WHY INVEST IN NOVOTEL

Accor Global Development
June 2020

NOVOTEL
HOTELS, SUITES & RESORTS
At Novotel, we believe that quality time is about making everyday moments matter. Everything has been thought to enhance our guests’ life balance, sense of well-being but also enjoyment. Whether through our intuitive & modern design or our large range of rewarding experiences, everyone can disconnect from a busy life or make time to connect with their family, friends or colleagues.

This combination makes Novotel the perfect spot for travellers and locals to have a drink, a bite to eat, to work, play or just relax.

RELAXED   LIVELY   COMFORTED   ENERGIZED

POSITIONING VIDEO
THE MOST WELL KNOWN & RELIABLE BRAND OF ITS CATEGORY

Large global footprint of 541 hotels in 62 countries & 134 hotels in pipeline

Strong brand awareness > 50% in > 10 feeder markets

Best-known & trusted upper midscale "full services brand": Sleep, Eat & Drink, Meet & Exercice

Official figures 2020
INTUITIVE & EFFECTIVE DESIGN

Flexibility within a framework –
4 new full hotel concepts developed by international designers

Brand fluidity, modularity & multifunctional
Repositionable table/sofa-extra bed(s)

Optimized valued engineering = best construction & FFNE costs

Official figures 2018
FAMILY FRIENDLY

BUSINESS DRIVEN
Individuals/groups

FAMILY FRIENDLY
Best family offer on the market > 2 million kids every year worldwide

Perfect mix of business / leisure,
Leveraging the occupancy in lower periods (week ends & holidays)

Official figures 2018
NETWORK AND PIPELINE

541 HOTELS
105,709 ROOMS
62 COUNTRIES IN 2020

134 NEW HOTELS
29,369 MORE ROOMS BY 2025
Network and Pipeline

**Europe**
- Network: 31,529 rooms, 166 hotels
- Pipeline: 4,410 rooms, 25 hotels

**France**
- Network: 17,829 rooms, 135 hotels
- Pipeline: 513 rooms, 5 hotels

**Americas**
- Network: 8,629 rooms, 43 hotels
- Pipeline: 1,463 rooms, 11 hotels

**Asia-Pacific**
- Network: 40,862 rooms, 163 hotels
- Pipeline: 16,557 rooms, 70 hotels

**Africa – Middle East**
- Network: 6,860 rooms, 34 hotels
- Pipeline: 6,426 rooms, 23 hotels

**Operating Mode**
- Managed: 73%
- Franchised: 27%

**Brand Status**
- Managed: 73%
- Franchised: 27%

Official figures, December 2018, including Novotel Suites.
Novotel Singapore On Stevens

SINGAPORE

254 Rooms
Novotel Bangkok Sukhumvit 20

THAILAND

244 Rooms
Novotel Bangkok Sukhumvit 4

THAILAND

185 Rooms
Novotel Brisbane
South Bank
AUSTRALIA
238 Rooms
Novotel RJ Praia dO
Botafogo

BRAZIL

134 Rooms
Novotel New York Times Square
USA
480 Rooms
FLAGSHIPS

Novotel Bur Dubai
UAE
219 Rooms
Novotel Sharjah Expo Centre
UAE
200 Rooms
Novotel Wrocław Centrum

POLAND

194 Rooms
FLAGSHIPS

Novotel Parma CentrO

ITALY

133 Rooms
RESORTS

Novotel Itu

BRAZIL

343 Rooms
Novotel Bogor Golf Resort & Convention Center

INDONESIA

133 Rooms
Novotel Phuket Karon Beach Resort & Spa

THAILAND

224 Rooms
Novotel Hua Hin Cha-Am Beach Resort & Spa

THAILAND

243 Rooms
Novotel Lombok Resort & Villas
INDONESIA
102 Rooms
Novotel Deauville Plage
France
100 Rooms
LATEST OPENINGS

Novotel Perth Murray Street
AUSTRALIA
435 Rooms
LATEST OPENINGS

Novotel Christchurch Airport
NEW ZEALAND
200 Rooms
LATEST OPENINGS

Novotel Blois Centre
Val de Loire
FRANCE
78 Rooms
Novotel Madrid CITY LAS VENTAS
SPAIN
156 Rooms
Novotel Suites Almaty
KAZAKHSTAN
50 Rooms
KEY UPCOMING OPENINGS

