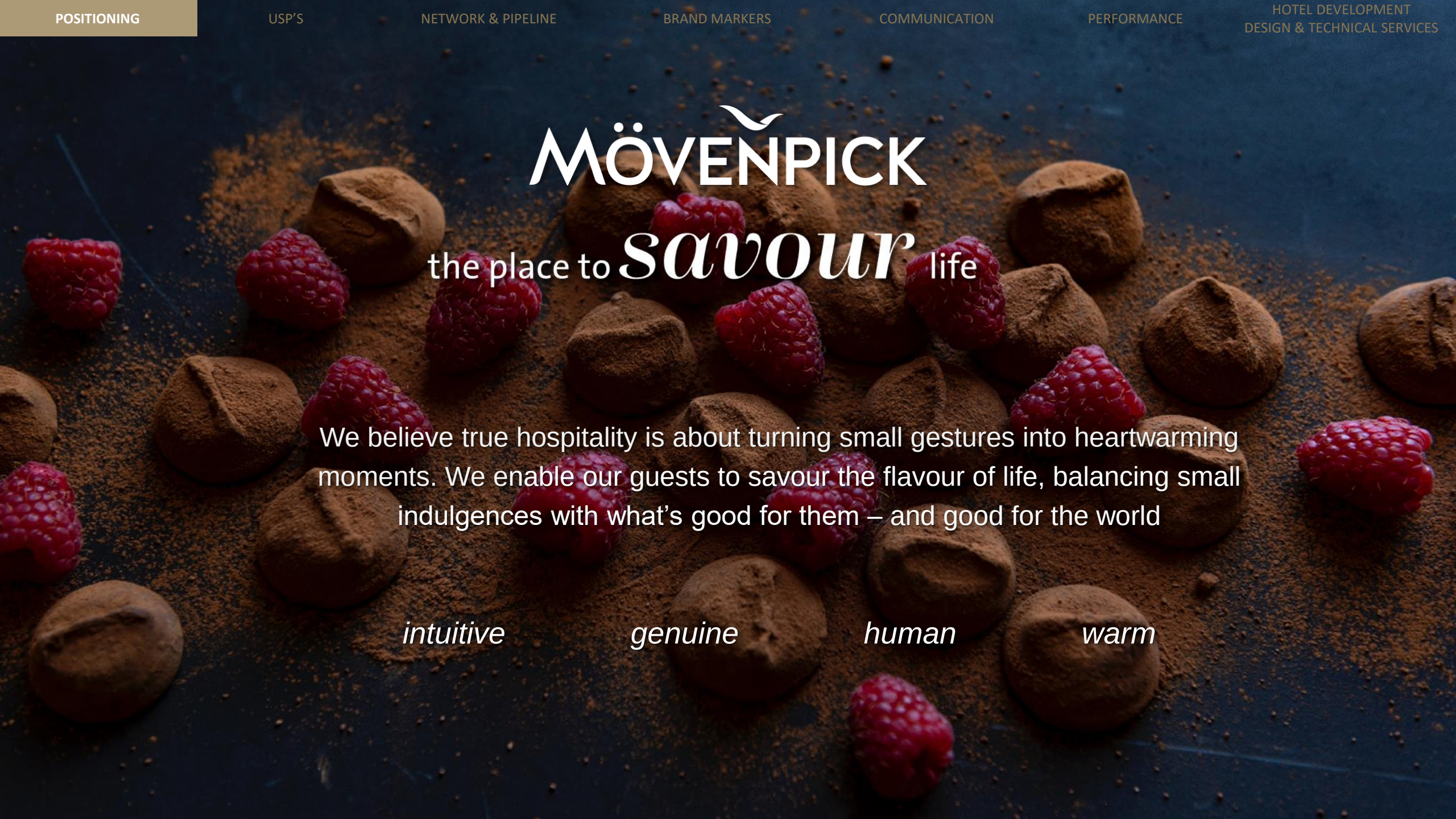
WHI INVEST IN MOVENPICK

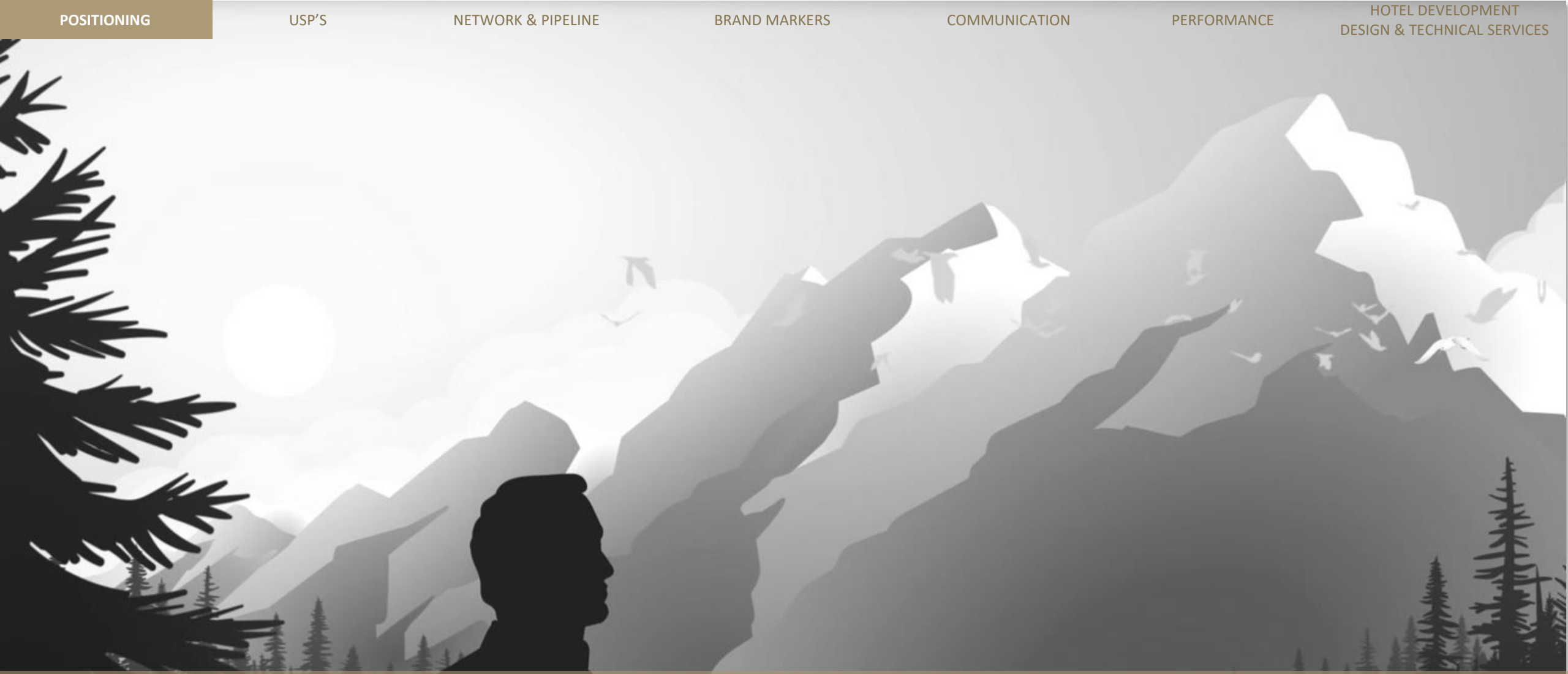
Accor Global Development

Q1 2021



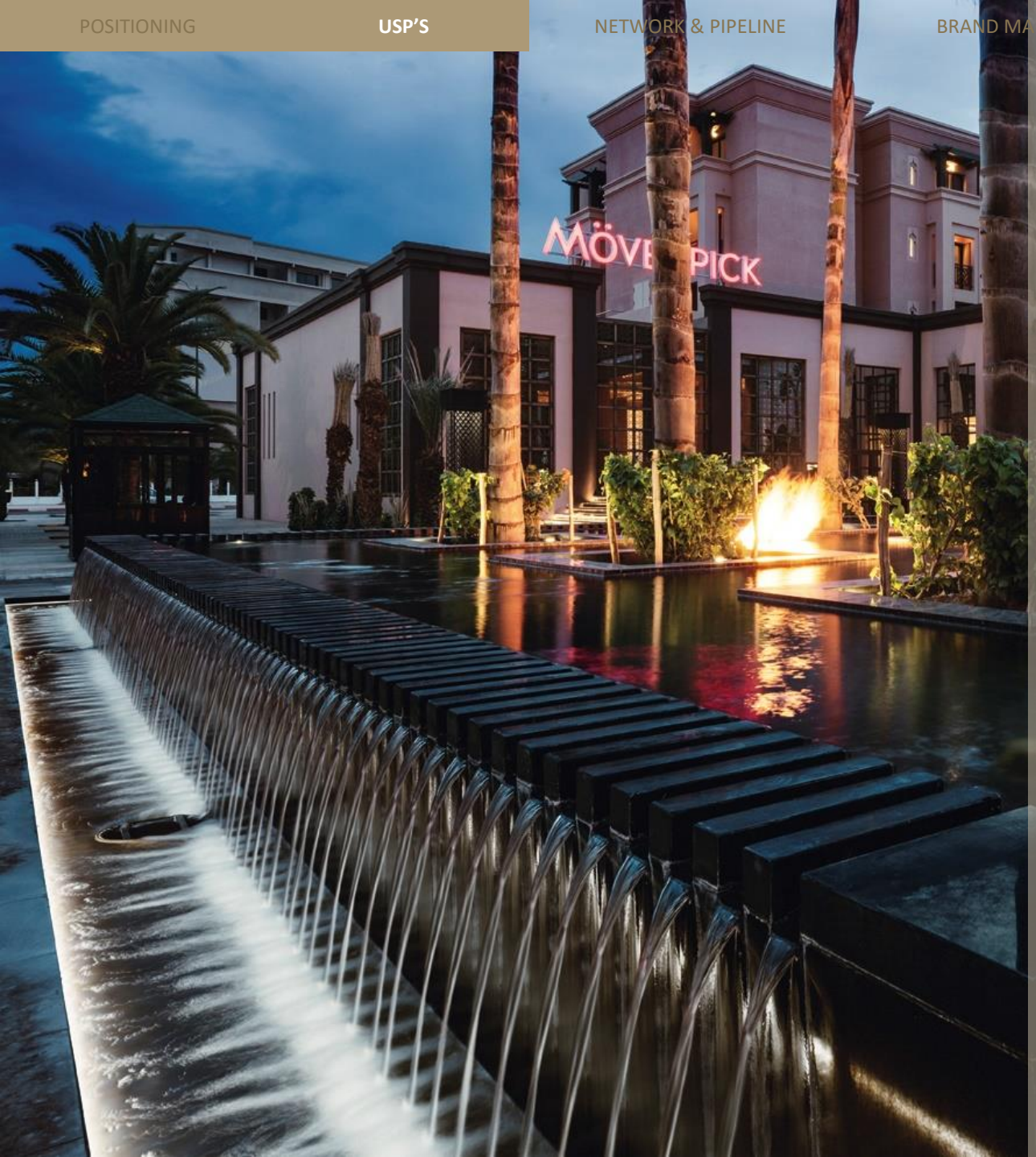
We believe true hospitality is about turning small gestures into heartwarming moments. We enable our guests to savour the flavour of life, balancing small indulgences with what's good for them – and good for the world

intuitive *genuine* *human* *warm*



Brand story

Our unique name was inspired by a stroll along a Swiss lake, Lake Zürich, in 1948, where Mövenpick's founder Ueli Prager saw a seagull (Möwe in German) swoop down and pick up something to eat. So, he gave the name Mövenpick to his pioneering restaurant chain



