



ORIENT  EXPRESS
HOTELS

DEVELOPMENT PRESENTATION
Accor Global Development
February 2020

BRAND DIFFERENTIATOR

Journey to Elsewhere

Your journey on board Orient Express starts at the very moment you arrive. An intriguing voyage transporting you from day to night, present to past, East to West and back again.

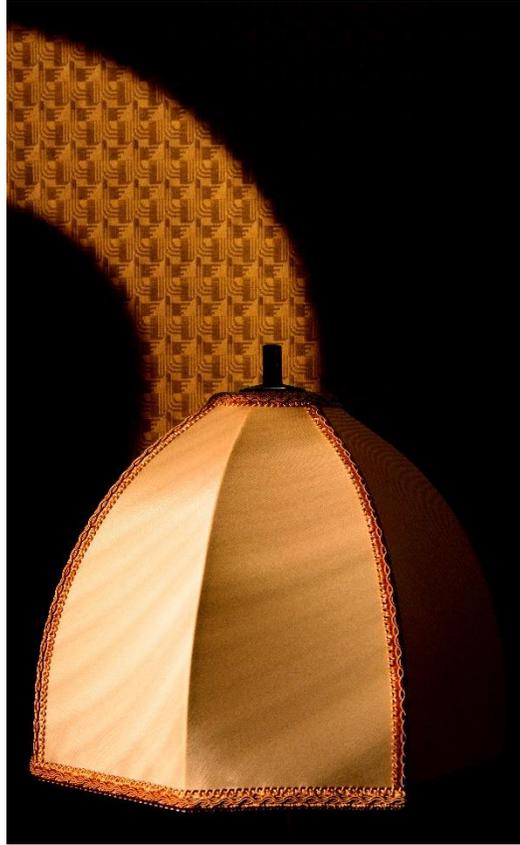
For Orient Express, the essence of Travel is a moment beyond geography and time. It is a Journey to Elsewhere.



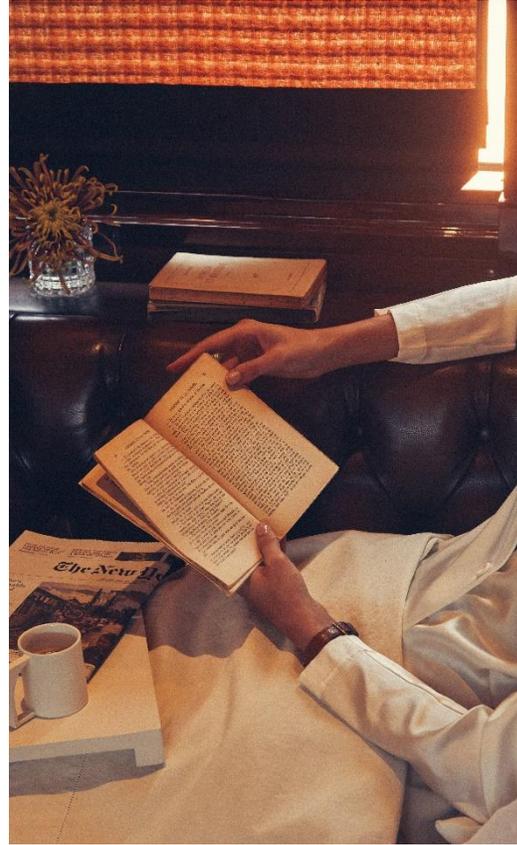
POSITIONING
VIDEO



I



II



III

TOP 3 USPs

I/ A luxury Journey to Elsewhere

Orient Express is now a precious collection of destinations for captivating escapades, embarking guests on a journey through time and space – a Journey to Elsewhere.

II/ Inspired by the Myth

Orient Express is a myth which goes back to 1883 – since then, the internationally renowned name has always been synonymous with travel, luxury and refinement. Today, the brand is offering a resolutely modern interpretation of this Myth.

III/ Art of Travel

Orient Express invites you to explore a reinvented Art of Travel, as the brand will soon propose its own range of products, some of which will be created through strong partnerships and collaborations. This Art of Travel will be available in hotels and beyond.

STRONG BRAND VALUE

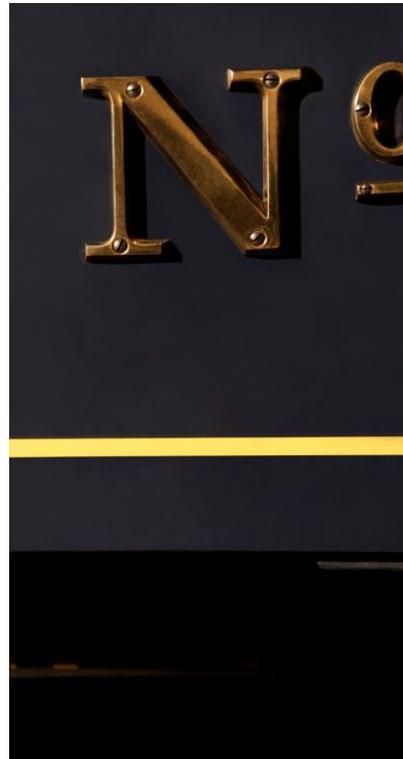
STRONG INTERNATIONAL AWARENESS

Overall brand awareness

The name "ORIENT EXPRESS" enjoys incredible brand awareness around the world, with an average awareness of 86% in Europe (up to 91% in UK) and more than 60% in key feeder markets (China, USA, Russia).

Awareness as a hotel brand

As a hotel brand, Orient Express has already a relative high brand awareness before launch, with an average of 30% awareness.



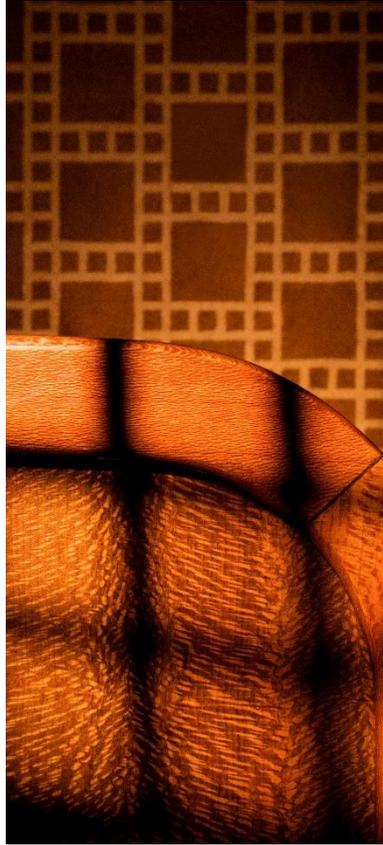
INSPIRATIONAL CULTURAL INFLUENCE

Orient Express benefits from an important cultural aura, due both to the works based on the myth:

