WHY INVEST IN MOVENPICK
Accor Global Development
July 2020
We believe true hospitality is about turning small gestures into heartwarming moments. We enable our guests to savour the flavour of life, balancing small indulgences with what’s good for them – and good for the world.
BRAND MOMENTUM

Global footprint soon to reach 100 hotels and a pipeline of around 50

60%+ brand awareness in the Middle East, strong presence in Europe and Africa plus rapid growth in Asia

Genuine, human and warm service philosophy and responsible attitude to sustainability
70 YEARS OF CULINARY EXCELLENCE

Premium quality Mövenpick retail food products: ice cream, chocolate, coffee and wine.

Innovative and award winning food and drink concepts: the Lobby Lounge concept with food product retail, the coffee & wine lounge, restaurants serving Swiss and local signature dishes.
FLEXIBILITY

Flexible space brand programming and great for conversion of existing buildings/hotels

Resorts and residential opportunities

A 5 star hotel at a 4 star cost and price
Mövenpick estate June 2020

99 hotels
26 countries
23, 725 rooms

Current as at June 2020
Mövenpick estate 2025

147 hotels + 48
38 countries + 12
35,121 rooms + 11,396

Current as at June 2020
Mövenpick network and pipeline

**EUROPE**
- **NETWORK**
  - Hotels: 21
  - Rooms: 4,513
- **PIPELINE**
  - Hotels: 7
  - Rooms: 1,235

**MIDDLE EAST & AFRICA**
- **NETWORK**
  - Hotels: 59
  - Rooms: 14,449
- **PIPELINE**
  - Hotels: 26
  - Rooms: 6,943

**ASIA**
- **NETWORK**
  - Hotels: 19
  - Rooms: 4,763
- **PIPELINE**
  - Hotels: 15
  - Rooms: 3,218

Current as at June 2020

- **OPERATING MODE**
  - 99% Managed
  - 1% Franchised

- **% of total global rooms (network + pipeline)**
  - Europe: 16%
  - Middle East & Africa: 62%
  - Asia: 22%
our flagships
Mövenpick Hotel and Convention Centre
Kuala Lumpur, Malaysia
Mövenpick Mansour Eddahbi Marrakech
Morocco
Mövenpick Hotel Amsterdam City Centre
Netherlands
our recent openings

Mövenpick Hotel Tahlia Jeddah
Saudi Arabia
our upcoming* projects

*Signed projects
Mövenpick Hotel Addis Ababa
Ethiopia
Secured pipeline over 5 years
As of end June 2020

EUROPE

Mövenpick Hotel Moscow Taganskaya, Russia – 156 rooms
Mövenpick Hotel Basel, Switzerland – 264 rooms
Mövenpick Rome Villa Pamphili, Italy – 235 rooms

ASIA PACIFIC

Mövenpick Hotel Khulna, Bangladesh – 222 rooms
Mövenpick Hotel Sylhet, Bangladesh – 235 rooms
Mövenpick Resort Khao Yaiin Thailand – 114 rooms
Mövenpick Resort Lang Co, Vietnam – 148 rooms
Mövenpick Resort Phu Quoc, Vietnam – 658 rooms
Mövenpick Danang, Vietnam – 143 rooms
Mövenpick Resort Halong Bay, Vietnam – 232 rooms
Mövenpick Van Phong, Vietnam – 196 rooms

AFRICA MIDDLE EAST

Mövenpick Hotel Abidjan, Ivory Coast – 160 rooms
Mövenpick Hotel Addis Ababa, Ethiopia – 252 rooms
Mövenpick Hotel Financial District Riyadh, Saudi Arabia – 269 rooms
Mövenpick Hotel Azaiba Muscat, Oman – 250 rooms
Mövenpick Hotel Islamabad Smart City, Pakistan – 400 rooms
Mövenpick Hotel Dakar, Senegal – 462 rooms
Mövenpick brand passions

FOOD & DRINK
Food & drink has been at the heart of the Mövenpick brand for more than 70 years
We feature a rich and inventive culinary offering, treating guests with whatever they are in the mood for, balancing both healthy and indulgent options

HEARTFELT SERVICE
Mövenpick hospitality is about turning small gestures into heartwarming moments—doing ordinary things in an extraordinary way
We place a strong emphasis on service, anticipating guests’ needs and creating special moments for each and everyone

MINDFUL SUSTAINABILITY
From the start, Mövenpick has embraced an eco-friendly mindset and today sustainability remains a key component of the brand
We take a holistic approach to sustainability that benefits all, mindful of people and the environment
Inspired by Swiss town squares, Mövenpick Market transforms the lobby into the main hub of the hotel, with modern, inviting spaces offering distinctive food and drink experiences.