BRAND MOMENTUM

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

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

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

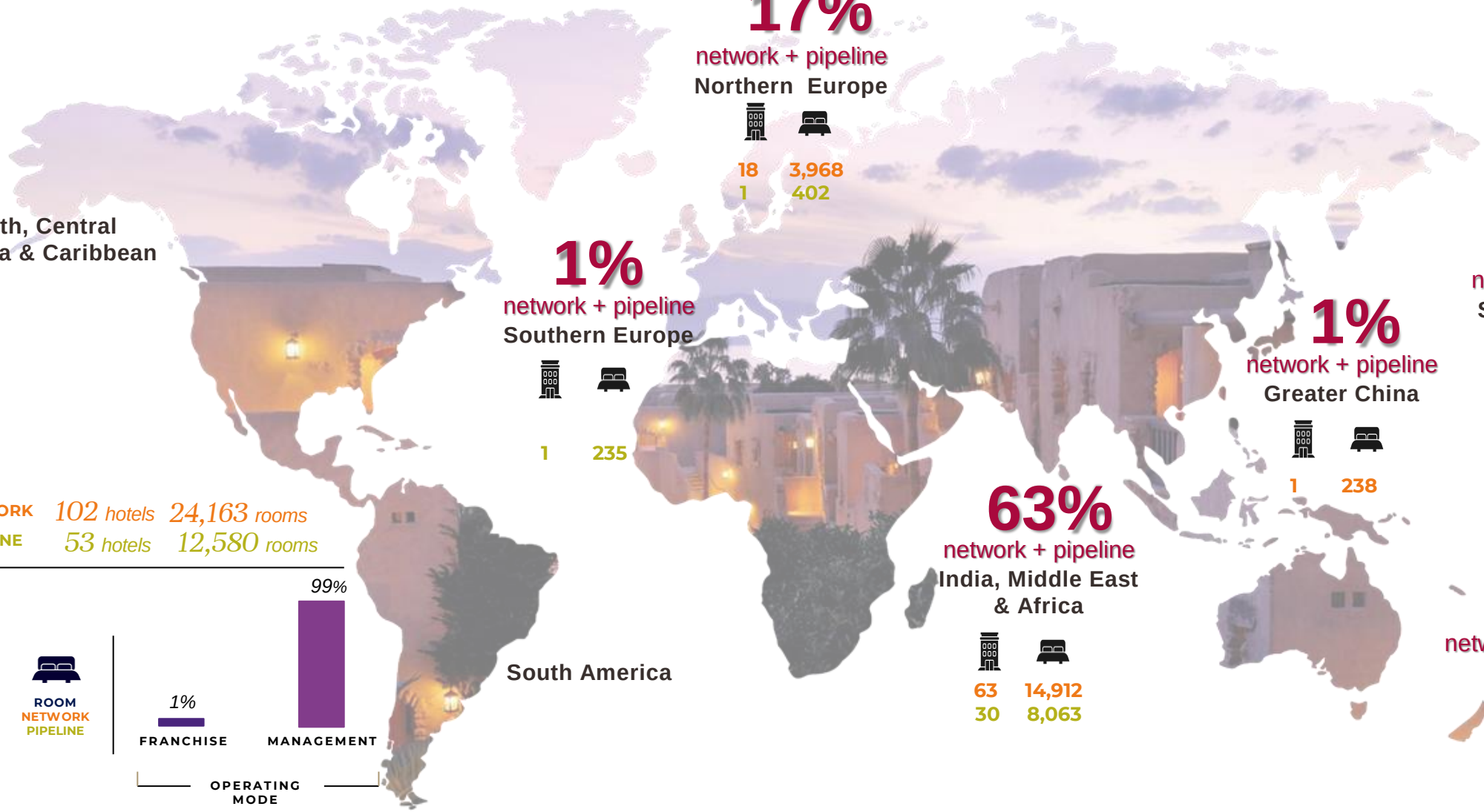
FLEXIBILITY

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

A GLOBAL FOOTPRINT OF 155 HOTELS OPENED AND IN THE PIPELINE



17%
network + pipeline
Northern Europe
18 3,968
1 402

1%
network + pipeline
Southern Europe
1 235

North, Central America & Caribbean

South America

63%
network + pipeline
India, Middle East & Africa
63 14,912
30 8,063

1%
network + pipeline
Greater China
1 238

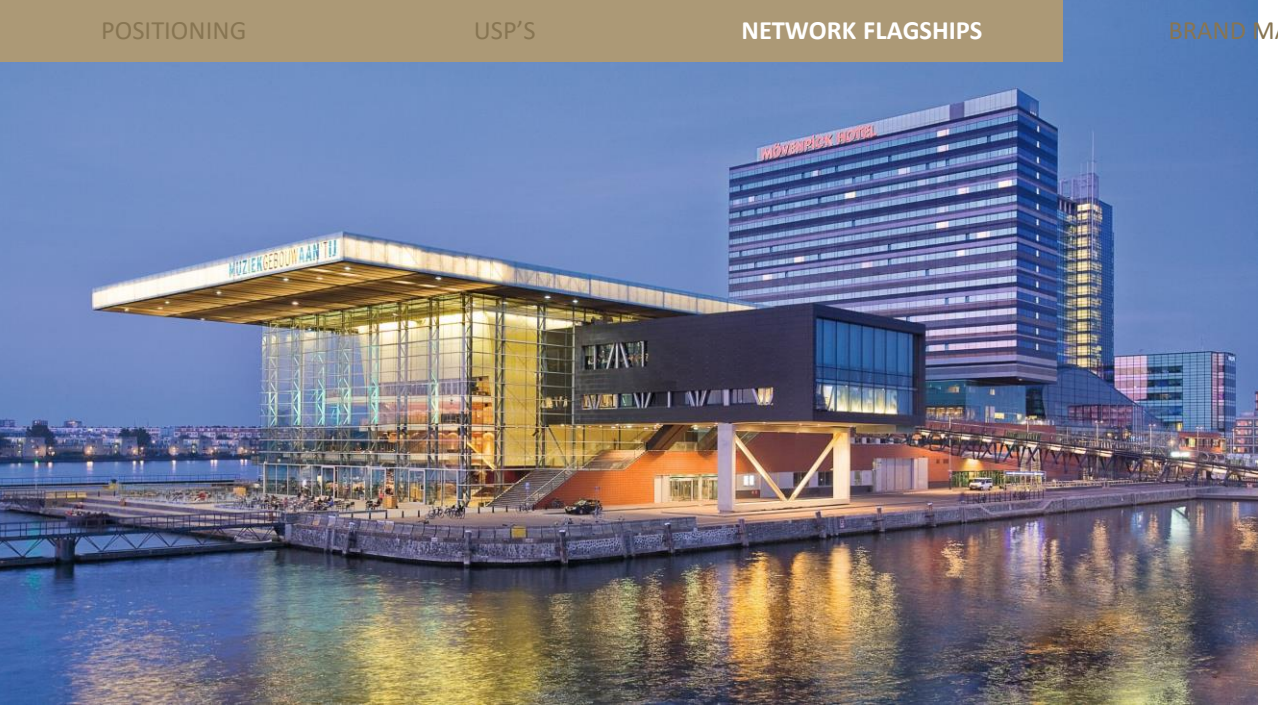
19%
network + pipeline
South East Asia
20 5,045
8 1,763

1%
network + pipeline
Pacific
2 394

NETWORK	102 hotels	24,163 rooms
PIPELINE	53 hotels	12,580 rooms

HOTEL NETWORK PIPELINE
ROOM NETWORK PIPELINE

All figures as of end December 2020
Breakdown network + pipeline by region is calculated by number of rooms



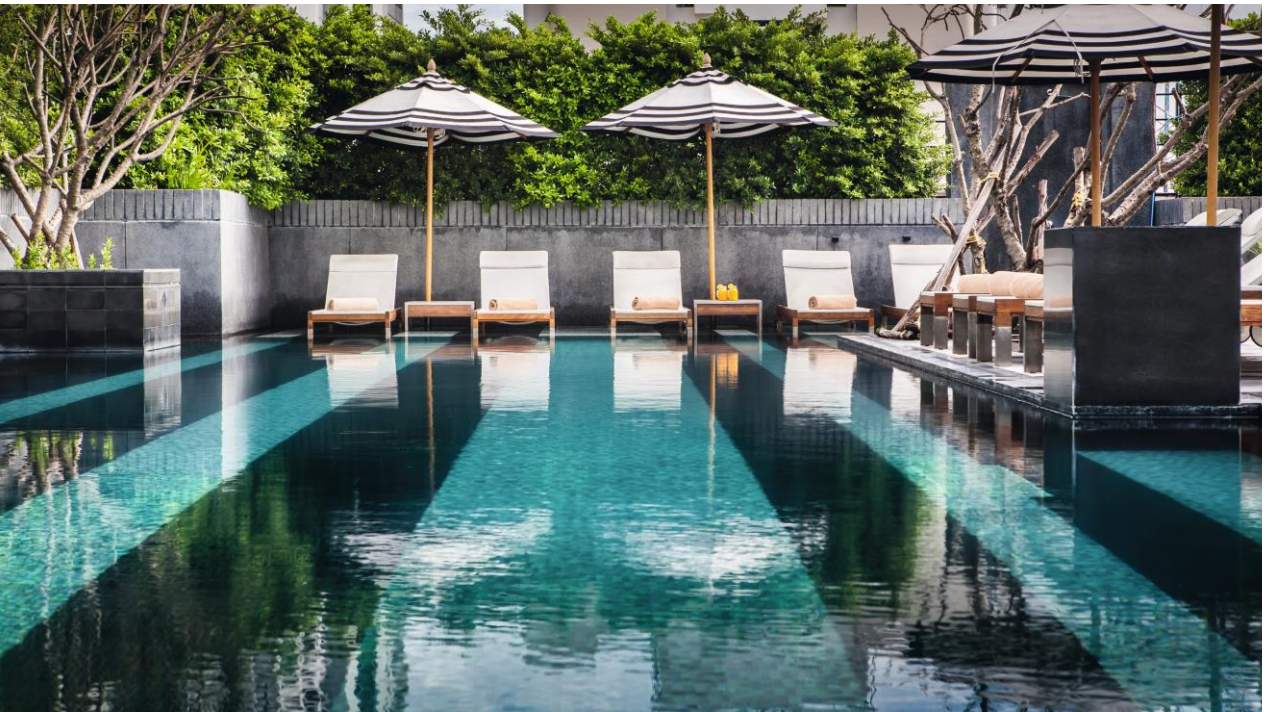
Mövenpick Hotel Amsterdam City Centre
Netherlands

