

**RAFFLES**  
HOTELS & RESORTS

# WHY INVEST IN RAFFLES

ACCORHOTELS GLOBAL DEVELOPMENT

FEBRUARY 2018

# An oasis for the Well Travelled Delivering Emotional Luxury



A destination

A beacon

A safe haven

A place to refresh and recuperate

Calm and vibrant

Where cultures meet

Where stories are told

Meaning different things to different people

Discerning

Culturally aware

Knowledgeable and worldly

Pioneering

Not for all



92/100  
High E-reputation  
performance & positive  
guest perception

# Raffles Has Real Value Around The World



€78  
Brand average rate  
premium versus  
independent hotels

84%  
of guests qualify  
Raffles as iconic

Figures as of end 2017

# One of the world's iconic hotel brand

Current Portfolio: 11 hotels, 1,927 rooms • Pipeline: 8 properties • 100% Managed hotels





# RAFFLES

SINGAPORE

*When at Raffles,  
why not visit Singapore?*

*103 rooms*



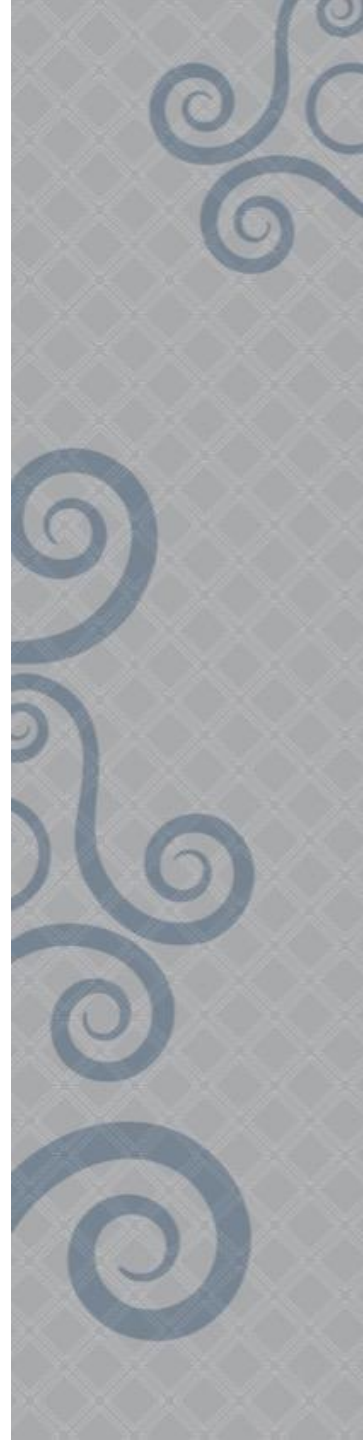


RAFFLES

LE ROYAL MONCEAU  
PARIS

*Palace & Parisian*

*149 rooms*





RAFFLES

DUBAI  
رافلز دبي

*252 rooms*





# RAFFLES

HAINAN

海南莱佛士酒店

*321 rooms*







RAFFLES

PRASLIN  
SEYCHELLES

*86 rooms*





# RAFFLES

HOTEL LE ROYAL  
PHNOM PENH CAMBODIA

*175 rooms*





# RAFFLES

GRAND HOTEL D'ANGKOR  
SIEM REAP CAMBODIA

*119 rooms*

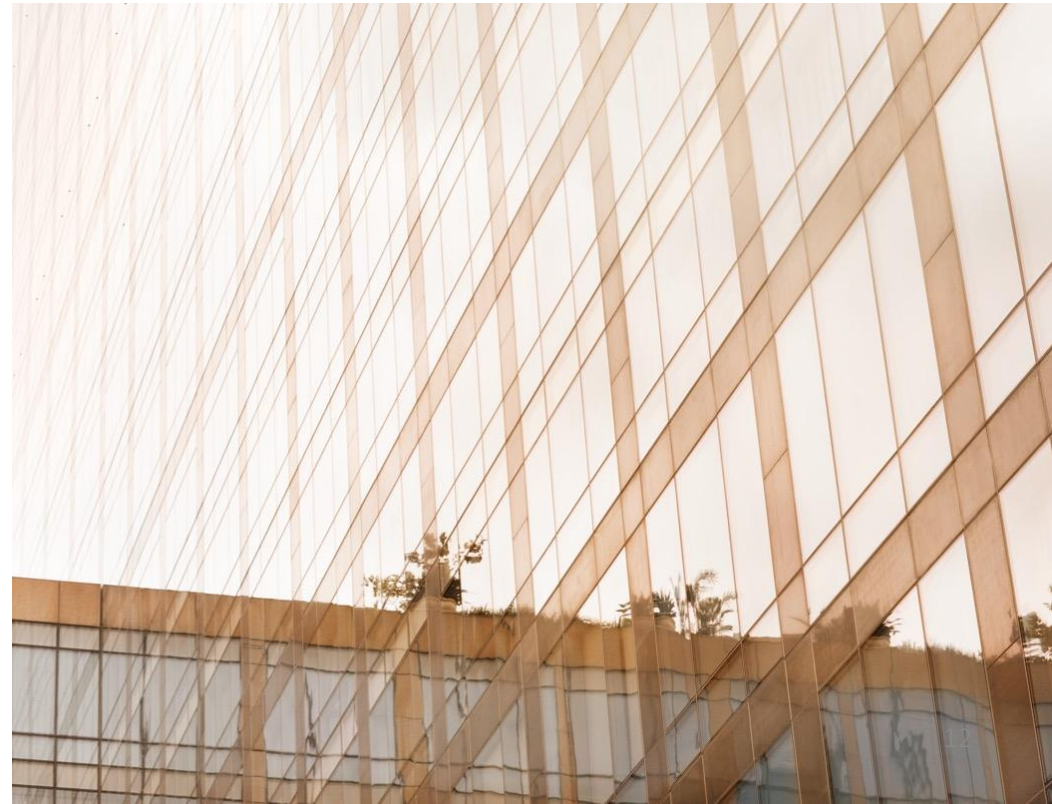
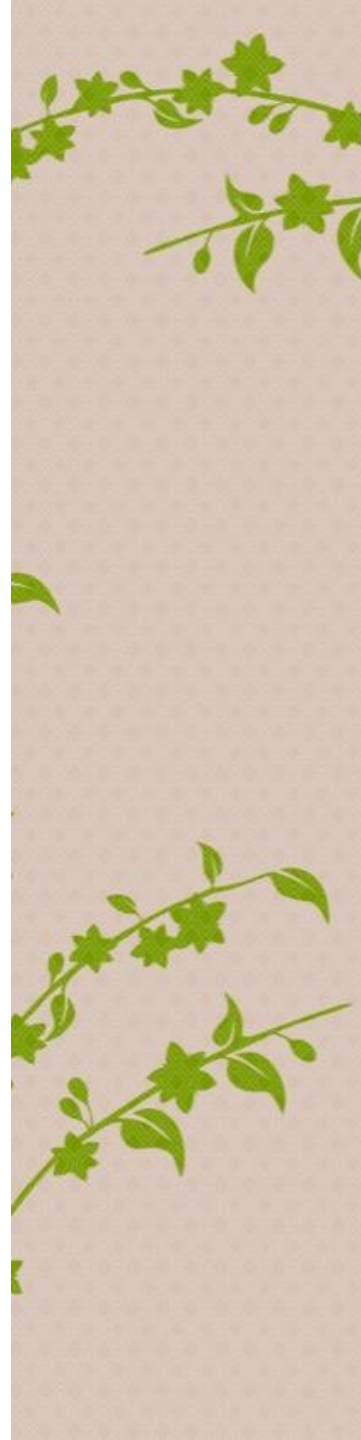