This comfortable, well-designed lobby living room concept connects with the needs of today’s travellers and showcases our coffee & wine lounge, plus chocolate and ice cream retail.
Mövenpick is all about those small indulgences that make like wonderful. That's why Mövenpick has its very own Swiss gourmet products, some of which date back more than 50 years.

Loved by consumers around the world, these premium products are a mandatory part of the Mövenpick guest experience and are available in all our hotels.
Mövenpick celebrates its heritage of culinary excellence by featuring its unique products and their key ingredients – chocolate, coffee and ice cream – right across the guest journey.

Guests can also experience the best in Swiss cuisine with Mövenpick signature dishes, which hotel chefs use as inspiration to create their own local signatures to serve alongside them.

Because life is a balance, Mövenpick has also developed a lighter range of go healthy options, using fresh seasonal and sustainably sourced ingredients.
Ritual Mövenpick chocolate hour

SWISS-INSPIRED GASTRONOMY

Chocolate hour is a creative and immersive chocolate experience that takes place in every Mövenpick hotel lobby every day— that’s more than 35,000 chocolate hours a year!

It’s all about being inventive with this famous Swiss ingredient. Guests interact with the pastry chef who ices cupcakes, rolls truffles … and stretches their chocolate imagination to the limit.
Consumers already recognise Mövenpick as a family-friendly brand – that’s why we created Mövenpick family to make holidays hassle-free for parents and children alike.

It’s not just about attractive family rates. Mövenpick hotels carry a full range of baby essentials, so you don’t have to bring your own.

Being Mövenpick, we’ve designed a healthy - and visually appealing - kids’ menu to enjoy in our restaurants. There are also kids’ clubs - we call them little birds’ clubs - and we’ve even created a Mövenpick bird family to make everything more fun!
Mövenpick hotels are all Planet 21 compliant and also Green Globe certified. We want to elevate sustainability to a much wider commitment to social responsibility within each hotel’s local community and beyond.

So we have created a truly integrated, guest-facing concept that ensures Mövenpick is perceived as a brand that truly cares.
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.
Paying homage to our heritage with an M reminiscent of the 1950s design.

The silver bird icon represents the seagull and is fundamental to our brand visual identity.

The M also represents Swiss mountains, bringing a Swiss dimension into the logo for the first time.
Mövenpick communications platform

FOOD & DRINK
BRAND CAMPAIGNS

These ensure Mövenpick is recognised by guests as the place to savour life. Imaginative new dishes based on Mövenpick products or Swiss ingredients are featured in our hotels during the campaigns.

GLOBAL TACTICAL CAMPAIGNS

Designed to drive revenue to Mövenpick hotels at key need periods, these campaigns target potential guests according to their behaviour online, ensuring a high level of conversion. In 2019 they produced €20 million+ revenue globally with a return of more than 15:1.

MÖVENPICK WEBSITE

movenpick.com is a true shop window for Mövenpick hotels, with inspiring content to attract potential guests and the latest search techniques to guide customers to its pages.

SOCIAL MEDIA & PUBLIC RELATIONS

Mövenpick promotional strategy focuses on earned media, driving down costs and maximising returns. Our 2020 #pickreal social media campaign features real, unstaged user generated content to reflect the genuine nature of the brand.
Mövenpick awards

TOTAL OF 162 LEADING AWARDS ACROSS 53 PROPERTIES IN 2019
Top Region: Middle East & India with 72 awards

Condé Nast Johansens – 1 Award
Haute Grandeur Global Awards – 6 Awards
Skryax Awards – 1 Award
TripAdvisor – 2 Awards
Versatile Excellence Travel Awards 2019 – 1 Award
World Luxury Hotel Awards – 12 Awards
Mövenpick Brand Awareness (%)

Europe
- France: 42
- United Kingdom: 33
- Germany: 42
- Russia: 56

Americas
- Canada: 46
- Brazil: 80

ASPAC
- Australia: 51
- China: 43
- Singapore: 44
- Japan: 28

MEA
- UAE/Saudi Arabia: 56

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
**Mövenpick Brand Margin (€)**

