



# WHY INVEST IN FAIRMONT

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ACCOR GLOBAL DEVELOPMENT  
FEBRUARY 2019



UNFORGETTABLE. SINCE 1907.

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At Fairmont, our passion is to connect our guests to the very best of our destinations. From the beaches of Hawaii to the deserts of the United Arab Emirates to the heart of London, our hotels offer guests extraordinary places, created by combining unique architecture, expressive decor and artistry, and magnificent features. Add great service, and the result is an unforgettable guest experience.

CHARISMATIC   THOUGHTFUL   CHERISHED   EXCEPTIONAL

# FAIRMONT TOP 3 USP's

## BRAND MOMENTUM

- Worldwide footprint with near 80 hotels
- Brand momentum & awareness in the USA, Middle East & Asia
- Iconic & historic and modern new built hotels
- Business and resorts hotels

X

## HEART OF THE DESTINATION

- Connection between the hotel and the destination
- Connection between the guest and the destination
- Connection between the hotel and the guest

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## PROFITABLE BUSINESS MODEL

- Large sized hotels with 400 rooms on average
- Luxury high driven average room rate and brand premium
- MICE, F&B, outside catering generate > 40% of hotel total revenue

# NETWORK AND PIPELINE

Official figures as of end 2018



Geographical  
Split

## AMERICAS

**NETWORK**  
42 Hotels  
19,544 Rooms

**PIPELINE**  
4 Hotels  
1,014 Rooms



## EUROPE

**NETWORK**  
9 Hotels  
2,687 Rooms

**PIPELINE**  
2 Hotels  
318 Rooms



## ASIA PACIFIC

**NETWORK**  
11 Hotels  
3,393 Rooms

**PIPELINE**  
7 Hotels  
2,774 Rooms



## AFRICA - MIDDLE EAST

**NETWORK**  
14 Hotels  
4,652 Rooms

**PIPELINE**  
9 Hotels  
2,911 Rooms

**76** HOTELS

**30,276** ROOMS

**26** COUNTRIES IN 2018

**22** NEW HOTELS BY 2023

**7,017** NEW ROOMS BY 2023

## OPERATING MODE

98%  
Managed

2%  
Franchised



# FLAGSHIPS

THE SAVOY (UK)

*Fairmont*





# FLAGSHIPS

THE PLAZA (US)

282 ROOMS

*Fairmont*





# FLAGSHIPS

FAIRMONT SAN FRANCISCO (US)

606 ROOMS

*Fairmont*





# FLAGSHIPS - RESORTS

*Fairmont*

FAIRMONT BANFF SPRINGS (CANADA)

764 ROOMS





# FLAGSHIPS - RESORTS

FAIRMONT THE PALM DUBAI (UAE)

