

ACCOR GLOBAL DEVELOPMENT
JUNE 2020

WHY INVEST IN



S O F I T E L
HOTELS & RESORTS

SOFITEL
HOTELS & RESORTS



LIVE THE FRENCH WAY

Imagine modern luxury hotels where the essence of each destination is artfully blended with sophisticated French art de vivre (art of living), creating chic experiences for guests to indulge in and celebrate life's pleasures, the French way.

CHIC PASSIONATE INDULGED SPECIAL





BRAND UPSs

ONLY FRENCH LUXURY HOTEL BRAND WITH A LARGE INTERNATIONAL PRESENCE IN OVER 45 COUNTRIES IN 5 CONTINENTS

Modern luxury hotels blending
French “art de vivre” (art of living)...

... with the best and most
sophisticated of local cultures

Showcasing authentic French
touches, across the guest journey,
e.g. "Gastronomie Francaise"
(cheese, bread, viennoiseries,
wine...), Sofitel perfume, l`art of the
French bouquet, French Luxury bath
amenities

BRAND UPSs

STRONG BRAND EQUITY

Most international network with > 120 hotels in key cities in > 45 countries in 5 continents

Strong awareness > 60% in key feeder markets

Strong PR coverage > 300 million net reach and > 400 annual awards

High perceived value with strong brand programs, partnerships, events, e.g. La Nuit by Sofitel and Les Diners Extraordinaires Sofitel





Sofitel Paris Le Faubourg, France

BRAND UPSs

INVESTORS' ASSURANCE

> 55 years of brand heritage and "savoir-faire"

French origin & French luxury DNA, higher brand perception and preference

High level of standards & service excellence drive customer satisfaction and reputation

Brand equity contributes to "sure-win" investment

NETWORK AND PIPELINE

Official figures as of end June 2020

120 HOTELS

30,216 ROOMS

46 COUNTRIES IN 2020

18 NEW HOTELS

5,443 MORE ROOMS BY 2025

NETWORK AND PIPELINE

Official figures as of end June 2020

22%

EUROPE

NETWORK
32 Hotels
6,590 Rooms

PIPELINE
2 Hotels
647 Rooms

48%

ASIA PACIFIC

NETWORK
50 Hotels
14,458 Rooms

PIPELINE
9 Hotels
2,857 Rooms

11%

AMERICAS

NETWORK
15 Hotels
3,398 Rooms

PIPELINE
2 Hotels
344 Rooms

19%

AFRICA - MIDDLE EAST

NETWORK
23 Hotels
5,670 Rooms

PIPELINE
5 Hotels
1,595 Rooms

OPERATING MODE

96%
Managed

4%
Franchised

FLAGSHIPS - EUROPE

SOFITEL PARIS LE FAUBOURG

(FRANCE)

148 ROOMS



FLAGSHIPS - EUROPE

SOFITEL LONDON ST JAMES
(UNITED KINGDOM)

183 ROOMS



FLAGSHIPS - EUROPE

SOFITEL MUNICH BAYERPOST
(GERMANY)

396 ROOMS



FLAGSHIPS - EUROPE

SOFITEL ROME VILLA BORGHESE
(ITALY)

78 ROOMS



FLAGSHIPS - AMERICAS

SOFITEL MEXICO CITY REFORMA
(MEXICO)

275 ROOMS



NETWORK & PIPELINE

SOFITEL
HOTELS & RESORTS

FLAGSHIPS - AMERICAS

SOFITEL WASHINGTON DC LAFAYETTE SQUARE
(UNITED STATES)

237 ROOMS



FLAGSHIPS - AMERICAS

SOFITEL CHICAGO MAGNIFICENT MILES
(UNITED STATES)

415 ROOMS

NETWORK & PIPELINE

SOFITEL
HOTELS & RESORTS



FLAGSHIPS - ASIA

SOFITEL BEIJING CENTRAL
(CHINA)

345 ROOMS



FLAGSHIPS - ASIA

SOFITEL SHANGHAI HONGQIAO
(CHINA)

350 ROOMS





FLAGSHIPS - ASIA

SOFITEL SINGAPORE CITY CENTRE
(SINGAPORE)

223 ROOMS

FLAGSHIPS - PACIFIC

SOFITEL SYDNEY DARLING HARBOUR
(AUSTRALIA)

590 ROOMS



FLAGSHIPS - AFRICA

SOFITEL MARRAKECH PALAIS IMPERIAL
(MORROCO)

184 ROOMS



FLAGSHIP RESORTS - ASIA

SOFITEL SINGAPORE SENTOSA RESORT & SPA
(SINGAPORE)

215 ROOMS



FLAGSHIP RESORTS - ASIA

SOFITEL BALI NUSA DUA
BEACH RESORT
(INDONESIA)

415 ROOMS



FLAGSHIP RESORTS — MIDDLE EAST

SOFITEL DUBAI THE PALM RESORT & SPA
(UAE)

546 ROOMS



LATEST OPENING

SOFITEL ISTANBUL TAKSIM
(TURKEY)
203 ROOMS



UPCOMING OPENINGS

SOFITEL DUBAI WAFI
(UNITED ARAB EMIRATES)

595 ROOMS
SEPTEMBER 2020



UPCOMING OPENINGS

SOFITEL HAIKOU

(CHINA)

211 ROOMS

JANUARY 2021



UPCOMING OPENINGS

SOFITEL ADELAIDE
(AUSTRALIA)
250 ROOMS
FEBRUARY 2021



UPCOMING OPENINGS



SOFITEL SEOUL

(KOREA)

563 ROOMS

JULY 2021

SECURED PIPELINE OVER 5 YEARS

As of end June 2020

AMERICAS

SOFITEL PANAMA LEGEND, PANAMA 157 ROOMS, JUNE 2021
SOFITEL BARU, COLOMBIA 187 ROOMS, SEPTEMBER 2021

AFRICA – MIDDLE EAST

SOFITEL DUBAI WAFI, UNITED ARAB EMIRATES 595 ROOMS, SEPTEMBER 2020
SOFITEL THALASSA ALGER, ALGERIA 182 ROOMS, DECEMBER 2021
SOFITEL DOHA WEST BAY, QATAR 430 ROOMS, JANUARY 2021
SOFITEL RIYADH, SAUDI ARABIA 388 ROOMS, MARCH 2022