**Europe**
- France: 39
- United Kingdom: 44
- Germany: 74
- Russia: 35

**Americas**
- USA: 12
- Canada: 26
- Brazil: 20

**ASPAC**
- Australia: 31
- China: 26
- Singapore: 45
- Japan: 16

**MEA**
- UAE/Saudi Arabia: 67

**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.

Traveller representative figures as at end 2019.
Distribution **performance**

**Powered by Accor for Luxury & Premium Brands**

- **63%** of luxury & premium room revenue comes through Accor Central Reservation System
- **38%** direct sales
- **37%** Hotel PMS
- **25% indirect sales**
- **19%** influenced hotel direct *E-mails & cluster services*
- **4%** voice
- **7%** Web partners (OTAs)
- **15%** GDS/IDS

**WEB FOCUS**
(ACCOR WEB + WEB PARTNERS)

- **10M** room nights
- **€2,019M** room revenue

Official figures as of end 2019
New Booking Engine & App

1 Multibrand portal
   all.accor.com

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

1 Lifestyle companion
   app

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

18 Brand.Com
   websites

- Plugged into ALL.ACCOR.COM

* Year 2019 + Dec 2019-Mid Feb 2020, since launch of ALL

Official figures as of end 2019
**New Booking Engine & App**

**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
- **2x** Members stay twice more
- **2x** Members spend twice more

**The most global loyalty program**

- South America - 8%
- Central Europe - 6%
- North & Central America, Caribbean - 11%
- ASPAC - 31%
- Northern Europe - 12%
- France - 12%
- Other Europe, Middle-East & Africa - 20%

*Official figures as of end 2019*
Mövenpick competition

Source: BDRC Hotel Guest Surveys 2018
Brand Ranking Index for Upper Full Service category, Top 10
### Movenpick Development Criteria - Programming

<table>
<thead>
<tr>
<th></th>
<th>AAA ultra city center location, historic conversion</th>
<th>WORLDWIDE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>RECOMMENDED NUMBER OF ROOMS</strong></td>
<td>150 keys and +</td>
<td>150 keys and +</td>
</tr>
<tr>
<td><strong>ROOM AVERAGE SIZE</strong></td>
<td>24 – 32 sqm</td>
<td>28 – 36 sqm</td>
</tr>
<tr>
<td><strong>TGFA / ROOM</strong></td>
<td>70 – 80 sqm</td>
<td>90 – 100 sqm</td>
</tr>
<tr>
<td><strong>RECOMMENDED NUMBER OF ROOMS</strong></td>
<td>120 keys and more</td>
<td>150 keys and more</td>
</tr>
<tr>
<td><strong>ROOM AVERAGE SIZE</strong></td>
<td>28 – 40 sqm <strong>+ balcony</strong></td>
<td>40 sqm <strong>+ balcony</strong></td>
</tr>
<tr>
<td><strong>TGFA / ROOM</strong></td>
<td>80 – 90 sqm</td>
<td>80 – 110 sqm</td>
</tr>
</tbody>
</table>

#### FOOD & BEVERAGE
- 1 all-day dining including Gourmet Coffee
- 1 specialty restaurant on market demand
- Lobby living room / lounge concept including:
  - 1 Movenpick Coffee & Wine food bar
  - 1 Movenpick product retail shop

#### WELL-BEING
- Spa market driven
- Fitness Centre
- Swimmingpool

#### MEETINGS
- Key meeting rooms
- Ballroom on market demand
- Business centre available
- Little Birds Kids Club (As part of family product)

#### PRIME LOCATIONS  |
- INTERNATIONAL CAPITALS
- KEY CITIES & RESORTS DEST.

#### SECONDARY LOCATIONS  |
- MAJOR DOMESTIC DESTINATIONS

#### AIRPORTS SUBURBS  |
- OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS
Mövenpick Design & Technical Services – Guidelines
All technical documents are available after NHCSA is signed

What’s happening in 2020?
Mövenpick Design Brief
Mövenpick Construction and Renovation Standards
Mövenpick Lobby Lounge Concept Guidelines
Consultant book tool

MÖVENPICK STYLE BOOK
Can be used before HCSA is signed