



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



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

DOMESTIC CARAVAN & CAMPERS

51.9^M

nights

11.9^M

trips



INTERNATIONAL CARAVAN & CAMPERS

5.1^M

nights

379,964

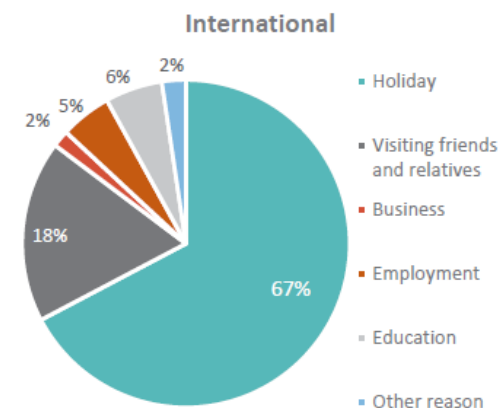
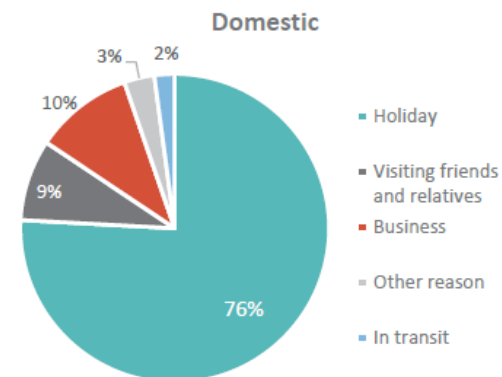
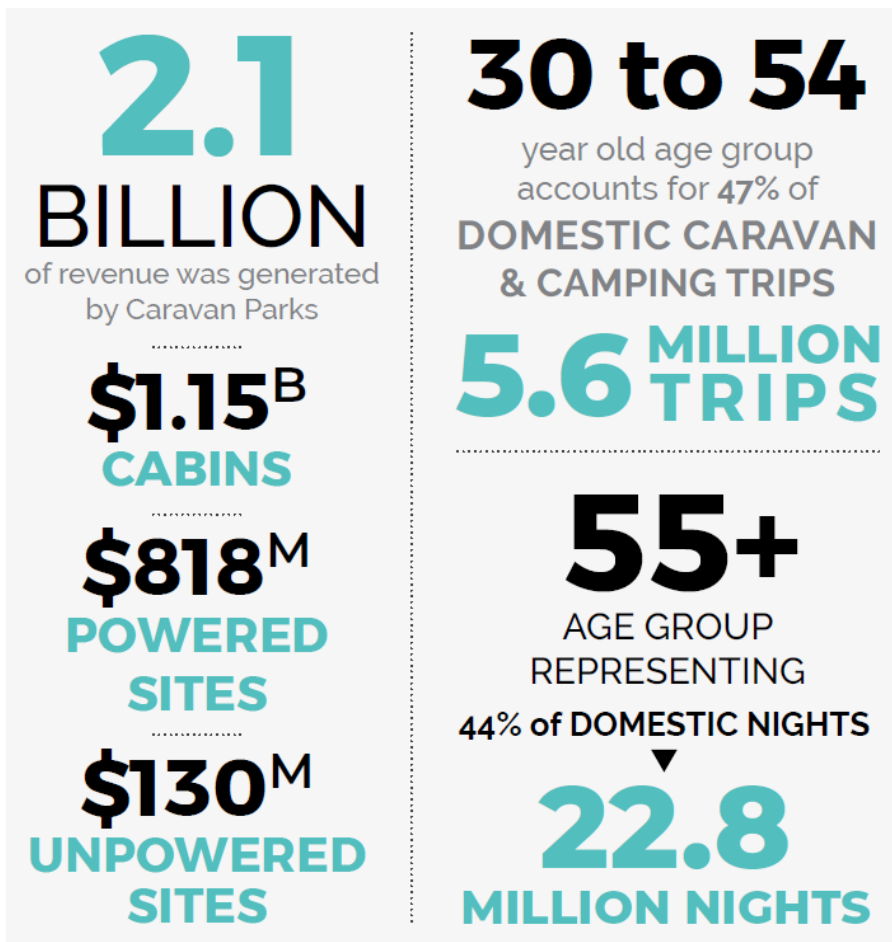
visitors



22,381 Recreational Vehicles were manufactured, the second largest year for manufacturing in the last 37 years. A record 647,319 were registered by January 2017.