ASIA – PACIFIC

SOFITEL ADELAIDE, AUSTRALIA 250 ROOMS, FEBRUARY 2021
SOFITEL HAIKOU TIAN TUO, CHINA 209 ROOMS, JANUARY 2021
SOFITEL HANGZHOU YINGGUAN, CHINA 580 ROOMS, DECEMBER 2021
SOFITEL CAM RANH, VIETNAM 240 ROOMS, DECEMBER 2022
SOFITEL AMBASSADOR SEOUL, SOUTH KOREA 563 ROOMS, JULY 2021

EUROPE

SOFITEL LIMASSOL, CYPRUS 245 ROOMS, JUNE 2023
SOFITEL DUBLIN AIRPORT, IRELAND 187 ROOMS, SEPTEMBER 2021

A PASSION FOR DESIGN



CHIC DESIGN

From the timeless and elegant settings of Sofitel Legend to the sophisticated and chic designs of Sofitel Hotels & Resorts, every Sofitel address is a work of art by masterly architects and designers like **Didier Gomez** (Sofitel Paris Le Faubourg), **Pierre-Yves Rochon** (Sofitel London St James), **Andrée Putman** (Sofitel Paris Arc de Triomphe), **Richard Francis-Jones** (Sofitel Sydney Darling Harbour) and many more.



Sofitel Paris Le Faubourg



Sofitel London St James

A PASSION FOR AUTHENTIC GASTRONOMY



AUTHENTIC & LIVELY F&B (WITH KEY FRENCH ELEMENTS)

Whether it is French haute cuisine or re-interpreted gastronomical traditions, our skillful chefs create enticing, inspired dining that is enriched by each destination's unique aromas, textures, ingredients, flavors and secret recipes. At Sofitel, guests are treated to "*Gastronomie Française*" from finest breads and delectable pastries to premium wines (e.g. Sofitel Wine Days, French Breakfast, Les Diners Sofitel...) and cheeses from around the world.



PROGRAMS



AUTHENTIC & LIVELY F&B

**LES DINERS
EXTRAORDINAIRES & LES
DINERS SOFITEL**

The Sofitel brand holds “Les Dinners Extraordinaires”, orchestrated by celebrated chef Yannick Alleno, in extraordinary locations around the world.

Les Dinners Sofitel are held throughout the network as chic dining experiences that showcase the best of modern French cuisine, staged according to the ritual of French gastronomy.

A CURIOSITY AND PASSION FOR ARTS & CULTURE



ARTS & CULTURE (WITH A FRENCH ATTITUDE)

Inventive art displays, traveling photography exhibitions, exhilarating musical performances (La Nuit by Sofitel, Fete de la Musique), poetic literary showcases, literary awards, Le Petit Prince for kids and more, Sofitel blends French and international artistic expressions to create celebratory cultural journeys that promise to both delight and inform.

LA PARISIENNE

by Sofitel



PROGRAMS



ART & CULTURE

LA NUIT BY SOFITEL

Sofitel's signature, multi-sensory party concept combines the best of Parisian nightlife with local culture, bringing guests together through leading musical acts, dynamic DJ sets, experimental cocktails and strikingly creative lighting and visual effects.



A PASSION FOR WELL-BEING



INDULGENT WELLNESS

Sofitel embraces the art of wellness holistically, offering a wealth of relaxation and rejuvenation benefits through its signature Sofitel Spa and Fitness concepts and De-Light wholesome foods. In the rooms, guests get to indulge in the blissful Sofitel MyBed™ sleep-time experience, soothing bath rituals and generous offers of luxury bath amenities from French brands Hermès, Lanvin and others.



PROGRAMS

Over 55,00 Sofitel MyBed™ products sold on Sofitel Boutique (sofitelboutique.com)



INDULGENT
WELLBEING

SOFITEL
MYBED™

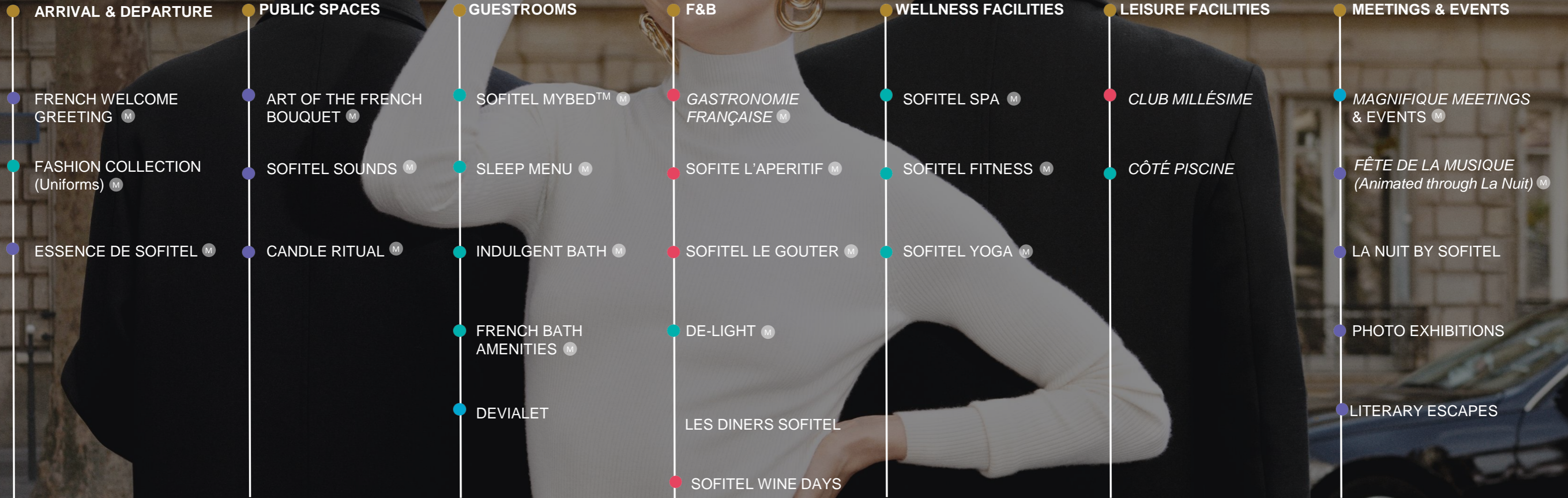
SOFITEL MYBED™

Designed to provide ultimate in-sleep-time bliss, Sofitel MyBed™ ushers a whole new concept in relaxation. This multi-sensorial experience ensures all guests have a luxurious rest and wake up feeling refreshed.

