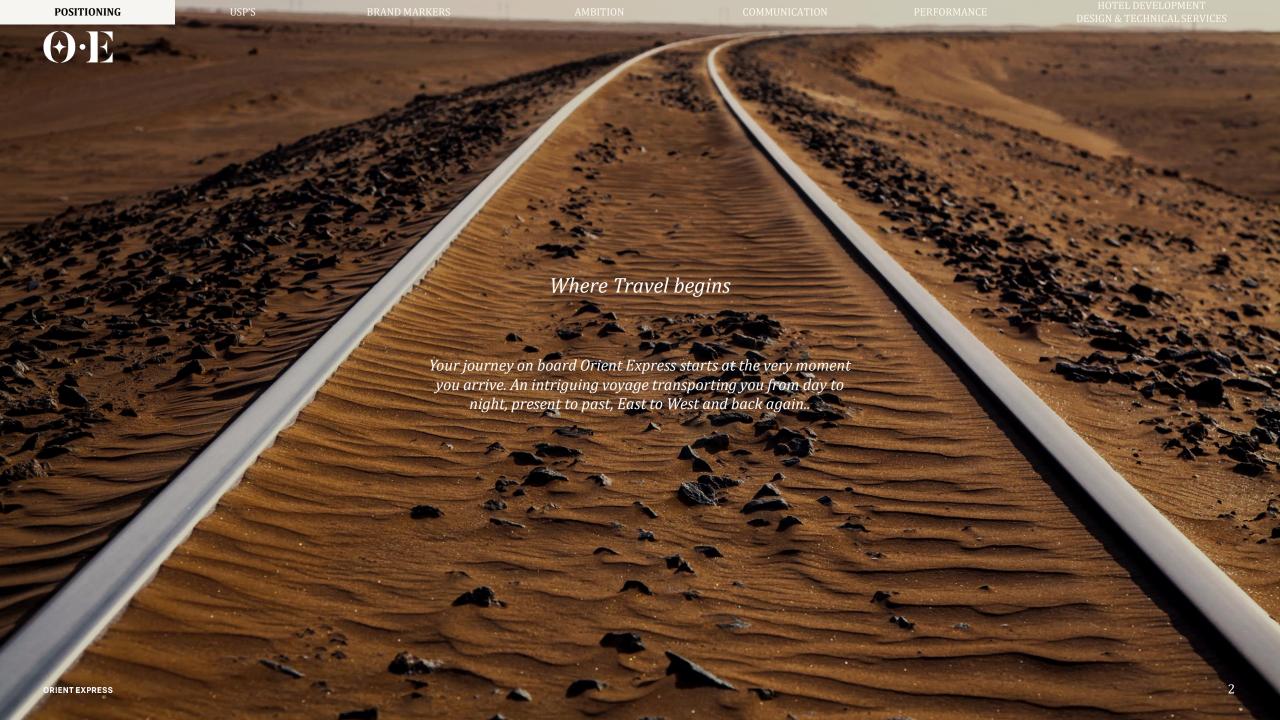


WHY INVEST IN ORIENT EXPRESS

Accor Global Development
Q1 2021











UNIQUE BRAND POSITIONING

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.

II III



STRONG
INTERNATIONAL
AWARENESS
& VALUED
BRAND EQUITY

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.



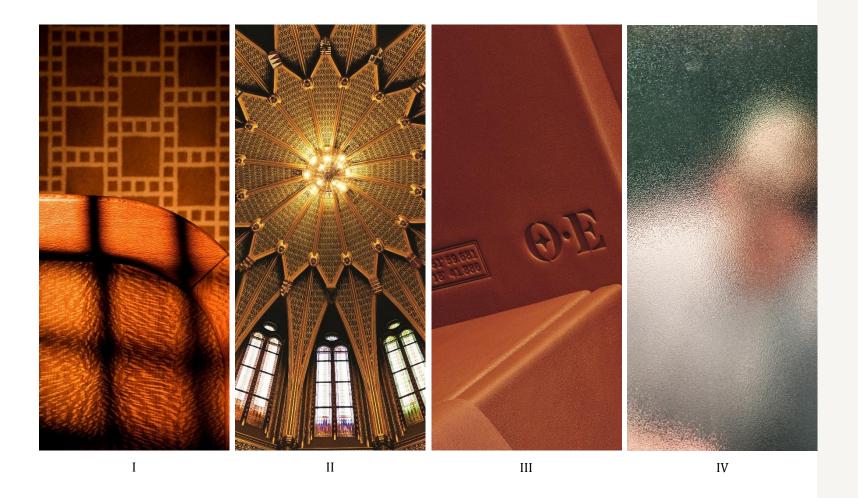
INSPIRATIONAL CULTURAL INFLUENCE

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, Paris (2019)
- Once Upon A Time on The Orient Express, Singapore (2020)
- Rencontres de la photographie, Arles (2021)