# RAFFLES

MAKATI

*150 rooms*



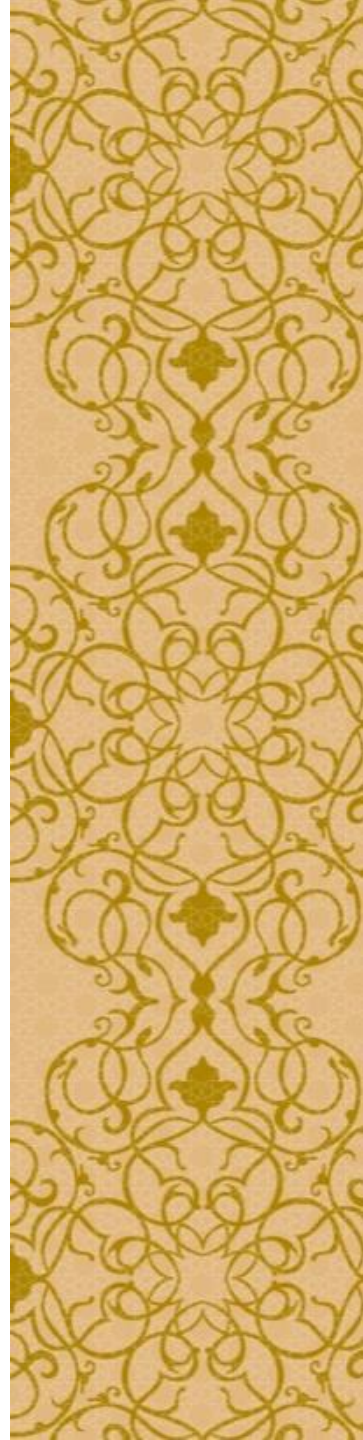


RAFFLES

MAKKAH PALACE  
SAUDI ARABIA

قصر مكة رافلز

*214 rooms*

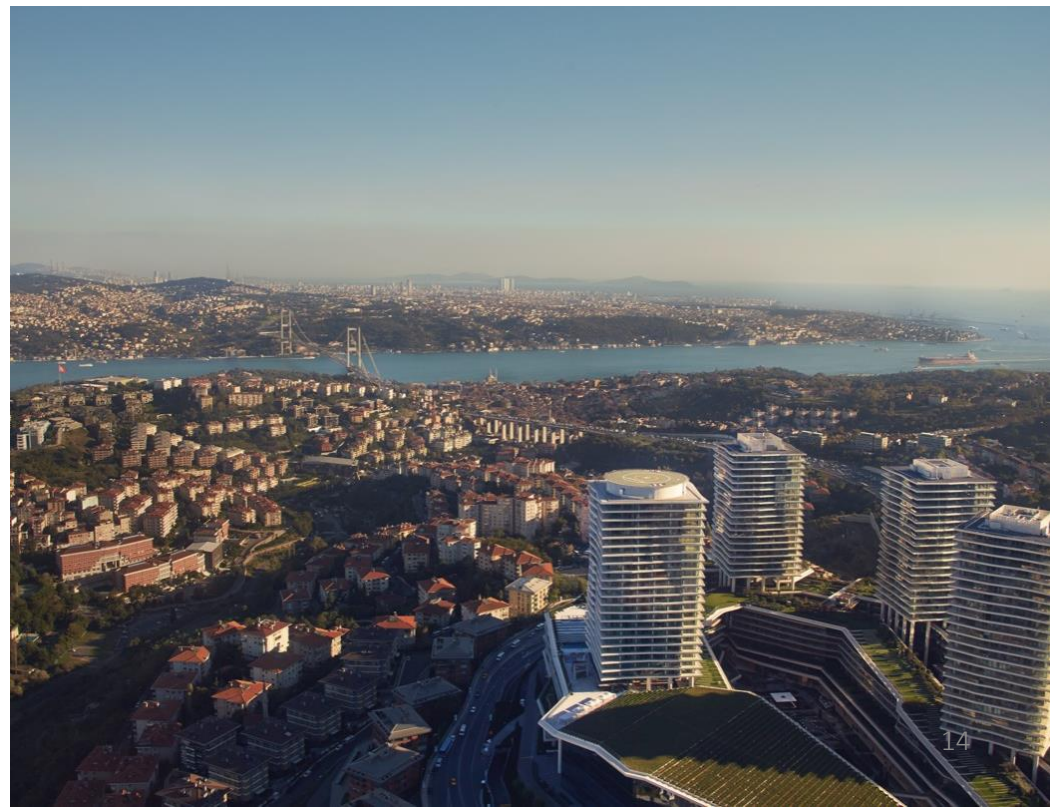




# RAFFLES

ISTANBUL

*185 rooms*





# RAFFLES

JAKARTA

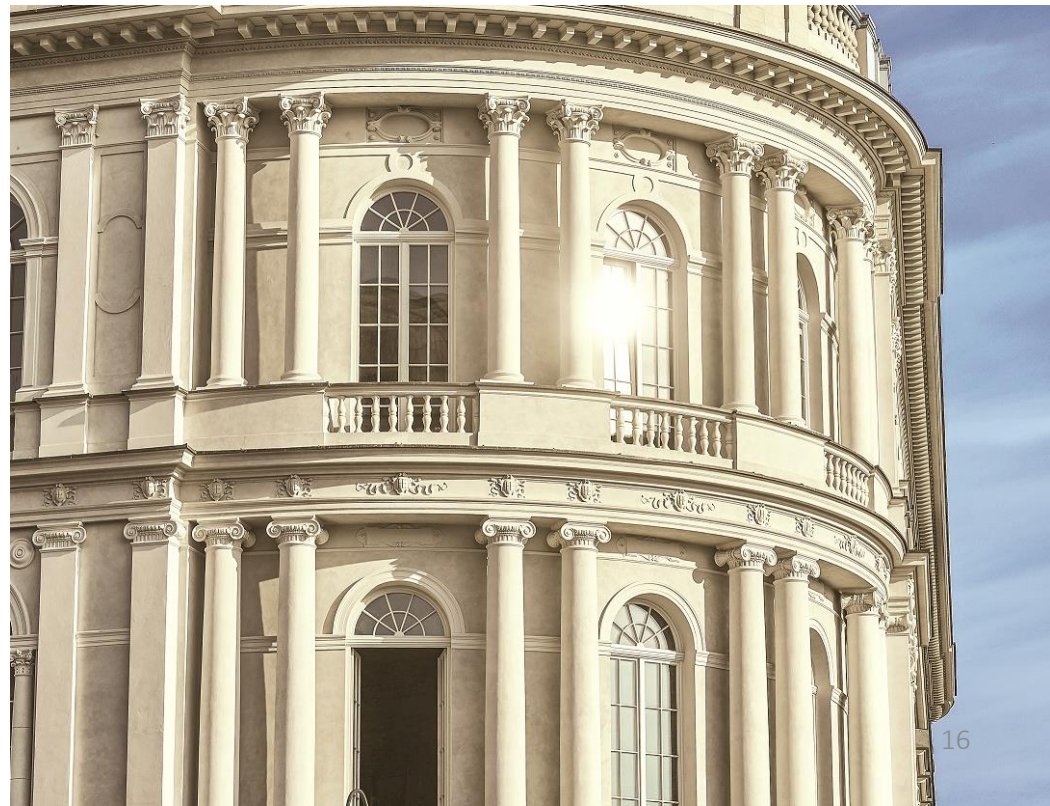
*173 rooms*





RAFFLES

EUROPEJSKI  
WARSAW





*Future Raffles Projects*



**China**

Shenzhen (2019) – 154 rooms

**China**

Suzhou (2022) – 153 rooms

**Greece**

Mykonos (2021) – 104 rooms

**India**

Udaipur (2019) – 101 rooms

**Saudi Arabia**

Jeddah (2020) – 181 rooms