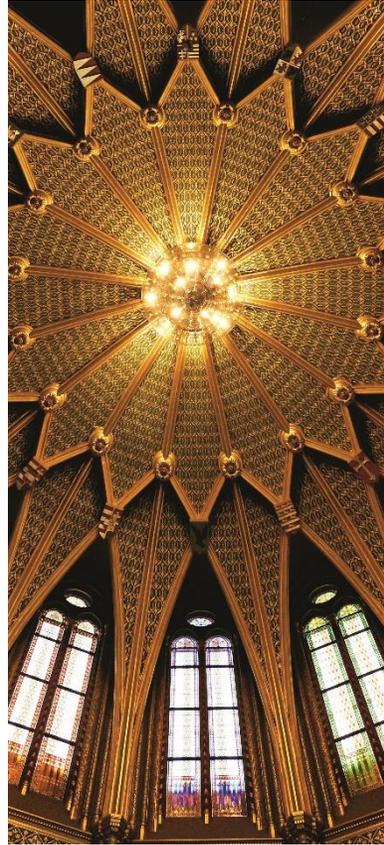
- Book *Fashion Eye Orient Express* with Louis Vuitton (2019)
- Documentary *In search of the Orient Express* for Arte & BBC (2018)
- Movie *Murder on the Orient Express* by Kenneth Branagh (2017)
- Etc.

And to the events carried by the brand:

- AD Intérieurs 2019
- Rencontres d'Arles 2020



I



II



III



IV

INVESTORS' ASSURANCE

I/ 135 years of brand heritage

A multicultural heritage since 1883, date of the train's maiden voyage from Paris to Istanbul

II/ Cross-cultural perception

Orient Express is a universal name, perceived as a bridge between East and West

III/ Finest design & craftsmanship

Orient Express still collaborates with exceptional designers, artists and craftsmen

IV/ Etiquette & outstanding service

Inspired by former conductors and staff, the Orient Express hotels teams deliver an outstanding luxury service

THE ORIENT EXPRESS MAHANAKHON WILL BE THE
FIRST ORIENT EXPRESS HOTEL IN THE WORLD

*The Orient Express MahaNakhon provides a
singular passage to Bangkok.*

*It is a route to cracking the lacquer of an
endlessly complex city.*

*It is a place to experience the most enchanting
and luxurious sensations it can evoke.*

*It is a way for the curious to grasp what makes
Bangkok what it is.*

THE FIRST HOTEL

Orient Express MahaNakhon, Bangkok

For the first hotel of its collection, Orient Express looked to Bangkok as a destination. Standing at the gateway to mystical Asia, the Thai capital combines tradition and innovation in a harmonious yet bold blend.

Beyond luxury, the Orient Express has always stood for cutting-edge engineering and technology, it was therefore evident that the first hotel had to be established in the ultra-modern setting of King Power MahaNakhon.

This new chapter reinvents the legendary train's spirit of luxury and adventure for 21st-century travellers.

MahaNakhon Tower – which means "metropolis" in Thai – enhances the stunning Bangkok skyline with its daring design.

Architect Ole Scheeren's vision plays with concepts of geometry and digital imagery. The glass-covered skyscraper appears to be a twisting computer projection, with a band of pixel-like windows creating an impression of movement.

This resolutely modern structure is now home to the first hotel in the Orient Express collection.



A DREAMLIKE DESIGN

by Tristan Auer

Architect Tristan Auer designed the MahaNakhon hotel as a journey in itself – combining Thai and French artistic styles and themes.

Decorations using lacquer, silk, ceramics and basketwork echo the marquetry, trimmings and cabinetwork in the rooms, inviting visitors to discover, contemplate and delight in their surroundings.

As the day moves from dawn to dusk, the atmosphere changes imperceptibly, evoking elegance and mystery.



“It’s all about hospitality, attention, somewhere you can take time out. A place that also invites you to be attentive, respectful. And maybe even changes you.”

Tristan Auer

154 ROOMS

Evoking a sense of Elsewhere

2 RESTAURANTS

*MOTT 32, for a modern approach to Chinese cuisine
Mahanathi by David Thompson, an exquisite sample
of local culinary art*

