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Key drivers of our Economy 1: Tourism

International Immersion Week 2019
Madrid, SPAIN.

1.- The Economic Impact of global Travel and Tourism

“Inclusive growth and ensuring a future with quality jobs are the concerns of governments everywhere. Travel & Tourism, which already supports one in every ten jobs on the planet, is a dynamic engine of employment opportunity.”

Gloria Guevara Manzo, President & CEO
World Travel & Tourism Council

10.4%

Travel & Tourism GDP as a percentage of global GDP.

4.6%

Direct Travel & Tourism GDP growth in 2017.

1/10

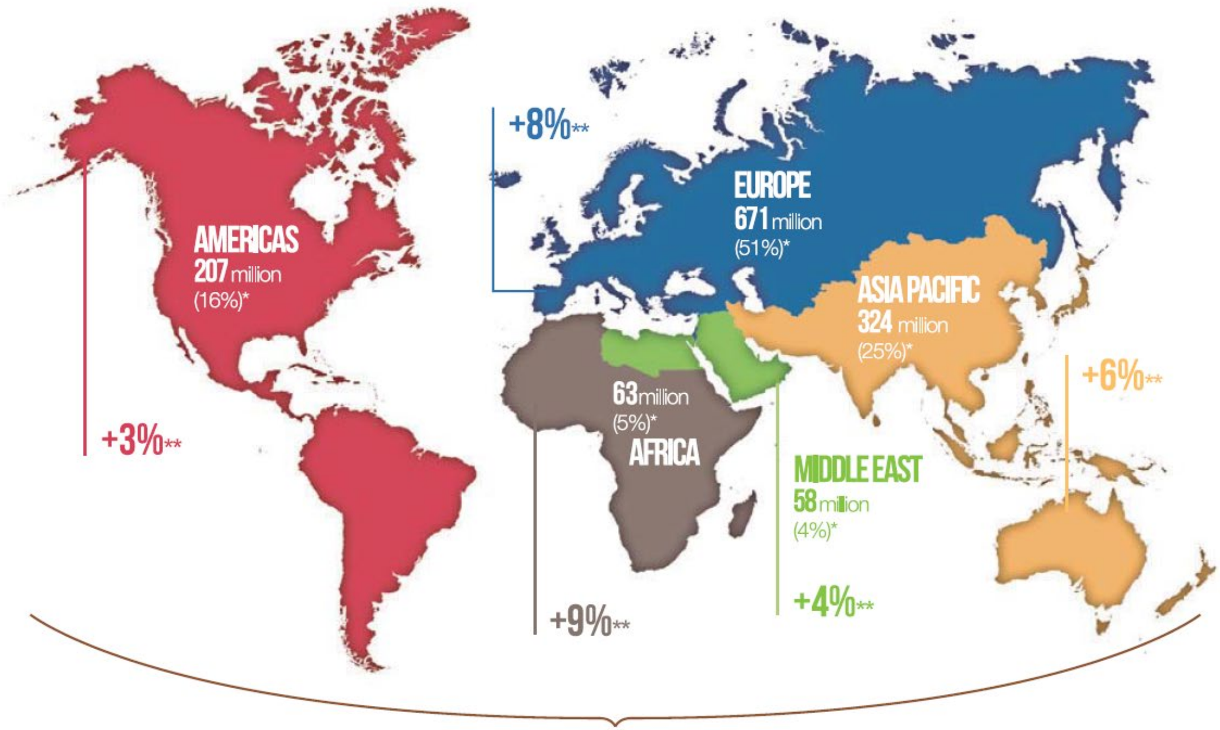
jobs are supported by Travel & Tourism. This is 9.9% of global employment.

1/5

of all global net jobs created in last decade have been within the Travel & Tourism sector.

INTERNATIONAL TOURIST ARRIVALS 2017

*Share (%)
**Increase (%)



WORLD: 1,323 MILLION

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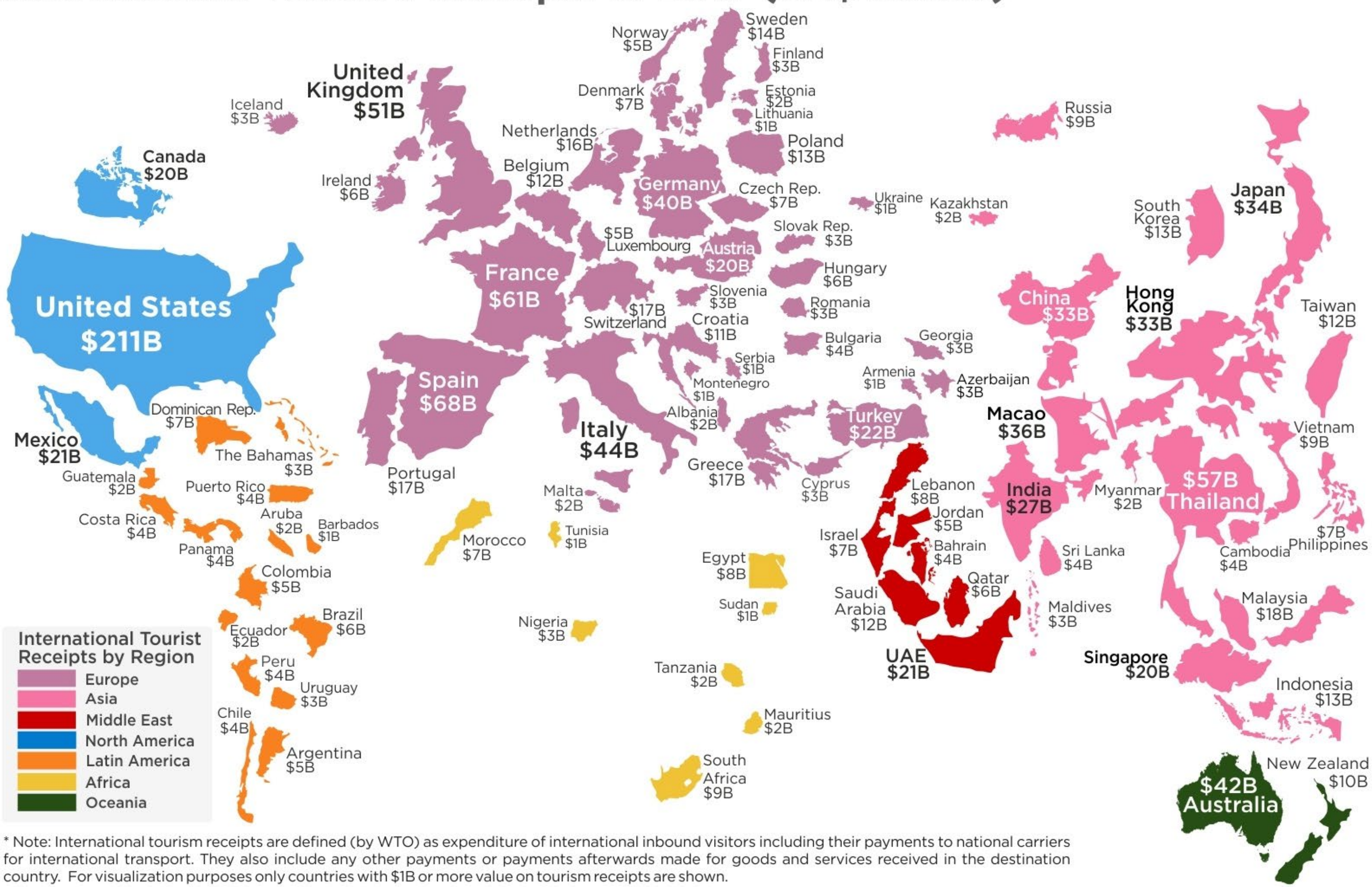
The World's Top Tourism Destinations Ranked by Money Spent

International Tourism Receipts in 2017 (US$ billion)*



* Note: International tourism receipts are defined (by WTO) as expenditure of international inbound visitors including their payments to national carriers for international transport. They also include any other payments or payments afterwards made for goods and services received in the destination country. For visualization purposes only countries with $1B or more value on tourism receipts are shown.

How to Read this Map: This map shows the biggest international tourism receipts in 2017. Each country is sized to reflect the amount of tourism receipts, countries appear bigger as their tourism receipts are higher, for example: USA. Conversely, countries with smaller tourism receipts appear smaller, for example: Sudan.