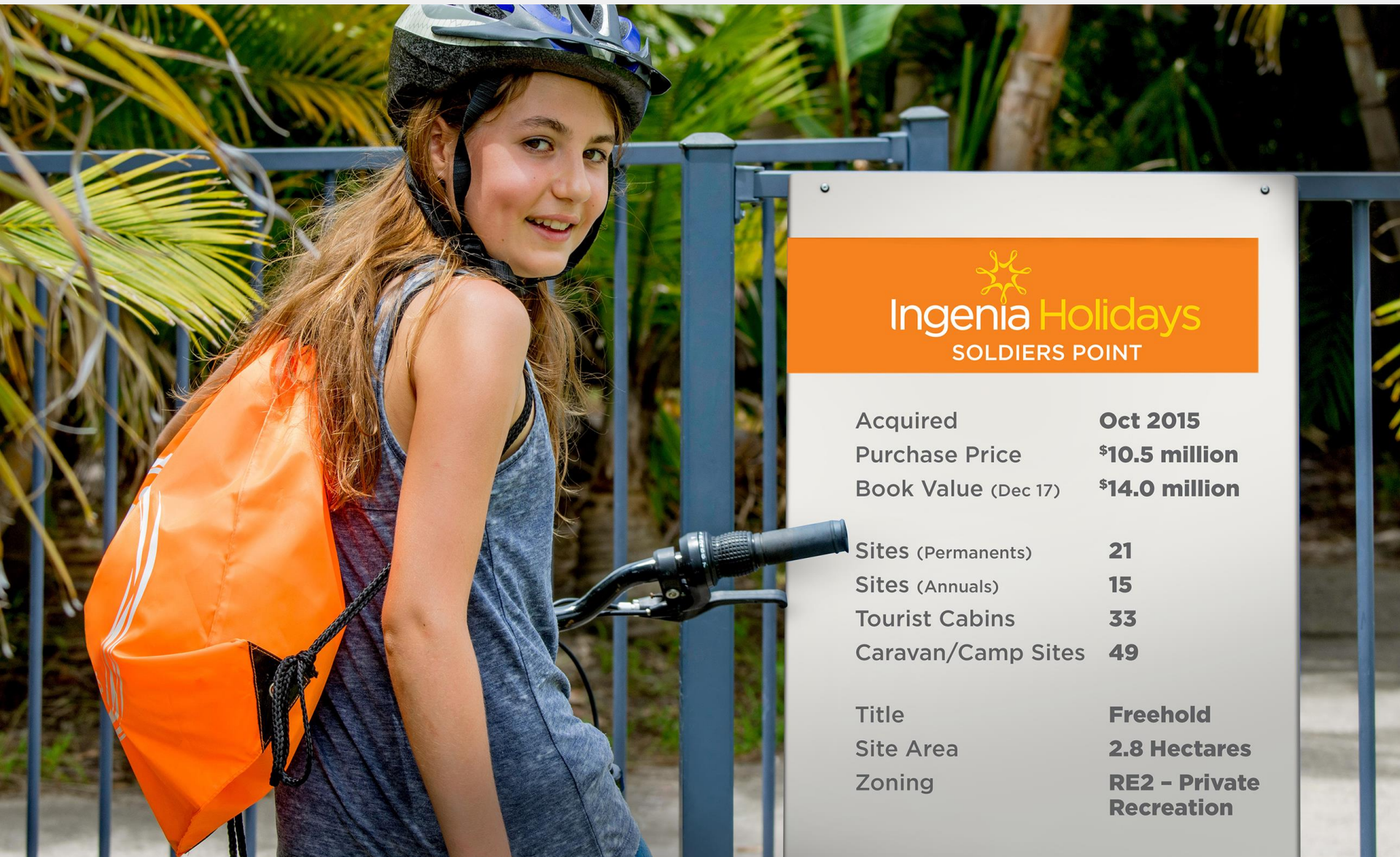
Source: Caravan Industry Association of Australia – State of the industry 2018