TERRACES

*Exotic settings that beckon guests
to float over Bangkok*

SWIMMING POOL

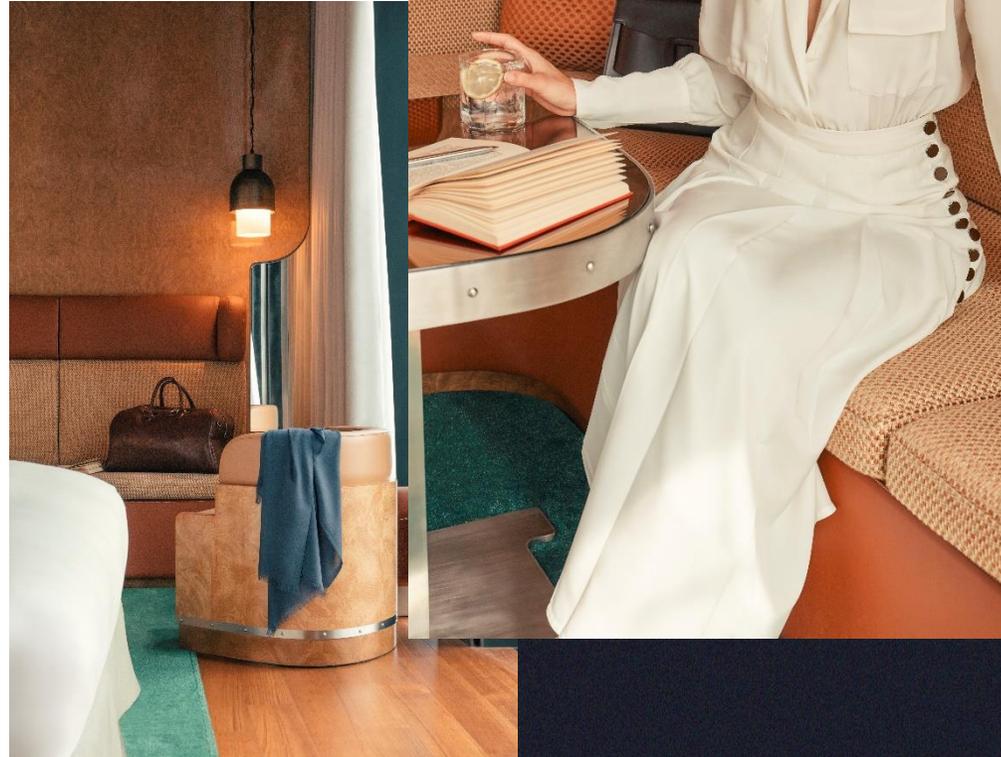
With an unbeatable view of the city

WAGON-BAR

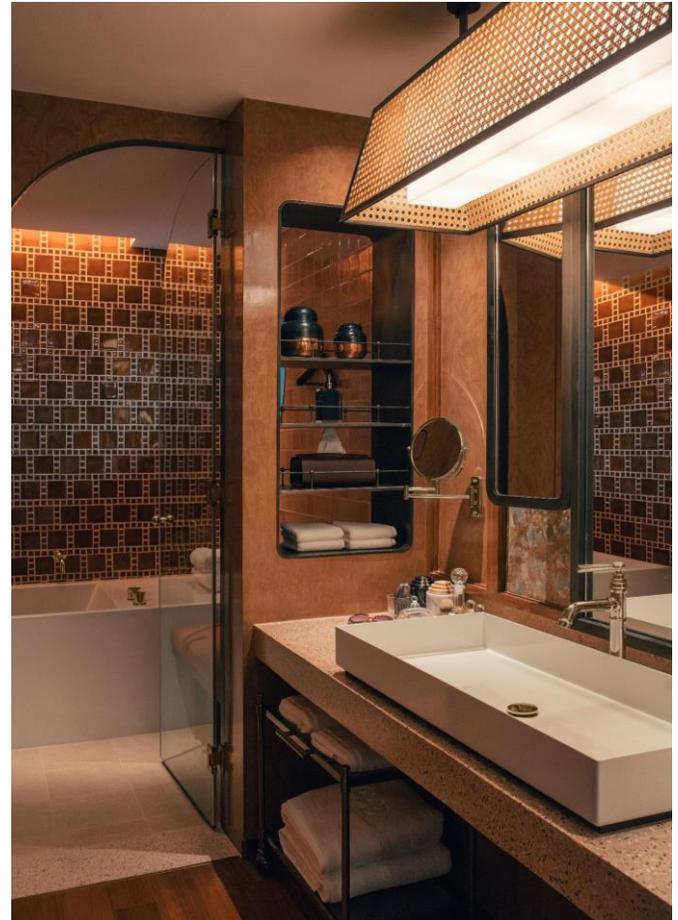
Inviting guests on a journey through time

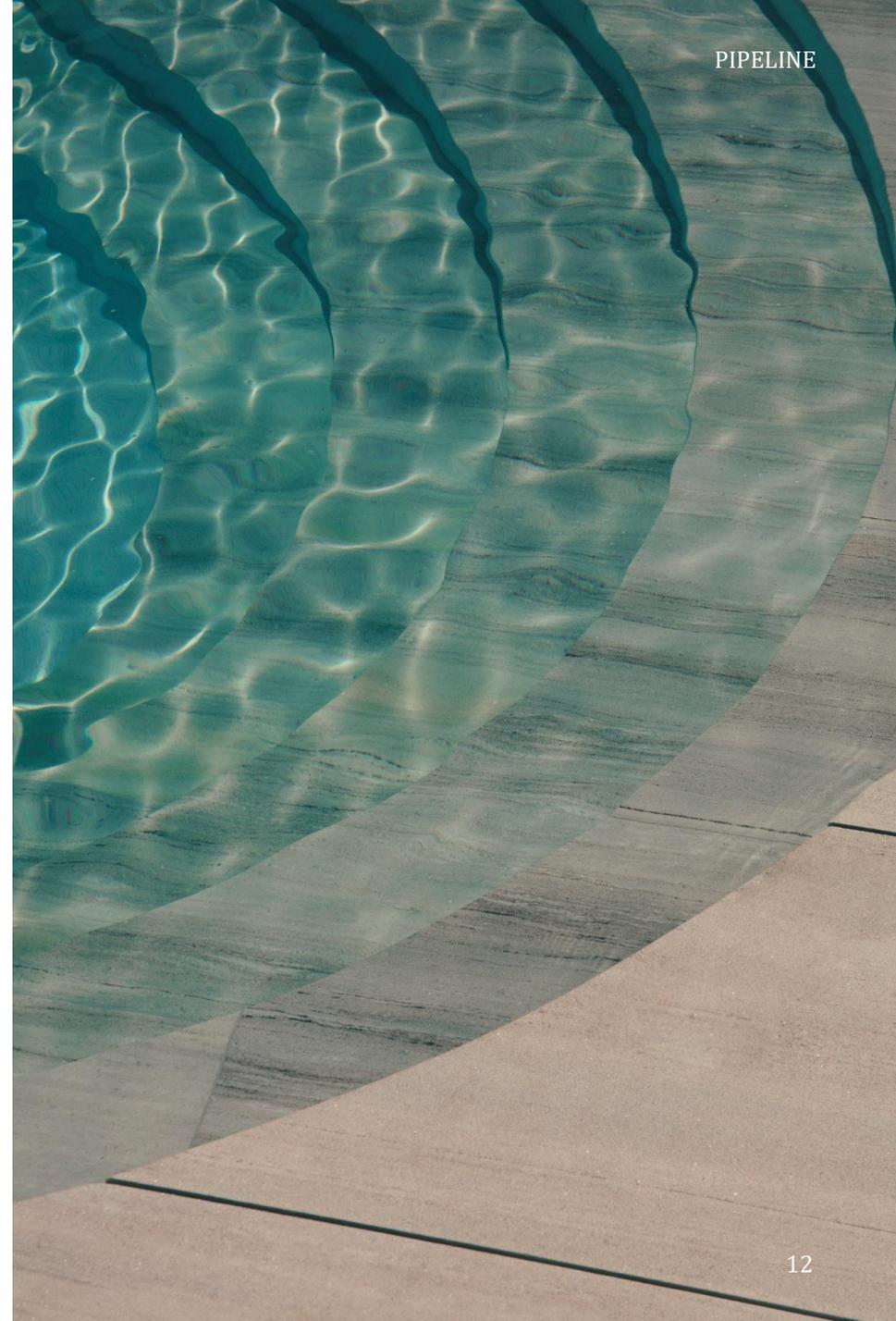
ORIENT EXPRESS SPA BY GUERLAIN

A unique place holding Ottoman promises



*Each space of the hotel is
designed to rediscover the
magic of the legendary train.*

