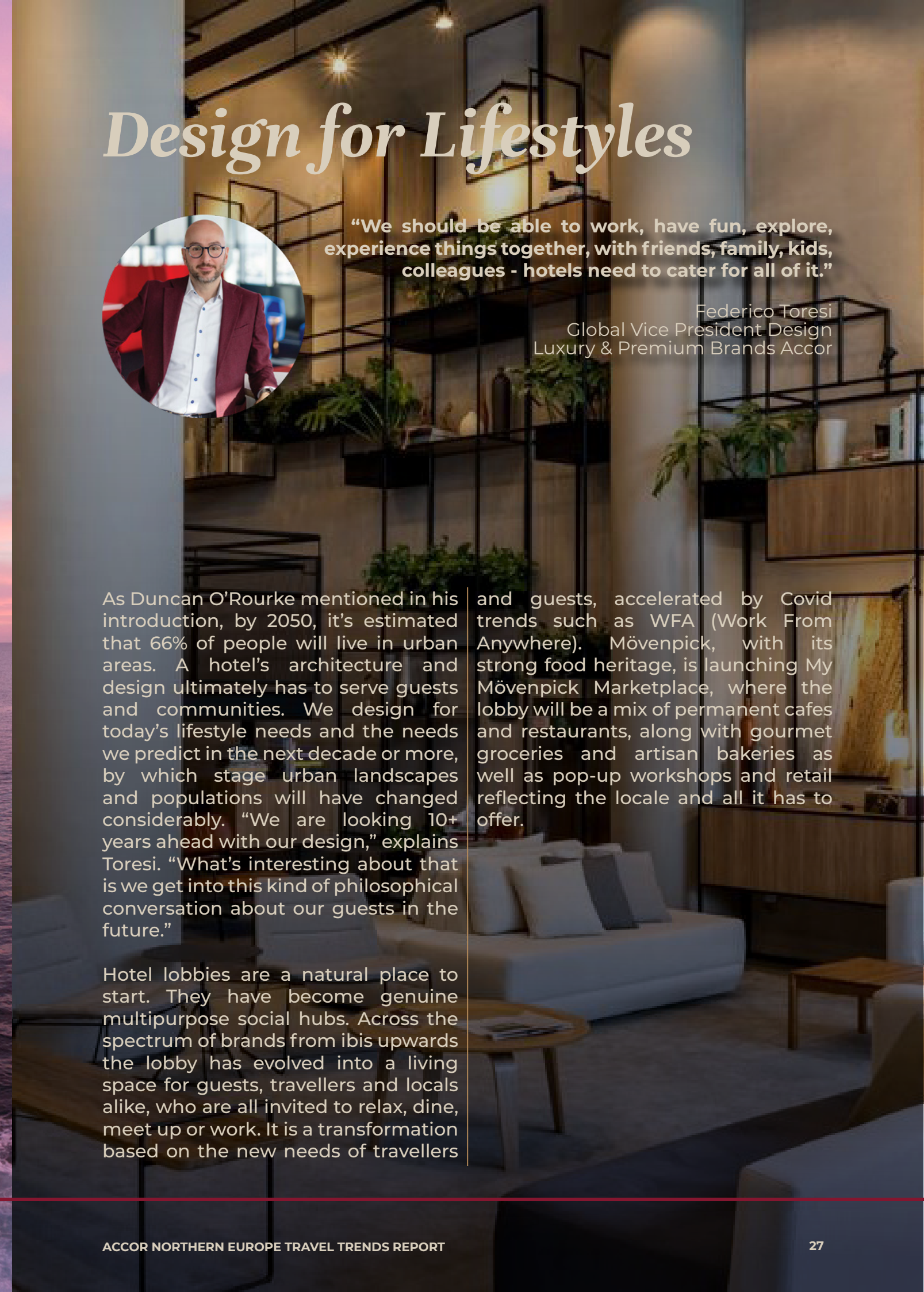
"We should be able to work, have fun, explore, experience things together, with friends, family, kids, colleagues - hotels need to cater for all of it."


Federico Toresi
Global Vice President Design
Luxury & Premium Brands Accor

As Duncan O'Rourke mentioned in his introduction, by 2050, it's estimated that 66% of people will live in urban areas. A hotel's architecture and design ultimately has to serve guests and communities. We design for today's lifestyle needs and the needs we predict in the next decade or more, by which stage urban landscapes and populations will have changed considerably. "We are looking 10+ years ahead with our design," explains Toresi. "What's interesting about that is we get into this kind of philosophical conversation about our guests in the future."