Article & Sources:
https://howmuch.net/articles/how-much-tourist-spend-around-the-world
https://www.e-unwto.org/

howmuch.net

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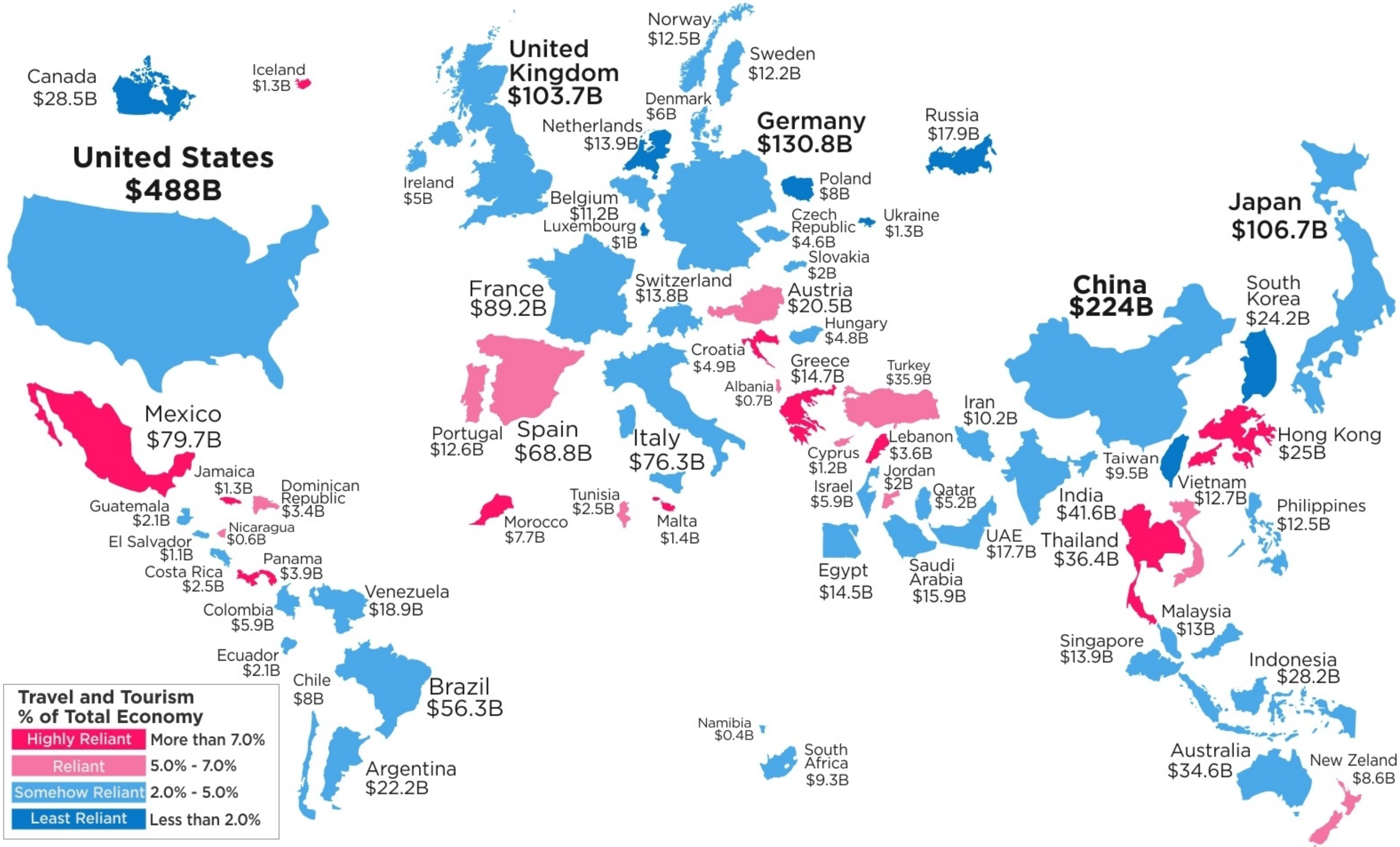
The Travel & Tourism Economy (2017)

Which Countries are Most Dependent on the Travel Industry?



How to read this map: The map shows the biggest Travel & Tourism (T&T) economies in selected countries. Each country is sized to reflect the Travel & Tourism GDP, countries appear bigger as their T&T GDP is higher. Conversely, countries with smaller T&T GDP appear smaller. The colour represent how reliant the overall economy is to T&T GDP.

Source and Article:

The Travel & Tourism Competitiveness Report 2017. World Economic Forum

https://howmuch.net/articles/travel-tourism-economy-2017

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COMPONENTS OF TRAVEL & TOURISM

DIRECT
Travel & Tourism contribution

COMMODITIES
- Accommodation
- Transportation
- Entertainment
- Attractions

INDUSTRIES
- Accommodation services
- Food & beverage services
- Retail Trade
- Transportation services
- Cultural, sports & recreational services

SOURCES OF SPENDING
- Residents' domestic T&T spending
- Businesses' domestic travel spending
- Visitor exports
- Individual government T&T spending

INDIRECT
Travel & Tourism contribution

- T&T investment spending
- Government collective T&T spending
- Impact of purchases from suppliers

INDUCED
contribution
(spending of direct and indirect employees)

- Food and beverages
- Recreation
- Clothing
- Housing
- Household goods

TOTAL
Travel & Tourism contribution

- To GDP
- To employment

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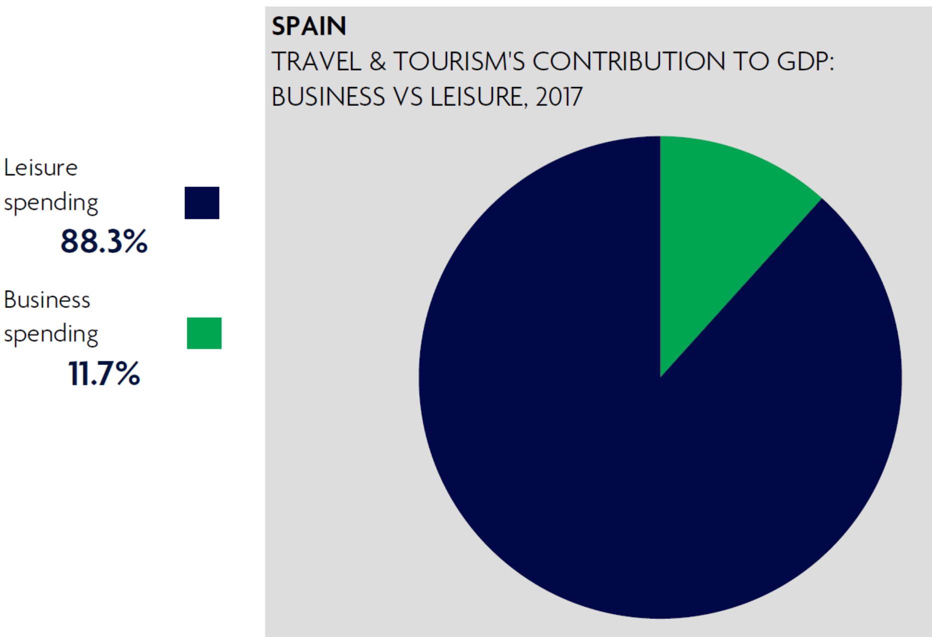
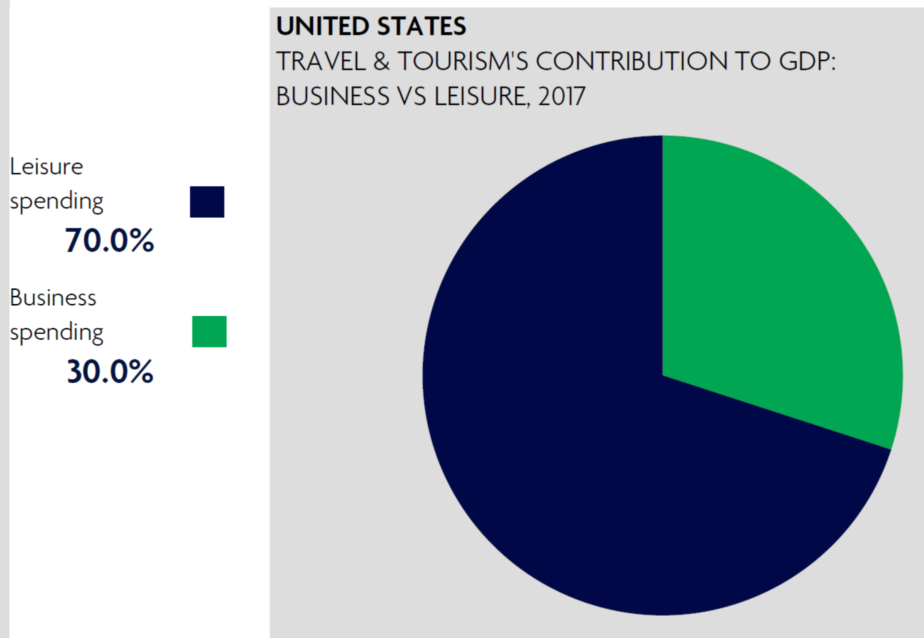
COMPONENTS OF TRAVEL & TOURISM