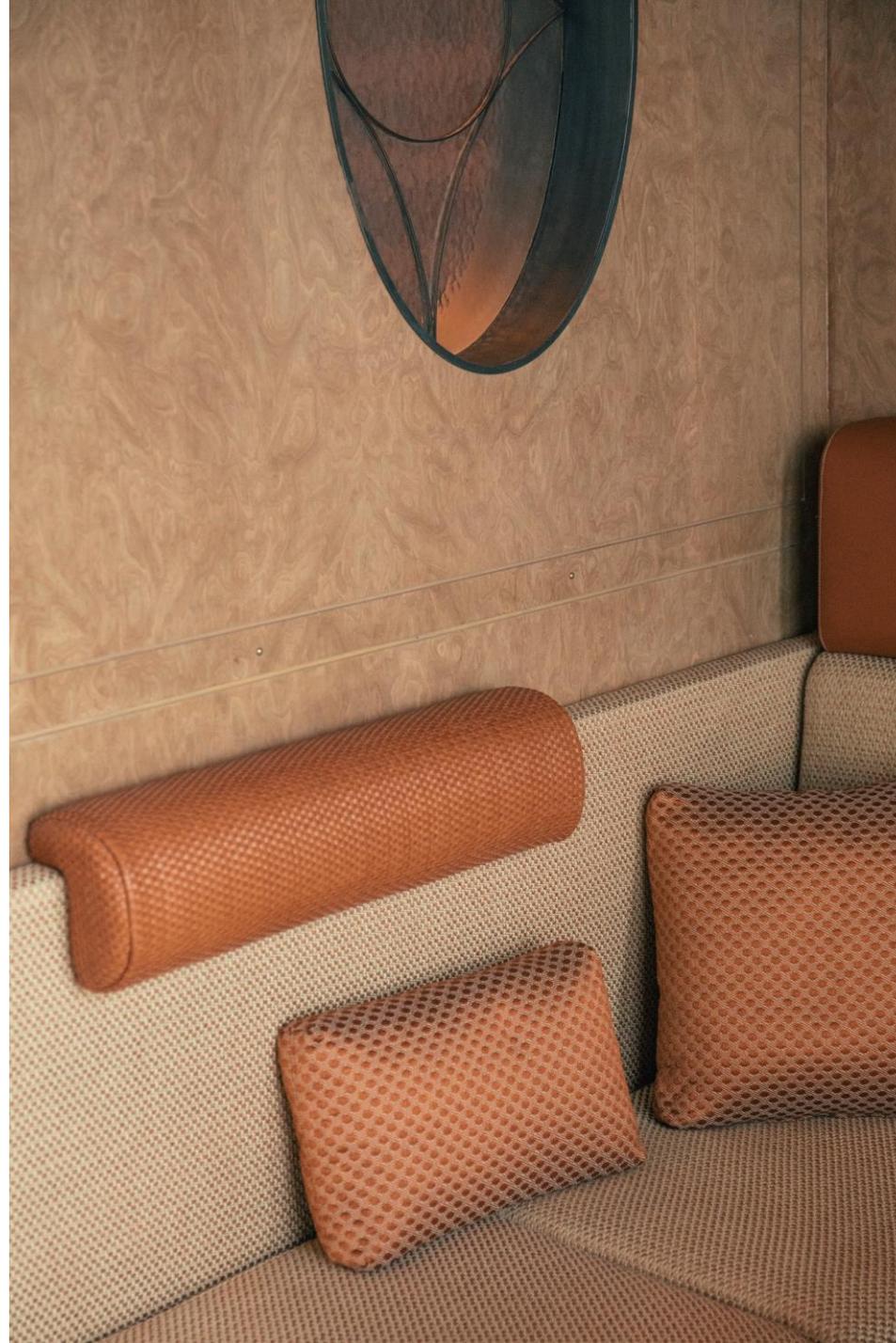




BRAND PASSIONS

I/ Nomadic Design

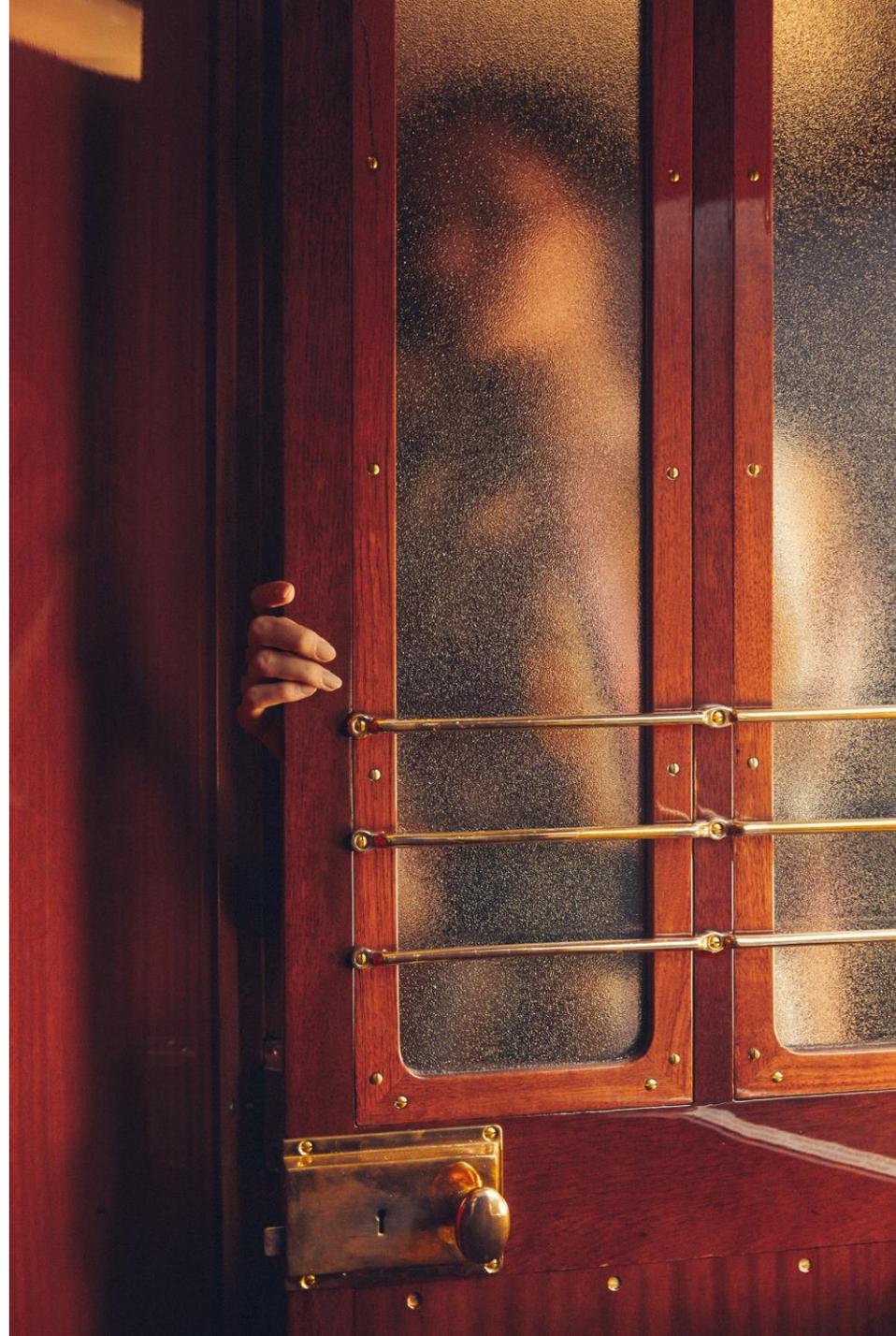
At Orient Express, always on the move citizen of the world experience a design combining state of the art refinement and innovative modularity to create unpredictable atmospheres.



BRAND PASSIONS

II/ Unexpected Encounters

At Orient Express hotels you never know what discoveries you are going to make or who you are going to run into, but you know it will be enriching.



BRAND PASSIONS

III/ Spirit of the Orient Express

A stay at Orient Express is the exploration of a myth built upon a historical legacy and stories from bigger-than-life travelers.



BRAND PASSIONS

IV/ Elemental Wellbeing

Orient Express hotels offer a selection of rituals and treatments going back to the roots of the ottoman baths tradition to help you reach serenity.