408

Mövenpick Hotel The Hague
Netherlands

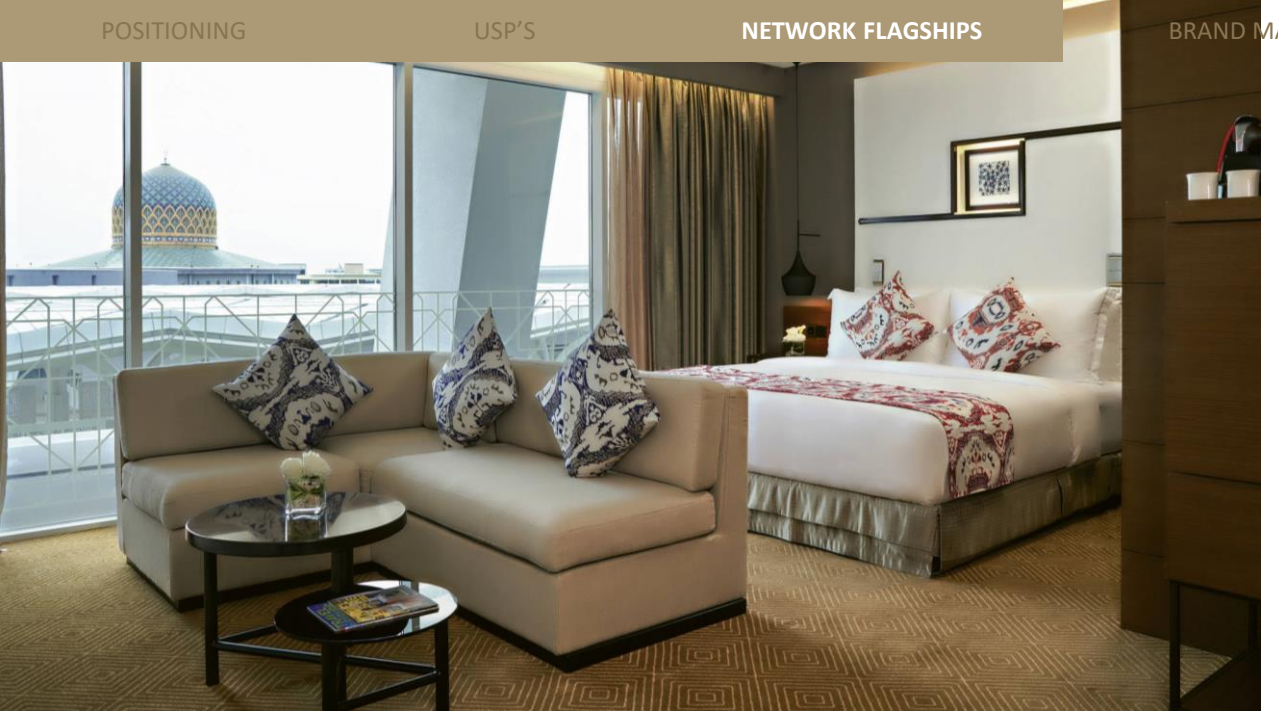
Grand Plaza Mövenpick Dubai
Media City *UAE*