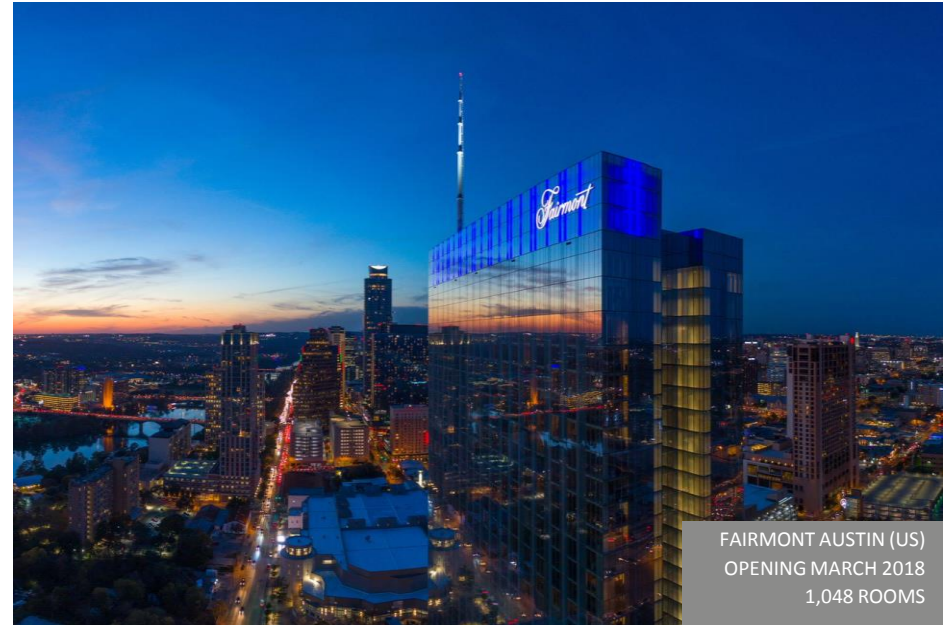
381 ROOMS

*Fairmont*





## LATEST OPENINGS





# KEY UPCOMING OPENINGS

## EUROPE

**FAIRMONT MYKONOS, GREECE** 176 ROOMS, FEBRUARY 2021  
**FAIRMONT MOSCOW MAYAKOVSKAYA, RUSSIA** 142 ROOMS,  
MARCH 2021

## ASIA – PACIFIC

**FAIRMONT WUHAN, CHINA** 324 ROOMS, APRIL 2019  
**FAIRMONT GUIYANG, CHINA** 363 ROOMS, JUNE 2019  
**FAIRMONT KUALA LUMPUR, MALAYSIA** 690 ROOMS, MARCH 2020  
**FAIRMONT AMBASSADOR SEOUL, SOUTH KOREA** 326 ROOMS, JULY  
2020  
**FAIRMONT PHU QUOC RESORTS & RESIDENCES, VIETNAM** 230 ROOMS,  
DECEMBER 2022  
**FAIRMONT MUMBAI SAHAR, INDIA** 566 ROOMS, DECEMBER 2022

## AMERICAS

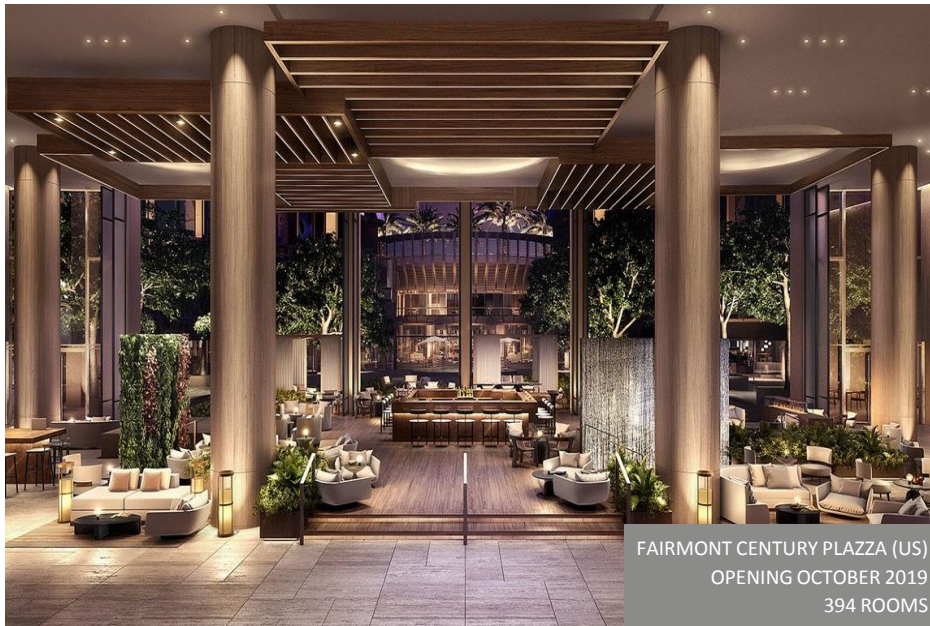
**FAIRMONT CENTURY PLAZZA** 394 ROOMS, OCTOBER 2019  
**FAIRMONT NEW ORLEANS, UNITED STATES OF AMERICA** 2502 ROOMS,  
JANUARY 2020  
**FAIRMONT COSTA CANUVA, MEXICO** 250 ROOMS, OCTOBER 2021  
**FAIRMONT SAINT LUCIA, UNITED STATES OF AMERICA** 120 ROOMS,  
OCTOBER 2021

## AFRICA – MIDDLE EAST

**FAIRMONT SHARM EL-SHEIK, EGYPT** 414 ROOMS, JANUARY 2020  
**FAIRMONT RABAT, MOROCCO** 274 ROOMS, MARCH 2020  
**FAIRMONT TEHRAN IRAN MALL, IRAN** 359 ROOMS, JUNE 2020  
**FAIRMONT AL JAZAYER BEACH, BAHRAIN** 213 ROOMS, JANUARY 2022  
**FAIRMONT FOKAH NORTH COAST, EGYPT** 320 ROOMS, DECEMBER  
2022  
**FAIRMONT CAIRO PYRAMIDS HOTEL & RESIDENCE, EGYPT** 250  
ROOMS, DECEMBER 2022  
**FAIRMONT JEDDAH, SAUDI ARABIA** 315 ROOMS, JANUARY 2022



## KEY UPCOMING OPENINGS





# DESIGN PHILOSOPHY

## CONTEMPORARY, TIMELESS AND UNRIVALED PRESENCE:

Sophisticated materials enhanced by subtle artwork collections to create inspiring atmospheres, a forward-thinking spirit empowered by local anchorage and authenticity. Every hotel is unique and original, a perfect setting for unforgettable experiences.