DESIGN PHILOSOPHY

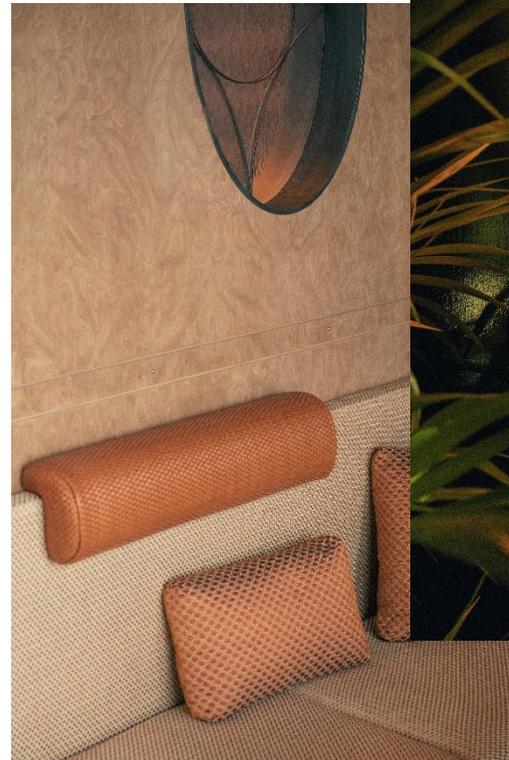
A COMMON THREAD BETWEEN OUR HOTELS

The reinterpreted Art Deco...

The Art Deco aesthetic, which has shaped the history of the train since 1920, is reflected in Orient Express hotels in its essence rather than in its literal reproduction.

To keep valuing this style and lead it into the 21st century requires the involvement of exceptional craftsmen with authentic savoir-faire from all over the world.

The main codes and values of Art Deco are now being revisited by Orient Express.



A POINT OF DIFFERENTIATION BETWEEN OUR HOTELS

... blended with local exoticism

Orient Express has a strong and nomadic aesthetic that interacts with its environment, drawing inspiration from every culture to bring out their best.

The cultures blend harmoniously in the decoration, as they are subtly integrated, here and there throughout the hotel: local materials, fine details, colours symbolizing the destination, traditional savoir-faire, finishing touches, etc. Countless elements capable of telling captivating stories of places and cultures.

This exoticism must always be sophisticated and subtle, yet remain evident to the cultured eye. Local peculiarities must be felt as soon as the guest enters the hotel, which is conceived as a celebration of the destination.

4 SIGNATURE PROGRAMS

activating the 4 Brand Passions

1/ The Great Transformation

Each day, as night falls, the hotel reveals itself. The mood shifts from local exoticism to more intimate, more mysterious atmospheres. All five senses are re-evoked, with changing light, scent, design, sound and experience.



4 SIGNATURE PROGRAMS

activating the 4 Brand Passions

II/ A Cast of Characters

Orient Express commits to bringing guests together with distinct personalities that have a story to tell and experiences to share. The Orient Express staff and their generous attentions become the highlight of the guest experience.



4 SIGNATURE PROGRAMS

activating the 4 Brand Passions

III/ Wagon-Bar

Inspired by the original train design, the Wagon-Bar takes guests on a journey through time, once they've uncovered the mystery of the bar's secret location.

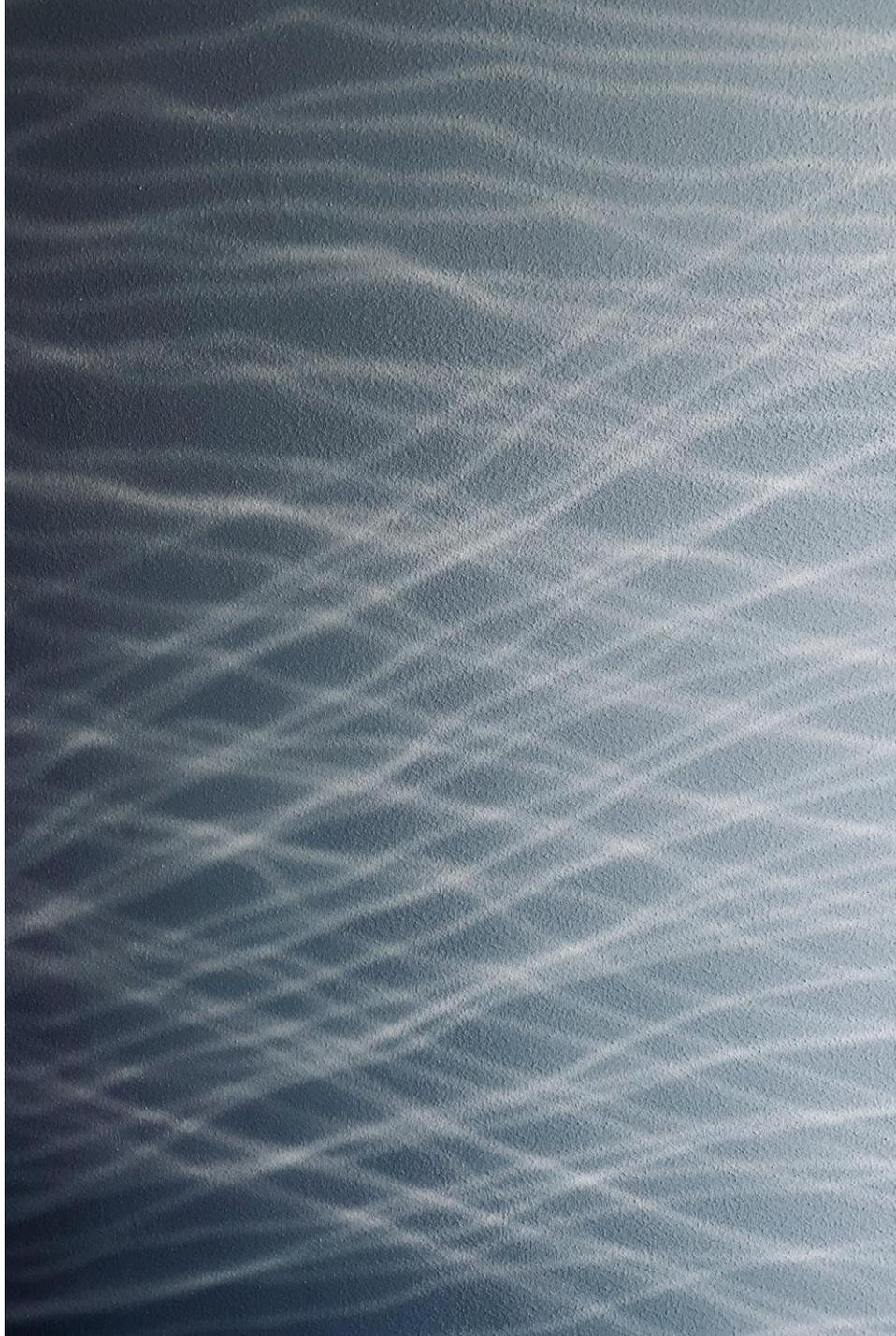


4 SIGNATURE PROGRAMS

activating the 4 Brand Passions

IV/ Orient Express Spa by Guerlain

Inspired by past traditions and Ottoman baths, Orient Express Spa learns from ancient wisdom to offer timeless rituals in places of extreme indulgence. This holistic concept is developed through an exclusive partnership with Guerlain.