235

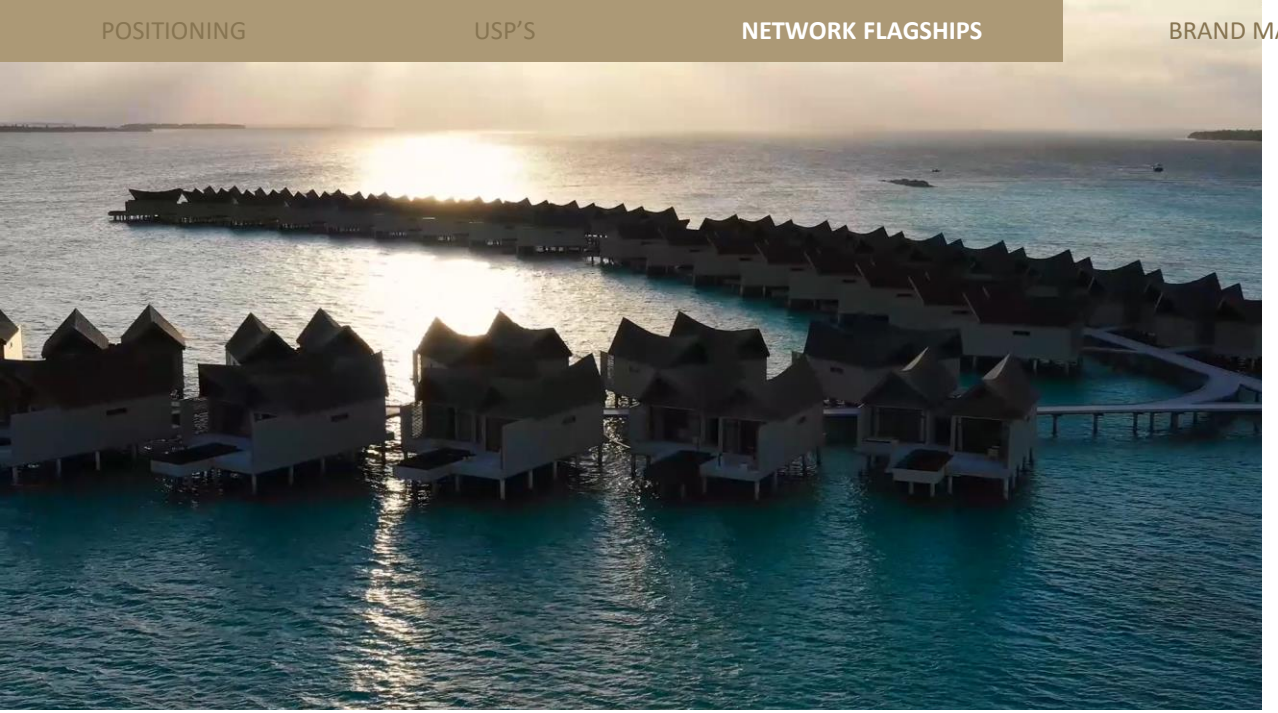


Mövenpick Hotel Sukhumvit 15 Bangkok
Thailand

297

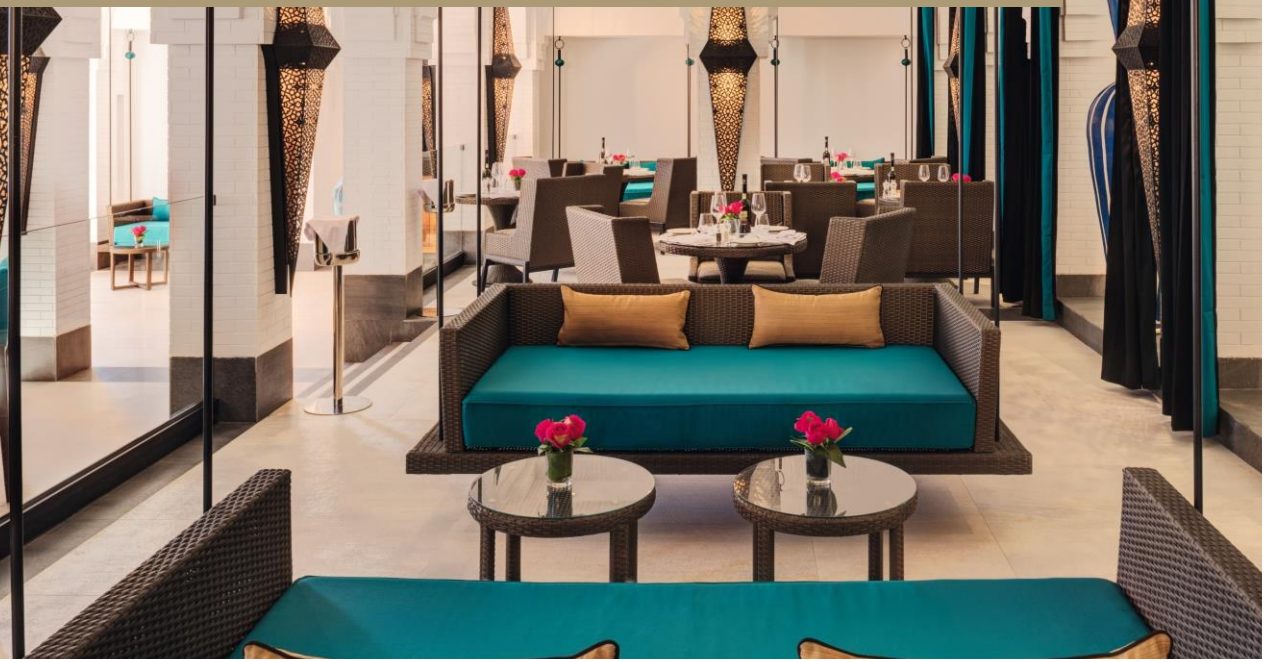


Mövenpick Hotel and Convention Centre
Kuala Lumpur *Malaysia*



Mövenpick Resort Kuredhivaru
Maldives

105



Mövenpick Mansour Eddahbi Marrakech
Morocco

503

Mövenpick Resort Phu Quoc
Vietnam

658

Mövenpick Resort & Spa Dead Sea
Jordan

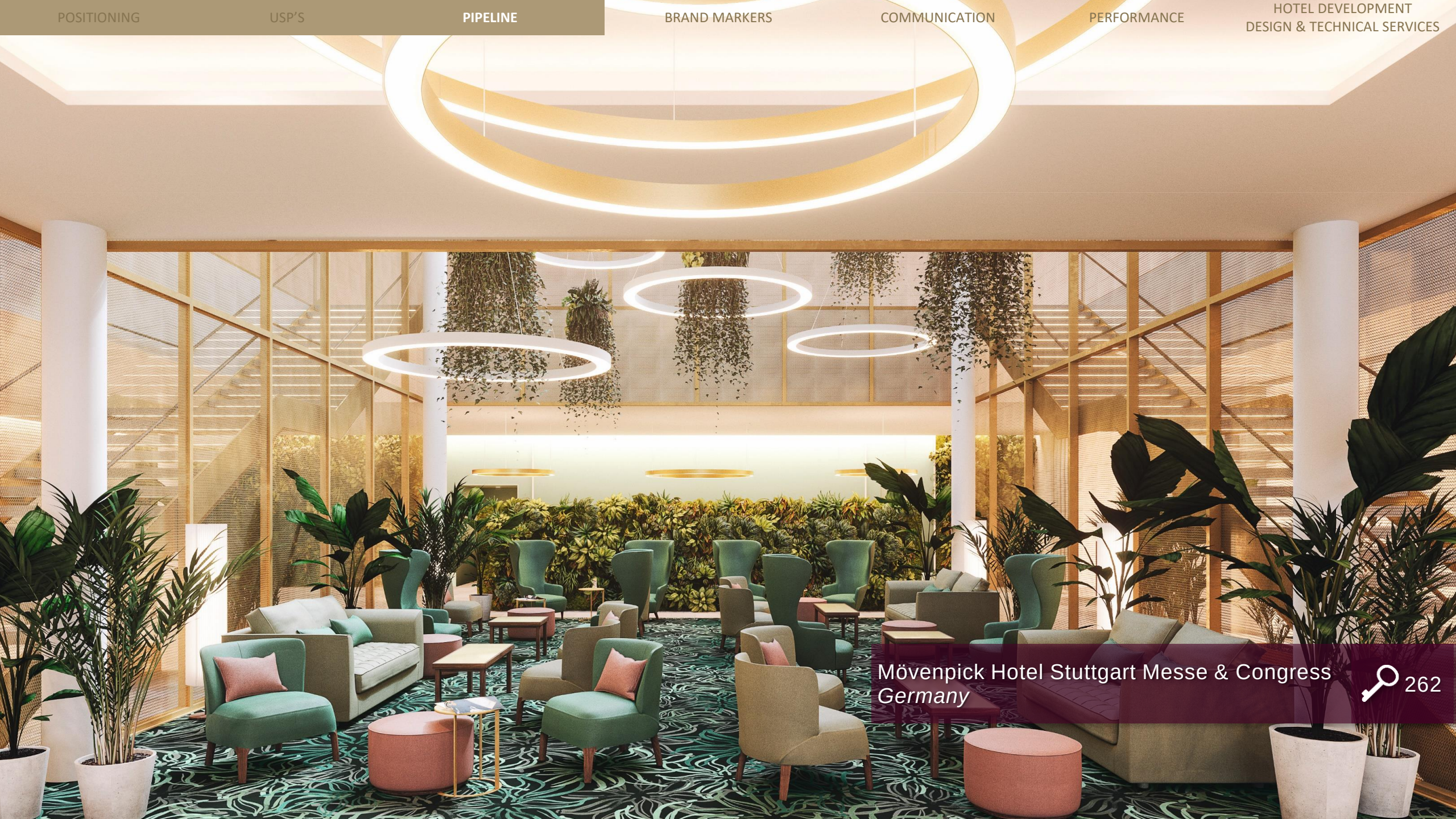
346

Mövenpick Hotel Taganskaya
Moscow

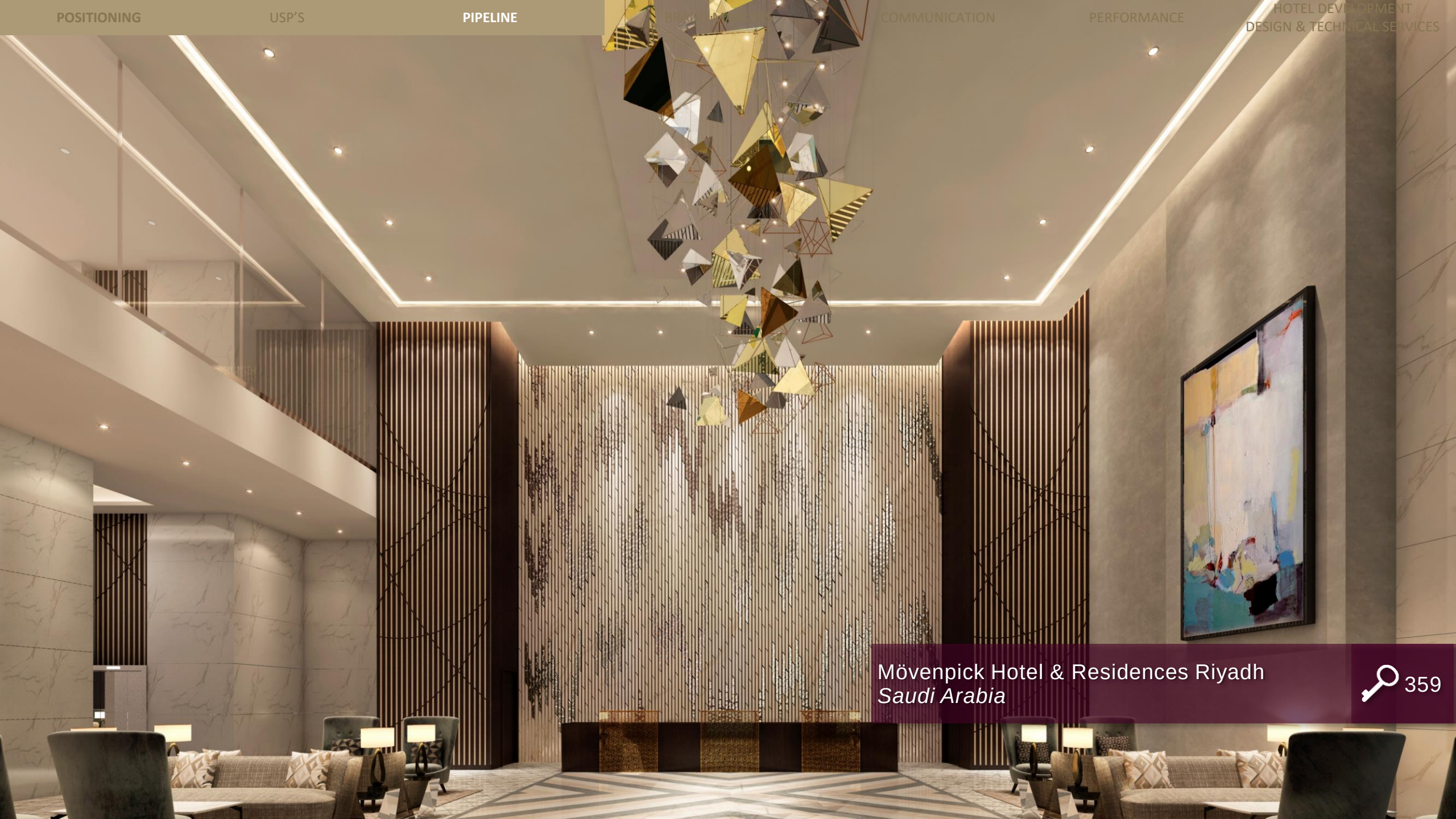
Mövenpick Hotel Abidjan
Côte d'Ivoire

Mövenpick Hotel Hobart
Australia

221



Mövenpick Hotel Stuttgart Messe & Congress
Germany



Mövenpick Hotel & Residences Riyadh
Saudi Arabia

359

Mövenpick Hotel Addis Ababa
Ethiopia

252

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

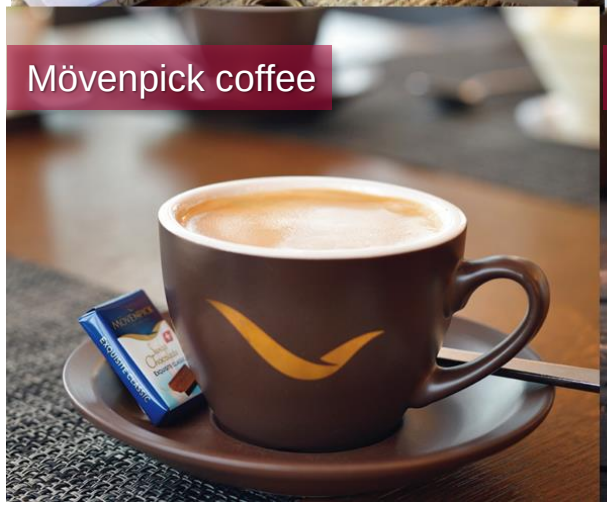
Marker Mövenpick Swiss gourmet products

Arrival · Public Spaces · Guest Room · Food & Drink · Wellness · Leisure · Meetings · Departure

SWISS-INSPIRED GASTRONOMY

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



Programme Mövenpick family

Arrival · Public Spaces · Guest Room · Food & Drink · Wellness · Leisure · Meetings · Departure