# 4 PASSIONS

## ENGAGING SERVICE

At the heart of our service promise is our people; thoughtful in everything they do, and empowered with the tools to deliver a service experience that builds lasting memories.



## HEART OF THE COMMUNITY

For over a century we have been intrinsically tied to the communities we call home; we are the place where cherished moments are celebrated, and where history is made.

## LEADING SUSTAINABILITY

Sustainability comes naturally to us; from creatively greening our operations to caring for our local communities, we have always assumed the role of protectors of our environments.



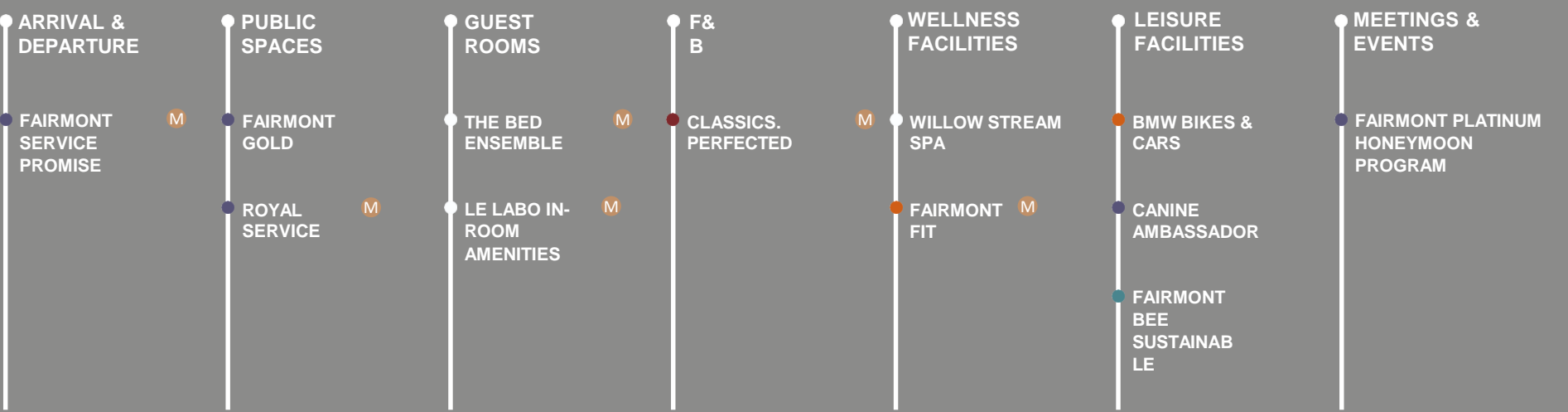
## INSPIRED F&B

Our menus both nourish and inspire our local and hotel guests by offering the most immersive experiences reflecting the best of each destination.





# EXHAUSTIVE PROGRAMS



- Engaging Service
- Heart of the Community
- Authentic F&B
- Leading Sustainability
- Mandatory



# KEY PROGRAMS

## FAIRMONT GOLD

Fairmont Gold offers an elevated guest experience for the discerning customer looking for exclusivity and enhanced privileges. Fairmont Gold, a hotel within a hotel delivers the perfect balance between privacy and personalization in a sophisticated, warm and inviting environment.

42 hotels in 11 countries: Canada, U.S., Bermuda, Ukraine, Azerbaijan, Philippines, China, UAE, Kingdom of Saudi Arabia, Egypt and India.

Accounts for 10% to 15% of room inventory, but generates (on average) a rate premium of \$150 USD with minimal incremental operating costs.





## KEY PROGRAMS



### FAIRMONT FIT

Fairmont Fit delivers the latest Reebok apparel and footwear, as well as yoga mats and stretch bands to guests based on their personal profile sizes and preferences.



## KEY PROGRAMS



### CLASSICS. PERFECTED.

Fairmont's global cocktail menu is a selection of cocktails created by Fairmont Tastemakers – Fairmont bartenders representing some of our most vibrant and successful bars around the world.

Launched in December, 2015, Fairmont's new cocktail program was rated #1 Hotel Cocktail Program by *USA Today*.