**U.A.E.**

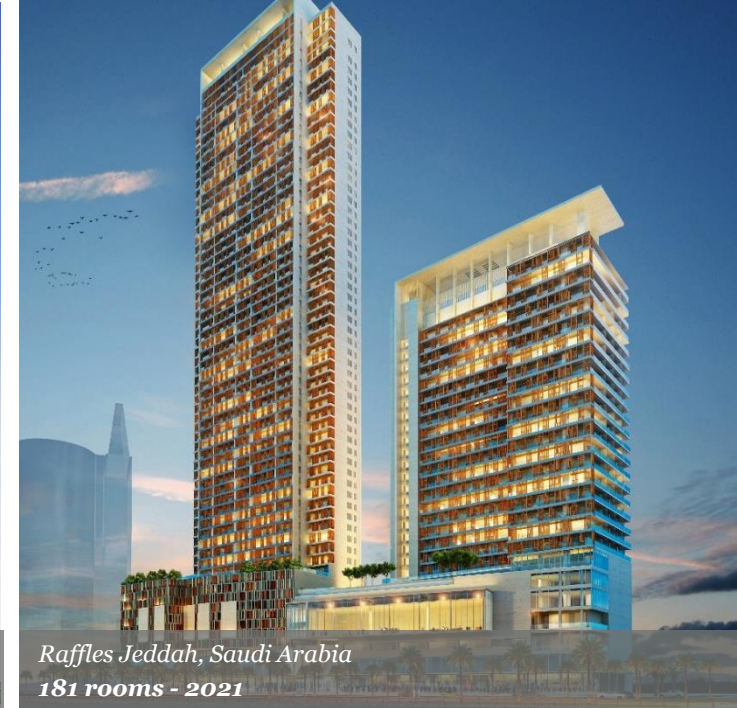
Dubai (2021) – 121 rooms

**U.K.**

London (2021) – 125 rooms



*Raffles The Palm, Dubai, UAE*  
**121 rooms - 2021**



*Raffles Jeddah, Saudi Arabia*  
**181 rooms - 2021**



*Raffles Udaipur, India*  
**101 rooms - 2019**



*Raffles London, United Kingdom*  
**125 rooms - 2020**



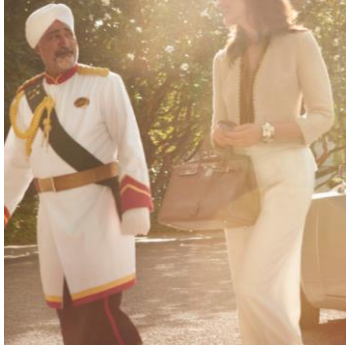
# Signature Products & Services

Our hotels provide a sense of place unique to Raffles. Not a colonial reproduction but about a pioneering sense of style and attitude.