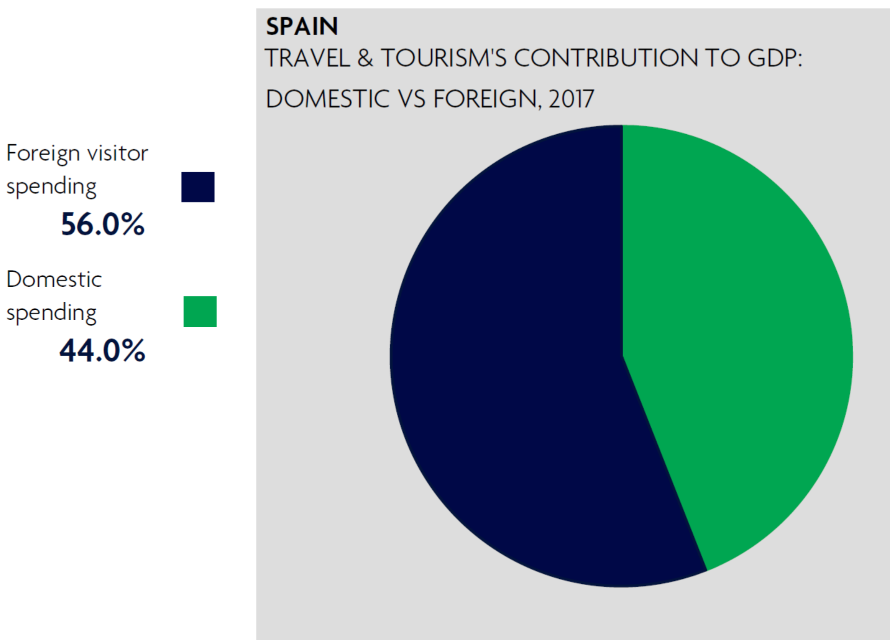
TRAVEL & TOURISM'S CONTRIBUTION TO GDP: BUSINESS VS LEISURE, 2017

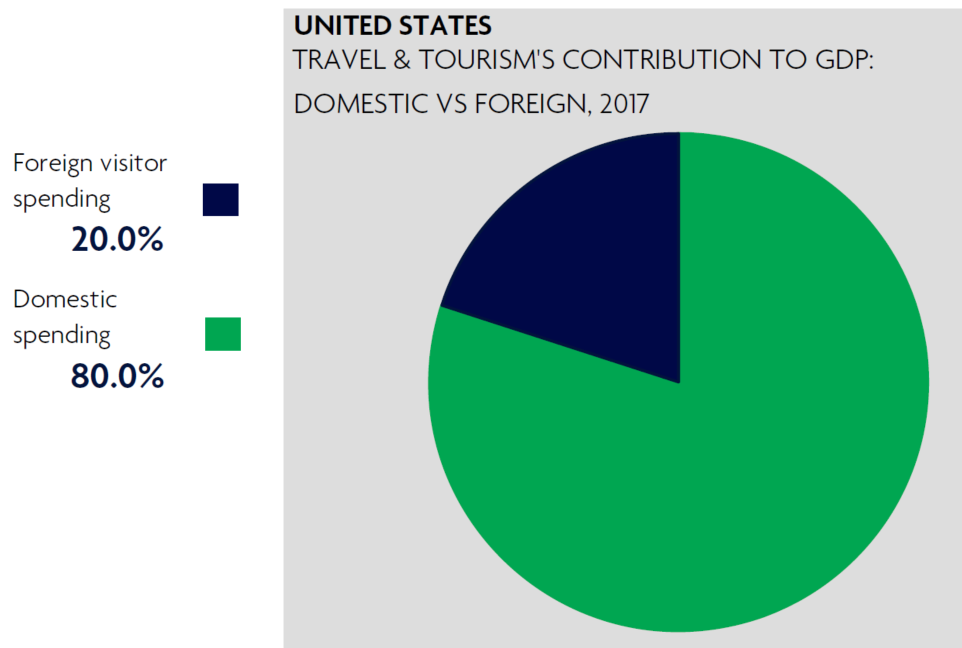




COMPONENTS OF TRAVEL & TOURISM

TRAVEL & TOURISM'S CONTRIBUTION TO GDP: DOMESTIC VS FOREIGN, 2017





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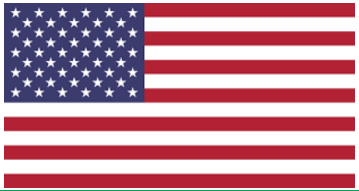
The Economic Impact of T&T in the USA and Spain

Source: The economic impact of Travel and Tourism. WORLD TRAVEL & TOURISM COUNCIL (WTTC)

WORLD RANKING (OUT OF 185 COUNTRIES):

Relative importance of Travel & Tourism's total contribution to GDP

9	53	131	168
ABSOLUTE	RELATIVE SIZE	GROWTH	LONG-TERM GROWTH
Size in 2017	Contribution to GDP in 2017	2018 forecast	Forecast 2018-2028



WORLD RANKING (OUT OF 185 COUNTRIES):

Relative importance of Travel & Tourism's total contribution to GDP

1	120	115	167
ABSOLUTE	RELATIVE SIZE	GROWTH	LONG-TERM GROWTH
Size in 2017	Contribution to GDP in 2017	2018 forecast	Forecast 2018-2028

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MAIN FIGURES AND FACTS.

GDP: DIRECT CONTRIBUTION

The direct contribution of Travel & Tourism to GDP was USD509.4bn, **2.6% of total GDP in 2017** and is forecast to rise by 3.4% in 2018, and to rise by 2.5%, from 2018-2028, to USD673.9bn, **2.9% of total GDP in 2028**

The direct contribution of Travel & Tourism to GDP was USD70.9bn, **5.4% of total GDP in 2017** and is forecast to rise by 3.2% in 2018, and to rise by 2.6%, from 2018-2028, to USD94.1bn, **6.1% of total GDP in 2028**

GDP: TOTAL CONTRIBUTION

The total contribution of Travel & Tourism to GDP was USD1,501.9bn, **7.7% of GDP in 2017**, and is forecast to rise by 3.2% in 2018, and to rise by 2.3%, to USD1,954.1bn, **8.4% of GDP in 2028**

The total contribution of Travel & Tourism to GDP was USD196.2bn, **14.9% of GDP in 2017**, and is forecast to rise by 2.9% in 2018, and to rise by 2.3%, to USD254.6bn, **16.4% of GDP in 2028**.

Source: The economic impact of Travel and Tourism. WORLD TRAVEL & TOURISM COUNCIL (WTTC)

MAIN FIGURES AND FACTS.

EMPLOYMENT: DIRECT CONTRIBUTION

In 2017 Travel & Tourism directly supported 5,285,500 jobs (**3.4% of total employment**). This is expected to rise by 2.1% in 2018 and rise by 1.7% to 6,363,000 jobs **(3.9% of total employment) in 2028**

In 2017 Travel & Tourism directly supported 930,500 jobs (**4.9% of total employment**). This is expected to rise by 2.0% in 2018 and rise by 2.0% to 1,154,000 jobs **(5.8% of total employment) in 2028**

EMPLOYMENT: TOTAL CONTRIBUTION

In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was **8.9% of total employment** (13,668,000 jobs). This is expected to rise by 2.3% in 2018 to 13,984,000 jobs and rise by 1.7% to 16,557,000 jobs **in 2028 (10.1% of total)**

In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was **15.1% of total employment** (2,838,500 jobs). This is expected to rise by 1.7% in 2018 to 2,887,500 jobs and rise by 1.5% to 3,342,000 jobs **in 2028 (16.9% of total)**

Source: The economic impact of Travel and Tourism. WORLD TRAVEL & TOURISM COUNCIL (WTTC)

MAIN FIGURES AND FACTS.

