BRAND PRESENTATION

ACCOR GLOBAL DEVELOPMENT

JUNE 2020
Every Mercure is a portal to a destination. Its teams are genuinely knowledgeable about the city and every detail of the décor tells a story about the location and its cultural heritage. While every Mercure hotel is unique, all share the same passion for high-quality services. So from the moment our guests step inside a Mercure – be it in Paris, Rio or Bangkok – they are immersed in their destination. Mercure, Locally inspired hotels.
A KNOWN & TRUSTED GLOBAL BRAND

2nd largest global player (WW excl. North America) with +820 hotels across +60 countries

The highest price premium in its segment

A highly considered brand in its segment with +40% of conversion from awareness to consideration.
A LOCALLY INSPIRED BRAND

A decorative design rooted in authentic values, elegance and local culture

Local products and specialties highlighted throughout the F&B guest experience

A brand programme, “Discover Local”, that brings the passion for local Food, Beverage and Craftsmanship to life in-hotels
A true sense of hospitality
A great perception of “genuinely pleasant staff”
A staff highly knowledgeable and passionate about its locality
851 HOTELS
111,419 ROOMS
62 COUNTRIES IN 2020

207 NEW HOTELS
32,961 MORE ROOMS BY 2025

OFFICIAL FIGURES, JUNE 2020
NETWORK AND PIPELINE

**EUROPE**
- Network: 67,453 rooms, 589 hotels
- Pipeline: 6,309 rooms, 53 hotels

**AMERICAS**
- Network: 8,328 rooms, 64 hotels
- Pipeline: 353 rooms, 3 hotels

**AFRICA – MIDDLE EAST**
- Network: 4,755 rooms, 23 hotels
- Pipeline: 2,502 rooms, 13 hotels

**ASIA-PACIFIC**
- Network: 30,883 rooms, 175 hotels
- Pipeline: 23,797 rooms, 138 hotels

**OPERATING MODE**
- 38% Managed
- 62% Franchised

Official figures, June 2020
FLAGSHIPS MERCURE BANGKOK MAKKASAN, THAILAND – 180 ROOMS
FLAGSHIPS MERCURE SHANGHAI YU GARDEN, CHINA – 230 ROOMS
FLAGSHIPS MERCURE IGUAZU HOTEL IRU, ARGENTINA – 100 ROOMS
FLAGSHIPS MERCURE SAO PAULO MOEMA TIMES SQUARE, BRASIL – 126 ROOMS
FLAGSHIPS MERCURE PARIS GARE MONTPARNASSE, France – 188 ROOMS
FLAGSHIPS MERCURE BRISTOL GRAND HOTEL, UNITED KINGDOM – 186 ROOMS
FLAGSHIPS MERCURE BERLIN WITTENBERGPLATZ, GERMANY – 183 ROOMS
FLAGSHIPS MERCURE BUDAPEST CASTLE HILL, HUNGARY – 250 RROMS
FLAGSHIPS MERCURE KALININGRAD, RUSSIA – 167 ROOMS
LATEST OPENINGS MERCURE SYDNEY ROUSE HILL, AUSTRALIA – 78 ROOMS
LATEST OPENINGS MERCURE SIBIU, ROMANIA – 85 ROOMS
LATEST OPENINGS MERCURE ISTANBUL BARKIRKOY, TURKEY – 92 ROOMS
LATEST OPENINGS MERCURE DUBAI BARSHA HEIGTHS, UNITED ARAB EMIRATES – 408 ROOMS
RESORTS MERCURE RESORT QUEENSTOWN, NEW ZEALAND – 148 ROOMS
RESORTS MERCURE CHANTILLY RESORT & CONVENTIONS, FRANCE – 200 ROOMS
RESORTS

MERCURE RESORT KASPROWY ZAKOPANE, POLAND – 288 ROOMS
UPCOMING OPENING  MERCURE MOSOW NEGLYNAYA, RUSSIA – 102 ROOMS & JUNE 2023
SECURED PIPELINE OVER 5 YEARS
As of YTD June 2020