From arrival, the environment, both inside and out whether it be an urban, resort or heritage property is always:

- elegant
- welcoming
- of its culture

# Visit



## *The Grand Welcome*

Pre-Arrival Contact from  
Private Butler

Always greeted by the  
Iconic Raffles Doorman  
(sense of ceremony and security)

In-Car check-in prior to  
arrival or In-Room check-  
in

The Red Carpet

Dedicated/Private VIP  
Arrival



## *The Grand Hall*

Grand sense of arrival  
Majestic in feel, elegantly  
and moderately scaled

Bespoke designed  
botanical features

Calm and intimate spaces  
to connect and converse  
Lighting to accentuate the  
architecture and its  
grandeur

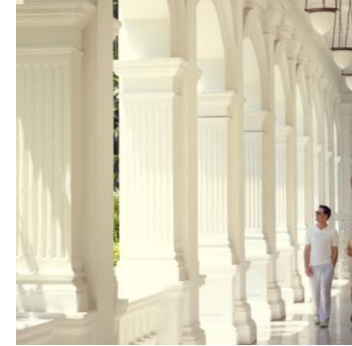


## *The Verandah*

A place to take in the  
amazing view...  
and breathe

Inviting indoor and  
outdoor connections  
in all living spaces

Bringing the Greenery of  
nature indoors through  
outstanding botanicals  
and romantic scents  
Celebrating a flair for the  
exotic



## *The Colonnade*

Long corridor fit for  
royalty

Tradition of grandeur

Special photographic  
spaces

Places to wander and  
discover



*Why invest in Raffles – February 2018*

Positioning | Key figures | Network & pipeline | **Key identifiers** | Communication | Performance

# Stay



## *Space, Privacy & Time*

Pre-Arrival Contact from Private Butler  
Always greeted by the Iconic Raffles Doorman (sense of ceremony and security)  
In-Car check-in prior to arrival  
or In-Room check-in  
The Red Carpet  
Dedicated/Private VIP Arrival



## *Personality Suites*

Grand sense of arrival  
Majestic Named after historical luminaries relevant to hotel history or culture  
Art, literature, photographs, memorabilia, music or movies showcasing the luminaries and their passion



## *The Writers Desk*

A well-appointed desk, suitable for work or dining  
A connection to Raffles' tradition  
The style of a traditional writer's desk with the technology to meet modern working standards  
A minimum of two-person dining when used in standard rooms



## *The Raffles Butler*

"Service like a Gentle Breeze"  
You never realize they are there, but you always miss them when you leave  
Pre-arrival contact with guest to note their in-room preferences  
24-Hour availability  
Dedicated Butler's Pantry on every guest room floor



## *Raffles Spa*

Each spa concept is unique to location, local culture and traditions  
Celebrating local rituals and healing treatments  
Focus on privacy  
Dedicated beauty and wellness offerings in specific markets  
Journey for the Senses



*Why invest in Raffles – February 2018*

# Dine



## *Destination Dining*

Diverse dining experiences to engage different segments  
All restaurants and food concepts to be developed by F&B specialist consultants with our F&B team

### **Destination Bar – The Long Bar\***

A lively vibrant bar with a warm welcoming atmosphere  
Signature long bar as feature element. Signature cocktails & rituals connected to the story and location. Dedicated street entrance



## *Destination Dining*

### **Library Lounge – The Writer's Bar\***

Quiet intimate bar/lounge dedicated for hotel guests or Raffles Club  
Residential feel transforms from day to night  
Access from within the hotel  
In some locations, a cigar lounge or humidor room



## *Destination Dining*

### **Raffles Patisserie\***

Retail focus with Bespoke Packaging  
Can also service the Lobby Lounge or Writer's Bar  
External street + hotel entrances

### **Raffles Afternoon Tea**

Tea cart service with ceremonial flair  
Best of British tradition with a slice of local interpretation



## *A collaboration with Sipsmith*

Raffles 1915 Gin is a sensational balance of botanicals found in Asia – jasmine flowers, fresh pomelo peel, lemongrass, Kaffir lime leaf, nutmeg and cardamom.



# Communication

## Raffles Magazine



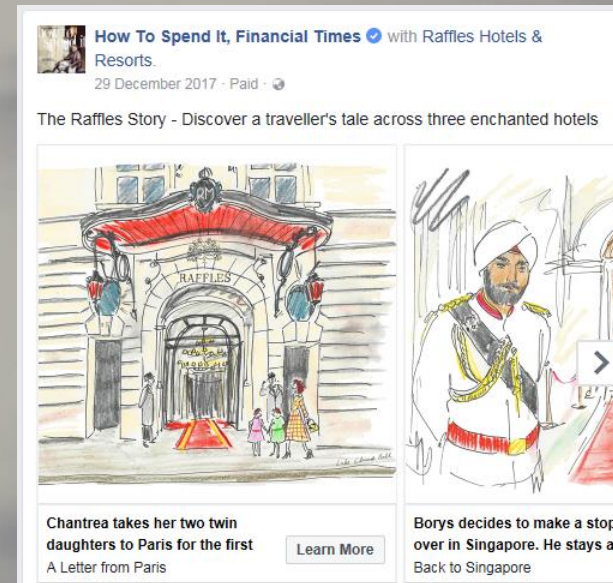
## Mobile Advertising



Our mobile advertising partner allows us to work with a number of premium lifestyle brands including British Airways and Harrods, to serve full screen advertisements in their apps