Industry Tourism Statistics



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

Case Study – Soldiers Point



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

Case Study – Soldiers Point

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

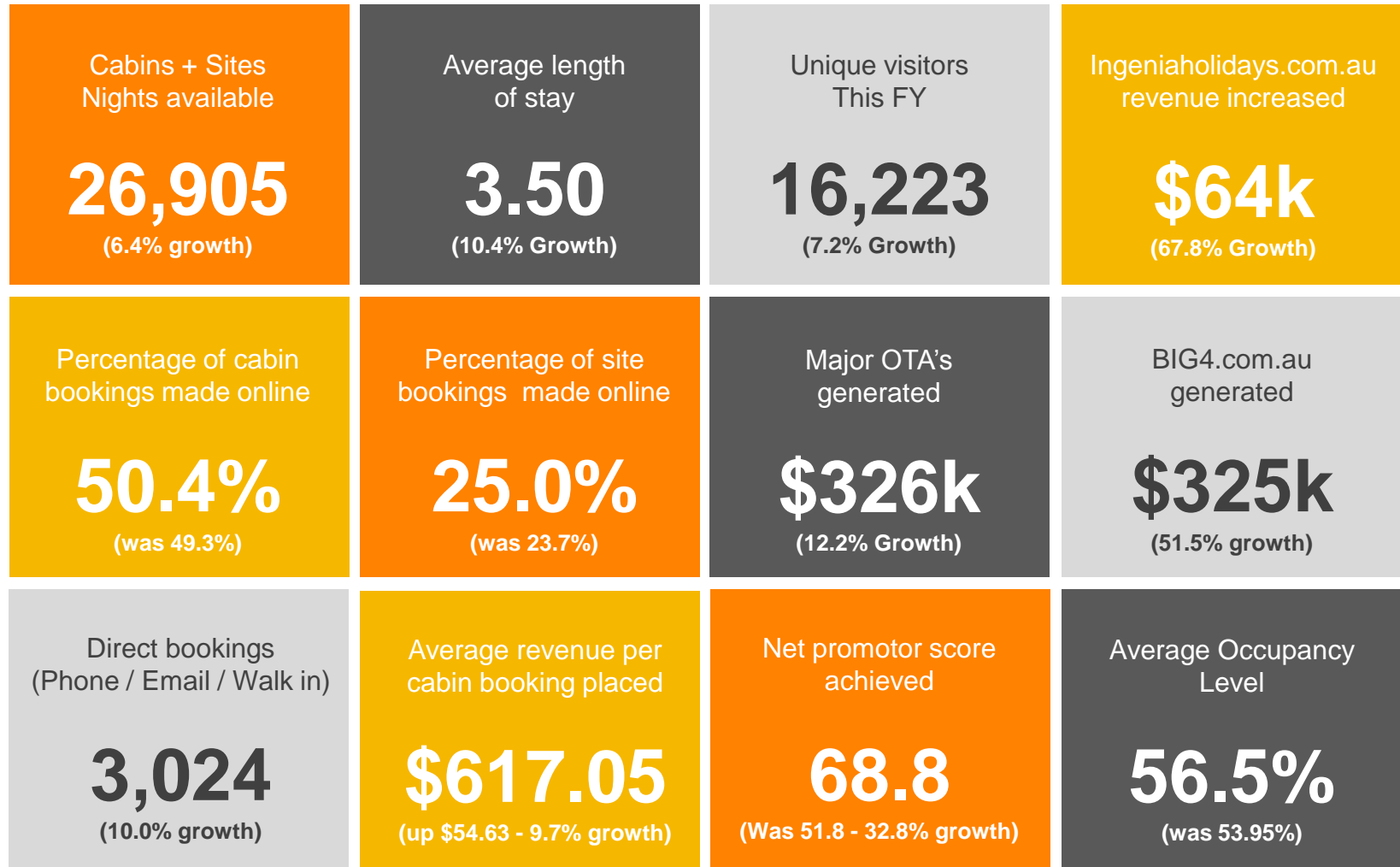
Marketing & Yield Strategy

- ✓ 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



Growth statistics based on same period in the prior year