EUROPE

POLAND – Mercure Warszawa Sacharowa, 137 rooms, December 2022
RUSSIA – Mercure Saint Peterburg, 191 rooms, April 2022
BELGIUM – Mercure Knokke, 90 rooms, April 2021
GERMANY – Mercure Ravensburg, 82 rooms, June 2020
FRANCE – Mercure Paris Gare de Lyon Opera Bastille, 49 rooms, September 2020
KOSOVO – Mercure Minimax Prishtina, 115 rooms, June 2022
MALTA – Mercure St. Julian’s Malta, 113 rooms, September 2020
PORTUGAL – Mercure Porto Centro Bonjardim, 83 rooms, October 2020
UZBEKISTAN – Mercure Nukus Street Tasheknt, 100 rooms, November 2022
UNITED KINGDOM – Mercure Stanwell Hotel, 94 rooms, May 2021
SPAIN – Mercure Benidorm, 215 rooms, March 2021

ASIA PACIFIC

AUSTRALIA – Mercure Sydney Bankstown, 123 rooms, June 2021
AUSTRALIA – Mercure Melbourne Doncatser, 181 rooms, June 2022
CHINA – Beijing Zhongguancun, 190 rooms, December 2020
CHINA – Shanghai Chenghuang Temple, 260 rooms, December 2021
CHINA – Shanghai Free Trade Zone, 160 rooms, December 2022
PHILIPPINES – Manila Greenhills, 200 rooms, December 2022
TAIWAN REPUBLIC OF CHINA – Mercure Taipei Station, 154 rooms, December 2021
SINGAPORE – Mercure Singapore Tywhitt, 270 rooms, March 2021
SOUTH KOREA – Mercure Ambassador Seoul Hongdae, 270 rooms, August 2020
JAPAN – Mercure Kyoto Station, 225 rooms, December 2020
NEW ZEALAND – Mercure Auckland Queen Street, 91 rooms, June 2021

MIDDLE-EAST & AFRICA

ALGERIA – Mercure Ain Benian, 152 rooms, October 2021
GHANA – Mercure Accra City Airport, 232 rooms, August 2021
SAUDI ARABIA – Mercure Riyadh King Fahd Road, 130 rooms, August 2021
SENEGAL – Mercure Dakar Corniche, 150 rooms, January 2022
UNITED ARA EMIRATES – Mercure Dubai Jumeirah Triangle, 348 rooms, January 2022
UNITED ARAB EMIRATES – Mercure Dubai Deira Waterfront, 152 rooms, January 2022
ETHIOPIA – Mercure Addis Ababa Uneca, 160 rooms, July 2021
ALGERIA – Mercure Sikkda, 178 rooms, December 2021

AMERICAS

ARGENTINA – Mercure Salta, 70 rooms, July 2022
BRAZIL – Mercure Cuiaba, 163 rooms, January 2025
BRAZIL – Mercure Balneario Camboriu Barra Sul, 120 rooms, January 2025
The Mercure brand programme brings to life in hotels its passion for local food, beverage and craftsmanship.

“Discover Local” is a series of in-hotel events and products showcase open to guests and locals.

The programme is designed to fuel local discovery, support local businesses and inspire social connections in order to enrich the guest experience.
IN 2020, A PASSION SHARED WITH OUR GUESTS

The creation of a global Supper Society. A true dining experience to meet local makers & doers and taste the best of local F&B culture.

A scalable activation to generate interest, awareness and engagement on social media and in the press.
SOCIAL HUB

WARM, MULTISENSORY AND LOCALLY INSPIRED FOR TRAVELERS & LOCALS

Mercure social hubs offer an all-day-dynamic with flexible places to eat, drink, socialize or work.
BRAND WALL

Made either of materials inspired by the locality, the hotel’s or the destination’s story, the Brand Wall is a key point of attention in the social hub translating the local inspiration of the designer.
GUEST ROOMS

ELEGANT, WARM AND WELCOMING

The decoration and furnishing reflect the hotel’s local inspiration, in full coherence with the overall hotel design.
GREAT BED

MADE FOR GREAT DREAMS

Everyone needs a cozy place, away from it all. That's why Mercure has created a great bed.