HEARTFELT SERVICE

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!

Green Globe Sustainability

MINDFUL SUSTAINABILITY

Mövenpick takes a uniquely holistic sustainability approach

Mövenpick was named the world's most sustainable hotel group by Green Globe in 2017. All Mövenpick hotels must be Green Globe certified – this is in addition to Accor Planet 21 compliance

Sustainability principles must be integral to the hotel dessign, showcasing the brand's commitment to the environment, people and local communities

Mövenpick brand look and feel

Elegant curves, all derived from the bird icon, give a flowing quality to Mövenpick marketing materials

A wide colour palette allows the bird icon to be matched to photography, making a variety of different looks possible. Headings in bold italic fonts complete the brand style

Mövenpick communications platform

FOOD & DRINK BRAND CAMPAIGNS

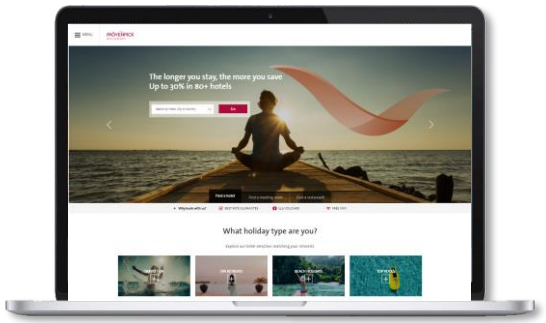
These ensure Mövenpick is recognised by guests as the place to savour life. Imaginative new dishes based on Mövenpick products or Swiss ingredients are featured in our hotels during the campaigns

