



INGENIA COMMUNITIES GROUP

Tourism Strategy

The Ingenia Tourism Strategy

- ✓ Create exceptional experiences for our guests.
- Grow market share and expand market capture to adjacent sectors
- ✓ Introduce new higher yielding customers
- ✓ Remix asset offer (stock and amenities) to reposition asset in market and improve yield and valuation metrics

In order to achieve our strategy, we strive to;

- Deliver exceptional customer service, set industry benchmark
- ✓ Deliver the best in park experiences (unique point of difference from member affiliation groups, as we own the customers "in park" experience)
- Redefine customer loyalty create sticky customers (and reduce cost of customer acquisitions)
- ✓ Leverage consumer content to create brand advocacy and awareness
- ✓ Leverage digital and social platforms to personalise customer interaction

Our strategy is relevant today and will remain relevant as we grow

The Customer Journey Framework



Tourism – Key Customer Demographics

Ingenia Holiday's Customer

Grey Nomads

(Key Buyer of Lifestyle Communities)

Young Families

(Mum, Dad and Young to Teenage Kids)

5 Common Customer Groups

- Full House
 Back To Nature
 - Real Working Class
 - Family First
 Penny Wise

Tourism – Key Customer Demographics



Full House

Married, paying off their own house



Back to Nature

Older households who have retired or plan to soon move to their beach home which they own



Real Working Class

Older married couples, mid-life families, young parents



Family First

Suburban separate house, well educated married / couples working fulltime, earning average income



Penny Wise

Mid-life married paying off their house, like to live cheap / save money



Ingenia Tourism Portfolio Statistics

Cabins + Sites available per night

2,192

Average length of stay (days)

4.2

Unique visitors per year

300k+

Ingenia Holidays email database

170k+

Percentage of cabin bookings made online

50.7%

Percentage of site bookings made online

16.9%

OTA revenue in last twelve months

\$6.3m

OTA channel revenue growth

42.9%

ingeniaholidays.com.au visitors to website

772k+

Ingeniaholidays.com.au channel grew in revenue

38.8%

Ingeniaholidays.com.au transactions grew

21.4%

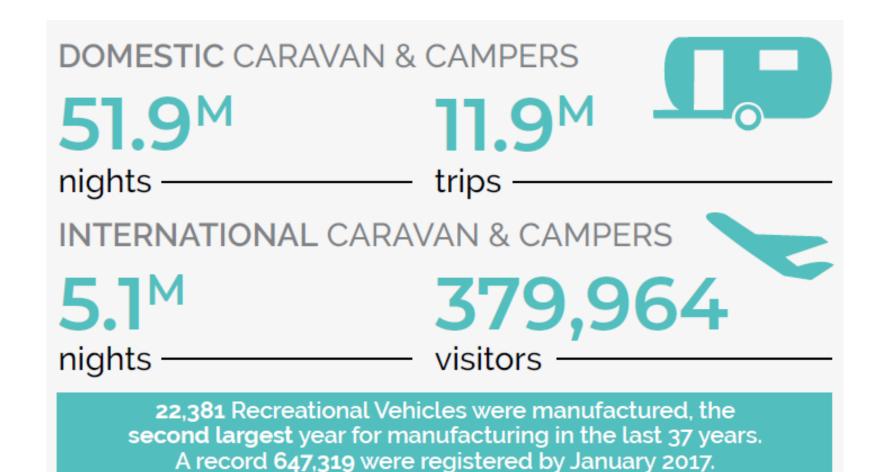
Ingeniaholidays.com.au share of online revenue