Case Study – Soldiers Point – New Cabin Stock



Case Study – Soldiers Point – Premium Facilities

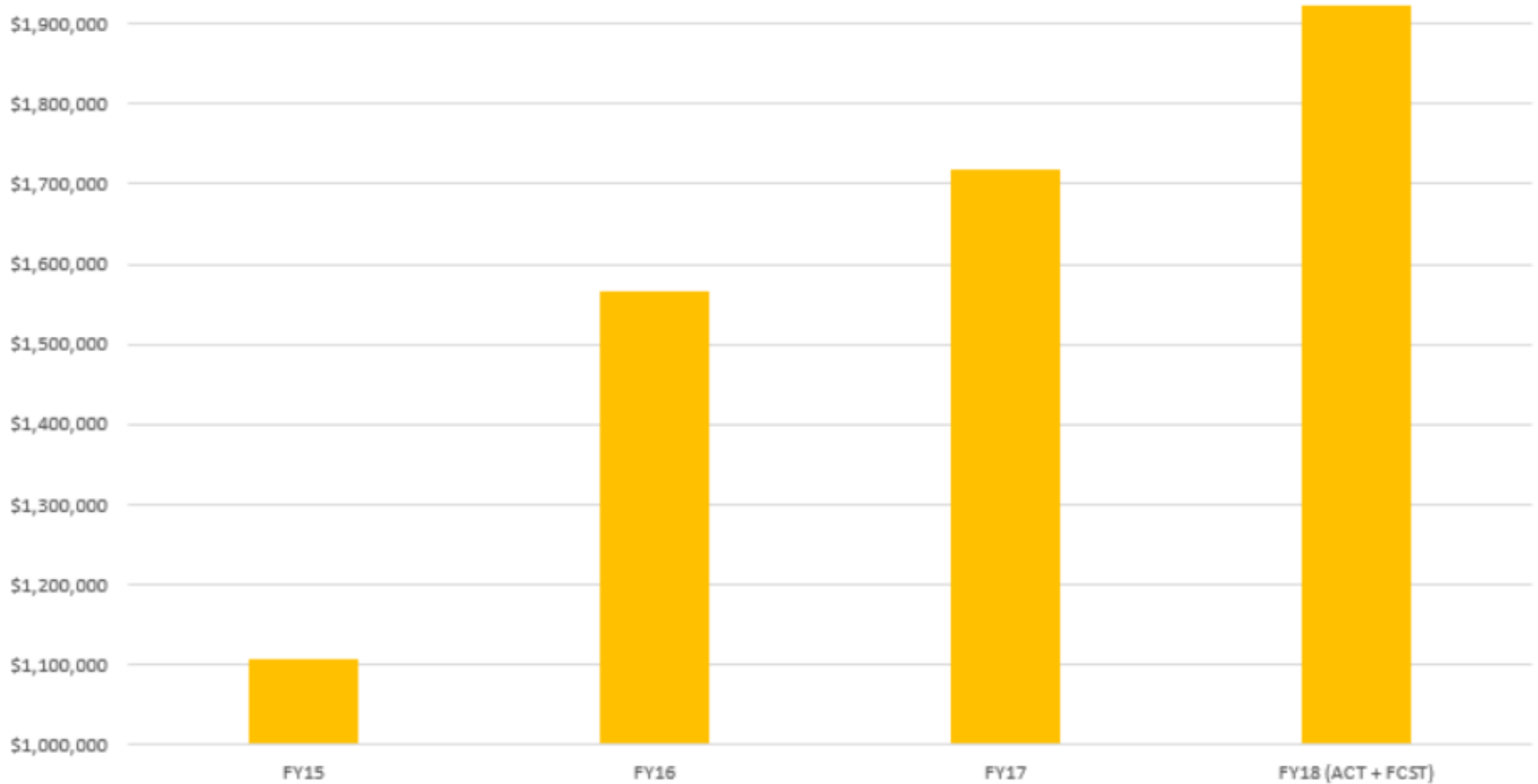


Case Study – Soldiers Point – Unique Experiences



Case Study – Soldiers Point

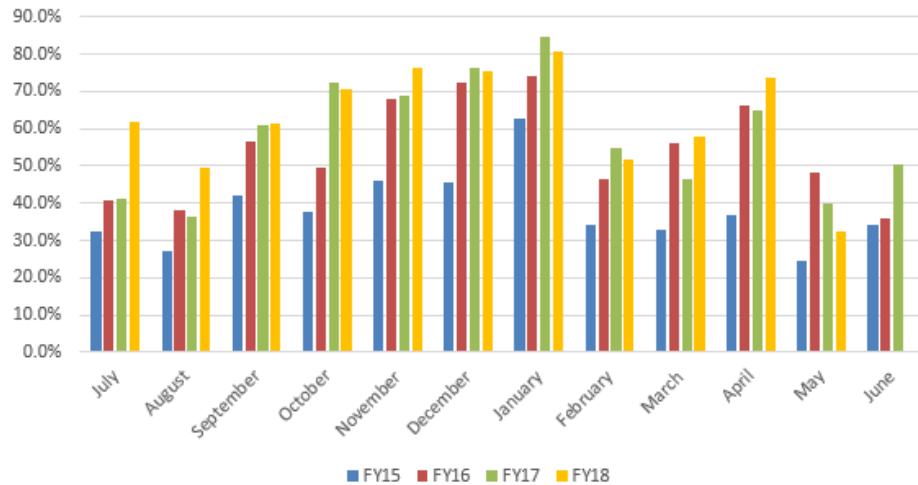
Soldiers Point - Total Tourism Revenue



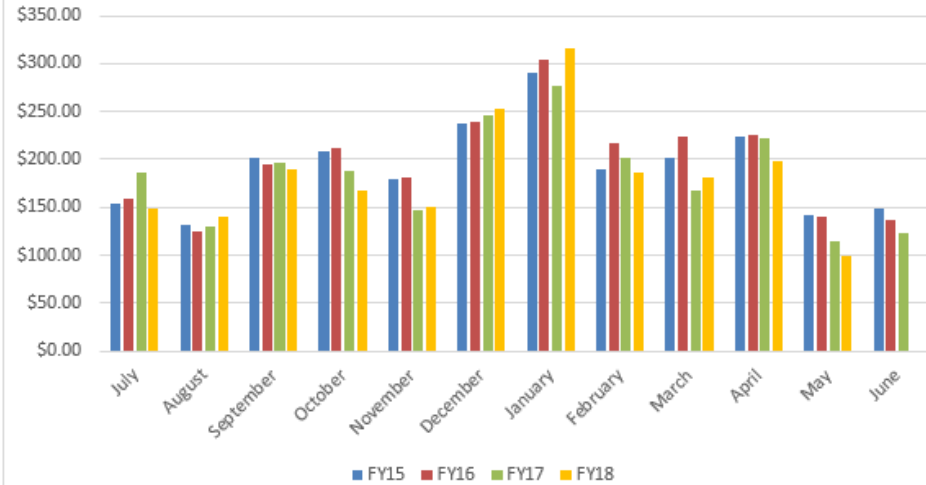
FY15 and FY16 (to acquisition) based on historical vendor data.