Novotel Moscow Taganskaya, Russia
156 Rooms, November 2020

Novotel Tunis, Tunisia
176 Rooms, October 2021
SECURED PIPELINE OVER 5 YEARS
As of end June 2020

AS PAC
China, Chongqing airport, 465 rooms
India, New delhi City Centre, 125 rooms
Indonesia, Bali ubud, 130 rooms
Thailand, Phuket Naiharn Beach, 650 rooms
Thailand, Novotel Suites Bangkok Sukhumvit 34, 148 rooms
Vietnam, Hanoi, Hanoi Thai Ha, 343 rooms
Australia, Sydney, Novotel Sydney Cabra Vale, 120 rooms
Myanmar, Myanmar, Novotel Taunggyi Taiba, 219 rooms
Malaysia, Kota Kinabalu, Novotel Kota Kinabalu Metro Town, 397 rooms
Bangladesh, Chittagong, Novotel Chittagong, 179 rooms
Cambodia, Phnom Penh, Novotel Phnom Penh Beung Keng Kong, 253 rooms
Indonesia, Jakarta, Novotel Jakarta International Airport, 265 rooms

MIDDLE EAST & AFRICA
Ivory Coast, Novotel Abidjan VGE, 201 rooms
Oman, Muscat Azaiba, 182 rooms
Qatar, Doha, Doha WEST BAY, 396 rooms
Algeria, Algiers, Bab Ezzouar Novotel, 255 rooms
Saudi Arabia, Mecca, Makkah Al Naseem, 480 rooms
Saudi Arabia, Makkah, Novotel Makkah Thakker City, 1539 rooms
Saudi Arabia, Madinah, Novotel Madinah, 650 rooms
Tunisia, Tunis, Tunis Lac, 124 rooms
Egypt, El Alamain, Novotel El Alamain City North Coast, 250 rooms
Morocco, Rabat, Novotel Rabat Gare, 176 rooms
Nigeria, Lagos, Novotel Lagos VI, 162 rooms
Democratic Republic of Congo, Kinshasa, Novotel Kinshasa, 115 rooms

EUROPE
Bulgaria, Sofia Novotel, 150 rooms
France, Paris, Novotel Paris Belleville, 245 rooms
Russia, St Peterburg, Novotel St Peterburg Airport, 251 rooms
Albania, Tirana, Novotel Tirana, 130 rooms
Croatia, Zagreb, Novotel Zagreb, 170 rooms
Germany, Duesseldorf, Novotel Duesseldorf Airport, 210 rooms
Kyrgyzstan, Bishkek, Novotel Bishkek Centre, 159 rooms
Romania, Oradea, Novotel Oradea Aquapark, 200 rooms
United Kingdom, Cambridge, Novotel North station - Science Park, 154 rooms
Uzbekistan, Tashkent, Novotel Tashkent Centre, 176 rooms
Czech Republic, Prague, Novotel Prague, 221 rooms
Italy, Milano, Novotel Milan Quark, 284 rooms

AMERICAS
Brazil, Belo Horizonte, BH savassi, 203 rooms
Brazil, Canela, Novotel Canela, 117 rooms
Peru, Lima, Lima Surco, 124 rooms
Mexico, Mexico, Novotel Mexico City, 84 rooms
Mexico, Mexico, Novotel Mexico City Insurgentes WTC, 106 rooms
Bolivia, Santa Cruz, Novotel Santa Cruz de la Sierra, 145 rooms
Chile, Arica, Novotel Arica, 144 rooms
BRAND PROGRAMS

At Novotel

TIME IS WELL SPENT

Because we see ourselves as a destination place, we make sure our guests can choose between relaxing moments disconnecting from their busy life, and energizing social moments, connecting with friends colleagues or family.

TAKE TIME

to rest, and relax—for you or your loved ones to refresh, reset and feel good.

MAKE TIME

for those you know or those you don’t, to get together to try something new or just have fun.
Novotel introduces a collection of 4 different interpretations of its design philosophy based on designers concepts coming from 4 different regions of the world, for common areas and bedrooms.

**RF STUDIO**  
Europe

**SUNDUKOVY SISTERS**  
Middle East

**METRO**  
South America

**HYPOTHESIS**  
Asia
SOCIAL HUB

Make the lobby a social hub, a lively and relaxed place open to all; guests and locals alike.

3 major principles:
flexible, multi-function, a lobby that invites the outside in

3 mandatory zones:
LIVING AREA
FAMILY ZONE
FOOD BAR
MODULAR & SPACIOUS

A universal and customizable design offering a sense of space and modernity. 3 different designs are now available.