32.9%

Data based on rolling 12 months to 31 May 2018 vs same prior comparable period



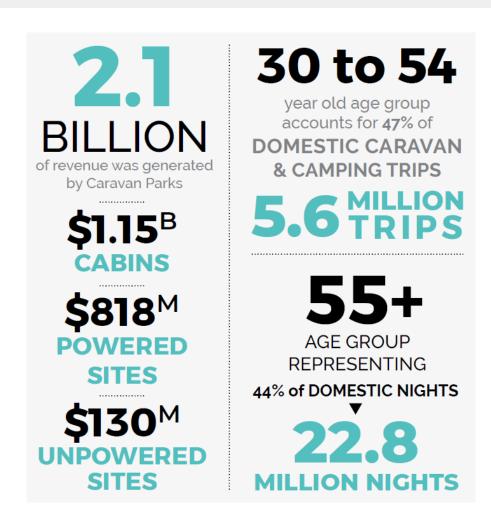
Industry Tourism Statistics

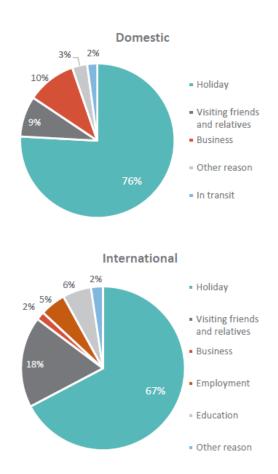


Source: Caravan Industry Association of Australia – State of the industry 2018



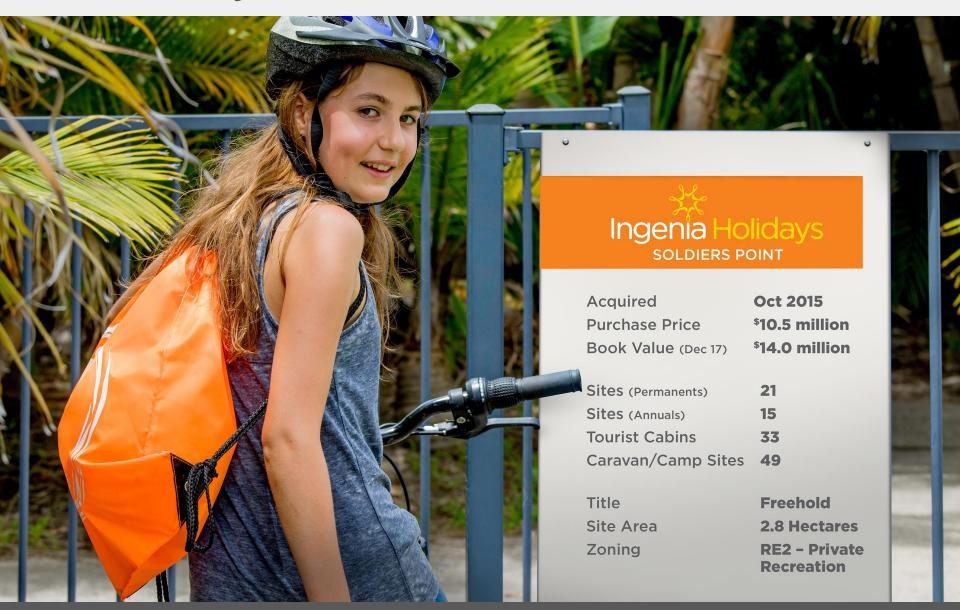
Industry Tourism Statistics



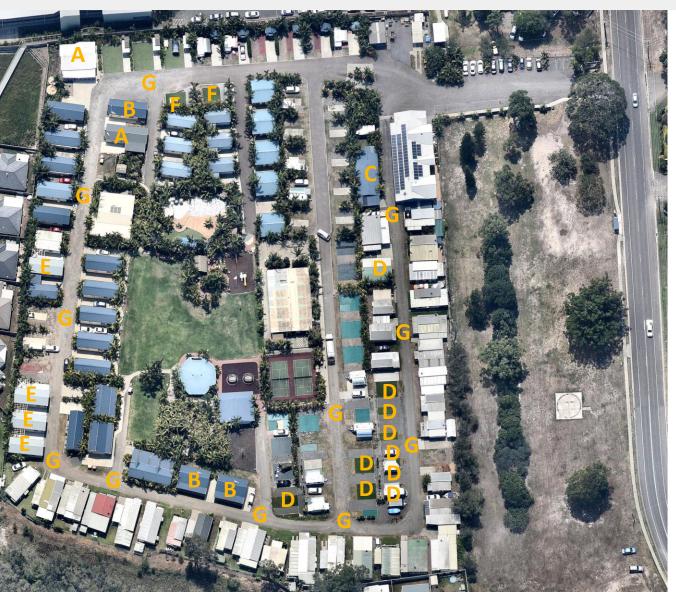


Source: Caravan Industry Association of Australia – State of the industry 2018





Case Study – Soldiers Point - Redevelopment



Redeveloping low yield sites to maximise returns

- ✓ Stage 1 Completed
 - A. Installation of 2 x premium 3BR Phoenix Cabins
 - B. Installation of 3 x 2BR Kentia Cabins
 - C. Conversion of managers residence to tourist accommodation
 - D. Conversion of low yield Permanents to Tourist Sites
- ✓ Stage 2 Completed
 - E. Installation of 4 x 2BR
 Aloha Cabins
 - F. Conversion of 3 x low yield motor home sites into 2 x Premium Powered Sites
 - G. Resurfacing Roadways

Asset Management Strategy – Measured investment, to remix offer and improve yield and valuation metrics.