Settle in to rest, relax, and let your mind wander. Dream up the next chapter in your life.

1. Zip off topper
   - Incredible comfort & softness
   - Complementary removable climatic and soft topper which can be easily replaced in case of damages and dirt
   - Provides a long life to the mattress

2. Elvea lining mattress - Height: 30cm
   - Pocketed Air Spring® technology
   - Totally independent sleeping comfort
   - Personalized and optimal support for each sleeper

3. Visible slats base
   Height: 16cm
   - Strength and flexibility of the slats
   - A perfect adhesion between mattress and bed base
   - Firm Support

4. Customizable 3D deco visible bedskirt
   - Aesthetic
   - Fit each room decoration

5. Customizable bed leg
   Height: 15cm
   - Aesthetic
   - Fit each room decoration
MORE COMFORT & FEATURES

• A full line of bathroom amenities and accessories: body lotion, vanity set, sewing kit...slippers and bathrobe
• An expresso machine and its courtesy tray
• A minifridge offering soft drinks, juice and water (still and sparkling)
• A daily newspaper
FOOD & BEVERAGE

WARM, CONTEMPORARY AND ELEGANT DÉCOR
LOCAL, GENUINE & INCLUSIVE OFFER

Food & Beverage plays a key role for travelers looking for unique and authentic experiences to discover a destination, from breakfast to diner.
GUEST JOURNEY – DISCOVER LOCAL EVENTS
BRING OUR PASSION FOR LOCAL FOOD, BEVERAGE AND CRAFTSMANSHIP TO LIFE IN HOTELS

IN-HOTEL ANIMATIONS

In collaboration with local makers, hotels are encouraged to set-up experiences that bring people together around the brand passion for local food, beverage and craftsmanship.

Tasting sessions, workshops, markets, product showcases... are communicated through the “Discover Local” visual identity and shared on social media to generate engagement and awareness.

SEASONAL DINNERs

The brand passion for local F&B is driven by Mercure chefs and teams around a dinner, inviting travellers and locals alike to discover local and seasonal products and specialities.

Seasonal dinners and menu specials are highlighted by the “Discover local” visual identity. Events are shared on social media to generate awareness, engagement and incremental revenue.
GUEST JOURNEY & EXPERIENCE – KEY STANDARDS AT A GLANCE

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

SOCIAL HUB
- Brand Wall (M)
- Host Table
- Signature Table
- Musical Ambiance

GUEST ROOMS
- GreatBed by Mercure (M)
- Local VIP Welcome Gift (P)
- Amenities (M)
- Privilege Room (M)

F&B
- Local sourcing (P)
- Breakfast (M)
- All-Day-Dining (M)

WELLNESS
- Fitness
- Spa

MEETINGS
- MeetWithMercure

EVENTS
- In-hotel animations (P)
- Seasonal dinners (P)

MANDATORY
P AS PART OF THE DISCOVER LOCAL BRAND PROGRAM
The brand’s unwavering commitment to quality ensures a consistent and reliable standard of service in every Mercure hotel around the world.

Team members are known for their passion, enthusiasm and warmth.

They share their local knowledge with guests, providing insider tips and stories only true locals know.
An efficient & straightforward brand visual identity platform focusing on the product & services Mercure hotels offer to showcase their local and authentic spirit.

PEOPLE
Highlighting quality of service via black & white portraits and details

PLACES
Highlighting unusual and locally inspired details of the hotels & its surroundings

In 2020, a new brand visual identity will be delivered.
BRAND COMMUNICATION – 360° APPROACH
SHOWCASE A MODERN AND EMOTIONAL LOCALLY INSPIRED EXPERIENCE

FEEL LOCAL EVERYWHERE
Advertising Platform
A platform that showcases Mercure’s locally inspired hotels and immersive experiences across the world, through visual interplays inside and outside key hotels and destinations.

LOCAL STORIES
Digital Platform
A collection of more than 2000 exclusive insider tips and stories about Mercure’s destinations around the world, that only a true local would know.