I



II



III



IV



V

5 ICONIC ELEMENTS

activating the 5 senses

I/ Iconic Uniforms

by designer Louis-Marie de Castelbajac
for the sense of sight

II/ Iconic Playlist

by the famous duo Polo & Pan
for the sense of hearing

III/ Iconic Tea

by Gongfu tea master Yu Hui Tseng
for the sense of taste

IV/ Iconic Writing Set

by illustrator Philippine Poplu
for the sense of touch

V/ Iconic Scent

by perfumer Thierry Wasser
for the sense of smell

GLOBAL VISUAL IDENTITY

A neat and modern take on the Orient Express heritage, with direct references to the train, and subtle allusions to the cultural elements that initiated the myth.

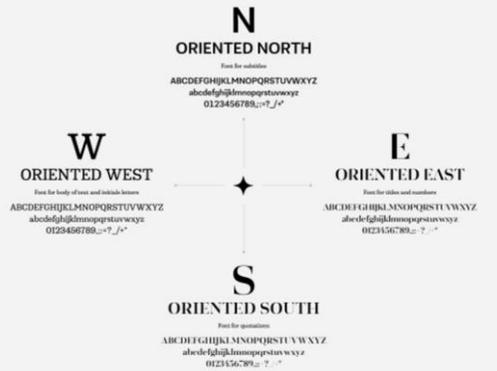


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HOTEL VISUAL IDENTITIES

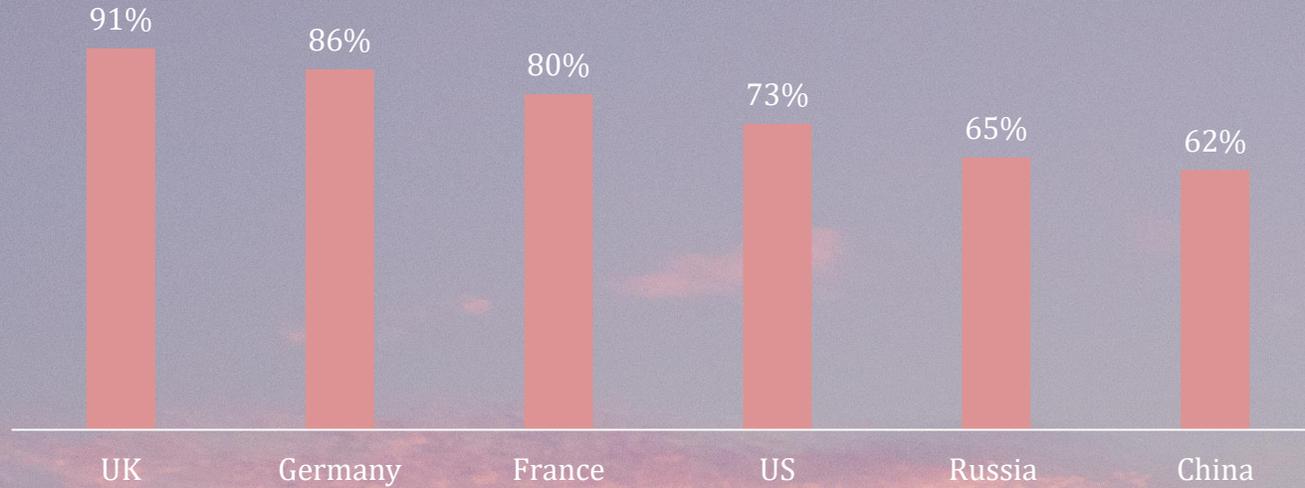
Orient Express is a strong and evocative brand, which encapsulates a collection of hotels. Properties will present a sense of diversity, always linked to the location.

Each of them will therefore possess its own visual identity inspired by the destination and its culture, whilst maintaining a connection to the overall Orient Express narrative and identity.

These distinctive identities will be developed separately, specifically for each new property of the brand – except if the hotel already has one, in which case it will be adapted.



A GREAT BRAND AWARENESS
around the world

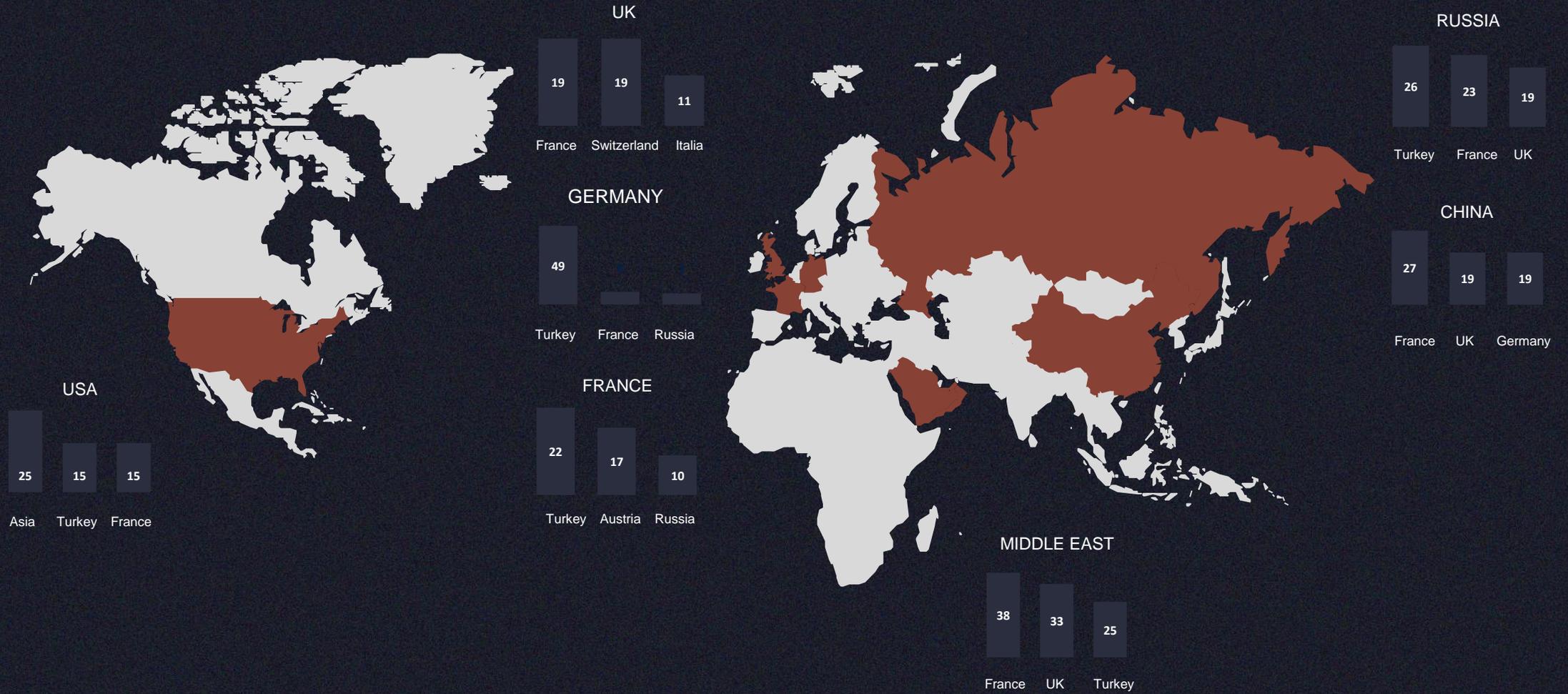


The name "ORIENT EXPRESS" enjoys incredible brand awareness around the world. The brand is notably associated with the words "travel", "luxury" or "refinement".