Sofitel MyBed™ lulls guests to sleep with plush beddings, comforting tea, aromatherapy scents inspired by the destination.

GUEST JOURNEY & EXPERIENCE – KEY STANDARD AT A GLANCE

The following list contains the key brand concepts & markers. Specific and detailed guidelines with rich elements & content bring each experience to life in the guest journey. Brand standards as of end 2019, might be subject to changes.



AUTHENTIC & LIVELY F&B ● ART & CULTURE ● CHIC DESIGN ● INDULGENT WELLBEING ● MANDATORY

PEOPLE ACTIVATION

SOFITEL COUSU MAIN – SERVICE FROM THE HEART

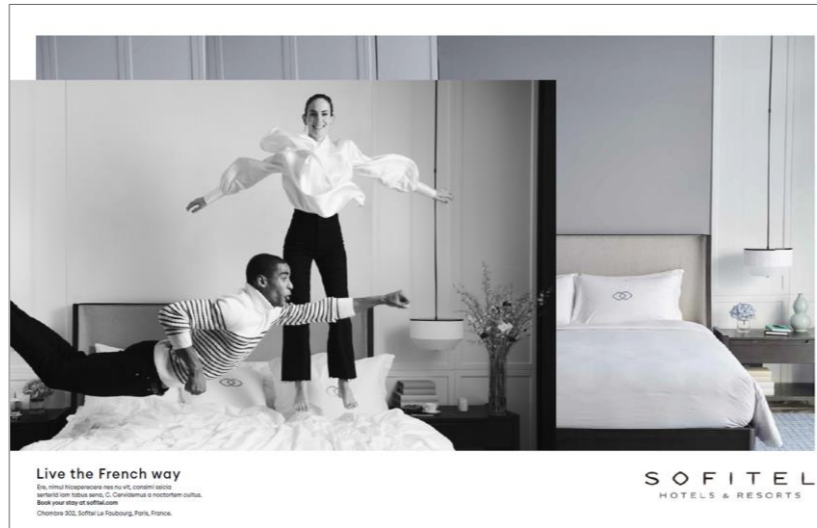
Sofitel Heartists and Ambassadors around the world are passionate about heartfelt hospitality, delivering genuinely caring and thoughtfully personalized service right from the heart. This is the service culture of Sofitel - Cousu Main, a mark of service excellence that Sofitel guests have come to recognize and appreciate over the years.



COMMUNICATION PLATFORM

GLOBAL COMMUNICATION CAMPAIGN (2019 - 2022)

LIVE THE FRENCH WAY



BRAND WEBSITE:

Informative and inspiring, the Sofitel website provides seamless research-to-reservation journey anytime, anywhere.

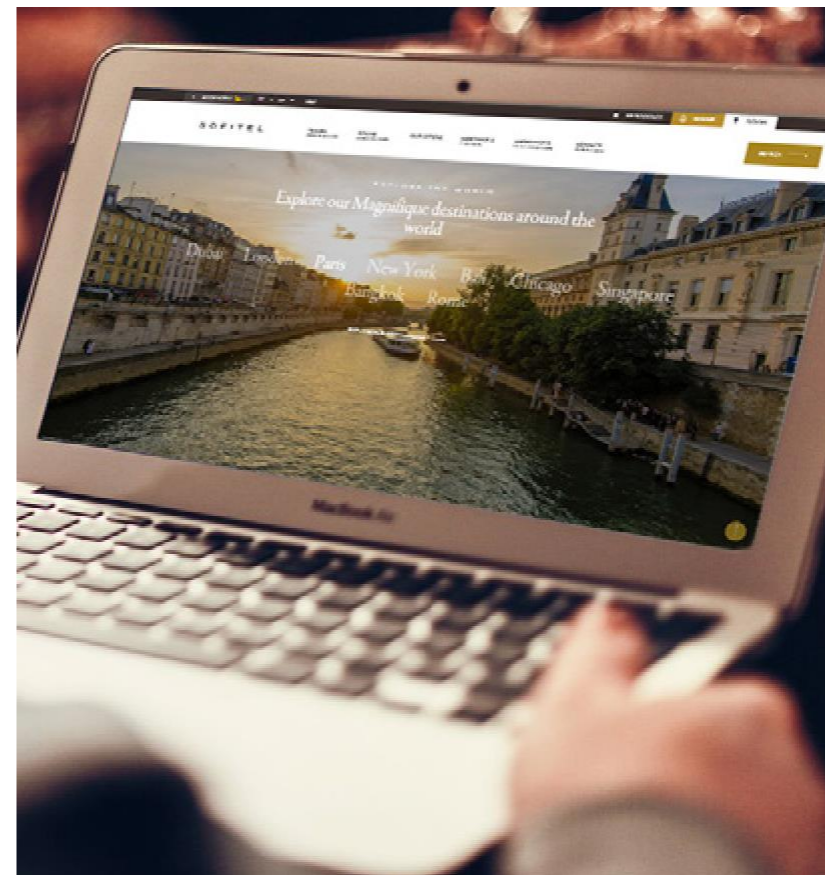
Sofitel.com



PR & COMMUNICATIONS

Spontaneous, joyous, carefree, with an elegant touch of *joie de vivre* and “*désinvolture*”, this is how we describe the hedonist French way of living.

TOTAL REACH 2.4B
NET REACH 2019 571M



SOCIAL MEDIA

- Over 1.3 million followers.
- Almost 83,000 followers.
- Over 104,000 followers.
- Over 10,600 followers.

Sofitel is also presented on

AWARDS

410 PROMINENT AWARDS ACROSS 52 PROPERTIES, INCLUDING :

World Travel Awards Indonesia's Leading Resort
Sofitel Bali Nusa Dua Beach Resort

Expedia's Most Wanted
Sofitel Bogota Victoria Regia

Travel + Leisure - World's Best Awards
Sofitel Legend Santa Clara, Cartagena

Smart Travel Asia's Best Luxury Hotels in Asia
Sofitel Legend Metropole Hanoi

**MOST AWARDED PROPERTY IS
SOFITEL LEGEND METROPOLE HANOI
WITH 34 NOTABLE AWARDS**

**SOFITEL LEGEND AWARDED BY T&L AS ONE
OF THE TOP 10 GLOBAL LUXURY BRANDS**

**TOP REGION IS ASIA PACIFIC
WITH 317 AWARDS**



BRAND PERFORMANCE

BRAND AWARENESS

>61%

Of awareness in 10 countries

A truly international recognition in the luxury segment

- The #1 luxury brand in terms of awareness and preference in France, Australia & Brazil

Our objective is to increase brand awareness in the top markets: US, China, Middle East and UK

BRAND PERCEPTION

66%

Sofitel is recognized for...