Case Study – Soldiers Point

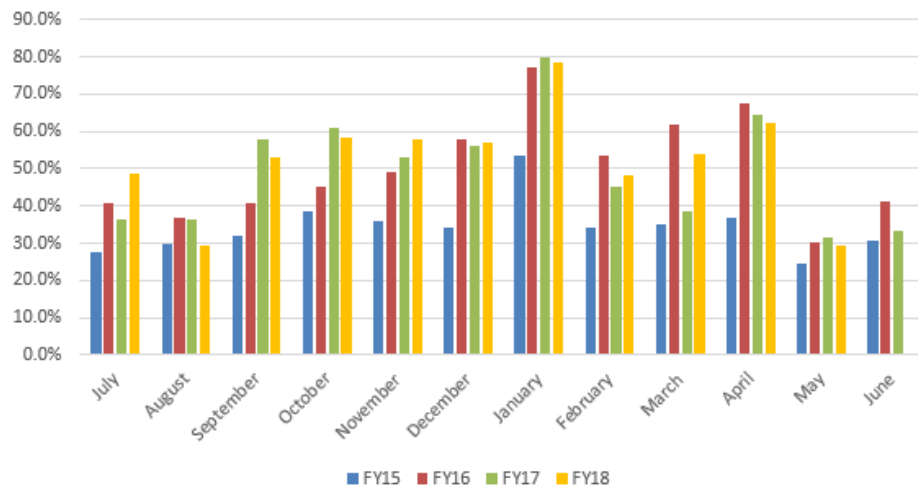
Soldiers Point - Cabin Occupancy Year on Year



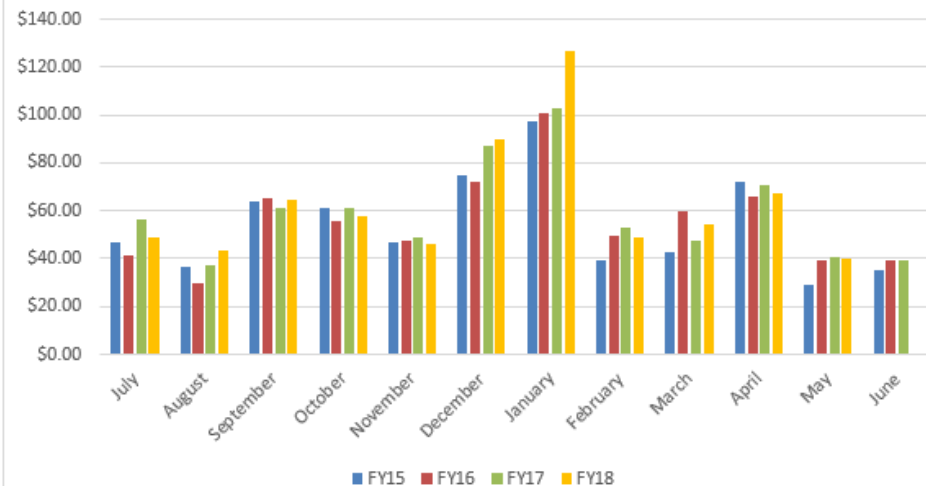
Soldiers Point - Cabin RevPOR Year on Year



Soldiers Point - Site Occupancy Year on Year



Soldiers Point - Site RevPOR Year on Year



FY15 and FY16 (partial based on historical vendor data).



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