## Content partnership

Special Feature with Financial Times (Dec17 – Jan18)



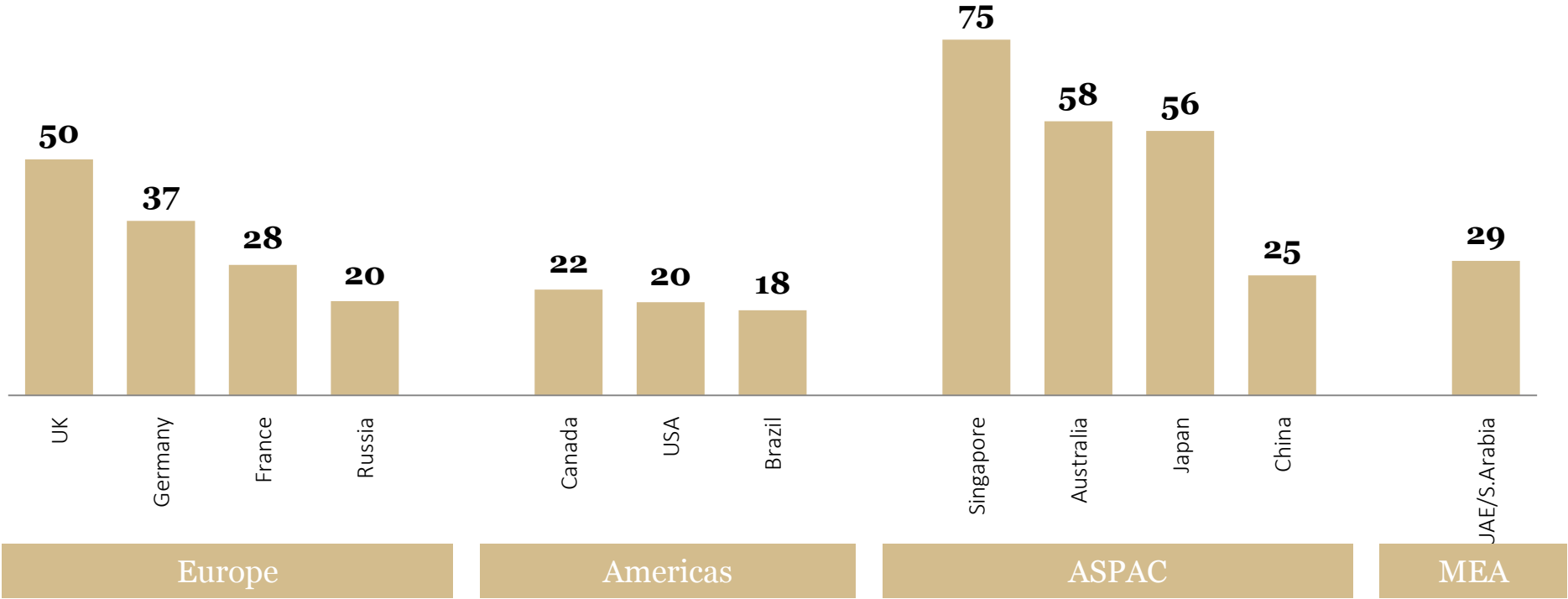
## Digital Advertising

Working with quality publishers such as Condé Nast or Hearst and selected bloggers, we can utilize existing and newly commissioned Raffles content to build dedicated pages on their websites. Adds credibility to our brand message and content, whilst amplifying it to a broader audience