1. A luxurious experience, especially though exceptional bed comfort
2. Standing out for its contemporary and elegant style & design
3. Loved for its inimitable French identity

Our objective is to enhance brand perception in all key feeder markets (modern French *art de vivre* and luxury positioning)

BRAND MARGIN

€71

Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative.

Our objective is to increase brand margin potential

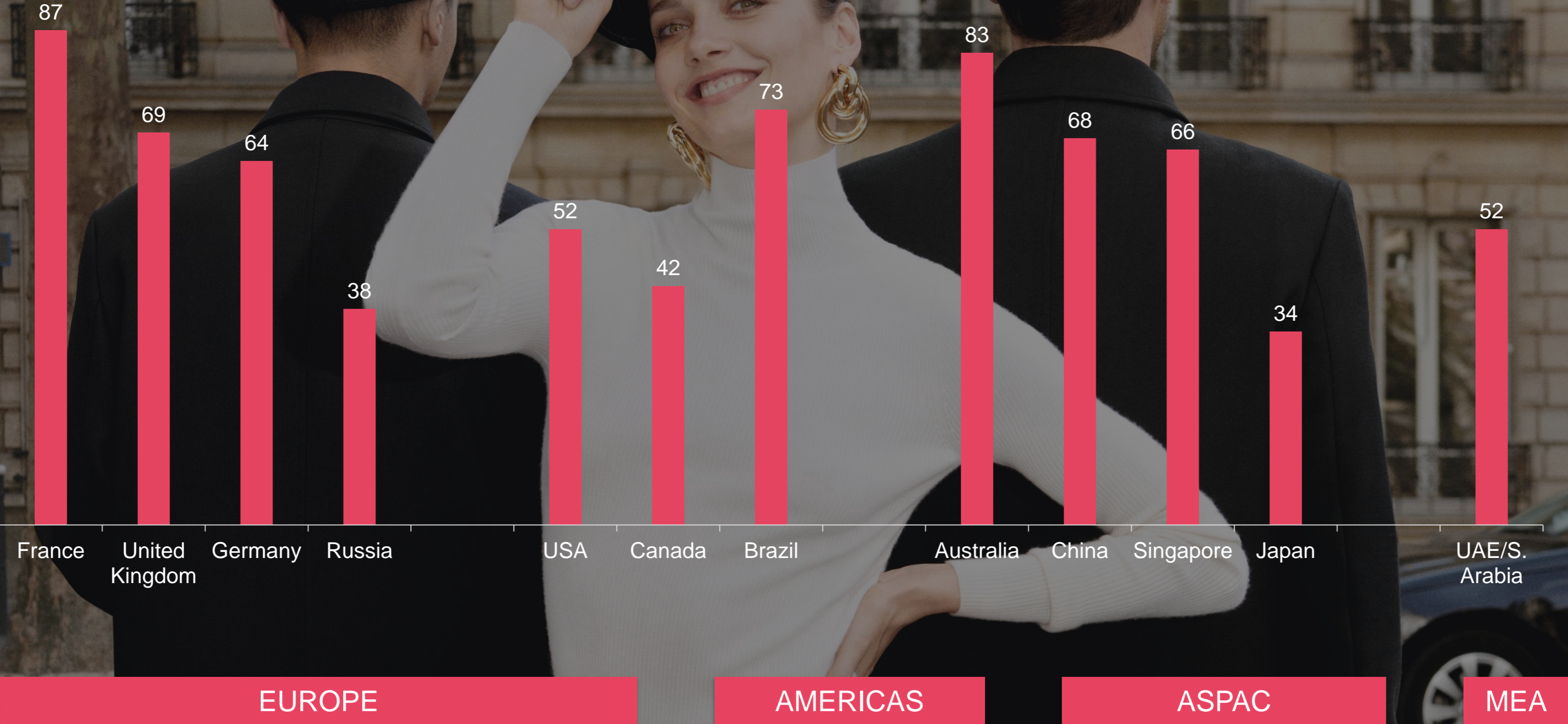
REPUTATION PERFORMANCE SCORE

89,3%

The Reputation Performance Score measures the overall hotel online reputation based on several sources: Guest Satisfaction Survey (GSS & Net Promoter Score), Trip Advisor, Booking, Ctrip etc. It is the most representative hotel's reputation KPI, requires at least 100 guests' feedback and give positive reputation score out of 100%

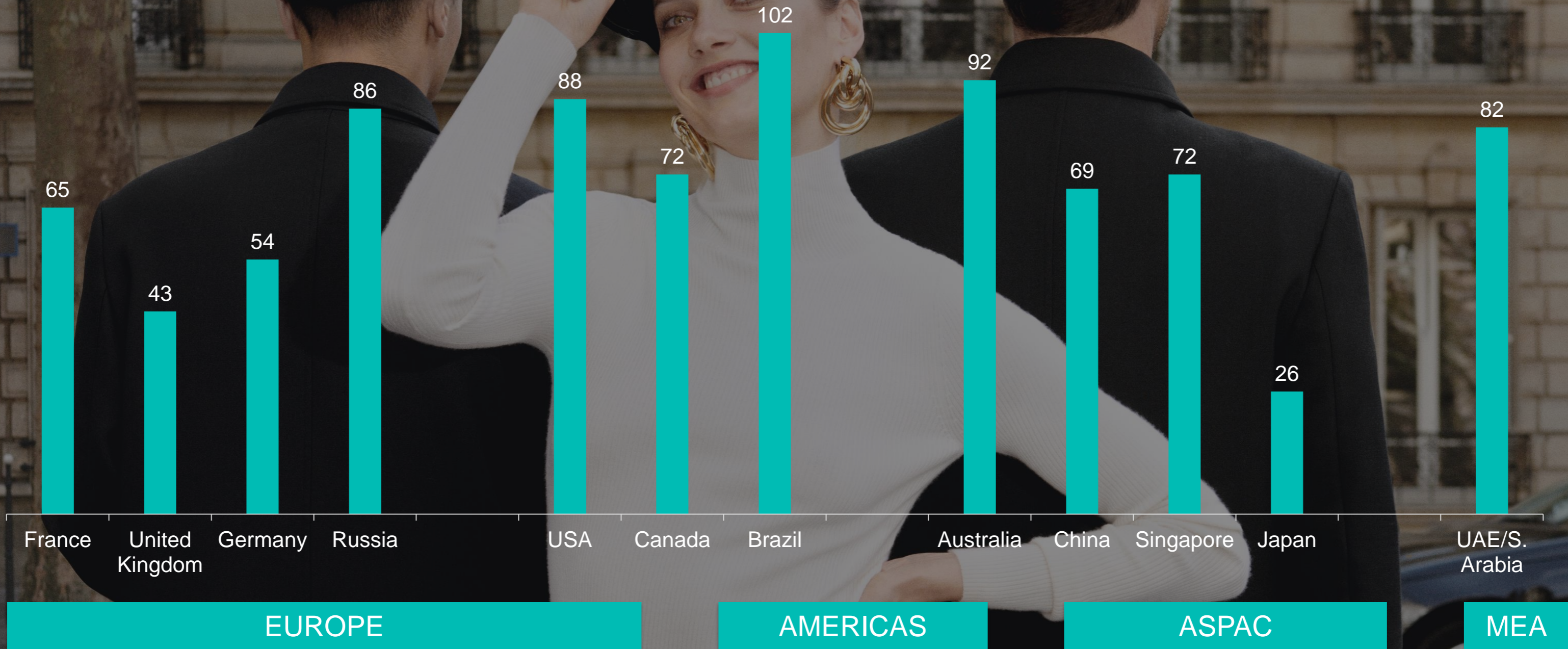
Our objective is to reach and to a ComplIndex of above 1.00 vs. global competition