# KEY PROGRAMS

## FAIRMONT BEE SUSTAINABLE

For the past 25 years, Fairmont Hotels & Resorts has been committed to protecting its local environments through its award-winning Fairmont Sustainability Partnership. In 2008, Fairmont saw an opportunity to help combat Colony Collapse Disorder. Placing bee hives on hotel rooftop gardens and other onsite locations helps the environment and appeals to guests' increased desire for local ingredients. As the leading hotel company in this space, Fairmont was the first luxury hotel brand to develop onsite honeybee programming. Today, the Fairmont Bee Sustainable program features over 20 honeybee apiaries and 18 wild bee hotels at Fairmont locations around the world.





## PEOPLE ACTIVATION



### FAIRMONT SERVICE PROMISE: **TURN MOMENTS INTO MEMORIES.**

- Connection between the hotel and the destination
- Connection between the guest and the destination
- Connection between the hotel and the guest



# COMMUNICATION PLATFORM

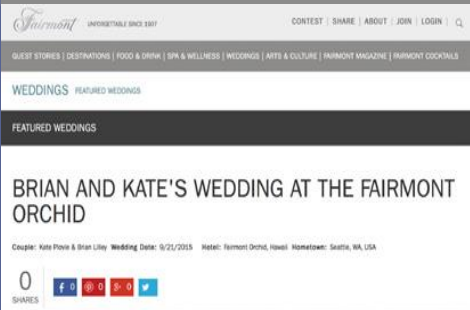
## GLOBAL COMMUNICATIONS CAMPAIGN



## PRINT



## SOCIAL MEDIA & WEBSITE



## FAIRMONT MAGAZINES



# AWARDS

**330 PROMINENT AWARDS ACROSS 43 PROPERTIES, INCLUDING :**

**Condé Nast Traveler Readers' Choice Awards**

The Savoy #1 in United Kingdom/London  
Fairmont Hotel Vier Jahreszeiten #1 in Northern Europe