Hotel lobbies are a natural place to start. They have become genuine multipurpose social hubs. Across the spectrum of brands from ibis upwards the lobby has evolved into a living space for guests, travellers and locals alike, who are all invited to relax, dine, meet up or work. It is a transformation based on the new needs of travellers

and guests, accelerated by Covid trends such as WFA (Work From Anywhere). Mövenpick, with its strong food heritage, is launching My Mövenpick Marketplace, where the lobby will be a mix of permanent cafes and restaurants, along with gourmet groceries and artisan bakeries as well as pop-up workshops and retail reflecting the locale and all it has to offer.





With initiatives like this, hotels can truly be part of their community and increase revenue. As Luc Gesvret said earlier, it also impacts the hotel teams, it does away with check-in desks, does away with the formalities of a hotel, and literally gives teams the space to become part of the community and change how they engage with guests and locals. Locals can become members of the gym and come in to join guests for an early morning yoga class, a couple of friends may spend the afternoon with spa treatments before heading to the roof terrace for a drink. Other activities include taking a class or having the sort of birthday dinner you can't fit in your own apartment, seeing a film on the hotel's rooftop, a local band playing in the bar, an author reading in the lounge - all these experiences engage locals. There are benefits for hotel guests too; from top level gyms to feeling the buzz of the neighbourhood as they step through the door. "Ultimately it's adaptive reuse, which stems from a socialist idea that we should all be able to share certain elements of private spaces, like hotels," says Toresi.

Toresi adds: "Increasingly we look at how to integrate spaces into a community that lives within 15-20 minutes of the hotel, because that's the way we're thinking the big cities will evolve. The micro 15-minute city concept is based on the premise that people shouldn't really need to have a car but they should be able to walk or cycle everywhere and access the infrastructure the city has to offer to enhance and augment their daily lives."

Toresi sees rooms changing too; becoming places where you can sleep, exercise and work, with furniture that is both easier to move around and

clean, a concept that has evolved from how Scandinavian countries have been handling guestroom fit outs for decades.

At the ultra-luxury end, ultra-customisation will see rooms tweaked to an individual's precise liking. "We're looking at the sort of interactions and intuitiveness that you get with very expensive cars where they automatically adjust the lights, colour hues, temperature and seat comfort. It is all pointing to more immersive experiences, interaction with and in the environment and hyper-personalisation," explains Toresi.

"Technology enables micro tweaking - lighting, temperature, sound and more - to make a space ultra-customised for our guests to have more meaningful experiences. We think that's the way that society is going: seeking memories and moments of meaning, not physical souvenirs."

Design in Northern Europe

Accor is a global business with a local touch, designing for the international traveller and the local neighbourhood, developing nuances in designs that address the behaviour and needs of the market. Here, Accor's regional designers share their vision and for lifestyle-centric design post-Covid.

Gabriella Patai - Accor Senior Design Manager, Eastern Europe

"In Eastern Europe it is not about the evolution of the space, but a 'social revolution' - it's a fundamental shift in a local's relationship with a hotel. For many, a hotel is still just for travellers. We are changing this. Coffee shop concepts such as our Chill concept enable perception and behaviour shifts, opening hotels up to locals and acting as a bridge between the hotel and local community. From there the relationship and dynamic can grow."

Birgit Hoff - Accor Senior Design Manager, Germany, Austria and Switzerland

"We have to consider the lifecycle of social hubs. Hotels need to create experiences, curiosity, excitement, and the desire for customers, guests and locals, to return. In order to do this we need to design flexible spaces able to welcome people for different needs and experiences, adapting to multiple uses, while still offering a warm and welcoming environment."

Arun Rana - Accor Design Manager, UK, Benelux and Nordics

"The evolution in hospitality design in the post-Covid world is creating more authentic and meaningful experiences. Guests have formed new habits, ways of thinking and expectations. They are looking for flexibility for places to stay, meet, work and socialise. It is more important than ever that our hotels create a bespoke and inviting experience. This is being done in many ways; through curated and edited dressing of a space to give a touch of home comfort and less traditional 'hotel feel', or through blending of spaces, such as bleeding the restaurant and lobby space together. More than ever, guests are looking to get out there and be in exciting and vibrant social spaces. Guestrooms are focusing heavily on comfort and wellbeing but encouraging guests to spend time in social spaces for working, eating and creating meaningful experiences. Guests want to make the space personal to them so we must adapt and be agile to change to the needs of the new traveller."