SOFITEL TOTAL AWARENESS



Source: BEAM - Brand Equity & Awareness Monitoring December 2019 |
Base: Affluent & Luxury hotel users = users having spent at least 1 stay in a luxury hotel over the last 12 months, 6 nights + in any type of paid-for accommodation, top 30% income within country

SOFITEL BRAND MARGIN (€)



Brand Margin® in €

Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative. A Brand Margin® of 10€ means that « Consumers think it is worth paying on average 10€ more per night to stay with brand X compared to an unbranded equivalent ». Base: people having stayed in paid-for accommodation in the last 12 months and somewhat/very familiar with the brand

Brand Margin ® in €. Traveller representative
Figures as of end 2019

BRAND PERCEPTION

SOFITEL
AVERAGE RPS

89,30%

EUROPE

87%

NORTH &
CENTRAL
AMERICAS

88%

ASIA PACIFIC

90%

SOUTH
AMERICA

90%

AFRICA -
MIDDLE EAST

90%

ACCOR DISTRIBUTION SOLUTION*

ACCOR OFFERS >110 GLOBAL DISTRIBUTION PARTNERSHIPS AT BEST MARKET CONDITIONS

1 all.accor.com multi-brand portal

18 BRAND WEBSITES

1 MOBIL APP

35 point of sales animated by countries

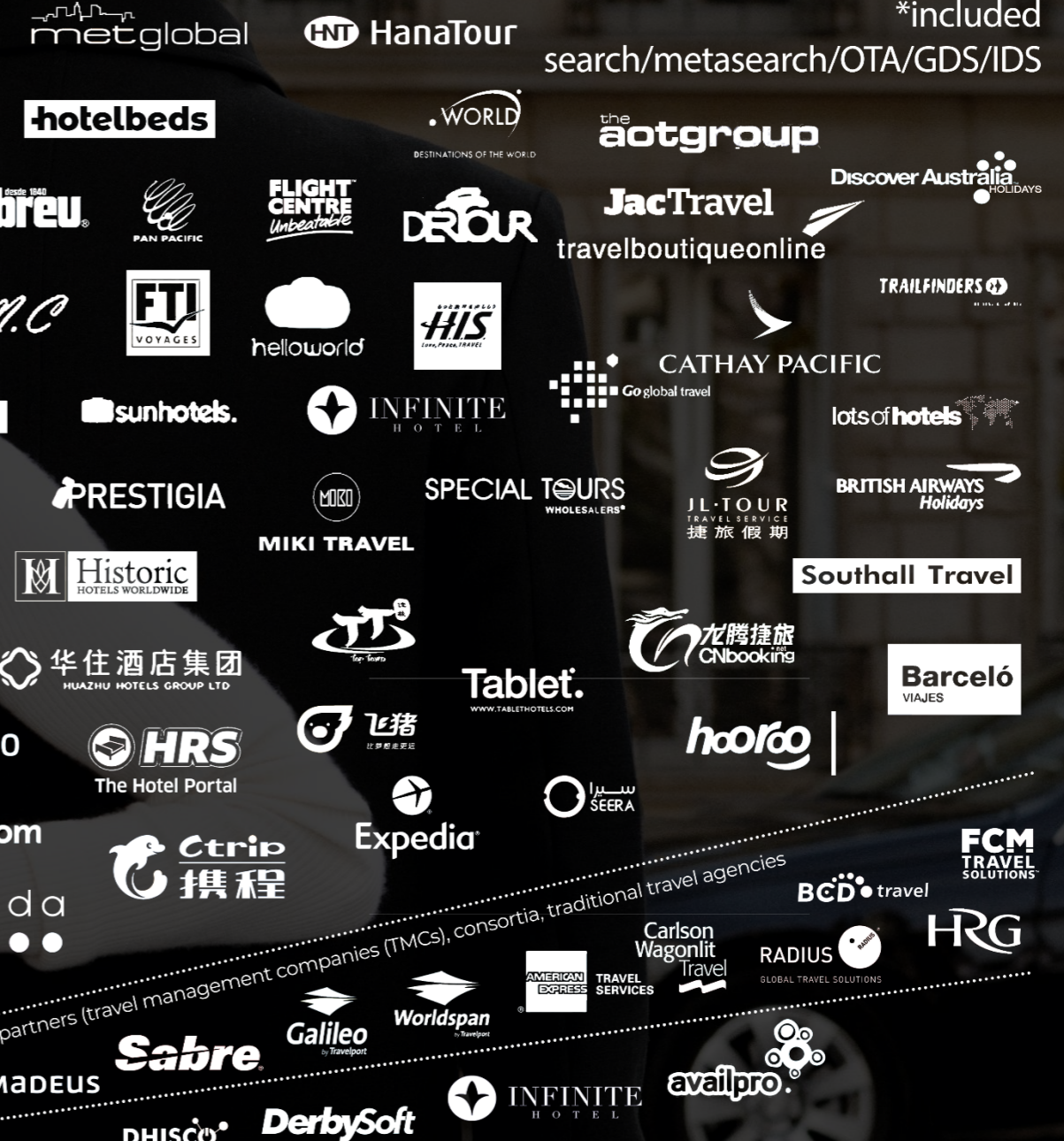
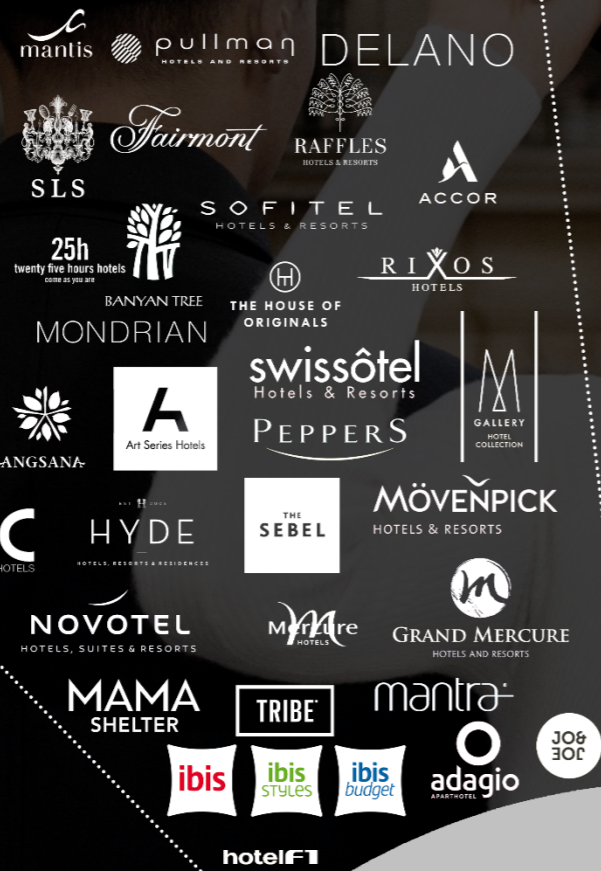
900 SALES AGENTS operate in