Why invest in Raffles – February 2018

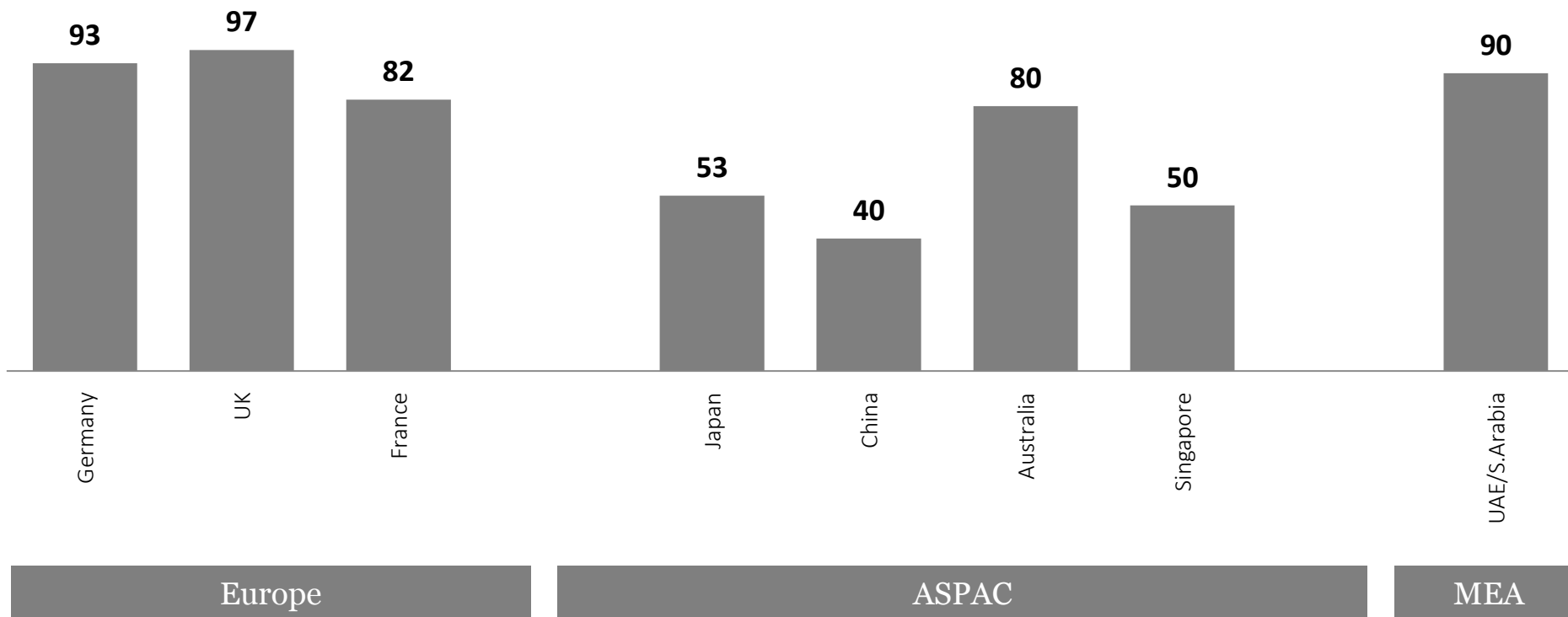
# Raffles Total Awareness

Strong awareness among affluent and engaged luxury hotel users



Figures as of end 2017. Base: people having stayed in paid-for accommodation in the last 12 months

# Raffles Brand Margin®



## Brand Margin® in €

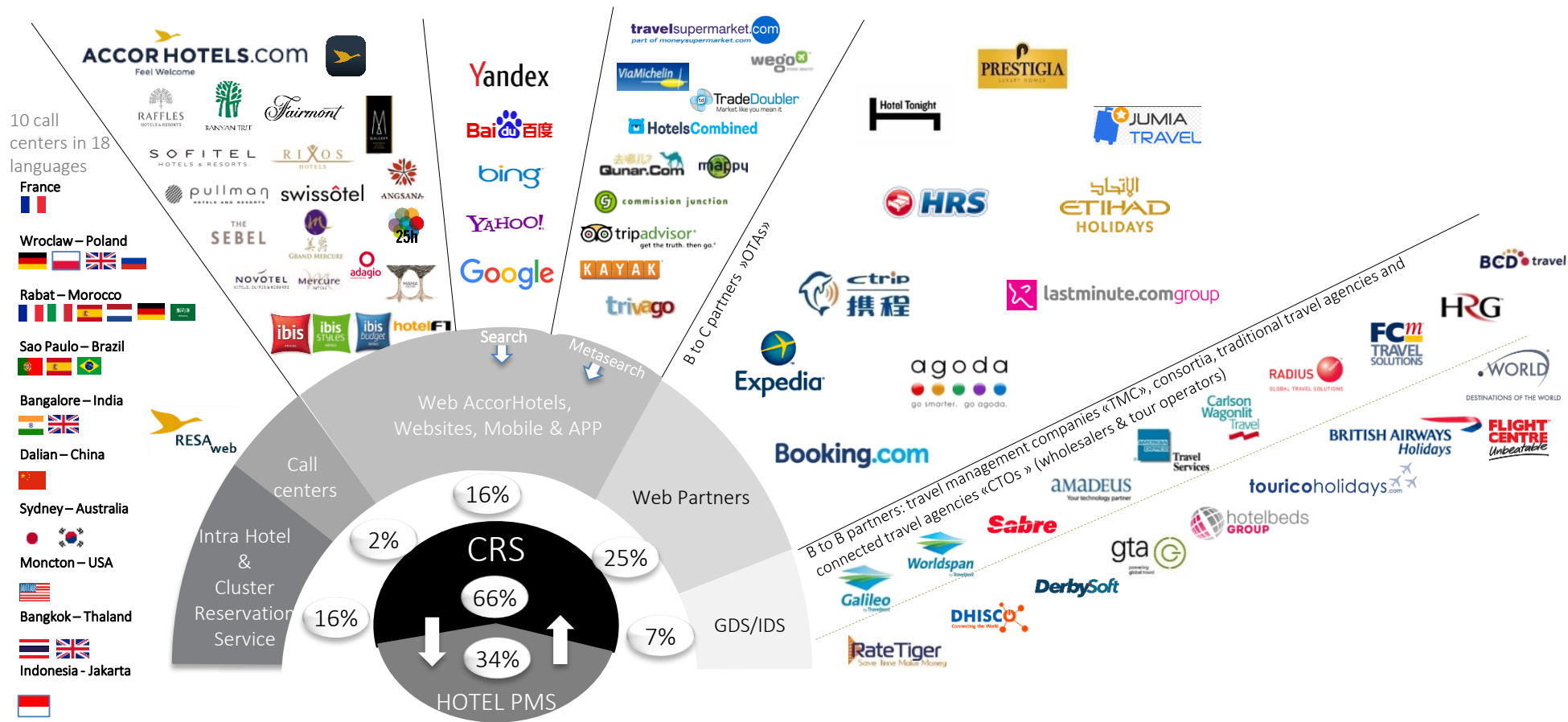
Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative. A Brand Margin® of 10€ means that « Consumers think it is worth paying on average 10€ more per night to stay with brand X compared to an unbranded equivalent ».