From one size fits all to freedom in a frame
• from 20 to 30 sqm
LIVE N’DREAM BED
A UNIQUE BEDDING EXPERIENCE

• 2 soft pillows that support your neck
• 2 “smart pillows” to fold when sitting up and unfold for sleeping
• A warm but light duvet
• A memory-foam mattress that adapts to your back
• A flexible slatted bed base that matches and absorbs movement
Travel can be stressful, whether it’s the journey or being in a new environment, which is why Calm and Novotel are teaming up to help people relax their mind and body.

Together, we’ll work to offer busy, often stressed, travelers the space and digital tools to take time for themselves, relax, rejuvenate, and sleep better.

Novotel believes everyone should be able to take a moment to unwind, creating the perfect environment to experience and enjoy Calm.
FAMILY & NOVOTEL
FAMILIES ARE ALWAYS VIPS AT NOVOTEL

BOOKING
Kids stay free in parents’ room
50% off the 2nd room for children

CHECK IN & OUT
Welcome gift & late check-out

STAY
Family play area & baby equipment

ROOM
Family rooms including dedicated TV channels

FOOD & BEVERAGE
Kids’ menu and free breakfast

SPECIALS
Extra-special year-round offers
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.

<table>
<thead>
<tr>
<th>ARRIVAL &amp; DEPARTURE</th>
<th>SOCIAL HUB</th>
<th>GUEST ROOMS</th>
<th>WELLNESS</th>
<th>F&amp;B</th>
<th>MEETINGS &amp; EVENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dress code</td>
<td>Fragrance</td>
<td>Executive Room</td>
<td>Fitness</td>
<td>Novotel Breakfast</td>
<td>Meeting By Novotel</td>
</tr>
<tr>
<td>Welcome-in</td>
<td>Family Zone</td>
<td>Live N' Dream</td>
<td>Swimming pool</td>
<td>All day dining philosophy</td>
<td>Collective Classes</td>
</tr>
<tr>
<td>Welcome gifts (family)</td>
<td>Welcome/ Living Area</td>
<td>20% family room</td>
<td>Spa</td>
<td>Calm content</td>
<td>Calm content</td>
</tr>
<tr>
<td>Welcome gifts (family)</td>
<td>Food Bar</td>
<td>Branded amenities</td>
<td>Calm free trial</td>
<td>Calm free trial</td>
<td>Calm content</td>
</tr>
<tr>
<td>Welcome gifts (family)</td>
<td>Brand playlist</td>
<td>Executive &amp; above</td>
<td>Calm free trial</td>
<td>Executive &amp; above</td>
<td>Calm content</td>
</tr>
</tbody>
</table>

MANDATORY

BRAND EXPERIENCE
NOVOTEL’S VISUAL IDENTITY

LIVELY WITH A STRONG HUMAN TOUCH.

NOVOTEL’S VISUAL IDENTITY EMPHASIZES THE EMOTIONAL DIMENSION OF THE BRAND.
The new communication campaign showcases Novotel hotels as places where guests can spend their time well.

90%
I try to make the most of the moments that matter in my daily life.

56%
If I could choose, I’d rather have more time than more money.
(Source: IPSOS 2018)
SOCIAL MEDIA

NOVOTEL HELPS YOU
PRESS PAUSE ON SOCIAL MEDIA AND IN REAL LIFE

55K followers
- Global page
- Hotel pages

4,4K fans
- Global page

602K fans
- Global page
- 11 Country pages
- Hotel pages

27K followers
- Global page
- Hotel pages

11K visitors/month
- Global page

NEW
NOVOTEL.COM

11 GEOLOCATED VERSIONS
2.2M SUBSCRIBERS TO THE NEWSLETTER
MORE THAN 900K ROOMS BOOKED
21M€ REVENUE GENERATED
+400 MAILINGS PER YEAR
WE MEASURE SUCCESS THROUGH THE EVOLUTION OF:

**BRAND AWARENESS**

57%

Our primary asset: high brand awareness of over 50% in 11 countries.

Our objective is to raise awareness by 2 pts.

Source: BEAM

**BRAND PERCEPTION**

Novotel is recognized as a ‘relaxed’ and ‘lively’ brand, making people feel ‘comforted’, by more than the half of its frequent customers.

Our objective is to improve our image of modernity and create emotional connections between the brand and its customers.

Source: BEAM

**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.

Our objective is to maintain this price premium.