**Forbes Five Star**

Fairmont Grand Del Mar – hotel, restaurant and spa

**World's Best Bar, 2018 Tales of the Cocktail**

The Savoy

**Luxury Travel Guide**

**Luxury Hotel & Restaurant of the Year**

Fairmont Le Château Frontenac

**Luxury Travel Guide Awards**

**Japanese Restaurant of the Year**

Fairmont Hotel Vier Jahreszeiten

**Hotels.com Loved by Guests**

Fairmont Nile City

**2018 Skytrax World Airport Awards –**

**Top Airport Hotel in North America**

Fairmont Vancouver Airport

**MOST AWARDED PROPERTY IS  
FAIRMONT PEACE HOTEL, SHANGHAI  
WITH 39 NOTABLE AWARDS**

**TOP REGION IS NORTH & CENTRAL  
AMERICA  
WITH 159 AWARDS**







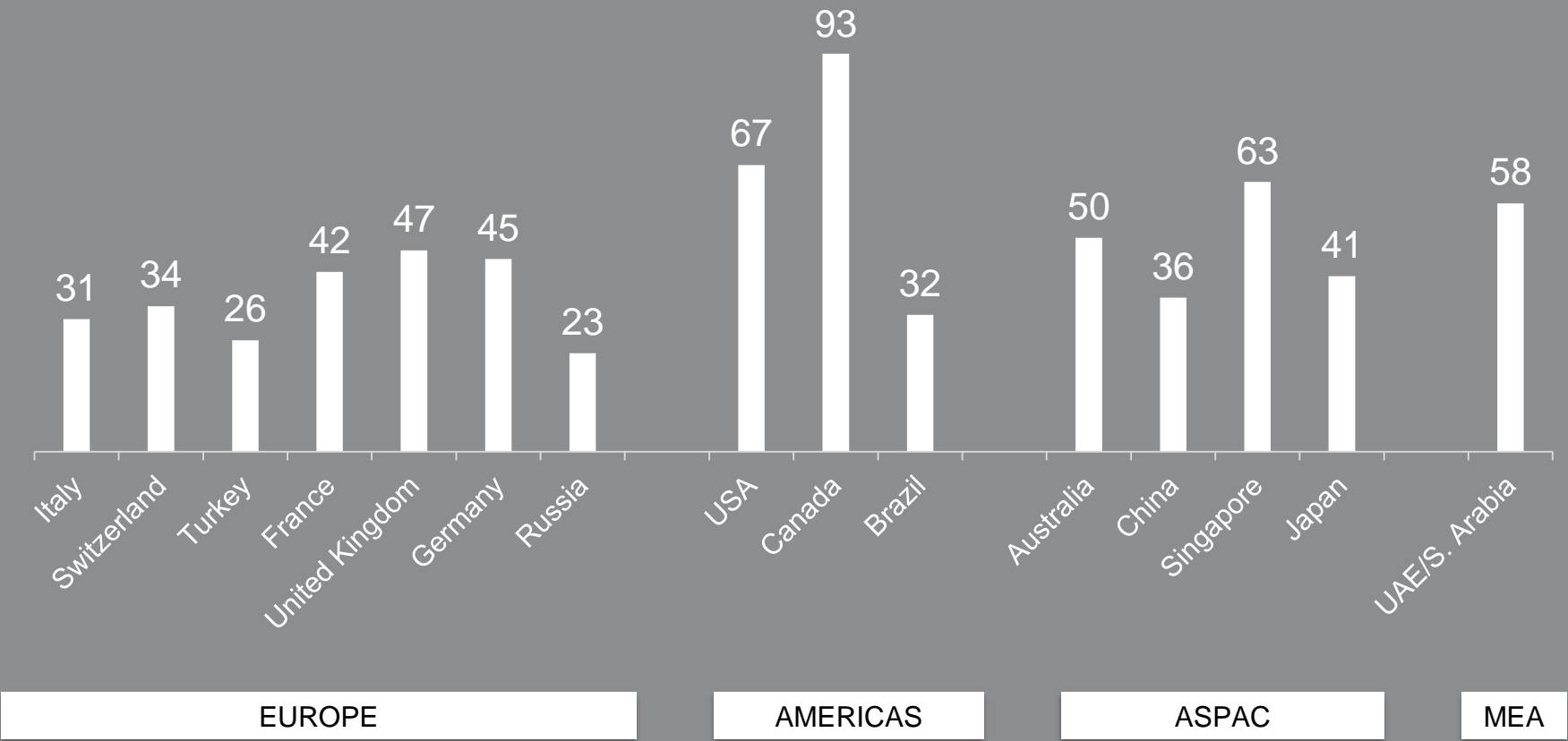


# BRAND PERFORMANCE

<div><div>BRAND AWARENESS</div><div><p>A well-established brand across all 5 continents in the luxury world</p><ul style="list-style-type: none"><li>A leading brand in North America: Total awareness (among affluent travellers) Canada 93%, US 67%</li><li>Total awareness above 40% among affluent travellers in:<ul style="list-style-type: none"><li>UK</li><li>Germany</li><li>Singapore</li><li>Australia</li><li>Middle-East</li><li>France</li><li>Japan</li><li>UAE/S. Arabia</li></ul></li></ul><p>Awareness objectives for 2019 – flat and +1% consider for US consideration</p><div>Source : BEAM by end of 2018</div></div></div>	<div><div>BRAND PERCEPTION</div><div><ul style="list-style-type: none"><li>72% of guests say Fairmont makes them feel like they are in the heart of the destination.</li><li>For 74% of guests, Fairmont is associated with unforgettable grand hotels (82% Canada – 81% Australia - 74% USA – 71% UK)</li></ul><p>Perception objectives for 2019 – flat</p><div>Source : BEAM by end of 2018</div></div></div>	<div><div>BRAND MARGIN</div><div><div>78€</div><p>Margin objective for 2019 – Euro 72</p><div>Source : BEAM by end of 2018</div></div></div>	<div><div>REPUTATION PERFORMANCE SCORE</div><div><div>89,0 %</div><p>Our objective is to reach 89,5 in 2019</p><div>Source : TrustYou by end of 2018</div></div></div>
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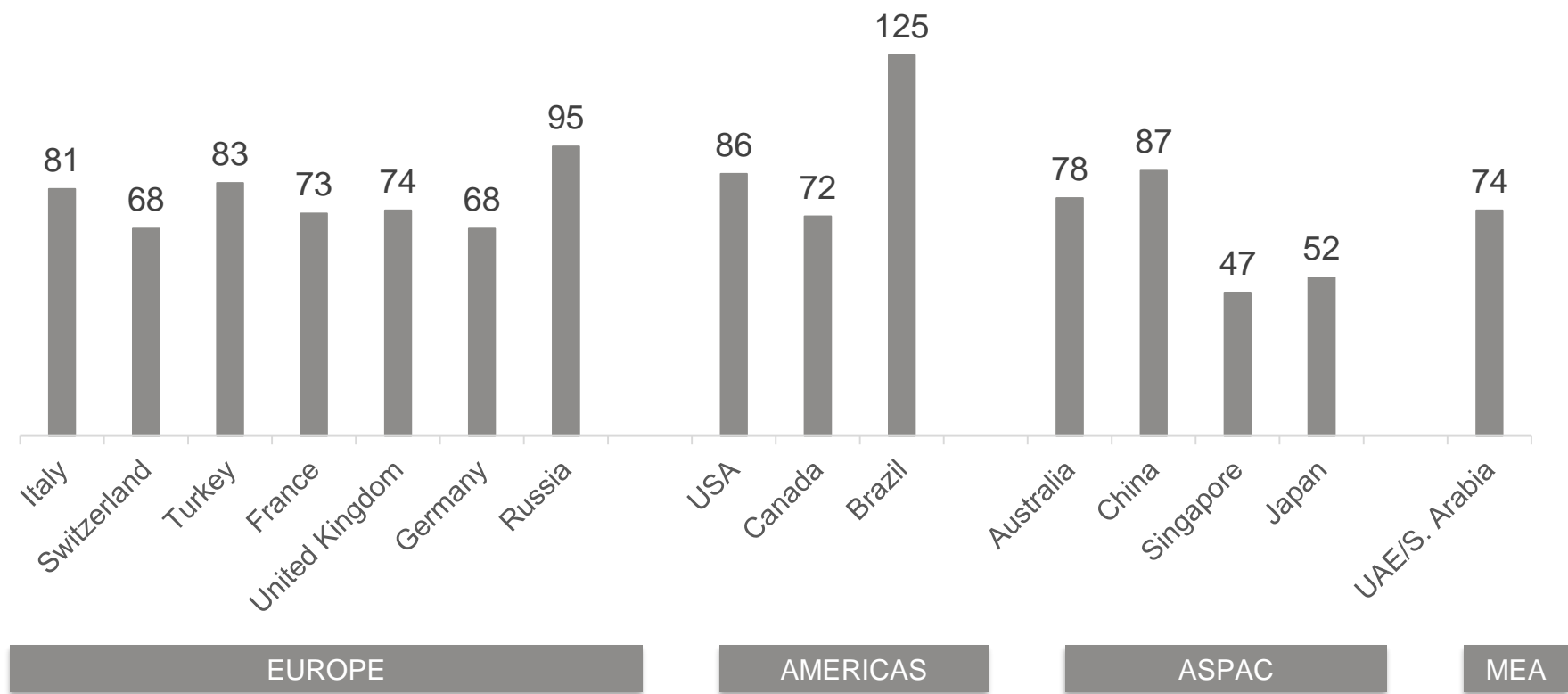