VISITOR EXPORTS

Visitor exports generated USD200.7bn, **8.6% of total exports in 2017.** This is forecast to grow by 4.1% in 2018, and grow by 3.4%, from 2018-2028, to USD291.7bn **in 2028, 8.6% of total**

Visitor exports generated USD75.4bn, **16.4% of total exports in 2017.** This is forecast to grow by 3.7% in 2018, and grow by 3.6%, from 2018-2028, to USD111.2bn **in 2028, 16.6% of total**

INVESTMENT

Travel & Tourism investment in 2017 was USD176.3bn, or **4.6% of total investment.** It should rise by 4.7% in 2018, and rise by 2.9% over the next ten years to USD246.2bn **in 2028 (5.2% of total).**

Travel & Tourism investment in 2017 was USD20.9bn, **7.7% of total investment.** It should rise by 3.9% in 2018, and rise by 3.3% over the next ten years to USD30.1bn **in 2028, 9.1% of total**

Source: The economic impact of Travel and Tourism. WORLD TRAVEL & TOURISM COUNCIL (WTTC)

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COUNTRY RANKINGS:

Source: The economic impact of Travel and Tourism. WORLD TRAVEL & TOURISM COUNCIL (WTTC)

	TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO GDP	2017 (US$bn)
1	United States	509.4
	North America Average	207.9
3	Germany	146.3
4	Japan	107.4
5	Italy	106.8
6	France	93.9
7	United Kingdom	93.5
10	Spain	70.9
13	Australia	41.7
14	Canada	32.0
	World Average	21.5
25	Greece	16.2

	TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO GDP	2017 (US$bn)
1	United States	1501.9
	North America Average	597.9
3	Germany	395.2
4	Japan	331.2
5	United Kingdom	266.1
6	Italy	253.5
8	France	232.0
9	Spain	196.2
12	Australia	151.4
13	Canada	106.5
	World Average	62.9
29	Greece	39.7

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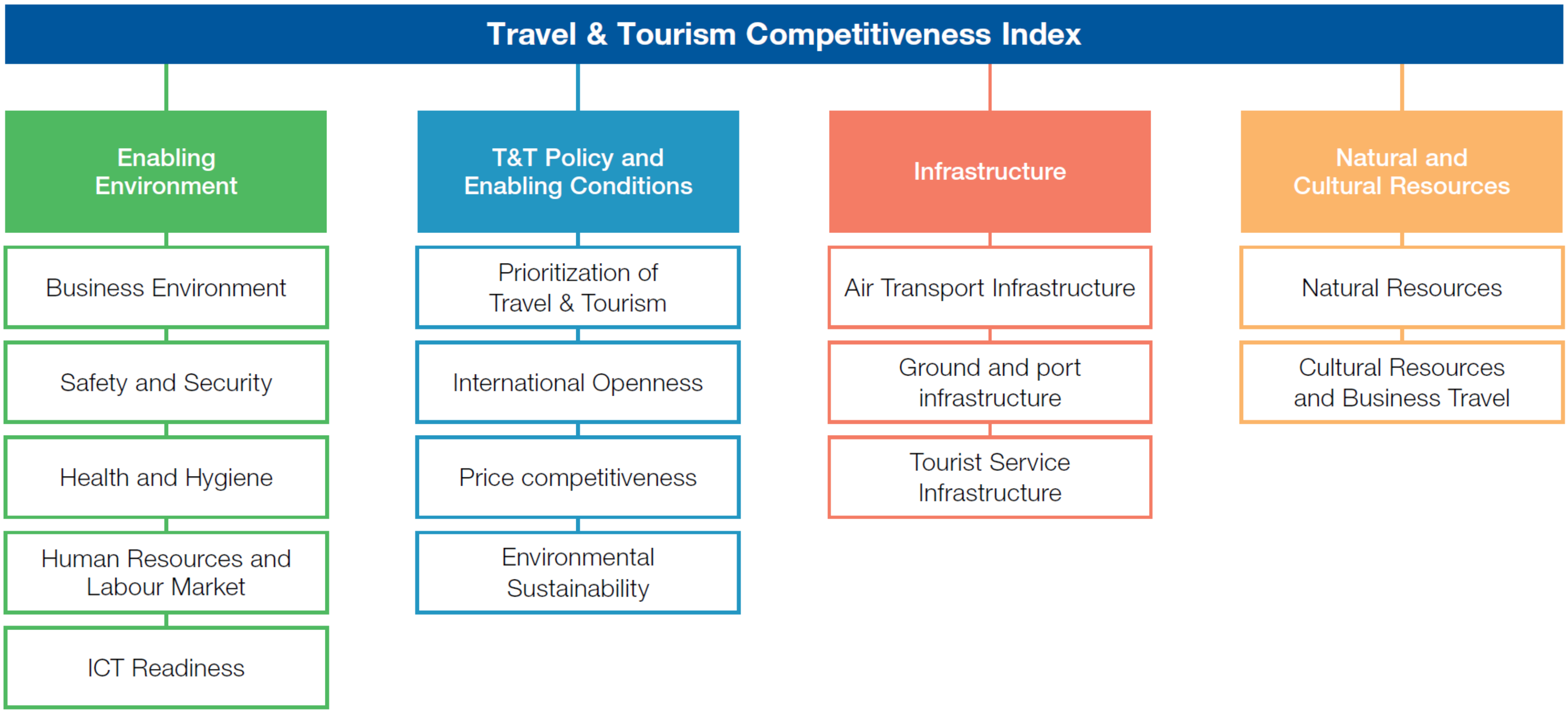
COUNTRY RANKINGS:

Source: The economic impact of Travel and Tourism. WORLD TRAVEL & TOURISM COUNCIL (WTTC)

TRAVEL & TOURISM'S DIRECT CONTRIBUTION TO EMPLOYMENT		2017 '000 jobs
3	United States	5285.7
	North America Average	3312.8
6	Germany	3143.9
11	United Kingdom	1716.3
13	Italy	1490.5
15	France	1192.2
19	Japan	1098.5
	World Average	**937.5**
20	Spain	930.4
23	Canada	739.3
33	Australia	531.7
36	Greece	459.0

TRAVEL & TOURISM'S TOTAL CONTRIBUTION TO EMPLOYMENT		2017 '000 jobs
3	United States	13668.0
	North America Average	7941.9
8	Germany	6118.4
10	Japan	4171.6
12	United Kingdom	4055.0
14	Italy	3394.7
17	Spain	2838.4
18	France	2830.5
	World Average	**2341.0**
26	Canada	1588.4
30	Australia	1501.6
40	Greece	934.4

2.- Why is Spain the number 1 country in the Travel & Tourism Competitiveness Index 2017 Ranking?



The Travel & Tourism Competitiveness Index 2017 Ranking

Country/Economy	Rank	Score	Change since 2015
Spain	1	5.43	0
France	2	5.32	0
Germany	3	5.28	0
Japan	4	5.26	5
United Kingdom	5	5.20	0
United States	6	5.12	–2
Australia	7	5.10	0
Italy	8	4.99	0
Canada	9	4.97	1
Switzerland	10	4.94	–4
Hong Kong SAR	11	4.86	2
Austria	12	4.86	0
Singapore	13	4.85	–2
Portugal	14	4.74	1
China	15	4.72	2
New Zealand	16	4.68	0
Netherlands	17	4.64	–3
Norway	18	4.64	2
Korea, Rep.	19	4.57	10
Sweden	20	4.55	3
Belgium	21	4.54	0
Mexico	22	4.54	8
Ireland	23	4.53	–4
Greece	24	4.51	7
Iceland	25	4.50	–7

Spain tops the 2017 edition of the TTCI global rankings for the second time, followed by **France** (2nd), **Germany** (3rd), **Japan** (4th, gaining five places), **the United Kingdom** (5th), **the United States** (6th, losing two places), **Australia** (7th), Italy (8th), **Canada** (9th, up one) **and Switzerland** (10th, losing four places

Country/Economy	Global rank	Business environment	Safety and security	Health and hygiene	Human resource and labour market	ICT readiness
Spain	1	4.4	6.2	6.3	4.9	5.5
France	2	4.7	5.4	6.5	5.1	5.9
Germany	3	5.3	5.6	6.9	5.6	5.8
United Kingdom	5	5.9	5.3	5.8	5.5	6.2
United States	6	5.4	5.2	5.7	5.5	6.0
Canada	9	5.3	6.1	5.6	5.5	5.6
Mexico	22	4.2	4.2	5.3	4.6	4.3
China	15	4.2	5.0	5.4	5.2	4.6
Egypt	74	4.3	3.3	5.4	4.1	3.9
Tunisia	87	4.4	4.7	5.2	4.0	4.3

	T&T policy and enabling conditions				Infrastructure			Natural and cultural resources	
Country/Economy	Prioritization of T&T	International openness	Price competitive-ness	Environmental sustainability	Air transport infrastructure	Ground and port infrastructure	Tourist service infrastructure	Natural resources	Cultural resources & business travel
Spain	5.9	3.9	4.5	4.6	5.0	5.2	6.7	4.9	6.9
France	5.1	4.2	4.1	4.8	4.9	5.6	5.7	4.8	6.7
Germany	4.8	4.3	4.2	5.2	4.9	5.8	6.0	4.0	6.3
United Kingdom	5.0	4.2	2.8	4.7	5.2	5.4	6.2	4.6	6.0
United States	5.3	4.0	4.4	3.6	6.0	4.6	6.6	4.9	4.8
Canada	4.9	3.3	4.5	4.7	6.8	4.0	6.0	4.6	4.1
Mexico	5.1	3.7	4.9	3.6	3.7	3.2	4.7	5.6	5.3
China	4.8	3.0	5.3	3.2	4.3	4.0	3.2	5.3	6.9
Egypt	5.0	2.5	6.2	4.1	2.9	3.0	3.2	2.5	3.3
Tunisia	4.8	3.0	5.9	3.9	2.3	2.7	4.1	2.5	1.5