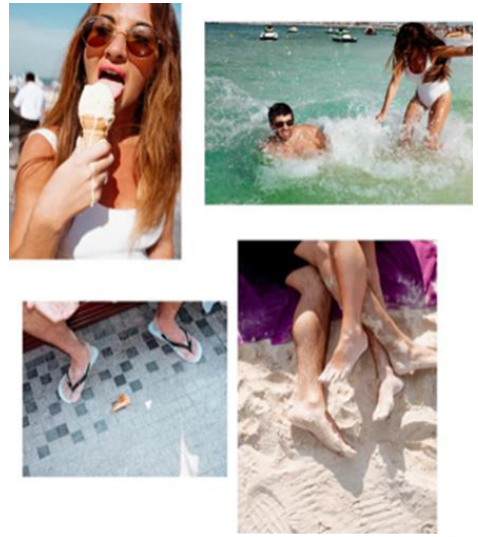
GLOBAL TACTICAL CAMPAIGNS

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 2020

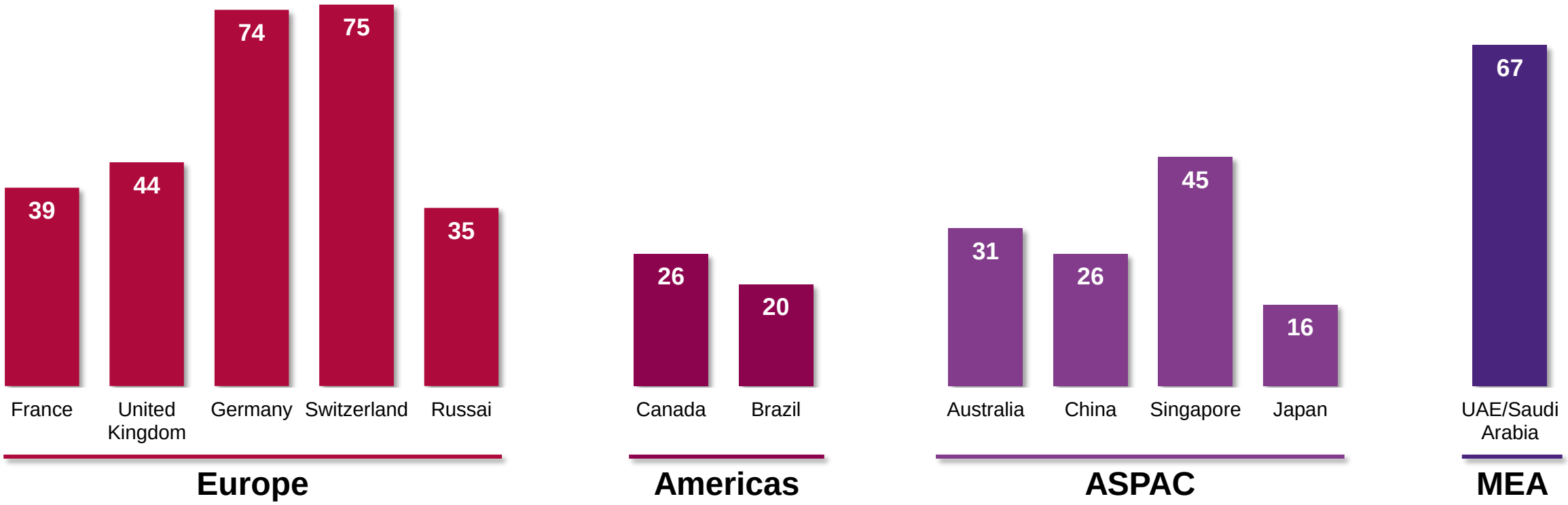
36 awards

Best performing region
India, Middle East & Adrica

23 awards

Award Organisation	Awards
American Chamber of Commerce in Thailand	1
Asia Tatler	1
Booking.com	1
Ghana Business Awards	1
Global Brands Magazine	1
Green Globe	2
Holidaycheck	1
hotels.com	3
International Property Awards	1
Luxury Hotel Awards	10
Netherlands-Thai Chamber of Commerce	1
Safe Hotels	1
Skytrax World Airport Awards	1
Travel & Hospitality Awards	4
TripAdvisor	6
TrustYou	1
Total	**36**

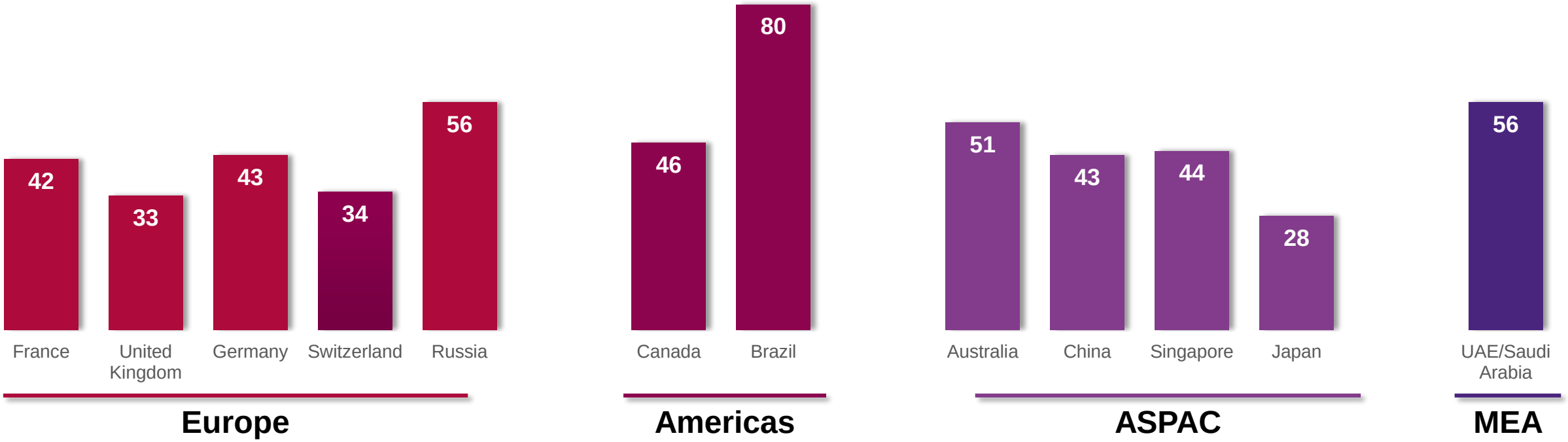
Mövenpick Brand Awareness (%)



MÖVENPICK HOTELS & RESORTS

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 (€)



MÖVENPICK HOTELS & RESORTS

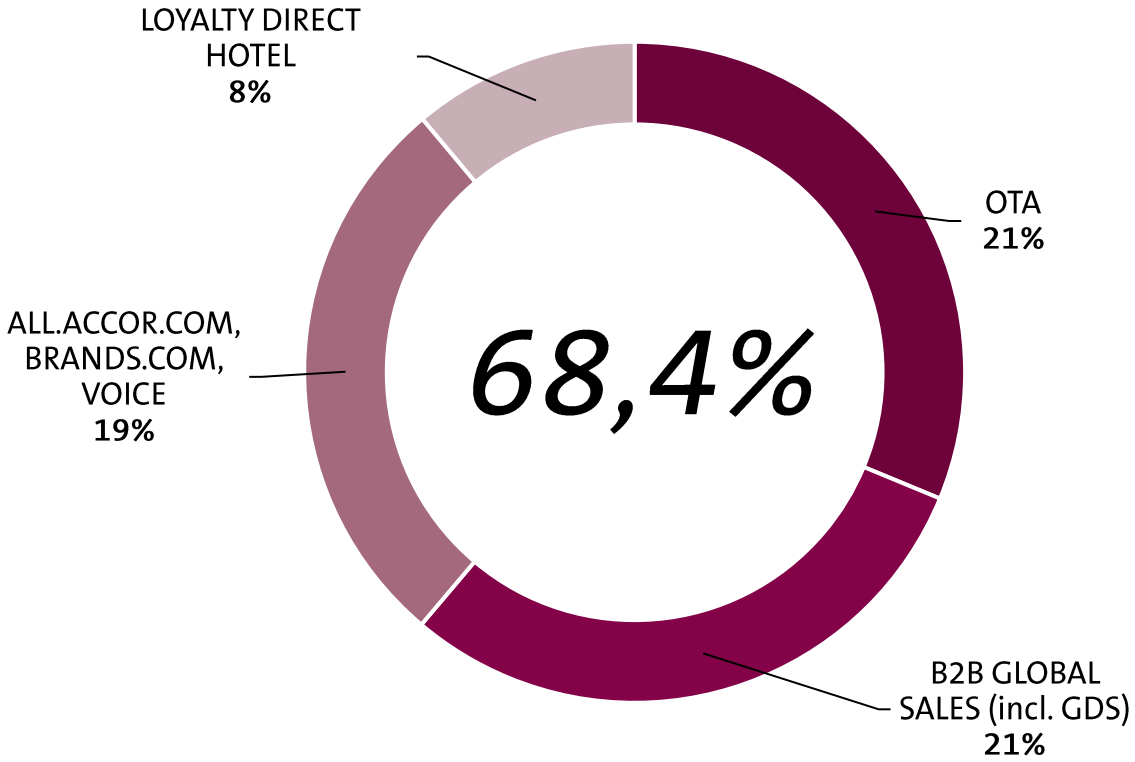
Brand Margin® in €

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

Central Brand Delivery powered by Accor

For Premium Brands (Room night based)



FOCUS WEB
(ACCOR WEB + WEB PARTNER)

1,5M ROOM NIGHTS

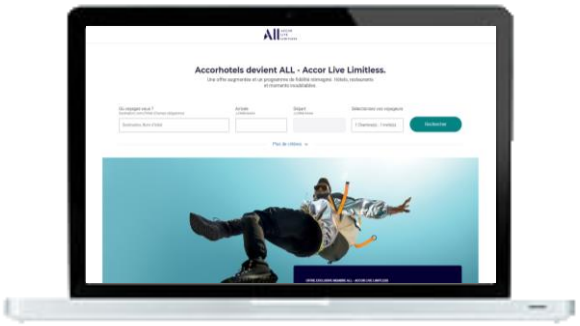
€208M ROOM REVENUE

Central Brand Delivery: CBD (%)

CBD (Central Brand Delivery) measures the business in room nights brought by Accor to the hotel through the 3 main group levers: Distribution (through Central Reservation System - CRS), Loyalty & Sales.
A 70% CBD means that 70% of the room nights of an hotel are driven by Accor & Brand Sales, Distribution (all channels powered by the CRS) & Loyalty ecosystem.