INVESTORS' ASSURANCE

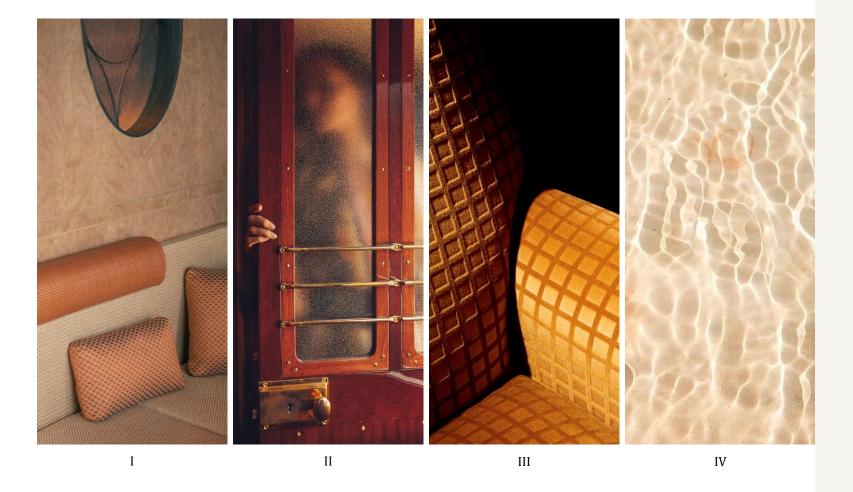
*I/ 135 years of brand heritage*A multicultural heritage since 1883, date of the train's maiden voyage from Paris to Istanbul

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





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 create to unpredictable atmospheres.

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.

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.

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.











II III IV

4 SIGNATURE PROGRAMS

activating the 4 Brand Passions

I/ 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.

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.

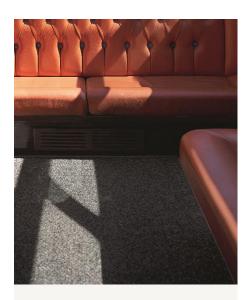
III/ Wagon-Bar

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.

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.

Arrival & Departure



Striking Transportation

As a travel brand, it would be surprising not to provide the guest with a means of transport for his/her arrival & departure.

Each hotel offers an unexpected, distinctive form of transportation, inspired by the brand's roots or the destination.

A classic, precious vehicle that also takes pride of place outside or in close vicinity to the hotel's entrance.

Iconic Uniforms

The Doorman is an emblematic character of Orient Express hotels, and as such, he/she is the first person to greet the guest, in front the hotel.

His/her uniform is reminiscent of the train legacy, with stopovers of the train represented by embroidered escutcheons along the right arm.

The Doorman outfit is the same in every Orient Express hotel.





Cast of Characters

A "cast" of unique characters lead the guest experience. Each one handpicked for their charisma, sophistication and charm. They guide guests on their journey from the moment they arrive.

On their arrival, guests will meet the Orientor – literally the character who "orientates" the guest during their stay. He/she is the face of the hotel and the ambassador for the brand.

Public Spaces



A Storied Collection

An eclectic variety of artworks and objects displayed across the hotel, created to feel like the collection of a curious, worldly traveller.

This collection includes local art and collectiles, as well as travel memorabilia and original artefacts related to the train.





Iconic Playlist

An iconic compilation of music evoking journeys and all destinations explored or yet to be explored by the sophisticated adventurer.

This playlist is created by the famous duo Polo&Pan and will inspire the musical identity of Orient Express hotels.



The Great Transportation

Inspired by the physical transformation of the train from day to night, the Great Transformation is an immersive, almost theatrical scene change that takes place in each hotel's main public space – ideally in the lobby.

Nomadic Trunks

Distinct luxury trunks are displayed around the hotel to provide a range of services with nostalgic elegance.

Created in partnership with a local craftsman or brand partnership, Orient Express hotels showcase a variety of different sized and shaped trunks.



Iconic Scent

Thierry Wasser brought his years of experience in creating the signature scent of Orient Express, reminiscing a journey between Orient and Occident.

This Iconic Scent will be diffused in the hotel, and will intensify every evening, at dusk.

Guest Rooms



The Great Transformation

The Great Transformations continues into the guest rooms, with a special "turn-up": a transition to create the perfect setting for guests to return to after daytime activities and prepare for the evening ahead.