Source: BEAM

**REPUTATION PERFORMANCE SCORE**

84.7%

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.

Our objective is to reach 84.06% in 2020.

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

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 (€) - Figures as of end 2019

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
REPUTATION PERFORMANCE SCORE - Figures as of end 2019

NOVOTEL REPUTATION PERFORMANCE SCORE 84.7%

NORTH & CENTRAL AMERICAS 85%
SOUTH AMERICA 86%
EUROPE 83%
AFRICA & MIDDLE EAST 86%
ASIA - PACIFIC 86%
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
NOVOTEL DISTRIBUTION PERFORMANCE POWERED BY ACCOR - Figures as of end 2019

- 72% of Novotel room revenue comes through Accor Central Reservation System
- 33% direct sales
- 28% hotel PMS
- 16% Call centers, influenced hotel direct* Hotel & cluster services
- 17% Accor web websites, mobile sites & app
- 29% GDS/IDS
- 10% Web partners (OTAs)
- 39% indirect sales

Focus Web (Accor Web + Web Partner)

€9M Room Night
€1,079M Room Revenue

46%
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
- 900K Rooms booked

*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

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

THE MOST GLOBAL LOYALTY PROGRAM

- 64M Loyalty members worldwide
- 31% Loyalty contribution rate
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- 64M Loyalty members worldwide
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APPENDIX
**SECURED PIPELINE OVER 5 YEARS**

As of end December 2019

<table>
<thead>
<tr>
<th><strong>ASPAC</strong></th>
<th><strong>EUROPE</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>China</strong>, Chongqing airport, 465 rooms</td>
<td><strong>Bulgaria</strong>, Sofia Novotel, 150 rooms</td>
</tr>
<tr>
<td><strong>India</strong>, New delhi City Centre, 120 rooms</td>
<td><strong>France</strong>, Paris, Paris Parc des Expositions Porte de Versailles, 245 rooms</td>
</tr>
<tr>
<td><strong>Indonesia</strong>, Bali ubud, 130 rooms</td>
<td><strong>Russia</strong>, Moscow, Moscow Rechnoy Vokzal, 220 rooms</td>
</tr>
<tr>
<td><strong>Thailand</strong>, Phuket Naiharn Beach, 850 rooms</td>
<td><strong>Albania</strong>, Tirana, Novotel Tirana, 130 rooms</td>
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<td><strong>Thailand</strong>, Novotel Suites Bangkok Sukhumvit 34, 148 rooms</td>
<td><strong>Croatia</strong>, Zagreb, Novotel Zagreb, 170 rooms</td>
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<td><strong>Vietnam</strong>, Hanoi, Hanoi Thai Ha, 343 rooms</td>
<td><strong>Germany</strong>, Duesseldorf, Novotel Duesseldorf Airport, 210 rooms</td>
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<td><strong>Australia</strong>, Sydney, Novotel Sydney Cabra Vale, 120 rooms</td>
<td><strong>Kyrgyzstan</strong>, Bishkek, Novotel Bishkek Centre, 159 rooms</td>
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<td><strong>Manar</strong>, Myanmar, Novotel Taunggyi Taiha, 219 rooms</td>
<td><strong>Romania</strong>, Oradea, Novotel Oradea Aquapark, 200 rooms</td>
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<td><strong>Malaysia</strong>, Kota Kinabalu, Novotel Kota Kinabalu Metro Town, 397 rooms</td>
<td><strong>United Kingdom</strong>, Leicester, Novotel Leicester, 154 rooms</td>
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<td><strong>Bangladesh</strong>, Chittagong, Novotel Chittagong, 179 rooms</td>
<td><strong>Uzbekistan</strong>, Tashkent, Novotel Tashkent Centre, 175 rooms</td>
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<td><strong>Cambodia</strong>, Phnom Penh, Novotel Phnom Penh Beung Keng Kong, 253 rooms</td>
<td><strong>Czech Republic</strong>, Prague, Novotel Prague, 284 rooms</td>
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<tr>
<td><strong>Indonesia</strong>, Jakarta, Novotel Jakarta International Airport, 265 rooms</td>
<td><strong>Italy</strong>, Milano, Novotel Milano Quark, 284 rooms</td>
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<th><strong>MIDDLE EAST &amp; AFRICA</strong></th>
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<td><strong>Ivory Coast</strong>, Novotel Abidjan VGE, 200 rooms</td>
<td><strong>Brazil</strong>, Belo Horizonte, BH savassi, 203 rooms</td>
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<td><strong>Oman</strong>, Muscat Azaiba, 200 rooms</td>
<td><strong>Brazil</strong>, Canela, Novotel Canela, 117 rooms</td>
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<td><strong>Qatar</strong>, Doha WEST BAY, 396 rooms</td>
<td><strong>Peru</strong>, Lima, Lima Surco, 112 rooms</td>
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<td><strong>Qatar</strong>, Doha Mansoura, 200 rooms</td>
<td><strong>Mexico</strong>, Mexico, Novotel Mexico City Forum Naucalpan, 168 rooms</td>
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<tr>
<td><strong>Saudi Arabia</strong>, Mecca, Makkah Al Naseem, 480 rooms</td>
<td><strong>Mexico</strong>, Mexico, Novotel Mexico City Insurgentes WTC, 106 rooms</td>
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<tr>
<td><strong>Tunisia</strong>, Tunis, Tunis Lac, 124 rooms</td>
<td><strong>Bolivia</strong>, Santa Cruz, Novotel Santa Cruz de la Sierra, 144 rooms</td>
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<td><strong>United Arab Emirates</strong>, Dubai, Burj Khalifa Street, 261 rooms</td>
<td><strong>Chile</strong>, Arica, Novotel Arica, 144 rooms</td>
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<td><strong>Egypt</strong>, El Alamain, Novotel El Alamain City North Coast, 250 rooms</td>
<td><strong>Democratic Republic of Congo</strong>, Kinshasa, Novotel Kinshasa, 114 rooms</td>
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<td><strong>Madagascar</strong>, Antananarivo, Novotel Antananarivo, 180 rooms</td>
<td><strong>Democratic Republic of Congo</strong>, Kinshasa, Novotel Kinshasa, 114 rooms</td>
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</table>
## DEVELOPMENT CRITERIA - PROGRAMMING