9 CALL CENTERS in 20 languages

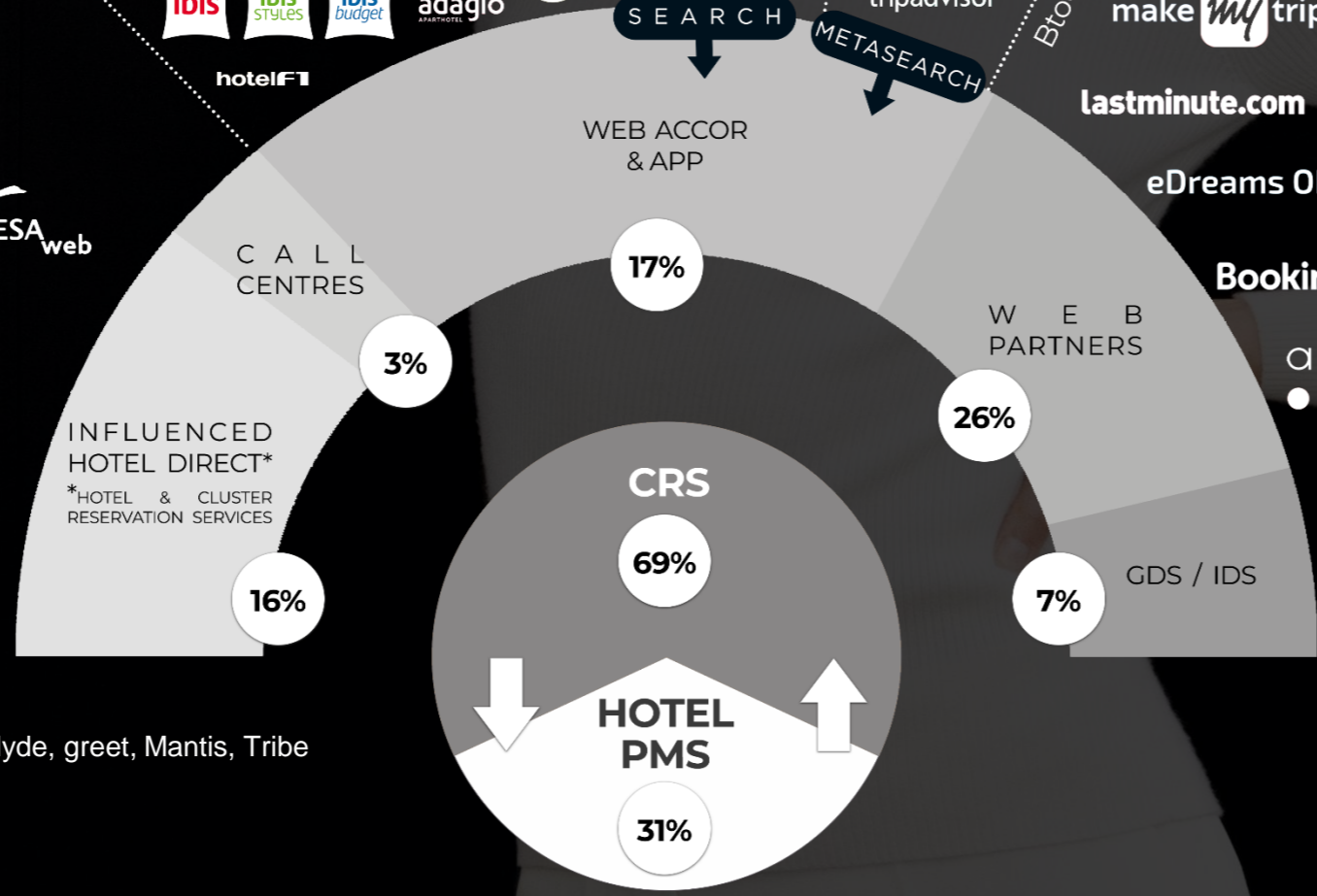
+ RESA web

1,470 HOTELS use Cluster facilities

1,500+ HOTELS use TARS for their own bookings



125+ PARTNERS*
*included search/metasearch/OTA/GDS/IDS



*All Accor brands excluding recently integrated: Delano, SLS, The House of Originals, Mondrian, Hyde, greet, Mantis, Tribe

SOFITEL DISTRIBUTION POWERED BY ACCOR (ROOM REVENUE BASED)