Changing Cities: Hybrid Real Estate & Workspitality

The Covid pandemic has fast-tracked significant changes to the way we all live and work. Investor behaviour is also changing, with offices no longer considered the safest asset class. Hybrid buildings - where guest rooms and amenities, office space, retail space, health and wellbeing spaces can sit comfortably within the same structure - are the next stage in the evolution of hotel real estate.

"Accor offers investors a 'one stop shop' for Live, Work & Play through a diverse brand portfolio" says Camil Yazbeck, SVP Development Northern Europe. "More and more we are seeing mixed-use projects. Pre-covid an investor wouldn't have thought twice about a twenty storey office block.

Now things are different, the use of urban spaces has changed and, crucially, the working week has changed. But property investors still need a return. So, what was previously a single use concept, may tomorrow be hybrid real-estate - ground level F&B, two floors of meeting space and co-working such as WOJO, a wellness floor, 10 floors of hotel, five floors of branded residences and rooftop F&B concepts - a complete urban offering all within Accor's ecosystem."

Yazbeck adds: "How do you reimagine city centres based on partial working weeks? Hybrid real-estate could be the future of urban planning. It feeds investor needs and speaks to the 15 minute city concept. One property, one site, with residential space, hotel rooms, venue space, community concepts like doctors or medical care, schooling, shopping - it's a fascinating time for this conversation and we expect it to move quickly."

In the survey, 43% said that it was now crucial places such as hotels have "suitable facilities to enable my job to a high standard". Over one in five (21%) expect remote working to be the norm in their job. Accor is meeting the needs of those looking for comfortable and professional co-working spaces. Accor's Workspitality® (Work + Hospitality) solutions are also creating opportunities to transform hotel spaces for remote workers.

This year the brand will offer over 1,000 WOJO Spots across the hotel network, allowing members to work and collaborate in a friendly atmosphere of their choosing, complete with a reliable and secure Wi-Fi connection plus food and drink options. The ibis chain has been an early adopter of this, with the brand's new open living space design concepts - Plaza, Agora and Square - being a perfect fit for co-working zones and the WFA guest.

The result mixes co-working with small business, including meeting rooms, well-being classes and social activities, wrapped around with office support but without long term lease obligations. The complementary trend of combining remote working alongside office work for short periods of time allows companies to flexibly house employees in the co-existing hotels.

Inspiring Travel

One of the reasons why people in our survey - and the wider population - feel travel is such a priority now is because it can intertwine with other aspects of our lives so perfectly. If we have an interest, such as sport, art or films, travel will enhance it. When we aren't in a pandemic, we can travel to follow our favourite sports teams, be part of major cultural celebrations, search out locations in our favourite films or fall in love with the history and stories of people and places – travel is part of all of this. After two years of being circumscribed in what we can do and where we go, travel can make us feel as if we belong to other places, other stories and, above all, literally feel transported.

Here are a few cultural moments to inspire our travels in the coming years:

Sport

This summer, the 150th British Open will take place in St Andrews, the home of golf. The Old Course is likely to see Jon Rahm and Rory McIlroy among the golfers teeing off. Overlooking this historic Scottish city is Fairmont St Andrews, with two highly rated golf courses of its own, an award-winning spa and six restaurants and bars.

Wait until November this year and the World Cup will take place in Qatar with 32 of the top football teams in the world. When it comes to where to stay, fans will be heading to the twin Raffles Doha and Fairmont Doha hotels of the architecturally impressive Katara Towers, the kingdom's finest luxury options.

In October 2023, the Rugby World Cup will take place across nine French cities. ResaEvents, a subsidiary of Accor, will operate the official hotel booking platform, for fans, teams, officials, media and more. One of the key stadiums will be the Stade Velodrome in Marseille; the Mercure Marseille Centre Prado Vélodrome is just a short walk away.