#LOCALLYINSPIRED
Social Media strategy
Position the brand as the travel insider that makes you live authentic and local experiences.
Which destination would you like to explore next month?

**BRAND SOCIAL MEDIA**

**STRONG ECOSYSTEM**

- **615K FANS**
  - 1 Global Page
  - 10 Country pages
  - 631 Hotel pages

- **46K FOLLOWERS**
  - 1 Global Account
  - 200 Hotel Accounts

- **3,5K FOLLOWERS**
  - 1 Global Account

Official figures, 2019
With mercure.com, explore destinations and benefit from special offers across the world.
In 2019, Mercure has proven to be a highly recognized and rewarded brand:

**Strongest Hotel Brand 2019**
Brand Finance Global Awards

**Top 10 Customer Experience Excellence 2019**
KPMG FRANCE

**Best UK Midscale Plus Hotel Brand 2019**
BTA awards
KEY BRAND PERFORMANCE INDICATORS

**BRAND AWARENESS**

A total awareness among Travellers of **40-60%** in 10 countries

FR: +70% - GER: +60% - AU: +58%

The objective is to raise the brand awareness in key markets

Source: BEAM 2019

**BRAND PERCEPTION**

Mercure has a positive image being “modern”, giving a “feeling of high status” and driven by its “genuinely pleasant staff”

The objective is to build our locally inspired brand positioning and capitalizing on people’s emotional connection to the brand

Source: BEAM 2019

**BRAND MARGIN**

+24€

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

The objective is to maintain this price premium

Source: BEAM 2019

**REPUTATION PERFORMANCE SCORE**

82,77%

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.

The objective was to reach 82.57% in 2019

Source: TrustYou 2019
BRAND AWARENESS (%)
Figures as of end 2019

<table>
<thead>
<tr>
<th>Country</th>
<th>EUROPE</th>
<th>AMERICAS</th>
<th>ASPAC</th>
<th>MEA</th>
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</thead>
<tbody>
<tr>
<td>France</td>
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<td>60</td>
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<td>Poland</td>
<td>15</td>
<td>43</td>
<td>56</td>
<td>27</td>
</tr>
</tbody>
</table>

Source: BEAM - Brand Equity & Awareness Monitoring | 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® 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."
REPUTATION PERFORMANCE SCORE

Figures as of end 2019

SOUTH AMERICA 86%
EUROPE 82%
AFRICA - MIDDLE EAST 83%
ASIA - PACIFIC 86%

MERCURE REPUTATION PERFORMANCE SCORE 83.06%
ACCOR DISTRIBUTION SOLUTION*
Figures as of end 2019
ACCOR OFFERS > 110 GLOBAL DISTRIBUTION CHANNELS AT BEST MARKET CONDITIONS

*All Accor brands excluding recently integrated: Delano, SLS, The House of Originals, Mondrian, Hyde, greet, Mantis, Tribe
MERCURE DISTRIBUTION SOLUTION POWERED BY ACCOR

Figures as of end 2019

- **CALL CENTERS, INFLUENCED HOTEL DIRECT**: 31%
- **HOTEL PMS**: 69%
- **OF MERCURE ROOM REVENUE COMES THROUGH ACCOR CENTRAL RESERVATION SYSTEM**: 28%
- **WEB PARTNERS (OTAS)**: 17%
- **GDS / IDS**: 15%
- **INDIRECT SALES**: 37%
- **DIRECT SALES**: 32%

**ACCOR WEB**
- MERCURE.COM,
- MOBILE SITES & APP

**WEB PARTNERS (OTAS)**:
- **GDS / IDS**: 32%
- **DIRECT SALES**: 37%
- **INDIRECT SALES**: 15%

**FOCUS WEB**
(ACCOR WEB + WEB PARTNER)
- **8.8M ROOM NIGHTS**
- **€965M ROOM REVENUE**

**PERFORMANCE**
NEW BOOKING ENGINE & APP
Figures as of end 2019

1 MULTIBRAND PORTAL
ALL.ACCOR.COM
- 300M Website + App visits
- 2200 Destinations
- 18 Languages

1 LIFESTYLE COMPANION APP
- 56% Mobile and App visits
- 1 Download every minute

18 BRAND.COM WEBSITES
- Plugged to ALL.ACCOR.COM
- 13M Pages viewed per year

*year 2019 + from dec 2019 to Mid Feb 2020, since launch of ALL
NEW LOYALTY PROGRAM
Figures as of end 2019