Brand Margin® in €. Traveller representative  
Figures as of end 2017



# AccorHotels Distribution Solution

AccorHotels offers > 110 Global distribution partnerships at best market conditions

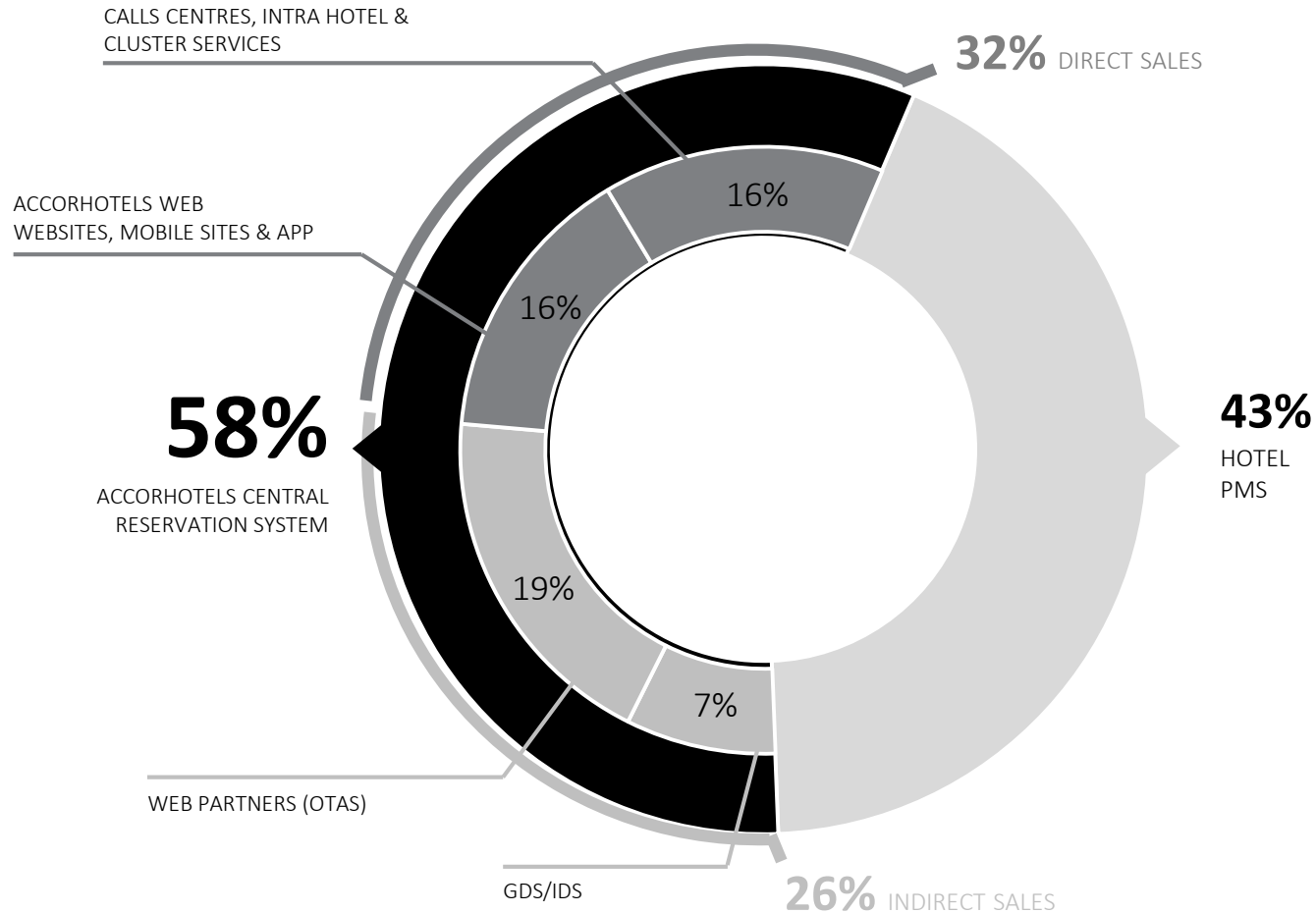


Figures as of end 2017

Why invest in Raffles – February 2018

# AccorHotels Distribution Performance

## LUXE Brands



**FOCUS ON WEB DIRECT**  
 AccorHotels.com + brands.com  
 + mobile websites

**16%** WEB ACCORHOTELS  
 ONLINE DIRECT SALES

**+60%** MOBILE GROWTH  
 (LUXE BRANDS ROOM REVENUE)

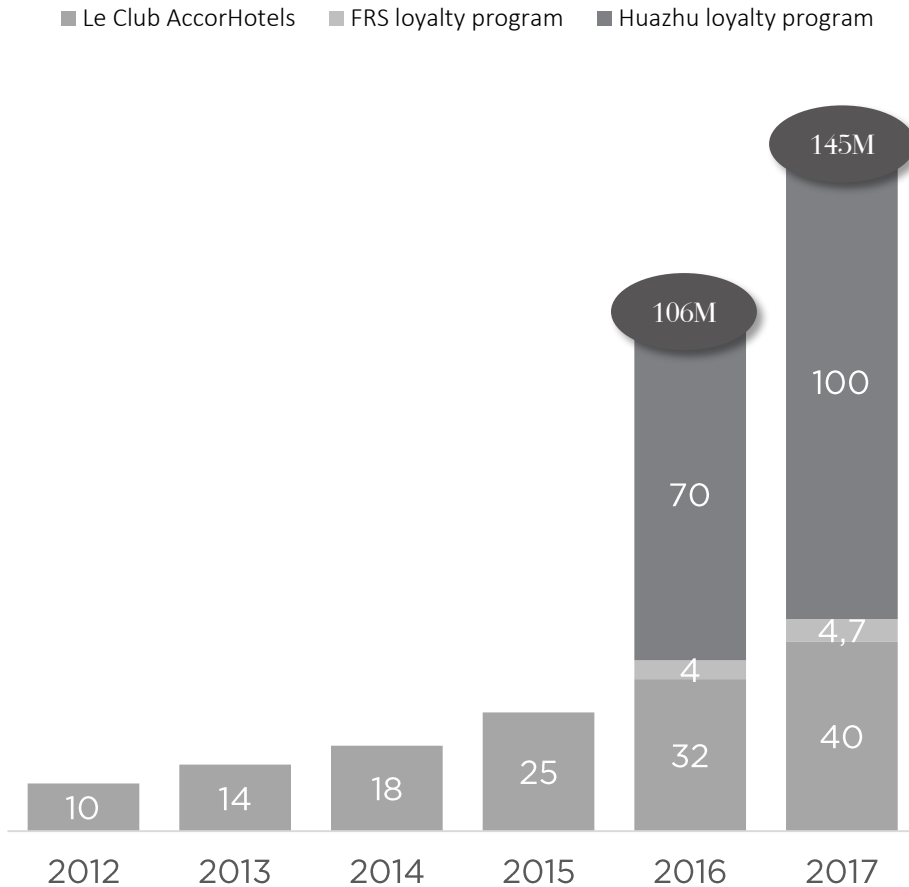
**6.1M** RAFFLES ROOM  
 REVENUE

Figures as of end 2017

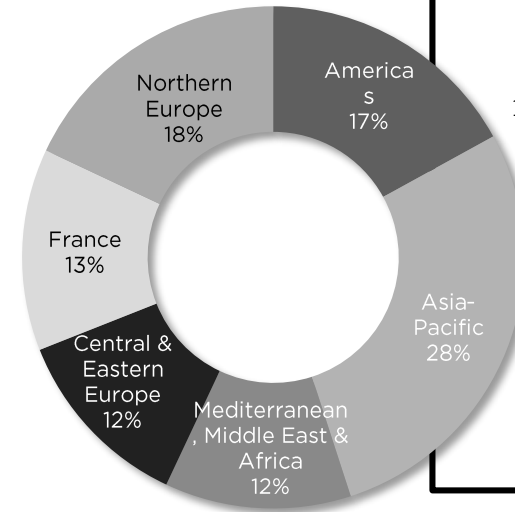
# Le Club AccorHotels

AccorHotels owns the most powerful international program

## Loyalty members - Worldwide



## Guests' origin - Worldwide



### A Worldwide program:

- 14 brands
- 3,400 hotels in 93 countries
- Free enrollment
- 100% Web based program
- More than 23,000 new members every day
- Le Club AccorHotels represents 30.6% of AccorHotels revenue
- Partnerships with large Airlines loyalty program: Skyteam, One World, Star Alliance...

**>40 MILLION**  
MEMBERS WORLDWIDE

**+23,000**  
MEMBERS EVERY DAY

**30.6%**

GLOBAL AVERAGE  
CONTRIBUTION TO  
HOTEL'S REVENUE

Figures as of end 2017