AN UNIVERSAL NAME

perceived as a bridge between East and West

TOP 3 COUNTRIES / REGIONS ASSOCIATED TO ORIENT EXPRESS BY COUNTRY



1. Note Several answers possible to the questions : What are the countries or regions most associated to the name Orient Express?
 2. Source BCG quantitative research among 3500 respondents in France, Germany, the United Kingdom, Russia, China and Middle East

BRAND PERCEPTION

A myth more alive than ever

Agatha Christie's novel, which related the investigation of her fetish hero – detective Hercule Poirot – in the legendary train, had previously received a film adaptation, directed by Sidney Lumet in 1974.

In December 2017, the release of Kenneth Branagh's version of "Murder on the Orient Express" shows how vivid the myth still is in people's minds. Orient Express was naturally an official partner of the movie.

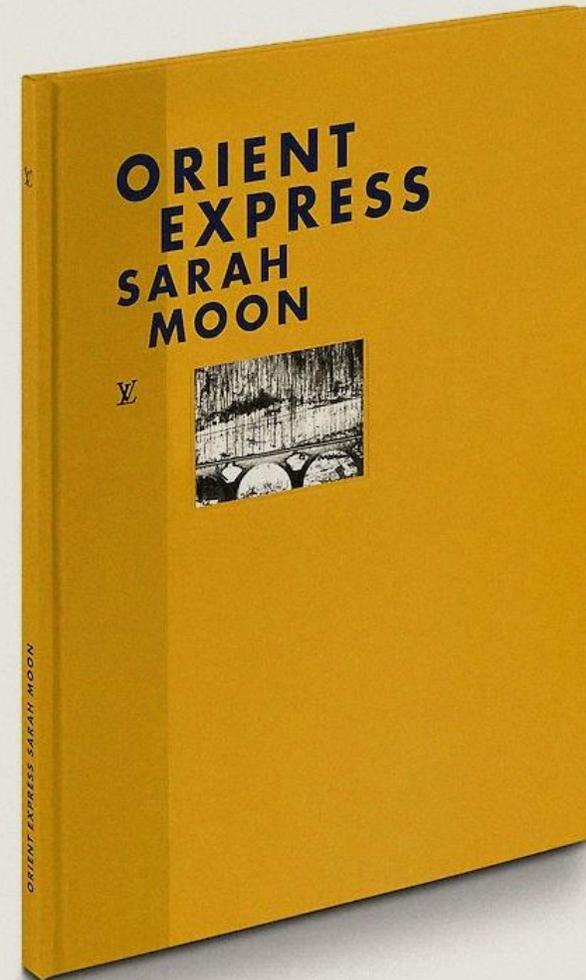
The latter has earned more than \$350 million worldwide (on a \$55m budget).



BRAND PERCEPTION

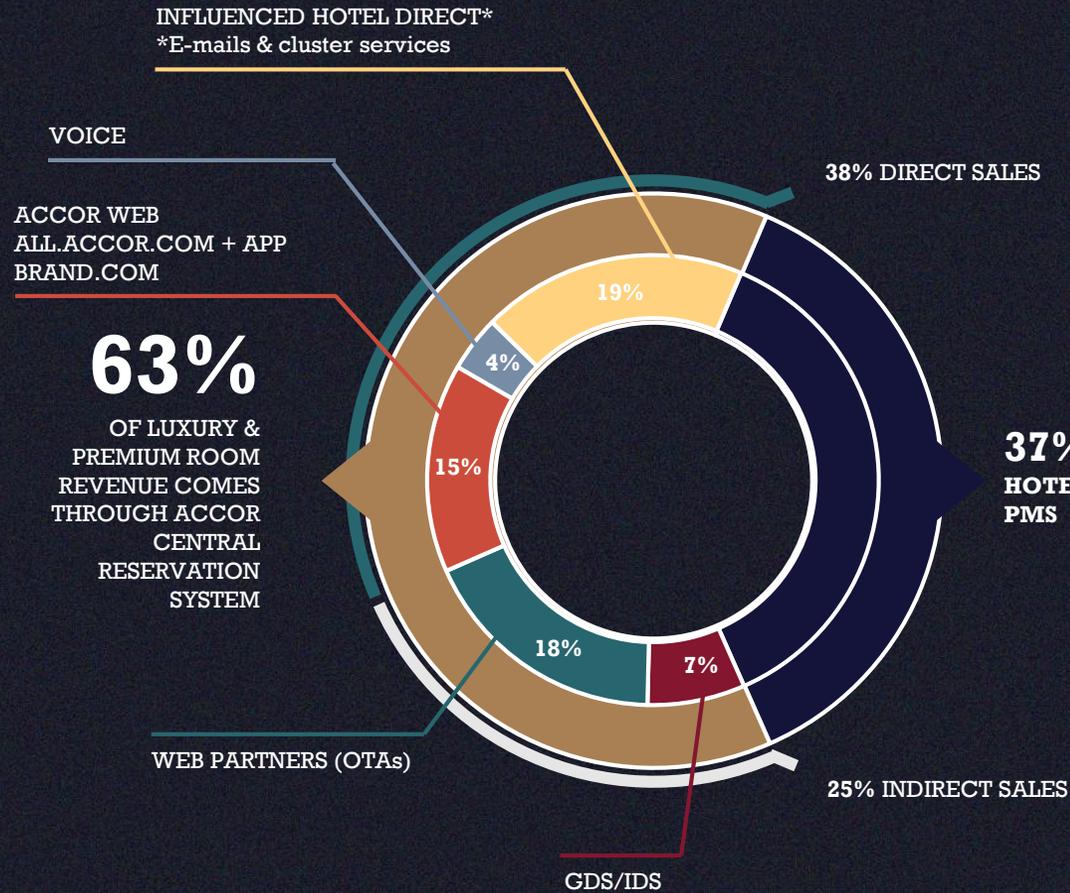
A powerful cultural presence

- 2014 Exhibition *Once upon a time the Orient Express* at the IMA, Paris
- 2016 Exhibition at the FIAC, Paris
- 2017 Book *Orient Express: Legend of Travel*, Assouline Editions
- 2017 *Orient Express ou la naissance du rêve ferroviaire*, Albin Michel Editions
- 2017 Partnership with the movie *Murder on the Orient Express*
- 2018 Documentary *Orient Express, le voyage d'une légende*
- 2019 Louis Vuitton *Fashion Eye – Orient Express* by Sarah Moon
- 2020 Exhibition at the Rencontres d'Arles photography festival