### AAA ULTRA CITY CENTER

<table>
<thead>
<tr>
<th>Location, Historic Conversion</th>
<th>Worldwide</th>
</tr>
</thead>
<tbody>
<tr>
<td>150 keys and more</td>
<td>150 keys and +</td>
</tr>
<tr>
<td>20 - 30 sqm</td>
<td>26 - 32 sqm</td>
</tr>
<tr>
<td>45 - 56 sqm</td>
<td>50 - 70 sqm</td>
</tr>
<tr>
<td>120 keys and +</td>
<td>150 keys and +</td>
</tr>
<tr>
<td>30 sqm</td>
<td>32 - 36 sqm</td>
</tr>
<tr>
<td>45 - 50 sqm</td>
<td>55 - 70 sqm</td>
</tr>
</tbody>
</table>

### Recommended Number of Rooms

- 1 restaurant (preferably connected to bed)
- 1 Gourmet Bar (hotel) or Boutique Gourmande (Novotel Suites)

### Room Average Size

- 32 - 36 sqm + balcony

### TGFA / Room

- 45 - 50 sqm

### Food & Beverage

- 1 restaurant (preferably connected to bed)
- 1 Gourmet Bar (hotel) or Boutique Gourmande (Novotel Suites)

### Well-Being

- Fitness center In Balance (50 sqm min.)
- Swimming pool (nice to have)
- Spa

### Meetings

- Meeting room
- Web Corner

- Based on market demand

---

### HOTEL

- Prime Locations
- Secondary Locations
- International Capitals
- Key Cities & Resorts
- Major Domestic Destinations
- Other Cities & Attractive Touristic Destinations

### RESORT

- Prime Locations
- Secondary Locations
- Airports
- Suburbs
NOVOTEL CONSTRUCTION & RENOVATION STANDARDS
Can be used after HCSA is signed

NOVOTEL DESIGN BRIEF
Can be used before HCSA is signed

DRAWINGS AVAILABLE
Can be used after HCSA is signed

SUNDUKOVY SISTERS SOCIAL HUB, SUNDUKOVY SISTERS MEETING ROOMS, SUNDUKOVY SISTERS CORRIDORS, SUNDUKOVY SISTERS ROOMS, RF STUDIO ROOMS, RF STUDIO SOCIAL HUB, RF STUDIO MEETING ROOMS, METRO ROOMS, METRO SOCIAL HUB, METRO CORRIDORS

What’s happening in 2020?
Design Brief

DESIGN & TECHNICAL SERVICES - GUIDELINES
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