- ✓ Post acquisition installation of 5 tourism cabins + conversion of managers residence
- ✓ 2017 installation of 4 tourism cabins
- ✓ Conversion of low yielding motorhome sites into premium 'forever green' tent sites
- ✓ Relocation and removal of permanent and annual sites (lower yield + low aesthetic standard)
- ✓ Internal road upgrade completed in June 2018

Marketing & Yield Strategy

- ✓ Leverage portfolio digital distribution, marketing and social channels
- ✓ Introduced strong customer experience focus and reputational management, guest surveys and NPS rankings
- ✓ Launched integrated revenue management system, to leverage distribution and dynamic pricing (demand based pricing)
- ✓ Leveraged placed with Online Travel Agents (OTA's) to grow distribution and access new markets
- ✓ Introduced sophisticated yield management strategies to improve market share and bottom line yield

Customer Engagement and Guest Experience Strategy

- Unique in park, experience based activities
- ✓ Introduced customer service training program with key park management team



Case Study – Soldiers Point – FYTD May 18

Cabins + Sites Nights available

26,905

(6.4% growth)

Average length of stay

3.50

(10.4% Growth)

Unique visitors This FY

16,223

(7.2% Growth)

Ingeniaholidays.com.au revenue increased

\$64k

(67.8% Growth)

Percentage of cabin bookings made online

50.4%

(was 49.3%)

Percentage of site bookings made online

25.0%

(was 23.7%)

Major OTA's generated

\$326k

(12.2% Growth)

BIG4.com.au generated

\$325k

(51.5% growth)

Direct bookings (Phone / Email / Walk in)

3,024

(10.0% growth)

Average revenue per cabin booking placed

\$617.05

(up \$54.63 - 9.7% growth)

Net promotor score achieved

68.8

(Was 51.8 - 32.8% growth)

Average Occupancy Level

56.5%

(was 53.95%)

Growth statistics based on same period in the prior year



Case Study – Soldiers Point – New Cabin Stock



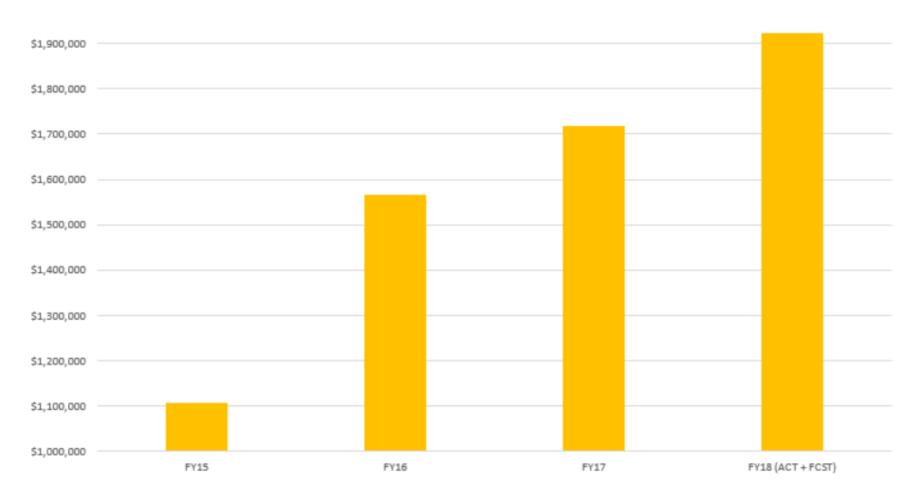
Case Study – Soldiers Point – Premium Facilities



Case Study – Soldiers Point – Unique Experiences

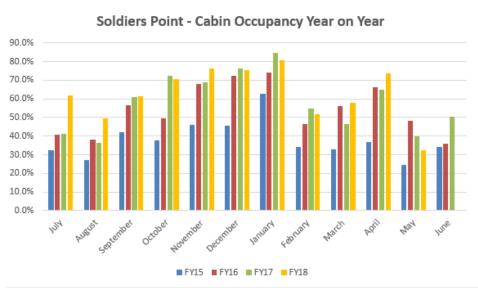


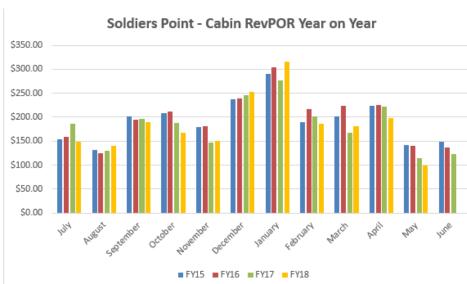
Soldiers Point - Total Tourism Revenue

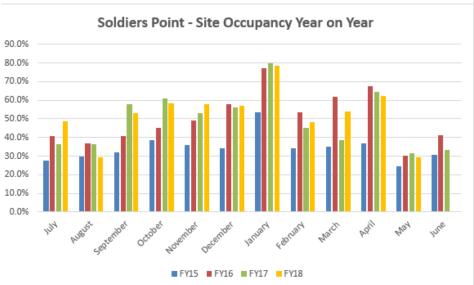


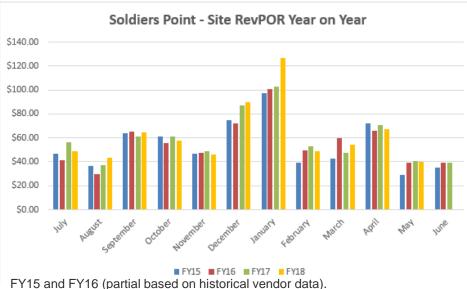
FY15 and FY16 (to acquisition) based on historical vendor data.













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