DISTRIBUTION PERFORMANCE POWERED BY ACCOR

For Luxury & Premium brand – Room Revenue based



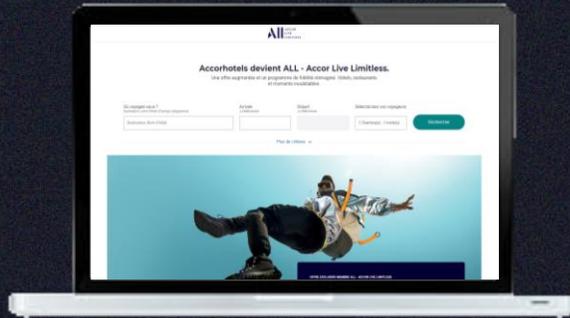
33%

FOCUS WEB
(ACCOR WEB + WEB PARTNER)

10M ROOM NIGHTS

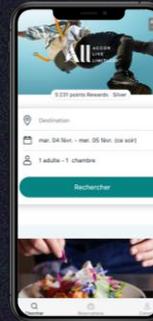
€2,019M ROOM REVENUE

all.accor.com



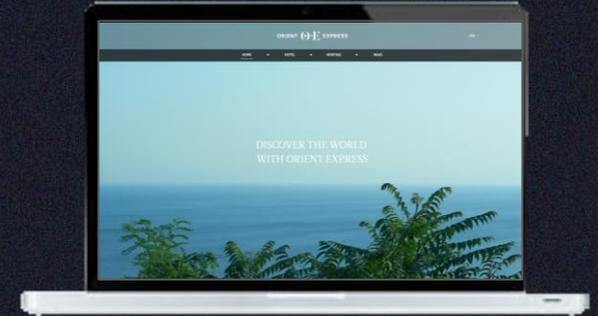
- **300M** Website + App visits
- **2,200** Destinations
- **18** Languages

1 LIFESTYLE COMPANION APP



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

18 BRAND.COM WEBSITES



*year 2019 + from dec 2019-to Mid Feb 2020, since launch of ALL

THE ONLY LIFESTYLE LOYALTY PROGRAM

New limitless experiences and extended opportunities to earn & redeem points

New benefits

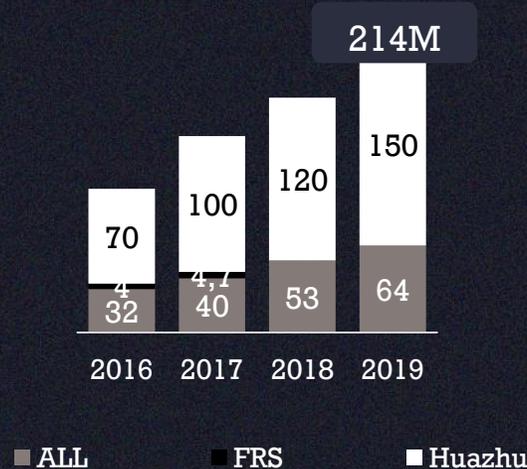
- 2 New tiers (diamond & limitless hidden tier)
- 34 Brands and +
- Suite Night Upgrade
- F&B outside a stay

New partnerships

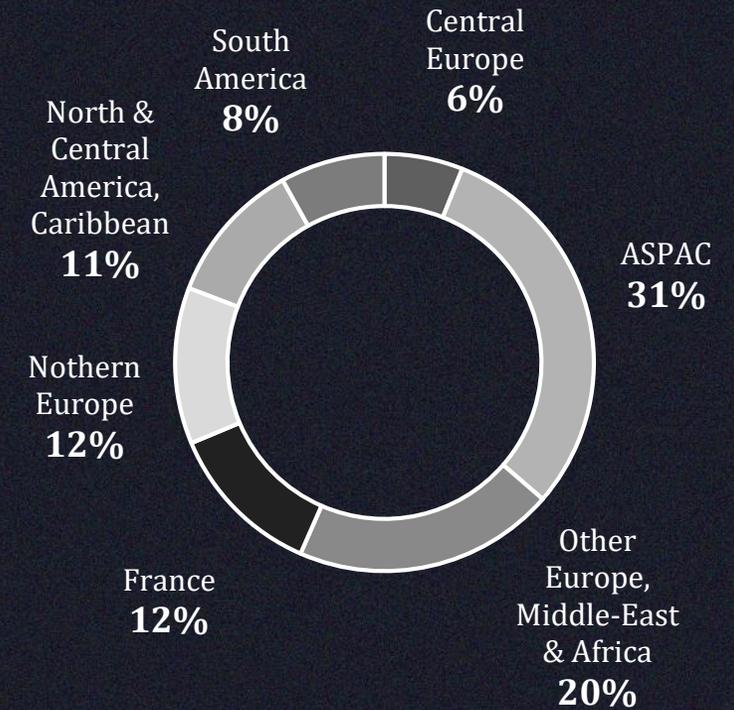
- PSG – Games / Net media value +€200m to ALL
- AEG – Worldwide arenas & festivals
- IMG – Taste festivals

THE FAST GROWING LOYALTY PROGRAM

- **64M** Loyalty members worldwide
- **31%** Loyalty contribution rate
- **X 2** Members stay twice more
- **X 2** Members spend twice more



THE MOST GLOBAL LOYALTY PROGRAM



APPENDIX



OUR GLOBAL COMPETITIVE SET



ROSEWOOD



DEVELOPMENT CRITERIA

Programming & Development

| | |
|----------|---|
| SIZE | 70 to 200 rooms 45 sqm* and more |
| | TGFA 110 – 150 sqm* |
| LOCATION | AAA unique situation |
| FUNCTION | A gateway to the destination with luxury facilities, such as: <ul style="list-style-type: none"> - 1 Signature Restaurant - 1 Specialty Dining** - 1 Private Dining** - 1 Destination Bar with Wagon-Bar - Rooftop Terrace (preferred) / terrace / courtyard / garden** - Orient Express Spa by Guerlain - Luxury Fitness - Exclusive Orient Express Retail & Concierge - Swimming pool (mandatory for resorts) - Executive Meeting rooms** |
| | ** on market demand |



DESIGN & TECHNICAL SERVICES

Guidelines



ORIENT EXPRESS DESIGN BRIEF
Can be used before HCSA is signed



ORIENT EXPRESS STYLE BOOK
Can be used before HCSA is signed

WHAT'S HAPPENING IN 2020?

- Construction and Renovation Standards
- Art & Styling Guidelines
- Orient Express MICE Concept

THANK YOU