# BRAND AWARENESS (%)



Source: BEAM - Brand Equity & Awareness Monitoring December 2018 |  
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

# 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 2018



# REPUTATION PERFORMANCE SCORE

FAIRMONT  
AVERAGE  
RPS

88,6%

NORTH &  
CENTRAL  
AMERICAS

88%

EUROPE  
89%

ASIA PACIFIC  
92%

AFRICA -  
MIDDLE EAST  
88%

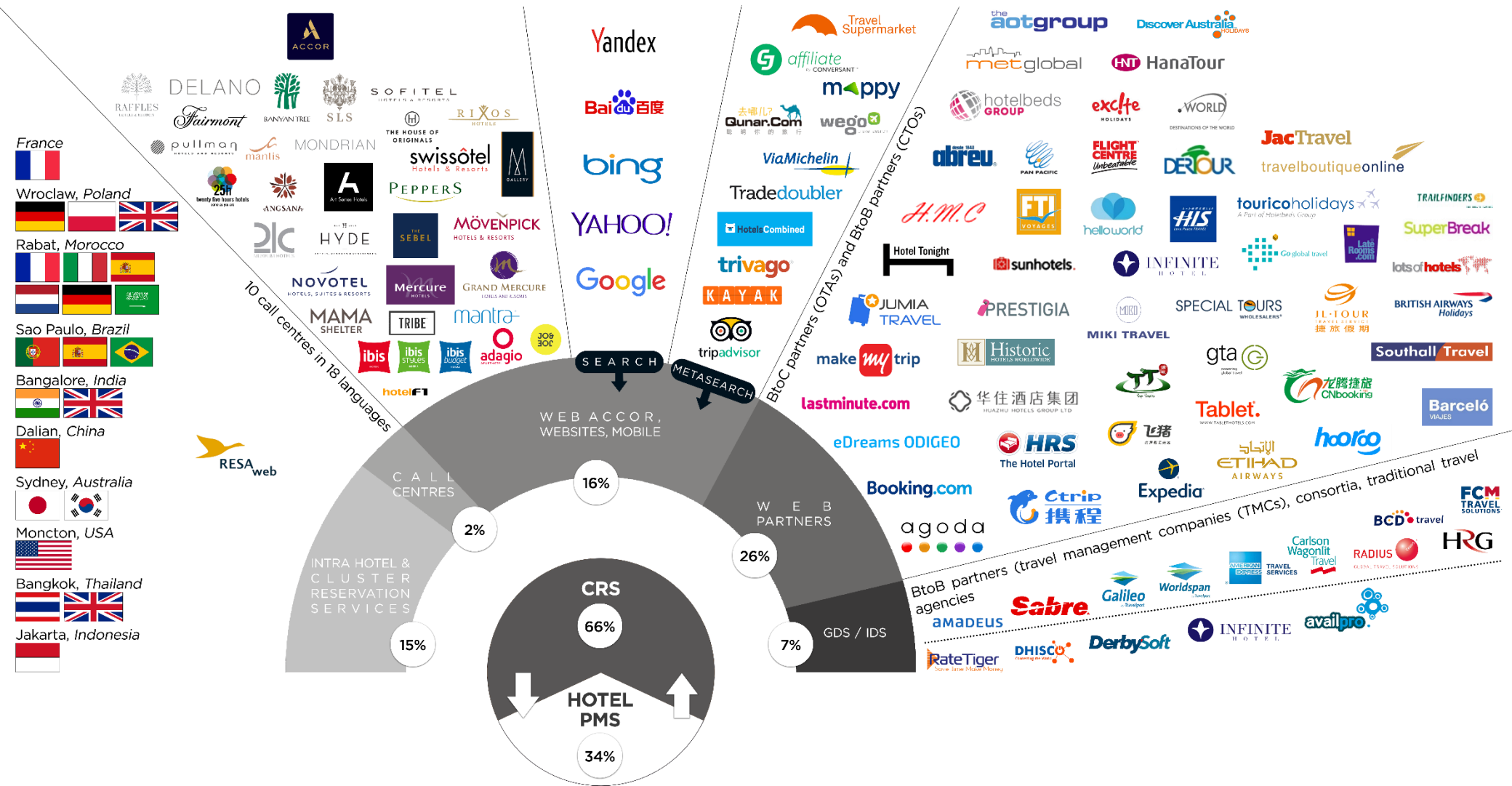
# REVPAR 2018



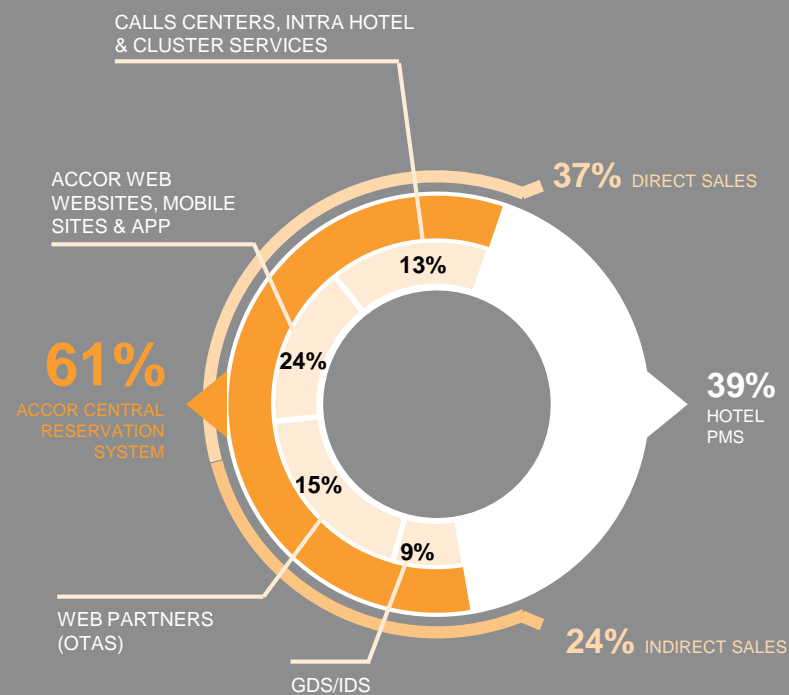


# ACCOR DISTRIBUTION SOLUTION

ACCOR OFFERS >110 GLOBAL DISTRIBUTION PARTNERSHIPS AT BEST MARKET CONDITIONS



# DISTRIBUTION PERFORMANCE POWERED BY ACCOR

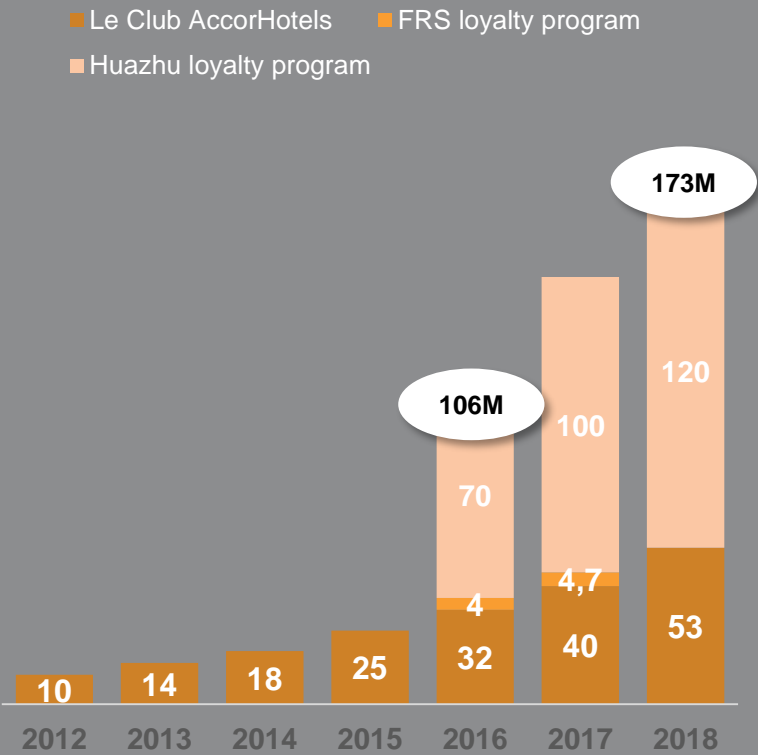




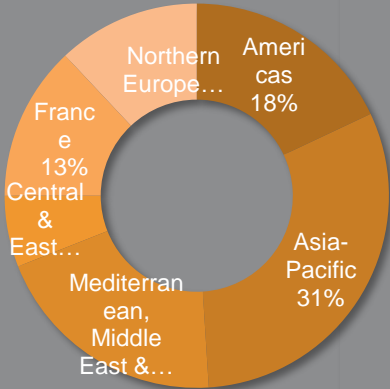
# LE CLUB ACCORHOTELS

ACCOR OWNS THE MOST INTERNATIONAL & FAST GROWING LOYALTY PROGRAM

## Loyalty members - Worldwide



## Guests' origin - Worldwide



### A Worldwide program:

- 20 brands
- 3,500 hotels in 100 countries
- Free enrollment
- 100% Web based program
- More than 27,7k new members every day
- Le Club AccorHotels represents 34.6% of all roomnights
- Partnerships with large Airlines loyalty program: Skyteam, One World, Star Alliance...