The guest room transformation mirrors the changes that take place in the lobby.

A Storied Collection

A Storied Collection reaches the guestrooms, and thus continues telling stories.

Some artworks are also displayed in guestrooms or suites, to keep the heritage alive even in these more private spaces.





F&B



Wagon-Bar

The Wagon-Bar is a speakeasy reminiscent of a bygone era, a private lounge for exchanges between like-minded travellers. It is certainly the most literal translation of the mythical train experience, with furniture, craftsmanship and materials similar to the ones found in the Orient Express, not to mention its warm atmosphere – and a subtle touch of mystery.

On the menu: vintage pours and classic cocktails, with a focus on a specialty drink (e.g. cognac bar, champagne bar, etc.)

Iconic Tea

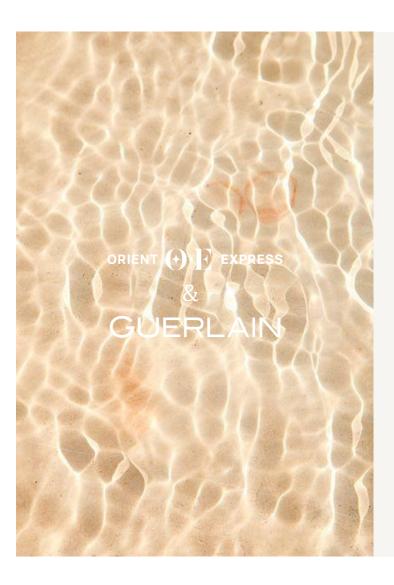
Orient Express Teas will bring together tea blends from different regions and cultures, all with their stories relating.

These blends will be selected with Master Tseng, officiating as a true custodian of the ancient Way of Tea.





Wellness Facilities



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.

Since the creation of "L'Institut" at 68 Champs-Elysées in Paris, Guerlain has been nurturing unique, expert and pioneering know-how, combining traditional treatments with constantly updated breakthrough techniques.

Its Made-To-Measure treatment is a foray into a haven of tranquillity that awakens the senses.



Leisure Facilities



Orient Express Explorations

Inspired by George Nagelmackers' vision, Orient Express properties blur the lines between hotel and travel agency to offer exceptional, tailored experiences within and outside their walls.

Three categories of Explorations are offered:

- 1) Tailored Moments
- 2) Explore with a Local
- 3) Out of Time Experiences

Artisan in Residence

Orient Express welcomes residence craftsmen and artists into its hotels. Each one is handpicked for their connection to the destination, the local culture and its distinct savoir-faire.

This exclusive presence of the artisan within the hotel is the opportunity to give public demonstrations, to exhibit the craft works within the hotel itself, or even to offer certain pieces for sale.



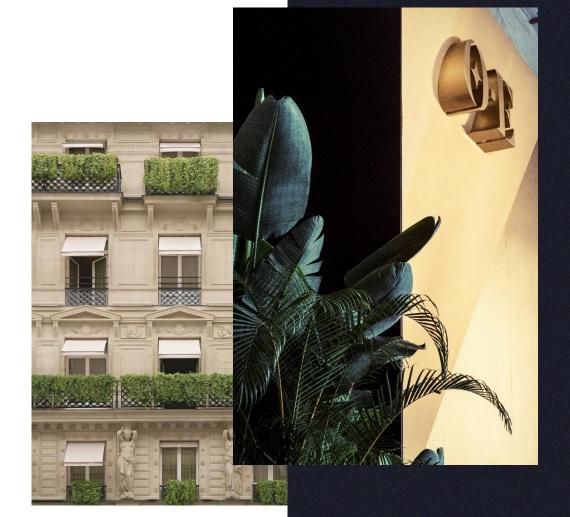


A STRONG BRAND...

Orient Express hotels will be linked by a strong common thread, especially in terms of services and experiences.

... ENCAPSULATING UNIQUE IDENTITIES

The Orient Express brand will propose a collection of hotels. Properties will present a sense of diversity, always linked to the destination and reflecting its soul.