THE ONLY LIFETIME LOYALTY PROGRAM

THE FAST GROWING LOYALTY PROGRAM
- 64M Loyalty members worldwide
- 31% Loyalty contribution rate
- X2 Members stay twice more
- X2 Members spend twice more

THE MOST GLOBAL LOYALTY PROGRAM

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

NEW LIMITLESS EXPERIENCES AND EXTENDED OPPORTUNITIES TO EARN & REDEEM POINTS

- 64M Loyalty members worldwide
- 31% Loyalty contribution rate
- X2 Members stay twice more
- X2 Members spend twice more

ALL FRS Huazhu

2016 2017 2018 2019

X 2 Members stay twice more
X 2 Members spend twice more

North & Central America, Caribbean 11%
North Europe 12%
France 12%
AS PAC 31%
Other Europe, Middle East & Africa 20%
Central Europe 6%
France 12%
North Europe 12%
AS PAC 31%
Other Europe, Middle East & Africa 20%
Central Europe 6%

North & Central America, Caribbean 11%
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Other Europe, Middle East & Africa 20%
Central Europe 6%
France 12%
APPENDIX
COMPETITION
<table>
<thead>
<tr>
<th>AAA ULTRA CITY CENTER LOCATION, HISTORIC CONVERSION</th>
<th>WORLDWIDE</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECOMMENDED NUMBER OF ROOMS</td>
<td></td>
</tr>
<tr>
<td>&gt;80 keys (Franchise)</td>
<td>&gt;125 keys (Management)</td>
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<tr>
<td>ROOM AVERAGE SIZE</td>
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</tr>
<tr>
<td>20 – 27 sqm</td>
<td>24 – 30 sqm</td>
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<tr>
<td>TGFA / ROOM</td>
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</tr>
<tr>
<td>40 – 60 sqm</td>
<td>52 – 75 sqm</td>
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<tr>
<td>RECOMMENDED NUMBER OF ROOMS</td>
<td></td>
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<tr>
<td>100 keys and +</td>
<td>150 keys and +</td>
</tr>
<tr>
<td>ROOM AVERAGE SIZE</td>
<td></td>
</tr>
<tr>
<td>24 – 30 sqm</td>
<td>26 – 33 sqm</td>
</tr>
<tr>
<td>+ balcony</td>
<td></td>
</tr>
<tr>
<td>TGFA / ROOM</td>
<td></td>
</tr>
<tr>
<td>52 – 75 sqm</td>
<td>56 – 82 sqm</td>
</tr>
</tbody>
</table>

**FOOD & BEVERAGE**
- Breakfast room and/or restaurant
- 1 bar

**WELL-BEING**
- Fitness center
- Swimming pool (nice to have)
- Spa

**MEETINGS**
- Meeting room
- "Ready to work" by Mercure
- Web Corner

(1) Based on market demand

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**DEVELOPMENT CRITERIA - PROGRAMMING**

**HOTEL**
- PRIME LOCATIONS
- SECONDARY LOCATIONS
- AIRPORTS
- SUBURBS

**INTERNATIONAL CAPITALS**
- KEY CITIES & RESORTS

**MAJOR DOMESTIC DESTINATIONS**

**OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS**
What’s happening in 2020?

- Design brief, Style Book, Design Philosophy, Mlounge Social Hub Global Concept Brief

MERCURE CONSTRUCTION & RENOVATION STANDARDS
Can be used after HCSA is signed

MERCURE STYLE BOOK
Can be used before HCSA is signed

MERCURE DESIGN BRIEF
Can be used before HCSA is signed
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