# Raffles performance

## RevPAR Index as of end 2017

ISTANBUL  
One Raffles Hotel with  
RevPAR index = 152

DUBAI & MAKKAH  
Two Raffles Hotels with  
RevPAR index = 181 to 222

CHINA  
One Raffles Hotels with  
RevPAR index = 105

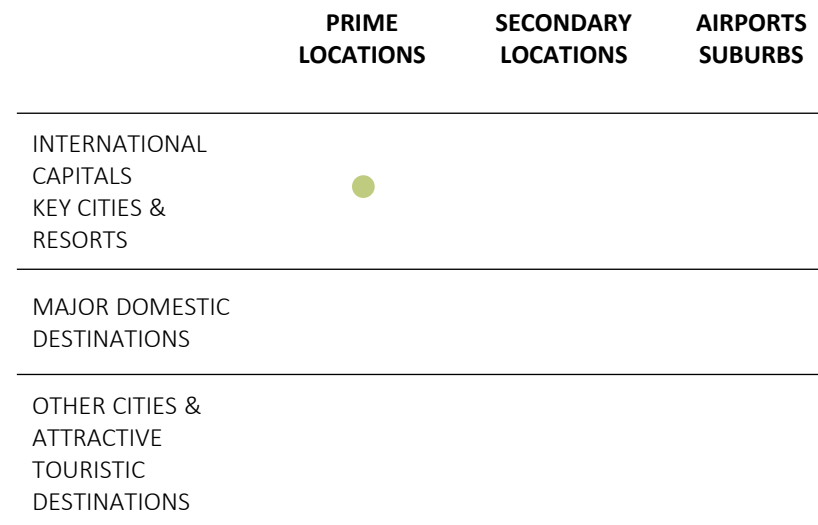
SINGAPORE  
One Raffles Hotels with  
RevPAR index = 105

CAMBODIA  
One Raffles Hotels with  
RevPAR index = 116

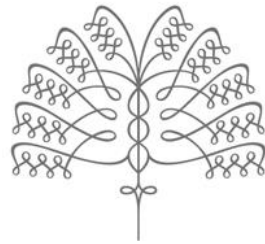
# Development Criteria

## Programming & Development Recommendation

	AAA ultra city center location, historic conversion	WORLDWIDE
<b>HOTEL</b>		
<b>RECOMMENDED NUMBER OF ROOMS</b>	70 – 200 keys	100 – 200 keys
<b>ROOM AVERAGE SIZE</b>	-10/-15% of worldwide	60 sqm and +
<b>TGFA / ROOM</b>	-10/-15% of worldwide	130 – 150 sqm
<b>RESORT</b>		
<b>RECOMMENDED NUMBER OF ROOMS</b>	40 – 80 villas	60 – 100 villas
<b>ROOM AVERAGE SIZE</b>	75 sqm indoor +outdoor	90 sqm indoor +outdoor
<b>TGFA / ROOM</b>	150 – 170 sqm	170 – 210 sqm
<b>FOOD &amp; BEVERAGE</b>	2 restaurants Specialty restaurant <sup>(1)</sup> 1 Long Bar (urban only) 1 Writers Bar Raffles Patisserie	
<b>WELL-BEING</b>	Raffles Spa <sup>(1)</sup> Luxury fitness centre Swimming pool	
<b>MEETINGS</b>	Meeting rooms <sup>(1)</sup> Bellroom <sup>(1)</sup> Raffles Library Business Centre available	



(1) Based on market demand



**RAFFLES**  
HOTELS & RESORTS