In 2024, it will be the turn of Paris to host the Olympics. Some of the key events will be held in the city itself, including the Marathon and the cycle races. Le Royal Monceau, Raffles Paris, located near to the Arc de Triomphe and will offer a ringside seat. Accor is an official partner of both the Olympic and Paralympic Games Paris 2024.

Culture

This year, marking 70 years since she ascended the throne, Britain will celebrate the Queen's Platinum Jubilee. The longest-serving British monarch ever will preside over a series of celebrations throughout the year but it will centre on London on the weekend of June 25. The Savoy, A Fairmont Managed Hotel, will be showing its patriotic fervour from a fabulous position overlooking the Thames and Fairmont Windsor Park will join the celebrations from the Queen's home in Windsor.

With a 50-year reign, Denmark's queen Margrethe will be celebrating her Golden Jubilee in 2022. The main celebrations take place this summer. Accor's first Danish hotel, ibis Styles Copenhagen Ørestad, opens in Denmark later this year.

Pop Culture

Game of Thrones prequel series, House of the Dragon, looks set to drive travellers to Portugal, Cornwall and Morocco, while The Northman, with Alexander Skarsgård, will highlight Iceland.

Mission Impossible 7 will be released in September 2022. Filming under the code name Libra, the production spent a month in Venice in November 2020 when star Tom Cruise was spotted filming around the Grand Canal. The Hotel Papadopoli, part of Accor's MGallery Hotel Collection, is located near the Grand Canal.

In February 2023, it will be World Pride in Sydney, a series of parades and parties for the LGBTQ+ population. The celebration will cover the city, but Harbour Rocks Hotel, part of the MGallery Hotel Collection, offers heritage, glamour and a near-waterfront position.

James Bond 26 has been confirmed. Whilst little is known about who, what, where or when, one thing is certain, London will welcome the world with Bond once more. The Old War Office, now reimagined as The OWO and later this year home to Raffles London, inspired Ian Fleming to write the famous James Bond series after working as key liaison officer between the War Office and Britain's Naval Intelligence Service. The building went on to feature in various Bond films, including Skyfall, Spectre, License to Kill, A View to a Kill, Octopussy and, most recently, No Time To Die.



Emerging Hot: Where is next for the travel hot list?

Split, Croatia

All eyes are on Croatia, already tipped to be the must-visit destination in 2022. Its green list status in 2021 helped Europeans fall back in love with Croatia's stunning coastline, islands and historic port towns.

Stay:
Heritage Hotel Fermai Split MGallery



Sopot, Poland

Poland's coastal Riviera, the spa town of Sopot, is a stunning seaside resort on the southern coast of the Baltic Sea in northern Poland, renowned for its long sandy beaches along the Gdansk Bay and home to the longest wooden pier in Europe. Sopot is built upon the waters of the St Adalbert's Spring and the city is spotted with glass domed 'inhalation mushrooms' with water flowing straight from the spring creating iodine air which is known for its health benefits.

Stay:
Sofitel Grand Sopot



Bern, Switzerland

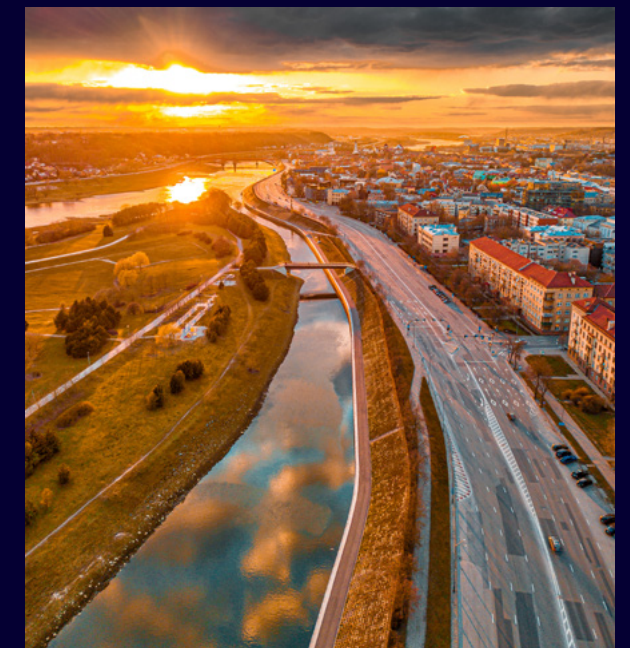
The UNESCO World Heritage old town is widely regarded as one of Europe's greenest cities. The medieval city is North of the Bernese Alps, surrounded by a stunning natural landscape of rivers, mountains and the Gantrisch Nature Park.