3.- Origins of the Spanish Hotel Industry, and its evolution

2017 rank	2016 rank	Company	Location	2017 Rooms	2017 Hotels	2016 Rooms	2016 Hotels
1	1	Marriott International	Bethesda, Maryland USA	1,195,141	6,333	1,164,668	5,952
2	2	Hilton	McLean, Virginia USA	856,115	5,284	796,440	4,825
3	3	IHG (InterContinental Hotels Group)	Denham, Buckinghamshire, England	798,075	5,348	767,135	5,174
4	4	Wyndham Hotel Group	Parsippany, New Jersey USA	753,161	8,643	697,607	8,035
5	5	Shanghai Jin Jiang International Hotel Group Co.	Shanghai, China	680,111	6,794	602,350	5,977
6	6	AccorHotels	Paris, France	616,181	4,283	583,161	4,144
7	7	Choice Hotels International	Rockville, Maryland USA	521,335	6,815	516,122	6,514
8	8	BTG Homeinns Hotels (Group) Co.	Beijing, China	384,743	3,712	373,560	3,402
9	9	China Lodging Group	Shanghai, China	379,675	3,746	331,347	3,269
10	10	Best Western Hotels & Resorts	Phoenix, Arizona USA	290,787	3,595	293,059	3,677
11	12	Hyatt Hotels Corp.	Chicago, Illinois USA	204,485	779	177,118	657
12	13	GreenTree Hospitality Group	Shanghai, China	190,807	2,289	173,053	2,100
13	-	Carlson Rezidor Hotel Group (now Radisson Hotel Group)	Minnetonka, Minnesota USA	179,379	1,151	-	-
14	14	G6 Hospitality	Carrollton, Texas USA	124,739	1,417	125,017	1,395
15	23	Dossen International Group	Guangzhou City, China	105,951	1,087	70,865	795

8 USA
5 China
1 England
1 France

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2017 rank	2016 rank	Company	Location	2017 Rooms	2017 Hotels	2016 Rooms	2016 Hotels
16	17	Westmont Hospitality Group	Houston, Texas USA	105,000	507	91,564	787
17	15	Magnuson Hotels	Spokane, Washington USA	103,306	1,274	103,306	1,274
18	16	Meliá Hotels International	Palma de Mallorca, Spain	96,956	382	96,355	376
19	22	Qingdao Sunmei Group Co.	Qingdao, China	91,706	1,697	72,408	1,313
20	18	La Quinta Inns & Suites	Irving, Texas USA	88,400	902	87,283	888
21	24	Aimbridge Hospitality	Plano, Texas USA	87,971	706	70,000	500
22	19	Interstate Hotels & Resorts	Arlington, Virginia USA	83,650	589	76,247	425
23	27	New Century Hotels & Resorts	Hangzhou, China	71,665	292	60,014	232
24	25	Whitbread	Dunstable, England	71,282	770	69,645	752
25	26	Extended Stay Hotels	Charlotte, North Carolina USA	66,100	599	69,000	629
26	21	RLH Corp.	Spokane, Washington USA	64,308	984	72,657	1,137
27	28	NH Hotel Group	Madrid, Spain	58,926	380	58,472	379
28	30	Toyoko Inn Co.	Tokyo, Japan	57,010	274	50,510	255
29	42	Barcelo Hotel Group	Palma de Mallorca, Spain	53,668	244	33,493	114
30	29	APA Group	Tokyo, Japan	53,168	355	56,734	361

7 USA
3 Spain
2 China
2 Japan
1 England

2017 rank	2016 rank	Company	Location	2017 Rooms	2017 Hotels	2016 Rooms	2016 Hotels
31	35	Scandic Hotels	Stockholm, Sweden	49,983	262	41,860	224
32	32	MGM Resorts International	Las Vegas, Nevada USA	49,000	27	48,257	20
33	33	Red Roof	Columbus, Ohio USA	48,508	528	46,562	501
34	62	Club Med	Paris, France	46,708	69	21,228	68
35	34	Riu Hotels & Resorts	Playa de Palma/Mallorca, Spain	44,226	98	43,902	95
36	38	Walt Disney Co.	Burbank, California USA	43,121	52	37,171	37
37	36	Shangri-La Hotels and Resorts	Hong Kong, China	42,600	103	39,830	96
38	37	Travelodge Hotels	Thame, England	40,000	562	38,206	532
39	47	Highgate	New York City, New York USA	39,940	132	29,944	108
40	40	Caesars Entertainment Corp.	Las Vegas, Nevada USA	39,680	32	36,829	30
41	39	Millennium & Copthorne Hotels	London, England	39,402	136	37,022	131
42	-	Zhuyou Hotel Group	Hangzhou, China	38,580	583	-	-
43	41	Jinling Hotels & Resorts Corp.	Nanjing, China	37,314	136	36,241	132
44	52	Iberostar Hotels & Resorts	Palma de Mallorca, Spain	37,100	110	24,775	71
45	43	Nordic Choice Hotels	Oslo, Norway	32,722	190	32,342	188

5 USA
3 China
2 Spain
2 England
1 France
1 Sweden
1 Norway

Total among the first 45 hotel chains
USA 20
China 10
Spain 5 (4 of them, Palma de Mallorca)
England 4
France 2
Japan 2
Sweden 1
Norway 1

And where is Mallorca?

Population - About 1 million
Largest City - Palma, Population over 400,000
Land Area - 3,600 Km^2

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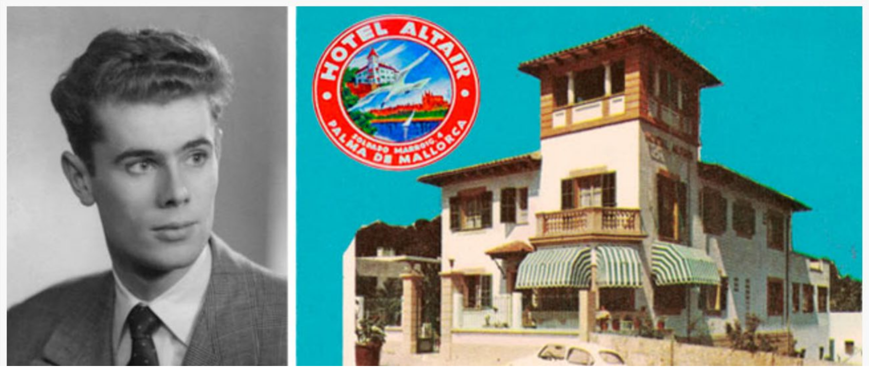
MELIÃ
HOTELS
INTERNATIONAL

In 1956 Gabriel Escarrer opened his first hotel in Palma de Mallorca (Balearic Islands, Spain)



During the 1960s the company continued to grow in the Balearic Islands (Spain)

Source: www.meliahotelsinternational.com

Barceló
HOTEL GROUP

Founded by Simón Barceló in 1931, from the creation of a small family business located in the town of Felantix Mallorca (Spain) and specialised in the transport of people and merchandise, Barceló Group has grown through 3 generations that have made it one of the most important tourism corporations in Spain and the world.

Source: www.barcelo.com

RIU
Hotels & Resorts

Source: www.riu.com

In November 1953, Juan Riu Masmitja and his wife Maria Bertran Espigule acquired, the San Francisco hotel, a small 80-bed establishment located in Playa de Palma (Mallorca, Spain). This was to be the first hotel of many. The 60s saw a real tourist boom in the Balearic Islands, which Luis Riu Bertran actively contributed to through his partnership with the German tour operator, Dr. Tigges (known as TUI since 1968). Following the consolidation of charter operations between Germany and Mallorca in the summer months, Luis Riu went one step further in strengthening the development of tourism in the Balearic Islands, by promoting Mallorca as a winter destination.