>53 MILLION MEMBERS  
WORLDWIDE

+27,700  
MEMBERS EVERY DAY

LE CLUB ACCORHOTELS  
REPRESENTS

34.6%

OF ALL ROOMNIGHTS

## DEVELOPMENT CRITERIA

HOTEL		AAA ultra city center location, historic conversion	WORLDWIDE			
	RECOMMENDED NUMBER OF ROOMS	200 – 300 keys	300 – 400 keys			
	ROOM AVERAGE SIZE	-10%/-15% of worldwide	40 sqm and +			
	TGFA / ROOM	90 – 120 sqm	100 – 140 sqm			
RESORT	RECOMMENDED NUMBER OF ROOMS	150 keys and +	200 keys and +			
	ROOM AVERAGE SIZE	-10%/-15% of worldwide	45 sqm + balcony	PRIME LOCATIONS	SECONDARY LOCATIONS	AIRPORTS SUBURBS
	TGFA / ROOM	100 – 120 sqm	120 – 160 sqm			
	FOOD & BEVERAGE	1 Signature restaurant (inc. Breakfast)		INTERNATIONAL CAPITALS	●	●
1 Speciality restaurant		KEY CITIES & RESORTS				
1 lobby lounge bar						
1 Gourmet Café						
Pool Bar & Grille in resorts		MAJOR DOMESTIC DESTINATIONS	●			
WELL-BEING	Willow Stream Spa					
	Extensive fitness <sup>(1)</sup>		OTHER CITIES & ATTRACTIVE			
	Swimming pool		TOURISTIC DESTINATIONS			
MEETINGS	Fairmont Gold <sup>(1)</sup>					
	Meeting room <sup>(1)</sup>					
	Ballroom <sup>(1)</sup>					
	Business centre		(1) On market demand			
	Kids Club <sup>(1)</sup>					



**Thank You**