Stay:
Swissôtel Kursaal Bern

Kaunas, Lithuania

Selected as one of the cultural capitals of Europe for 2022, the second largest city in Lithuania boasts over 1,000 cultural events in the next 12 months.

Stay:
Magnus Hotel Kaunas



Birmingham, UK

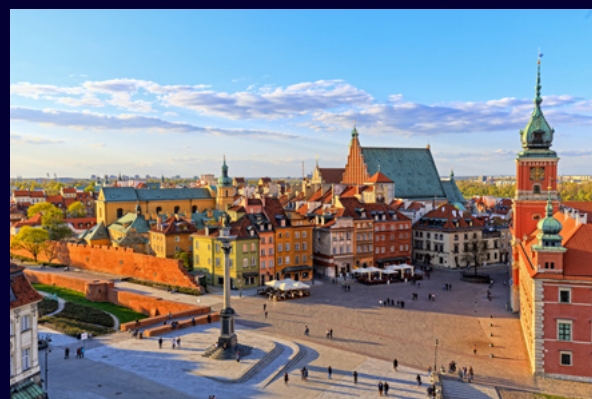
Host city for the 2022 Commonwealth Games, Birmingham offers a remarkable number of Michelin starred restaurants and a city centre undergoing an elegant transformation.

Stay:
ibis Styles Birmingham Hagley Road

Sittard, The Netherlands

Bordering Germany on the southern tip of The Netherlands, the historic town of Sittard keeps much of its 16th and 17th century architecture and the original city walls, built in the 13th century, are still visible in many places throughout the city. Renowned for historic churches and monasteries, such as the Mariapark, Sittard is also home to speciality boutiques, cosy terraces and beautiful parks such as the Secret Gardens of Sittard.

Stay:
Merici Hotel Sittard - MGallery



Warsaw, Poland

Poland's capital has rebuilt itself repeatedly architecturally and culturally, and never loses its charm and personality. It's a city that grows in character and most recently has grown in gastronomy, changing the culinary landscape of the city and making it a must-visit destination in 2022.

Stay:
Raffles Europejski Warsaw

Plovdiv, Bulgaria

The perfect balance of modernity and history, the ancient city has Roman, Persian and Ottoman influences as well as a strong creative quarter which grew out of its 2019 European Capital of Culture status.

Stay:
The Emporium Plovdiv - MGallery



Durrës, Albania

On the Adriatic sea, the port-city of Albania has the largest Roman amphitheatre in the Balkans, Byzantine city walls, sensational seafood and one of the most stylish stretches of coast in Albania.

Stay:
Mövenpick Hotel Lalez Durres



Bucharest, Romania

A century ago Romania's capital was called the "Paris of the East" thanks to its French-style Art Deco and Art Nouveau architecture and vibrant cultural life. Whilst much of that architecture has not survived the 20th century, the vibrant culture has. The Palace of Parliament, also known as 'The People's House', is a staggering piece of architecture and one of the largest buildings in the world, with ornate interiors which also feature in Sharon Stone and Andy Garcia's new film, 'What About Love' (2023). The city's café culture, art scene, museums, are quirky neighbourhoods are all just part of the city's incredible charm.

Stay:
ibis Bucharest Politehnica Hotel



Copenhagen, Denmark

In 2022 Denmark will become the 10th country to host the Grand Départ of the Tour de France. Departing from the capital, Copenhagen, Denmark will host three stages of the Tour. The Designmuseum Danmark reopens in June following 18 months of renovation. With the architecture, culture, coast and chic Scandi style of Copenhagen, it's little wonder why Denmark sits in our top 10 destinations to visit in 2022.

Stay:
25hours Hotel Indre By





#AccorNorthernEuropeTrends

www.group.accor.com

Credits:

Written by Sarah Turner & Sarah Wilson

Designed by Wojtek Kogut

Methodology:

The research is a general population survey of 6,000 adults across Northern Europe. The UK polling sample was 2,000 people across the country, and 1,000 people in each other market - The Netherlands, Germany, Poland and Russia. The research was carried out by OnePoll between 22nd September to 18th October 2021 and additional research between 14th to 21st January 2022.