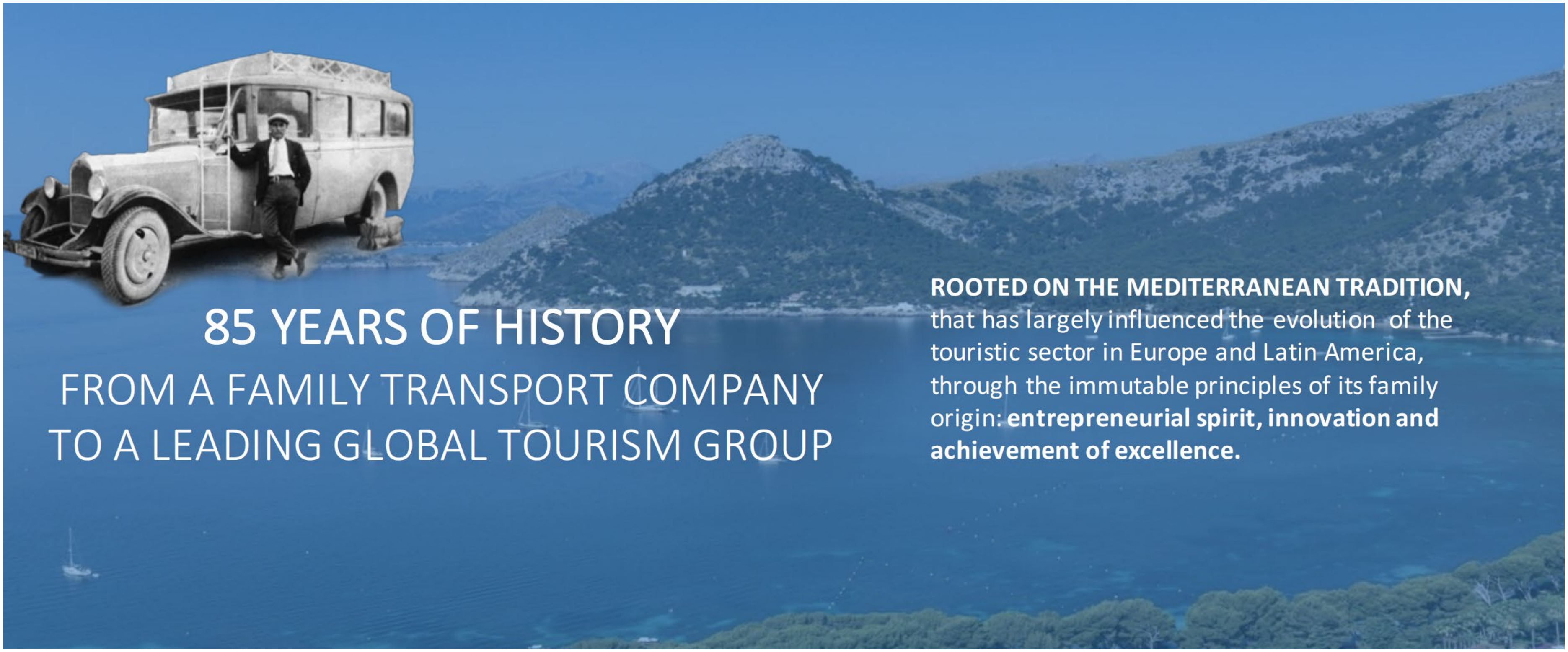
1877
On his own, Antoni Fluxà builds a small artisanal shoe workshop in Inca, Majorca (Spain).

1928
Lorenzo Fluxà (son of Antoni) takes over the family business.

1930
Viajes Baleares, an offshoot of Viajes Iberia, is founded without the participation of the Fluxà family.

Source: www.grupoiberostar.com

4. Barceló Hotel Group and Crestline Hotels and Resorts



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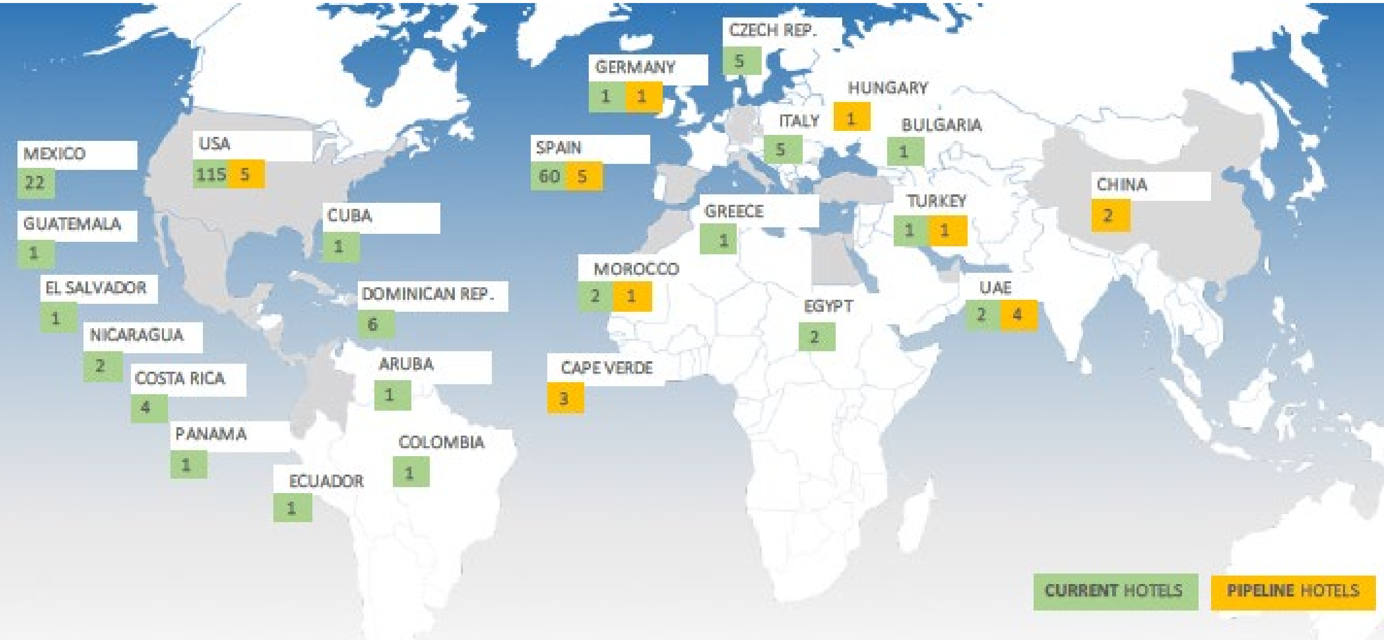
Barceló Hotel Group- Hotels around the world

Barceló HOTEL GROUP

Barceló Hotel Group is present in 22 countries worldwide



March 2018

Key Figures

HOTELS	ROOMS	CONTRACTS	SEGMENTS	BRANDS	REGIONS	DEVELOPMENT
234 HOTELS IN 22 COUNTRIES	OVER 52,000 ROOMS	29% OWNED 1% FRANCHISED 43% MANAGED 27% LEASED	48% LEISURE 52% URBAN	2% ROYAL HIDEAWAY 22% OCCIDENTAL 2% ALLEGRO 32% USA (OTHERS) 42% BARCELÓ	31% LATAM 37% EMEA 32% USA	EUROPE MEDITERRANEAN AMERICA MIDDLE EAST ASIA

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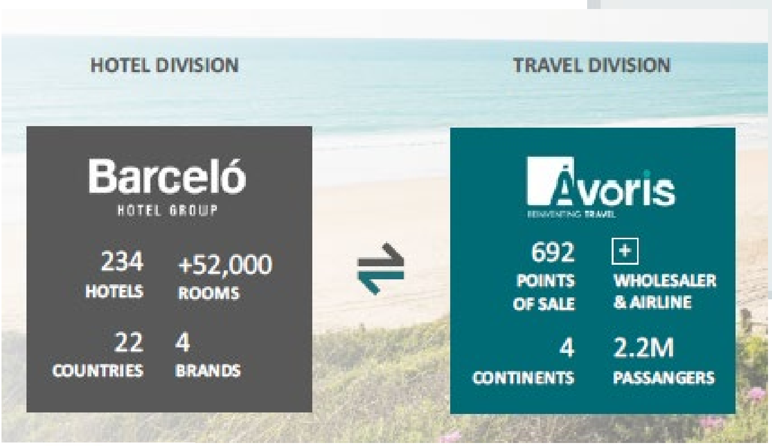
Barceló Hotel Group- An integrated tourism group

Barceló HOTEL GROUP

Barceló Hotel Group is a multinational family business running an integrated tourism company **operating at all levels of the value chain in the travel and hotel business.**



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Throughout it's 85 years of history and three generations of family members, the Barceló Group has developed a solid reputation of reliability and stability, with strong financial capabilities and excellent relationships with banking partners

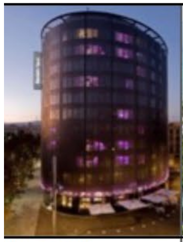
Four brands, four different ways of living Barceló

LUXURY	DESTINATION HOTELS	ROYAL HIDEAWAY LUXURY HOTELS & RESORTS
UPPER UPSCALE	HOTELS WITH SURPRISING CONCEPTS	Barceló HOTELS & RESORTS
UPSCALE	EASYLIVING HOTELS	Occidental HOTELS & RESORTS
UPPER MIDSCALE	HAPPY-SOUL HOTELS & RESORTS	allegro HOTELS

A diversified portfolio made up of four worldwide recognized brands for its quality and customer service, covering from Upper Midscale to Luxury hotels. Each brand has been carefully designed to ensure a well-rounded Guest Experience and deliver its most demanding preferences

Since 1982, Barceló has its own Construction Department,
taking part in construction, development and project management in more than 70 hotels and resorts,
owned and/or operated by Barceló Group, present in North Africa, Latin America and Europe.