PERFORMANCE

SPLIT OF HOTELS REVENUE PER DISTRIBUTION CHANNELS

INFLUENCED HOTEL DIRECT*
*E-mails & cluster services

VOICE

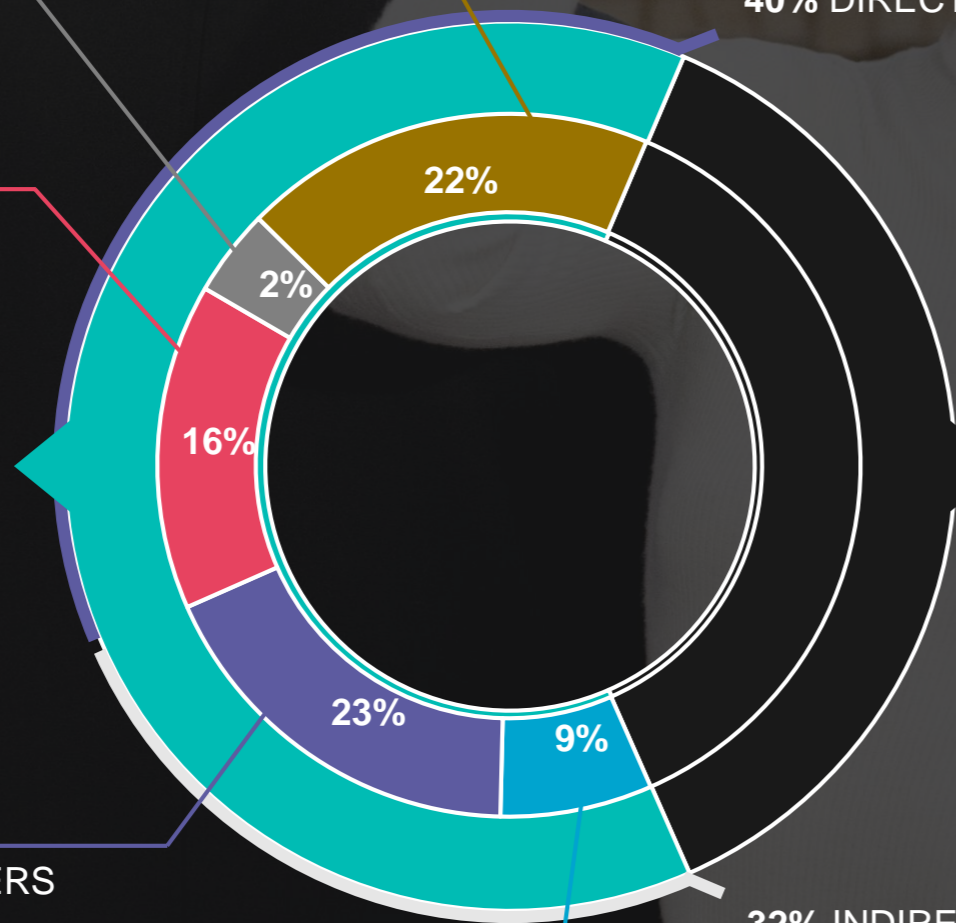
ACCOR WEB
ALL.ACCOR.COM + APP
BRAND.COM

72%

OF SOFITEL ROOM
REVENUE COMES
THROUGH ACCOR
CENTRAL
RESERVATION
SYSTEM

WEB PARTNERS
(OTAs)

GDS/IDS



40% DIRECT SALES

28%
HOTEL
PMS

32% INDIRECT SALES

FOCUS WEB
(ACCOR WEB + WEB PARTNER)