New Booking Engine & App

1 MULTIBRAND PORTAL
ALL.ACCOR.COM



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

NEW in 2020:
- **All Safe label visibility** on digital experience to rest-assure guests during the pandemic
- Launch of **Apartment & Villas** website dedicated to Branded Residences and Extended Stay hotels

+

1 LIFESTYLE COMPANION APP
ACCOR ALL

- **> 50%** Mobile and App visits
- **1** Download every minute
- **> 4,3/5** app ratings

iOS: 4,5/5 & Android: 4,3/5

.

+

18 BRAND.COM WEBSITES

- **MOVENPICK.COM** plugged to **ALL.ACCOR.COM**

Official figures as of end 2019

New Loyalty Programme

THE ONLY LIFESTYLE LOYALTY PROGRAM

NEW LIFESTYLE & AUGMENTED HOSPITALITY FRAMEWORK

OFFERING EXTENDED OPPORTUNITIES TO EARN & REDEEM POINTS

NEW BENEFITS

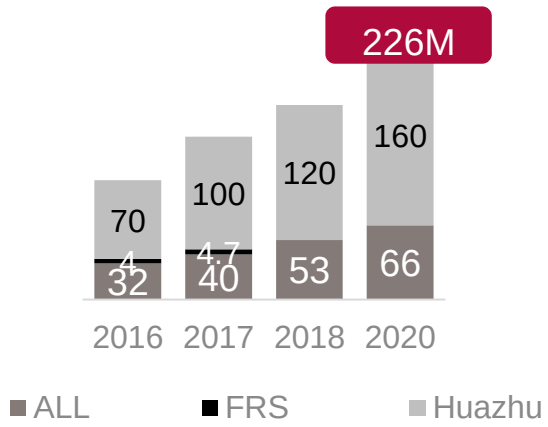
- **38** Brands and +
- **Suite Night Upgrade**
- **F&B** outside a stay

NEW PARTNERSHIPS

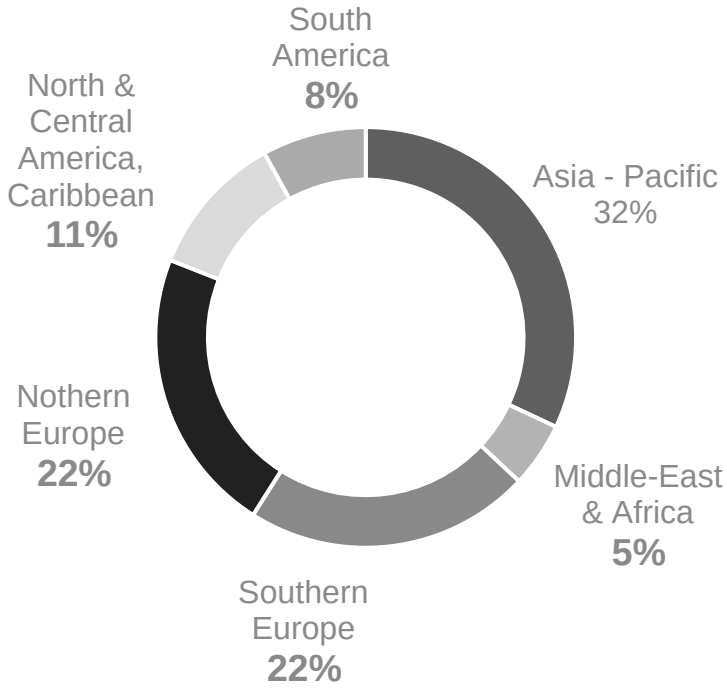
- **PSG** – Games / Net media value +€200m to ALL
- **AEG** – Worldwide arenas & festivals
- **IMG** – Taste festivals

THE FAST GROWING LOYALTY PROGRAM

- **68M** Loyalty members worldwide
- **37%** Loyalty contribution rate in RN
- **x 3,6** Members stay twice more than non-members



THE MOST GLOBAL LOYALTY PROGRAM



Official figures as of end 2019

Accor distribution solutions*

>110 global distribution channels at **best market conditions**

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

+

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

Official figures as of end 2019

Movenpick Development Criteria - Programming

		AAA ultra city center location, historic conversion	WORLDWIDE
HOTEL	RECOMMENDED NUMBER OF ROOMS	150 keys and +	150 keys and +
	ROOM AVERAGE SIZE	24 – 32 sqm	28 – 36 sqm
	TGFA / ROOM	70 – 80 sqm	90 – 100 sqm
RESORT	RECOMMENDED NUMBER OF ROOMS	120 keys and more	150 keys and more
	ROOM AVERAGE SIZE	28 – 40 sqm + balcony	40 sqm + balcony
	TGFA / ROOM	80 – 90 sqm	80 – 110 sqm

FOOD & BEVERAGE	1 all-day dining including Gourmet Coffee 1 specialty restaurant on market demand Lobby living room / lounge concept including: 1 Mövenpick Coffee & Wine food bar + a 1 Mövenpick product retail shop
WELL-BEING	Spa market driven Fitness Centre Swimming pool
MEETINGS	Key meeting rooms Ballroom on market demand Business centre available Litlle Birds Kids Club (As part of family product)

	PRIME LOCATIONS	SECONDARY LOCATIONS	AIRPORTS SUBURBS
INTERNATIONAL CAPITALS KEY CITIES & RESORTS DEST.	●	●	●
MAJOR DOMESTIC DESTINATIONS	●		
OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS	●		

Guest Journey & Experience Key standards a at 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, subject to change

BRAND PASSIONS

- SWISS-INSPIRED GASTRONOMY
- HEARTFELT SERVICE
- MINDFUL SUSTAINABILITY

Arrival	Public spaces	Guest room	Food & drink	Wellness	Leisure	Meetings	Departure
Mövenpick Swiss gourmet products	Mövenpick Swiss gourmet products	Mövenpick Swiss gourmet products	Mövenpick Swiss gourmet products	Spa and Fitness	Mövenpick Swiss gourmet products	Mövenpick Swiss gourmet products	Mövenpick Swiss gourmet products
Market	Chocolate Hour	Signature Flavours	Market		Mövenpick Family	Signature Flavours	Market
Mövenpick Family	Signature Flavours	Mövenpick Family	Signature Flavours			Clutter-free Meetings	
	Market	Power of Kindness	Mövenpick Family			Power of Kindness	
	Mövenpick Family		Power of Kindness				
	Fragrance & music						
	Power of Kindness						

MÖVENPICK
HOTELS & RESORTS

We make moments

MÖVENPICK STYLE BOOK
Can be used before HCSA is signed

MÖVENPICK LIVING DESIGN BRIEF
Can be used before HCSA is signed

MÖVENPICK DESIGN BRIEF
Can be used before HCSA is signed

MY MÖVENPICK MARKETPLACE WEBINAR
Can be used after HCSA is signed

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

MÖVENPICK
HOTELS & RESORTS