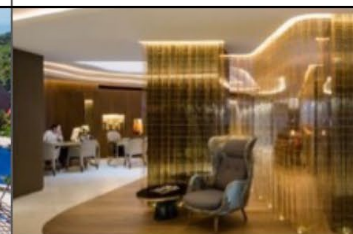
NEW DEVELOPMENTS



BARCELÓ RAVAL

BARCELÓ MAYA GRAND RESORT

RENOVATIONS & REFURBISHMENTS



BARCELÓ EMPERATRIZ

CONTINUOUS INVESTMENT

BARCELÓ TEGUISE BEACH

ANNUAL CAPEX INVESTMENT 3% OF THE REVENUES

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Barceló Teguise Beach

Barceló Teguise Beach, (former B. La Galea), was acquired in 2004.
It started as a 3* hotel with 256 rooms and due to **an extensive refurbishment of almost 12M€** that ended on mid 2015, **it has evolved into a 4* Only Adults** hotel, with 305 rooms.

BEFORE AFTER

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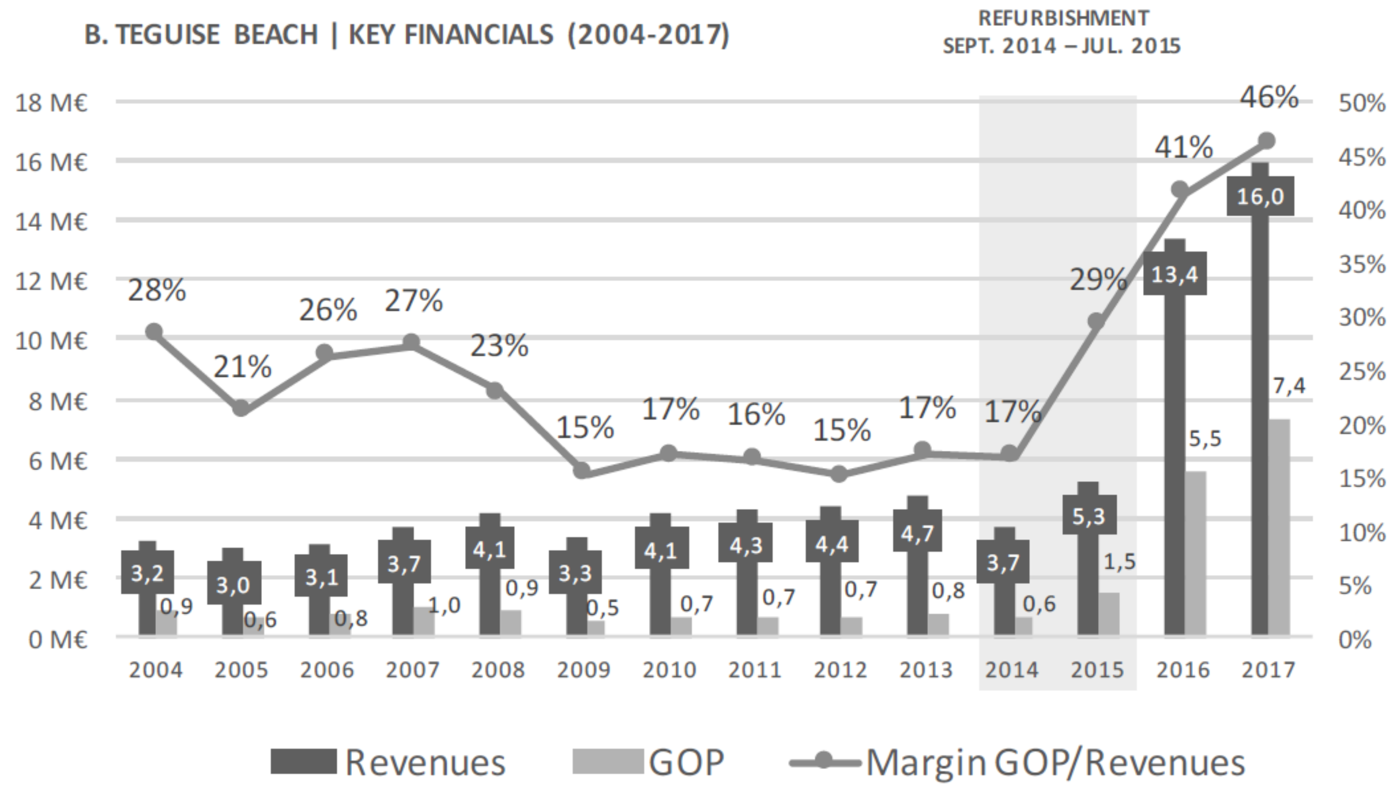
Barceló Teguise Beach



Δ 2014-2017
Revenue x3

Δ 2014-2017
Margin +29pp

Δ 2014-2017
GOP x11

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Barceló Hotel Group- Sustainable Development

Barceló HOTEL GROUP

Barceló | CORPORATE SOCIAL RESPONSABILITY

Plan RETO 2018, a specific Plan for Reinforcing Corporate Reputation within the general objective of growing as a Management Company.

Our Plan for Reinforcing Corporate Reputation is embodied in **3 fundamental pillars:**

1. Prepare a **Corporate Social Responsibility Report.** This offers a unique opportunity to transmit the creation of Barceló's value, and will also serve as a communication tool for interest groups.

2. Participate in the **development of CSR actions** with reference partners linked to the business objectives of the company, which helps to guarantee the maximum positive impact of Barceló on the environment, society, employees and all stakeholders.

3. **Promotion of CSR from within the Barceló Hotel Group.** Advance in the positioning of Barceló Hotel Group as a sustainable company in all areas, through the development of specific projects ensuring internal and external communication of results achieved.

"Fundación Barceló": Contribute to the improvement of the human, economic and social development of the most needy people, primarily in the poorest countries of Africa and Latin America.

Barceló Hotel Group- Sustainable Development

Barceló
HOTEL GROUP

B ECOLOGY

B-Ecology is the Energy Efficiency and Environmental Support project of Barceló Hotels & Resorts Group.

It is structured in 3 large sections with the idea of covering all those aspects related to the protection of the Environment and Energy Efficiency.

GOALS: to reduce electricity consumption in hotels by **10%**, reduce gas consumption by **5%**, and reduce water consumption by **10%** in the coming years.

B-Ecology IDEAS	B-Ecology MAINTENANCE	B-Ecology NEWS
The implementation of new technologies, studies, technical audits, and implementation of the group's know-how.	The daily work in hotels, interdepartmental meetings, technical inspections in all facilities, and energy training of our workers.	Everything related to external (our customers) and internal (our workers) communication of the objectives and results obtained from the implementation of energy.

LED lighting, motion sensors, faucets with savings systems, solar energy,…

Hotel Bobadilla: olive bones as biomass. ***Hotel Montecastillo:*** ecological garden, hen house and greenhouse.

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Barceló Hotel Group- New Innovation Projects

Barceló
HOTEL GROUP

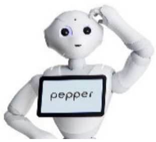
Voice assistants

- General information
- Hotel or destination information
- Interaction with other elements: TV, lighting, climate...

Dynamic content in destination

- Living agenda of destiny - be able to tell the client what is happening in the destination exactly on the date he visits it.
- Channels: Web, App, Totems ...
- Smartvel proposal with impact on several channels.

Robotics

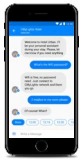


- Independent robots
- Interaction with clients, Social Networks, hotel and destination information, events, flight and train information, survey and feedback collection, my Barceló program promotion and App

IPTV Basic Version

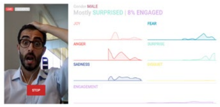
- Customize the experience of customers through TV.
- Application to the TV with 2 functionalities:
- Casting (user content sharing: Spotify, Netflix, HBO, Youtube ...)
- Personal greeting to the customer (PMS)

Chatbot



- Facilitating immediate responses through a channel that generates high engagement
- Data collection
- Many partners who have proposed us to carry out chatbot projects
- It can be integrated into channels such as Facebook, Telegram, Apps, Webs

Emotional state of the client



- New customer information acquisition channel, based on scientific methodology
- Robbie allows us to analyse the behaviour of customers using biometrics - providing scientific measurement on the expressions of the faces.

Improve customer knowledge

- Scoop: Thanks to the injection of a sdk in our App (or even in other formats such as QR code), able to record the movements of the client.
- Obtaining customer profiles based on up to 170 attributes.