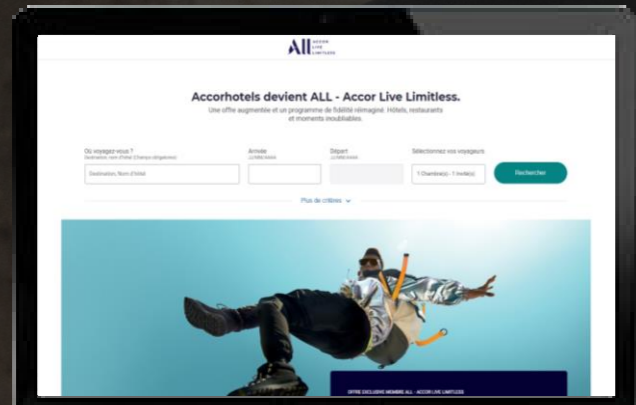
39%

2M ROOM NIGHT
€500M ROOM REVENUE

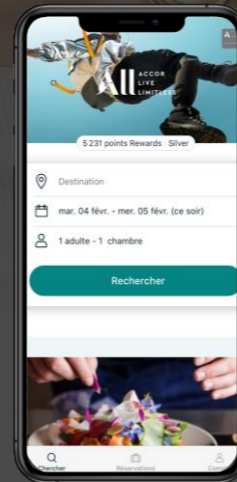
NEW BOOKING ENGINE & APP



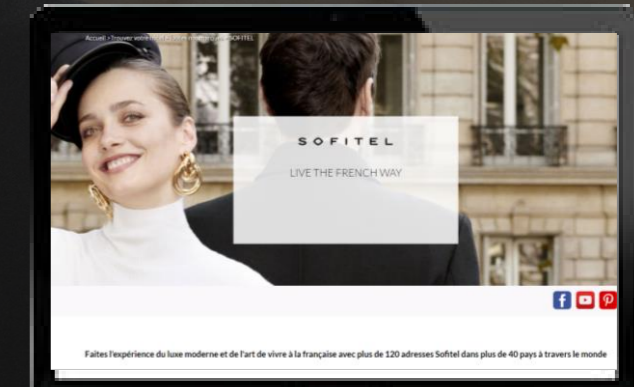
1 MULTIBRAND PORTAL ALL.ACCOR.COM



1 LIFESTYLE COMPANION APP



18 BRAND.COM WEBSITES



- **300M** Website + App visits
- **2,200** Destinations
- **18** Languages

- **56%** Mobile and App visits*
- **1** Download every minute

- Plugged to **ALL.ACCOR.COM**

*year 2019 + from dec 2019-to Mid Feb 2020, since launch of ALL

NEW LOYALTY PROGRAM



THE ONLY LIFESTYLE LOYALTY PROGRAM

NEW LIMITLESS EXPERIENCES AND EXTENDED OPPORTUNITIES TO EARN & REDEEM POINTS

NEW BENEFITS

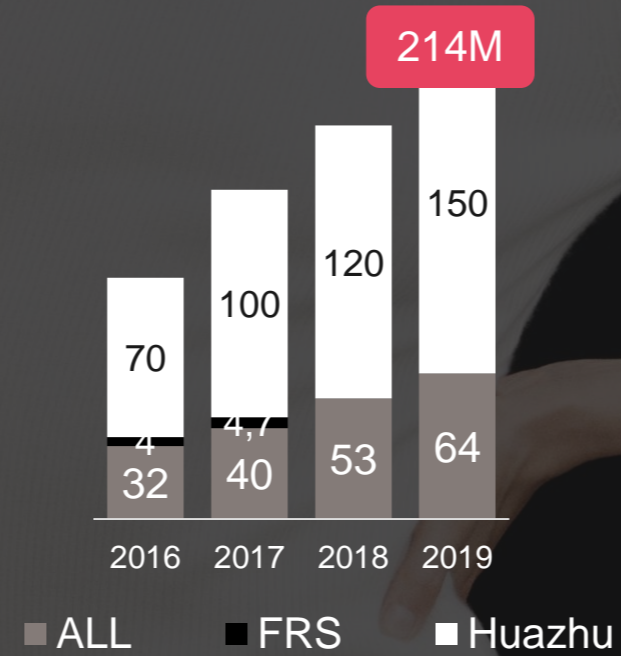
- **2** New tiers (diamond & limitless hidden tier)
- **34** Brands and +
- **Suite Night Upgrade**
- **F&B** outside a stay

NEW PARTNERSHIPS

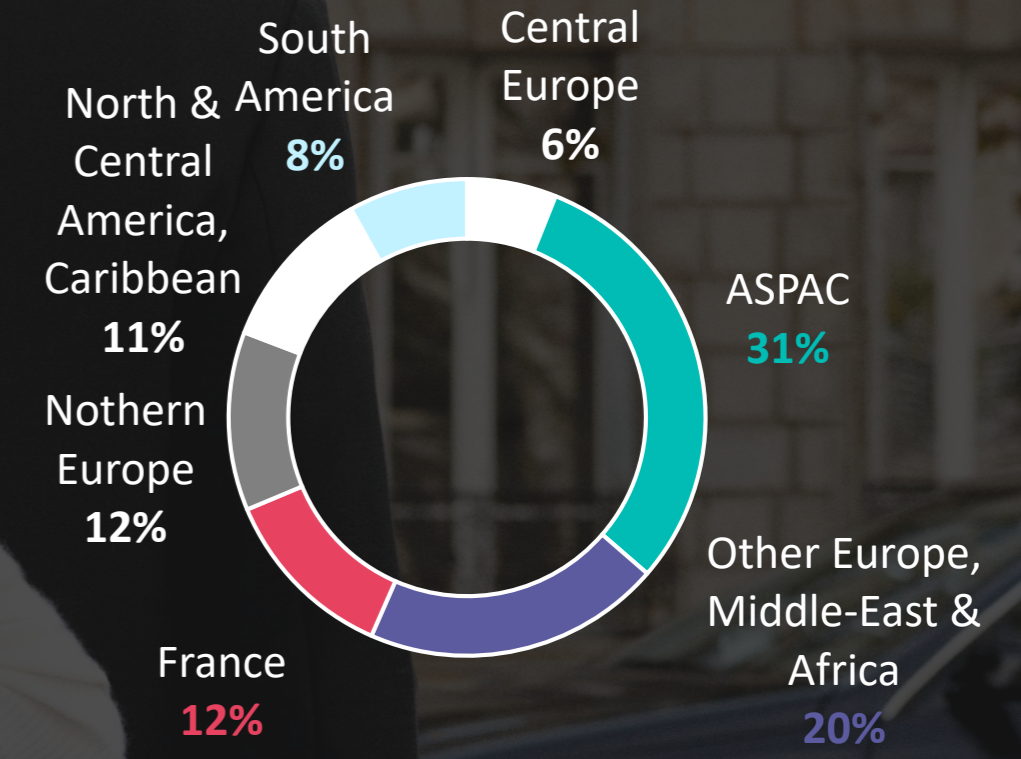
- **PSG** – Games / Net media value +€200m to ALL
- **AEG** – Worldwide arenas & festivals
- **IMG** – Taste festivals

THE FAST GROWING LOYALTY PROGRAM

- **64M** Loyalty members worldwide
- **31%** Loyalty contribution rate
- **X 2** Members stay twice more
- **X 2** Members spend twice more



THE MOST GLOBAL LOYALTY PROGRAM



APPENDIX



COMPETITION



INTERCONTINENTAL
HOTELS & RESORTS

CONRAD™
HOTELS



JW MARRIOTT®



SHANGRI-LA
HOTELS *and* RESORTS

DEVELOPMENT CRITERIA

HOTEL

RESORT

AAA ULTRA CITY CENTER
LOCATION, HISTORIC
CONVERSION

WORLDWIDE

RECOMMENDED
NUMBER OF ROOMS

150 – 250 keys

200 – 250 keys

ROOM AVERAGE SIZE

-10/-15% of worldwide

40 sqm and +

TGFA / ROOM

75 – 90 sqm

90 – 110 sqm

RECOMMENDED
NUMBER OF ROOMS

150 – 250 keys

200 – 250 keys

ROOM AVERAGE SIZE

40 sqm + balcony

45 sqm + balcony

TGFA / ROOM

110 – 150 sqm

120 – 165 sqm

FOOD & BEVERAGE

1 Breakfast Restaurant
1 Destination Restaurant
1 Destination Bar
Additional F&B ⁽¹⁾

WELL-BEING

SoSpa
SoFit
Swimming pool

MEETINGS

Club Milesime
Magnifique meetings & events
Ballroom ⁽¹⁾
Business Centre available
Kids Club (Le Petit Prince / Villa des Enfants) ⁽¹⁾

PRIME
LOCATIONS

SECONDARY
LOCATIONS

AIRPORTS
SUBURBS

INTERNATIONAL
CAPITALS
KEY CITIES & RESORTS

MAJOR DOMESTIC
DESTINATIONS

OTHER CITIES &
ATTRACTIVE TOURISTIC
DESTINATIONS

DESIGN & TECHNICAL SERVICES Guidelines



SOFITEL DESIGN BRIEF

Can be used before HCSA is signed



SOFITEL STYLE BOOK

Can be used before HCSA is signed

WHAT'S HAPPENING IN 2020 ?

- Construction & Renovation Standards
- Art & Styling Guidelines