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CRESTLINE
HOTELS & RESORTS

A World-Class Hospitality Company

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CRESTLINE
HOTELS & RESORTS

Mission

Crestline's Mission: "To continue to enhance and grow our reputation as one of the nation's most respected hospitality management companies. We will do this by exceeding guest expectations, providing an engaging and supportive work environment, and delivering financial success and opportunities for our employees, our company and our owners and investors."

- As one of the nation's largest independent hospitality and hotel management companies, Crestline's growing portfolio includes 118 hotels with nearly 17,250 rooms in 27 states and the District of Columbia.
- Crestline provides management services for the following major brands as well as a collection of independent hotels:

- Hilton
  - Hilton Hotels & Resorts
  - Embassy Suites by Hilton
  - DoubleTree by Hilton
  - Hilton Garden Inn
  - Homewood Suites by Hilton
  - Hampton Inn by Hilton
- Hyatt
  - Hyatt Place
  - Hyatt House
- Marriott
  - Marriott Hotels & Resorts
  - Courtyard by Marriott
  - Residence Inn by Marriott
  - SpringHill Suites by Marriott
  - TownePlace Suites by Marriott
  - Fairfield Inn & Suites by Marriott
  - Westin

CRESTLINE
HOTELS & RESORTS

Signet by Crestline and The Signet Collection by Crestline

- Crestline's independent hotels and conference centers are an eclectic collection of properties with unique attributes.

- Each hotel has its own personality and in many cases, is either an historic property or associated with a university or other esteemed facility.

- What ties these properties together is their commitment to guest service and a promise to serve the communities in which they do business.

- In creating our branding for these private label hotels, Crestline wanted a name that reflects Crestline's mission and distinguishes the collection as one that could only be associated with Crestline.

Services

As a leader in hospitality a management, Crestline offers award-winning **third-party hotel management** to maximize returns through expertise. Their expertise spans across all segments of the hotel industry ranging from select service to extended stay to full service hotels.

Their platform of services include, amongst others:

- **Operations**
- **Sales and Marketing**
- **Revenue Management**
- **Human Resources**
- **Accounting**
- **Payroll**

By working closely with the hotels' ownership group they establish and implement financial goals, using their industry knowledge to provide high guest satisfaction and overall financial success.

5.- Challenges and Opportunities facing the Travel Industry

To advance and shape a 21st century tourism model based on innovation, technology, sustainability and accessibility

- **New Platform Tourism Services (or the so-called Sharing Economy)**
- **Smart destinations:** digital applications that make it possible to offer **increasingly customized services** and to differentiate tourist destinations that provide added value while preserving the natural, social and cultural environment.
- How to stimulate innovation in tourism by **connecting public and private initiatives** and sharing best practices
- Tourism has changed from being a service industry offering you a flight, a room and some food **to offering experiences**
- **Overtourism**: For decades most tourism destinations have tried to attract as many tourists as possible, without any thought that there could be limits beyond which local people's lives and tourists experiences start to suffer

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- As **mobile technology** becomes mainstream, the T&T sector has had to adapt

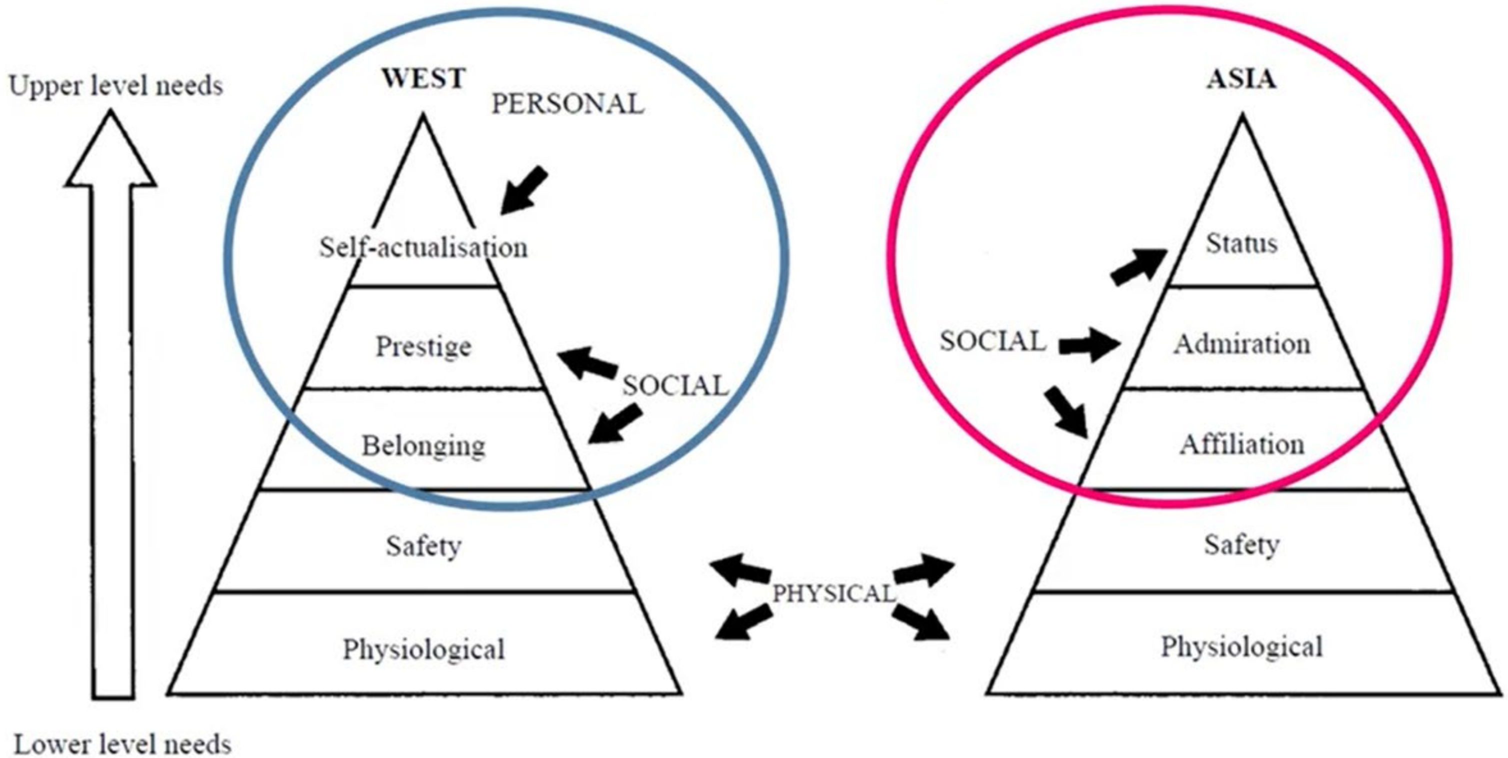
- Though countries are increasingly committed to **respecting international environmental standards**, environmental performance benchmarking assessments show that deforestation, overfishing, and air and water pollution continue to reduce the global natural capita

- A growing part of the market and attracting investment, cruises are attracting new audiences. **Package vacations have survived numerous dips following terror attacks** around the world, and appear set to remain the mainstay of vacations

- The processing and management of **Big Data.** Access to more and more information about the tastes and activities of visitors at destinations, recognizing trends in the seasonality of demand, and other key factors of tourist behavior are fundamental in the development of product linked strategies

New markets and new expectations

West vs. Asia Hierarchy of Needs



Source: Schütte & Ciarlante (1998)

- **Make destinations distinctive:** Many countries have been seeking to capitalize on market trends towards more personalized experiences by making their destinations more distinctive and thereby also meeting strategic objectives of spreading tourism benefits more widely and extending the season

  - ✓ **Thematic product development and promotion**
  - ✓ **Targeted and coordinated marketing**
  - ✓ **Harnessing the digitalization of tourism**

- **Achieve competitiveness and sustainability:** Tourism policies broadly seek to improve the competiveness of destinations as places to visit and to do business, while also addressing issues of sustainability an responsibility towards the impacts of tourism

- **Changes in visa and trade policies** can promote or stop the growth of the T&T industry

- **Develop long term tourism strategies:** Many countries have adopted tourism strategies to 2025 or 2030, focusing on the wider development and infrastructure needs of the sector rather than just short term marketing. This has proved very helpful in bringing together and coordinating different stakeholder interests

- **Improve coordination with local destinations:** In order to achieve effective and efficient management and marketing, national and local level policies and actions need to reinforce and support each other. Establishing optimal structures for destination management at a local level has become a key issue

Security and safety, economic crisis, sustainability, social changes, technology…

"Every day, more than 3 million tourists cross international borders. Every year, almost 1.2 billion people travel abroad. Tourism has become a pillar of economies, a passport to prosperity, and a transformative force for improving millions of lives. The world can and must harness the power of tourism as we strive to carry out the 2030 Agenda for Sustainable Development."

António Guterres, United Nations Secretary-General

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Muchas Gracias!

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