A COLLECTION OF 10 PRESTIGIOUS ADDRESSES BY 2030

OVER 5 PROJECTS UNDER ACTIVE NEGOTIATION

TARGETED CITIES

London Paris Rome Venice Vienne Budapest Istanbul Jerusalem Cairo

And all worldwide capital cities and gateway destinations



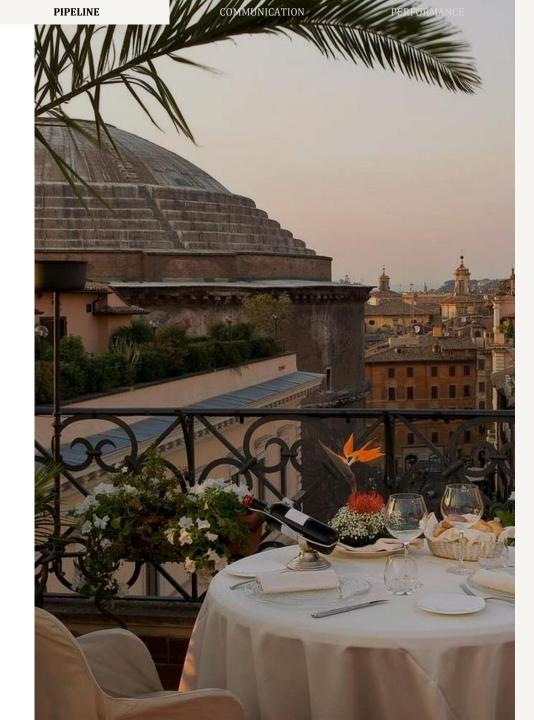
THE FIRST ORIENT EXPRESS HOTEL Grand Hotel de la Minerve, Rome

For its first destination, Orient Express settles in one of the emblematic countries which the mythical train once crossed – Italy.

- 93 rooms, including 34 suites
- 600 sqm Roof-top with a breathtaking view over Rome
- Wagon-Bar (Orient Express speakeasy)
- Orient Express Spa by Guerlain

Close to the Pantheon and Colosseum, this luxury hotel is housed in a fabulous 17th-century mansion.

The "Grand Hotel de la Minerva" will arrive in Rome in 2023.











A TYPICAL JOURNEY THROUGH AN ORIENT EXPRESS HOTEL

The exterior façade

A spirit of harmony between the old and the new – classical timelessness mixes with modern refinement and small touches of oriental details. The building should exude a feeling of romance and charm while celebrating the spirit of the travel and adventure captured through its seemingly mysterious doorway and corridors beyond.













A TYPICAL JOURNEY THROUGH AN ORIENT EXPRESS HOTEL

The restaurant &

The garden bar

To be noted as a favorite neighborhood lunch and dinner spot, the garden restaurant will bear a unique food and beverage offering like no other in the city. A feature bar will anchor the space with suitable lounge seating, also serving as a resting spot for guests to gather for casual meetings and light social events. There will be two culinary offerings noted on the following pages.











A TYPICAL JOURNEY THROUGH AN ORIENT EXPRESS HOTEL

Specialty dining & Function spaces

The upper restaurant will be an exclusive offering from the restaurant below. Only 25 guests per seating and only open on specific days of the week, this will be a highly sought-after experience for those with more refined taste.

Purchasing the only remaining train car from the original Orient Express, guests can also chose to dine within the train car on special evenings under exclusive offering. This will be placed within the restaurant terrace.

19











A TYPICAL JOURNEY THROUGH AN ORIENT EXPRESS HOTEL

Guest quarters

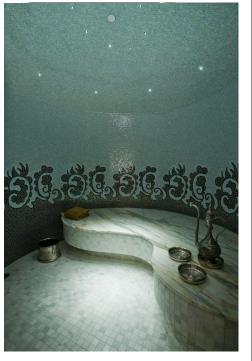
The guest rooms will be fitted with the luxury of craftsman perfection, adorned with treasures and motifs from exotic regions of travel. While they will have a modern Parisian flair, it is the combination of French and Oriental cultures that give the rooms a unique look and feel, while 24 hour butler service caters to the guest's every need.













A TYPICAL JOURNEY THROUGH AN ORIENT EXPRESS HOTEL

The one-of-a-kind spa

Reminiscent of luxurious Ottoman-style baths that captured the fascination of European elite during the turn of the century, the Baths will be the first healing and well-being bathhouse of the city, designed to modern lifestyle standards.

Here, guests will find healing remedies in calculated salt baths, salt saunas, vitamininduced steam rooms and a traditional

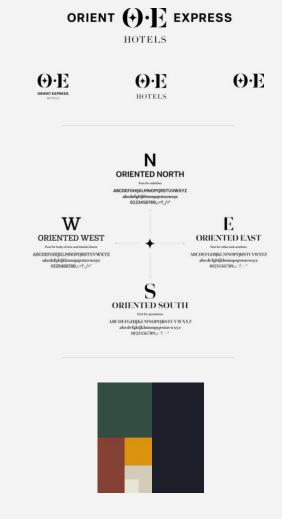
Oriental Hammam.

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.







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.





INSTAGRAM

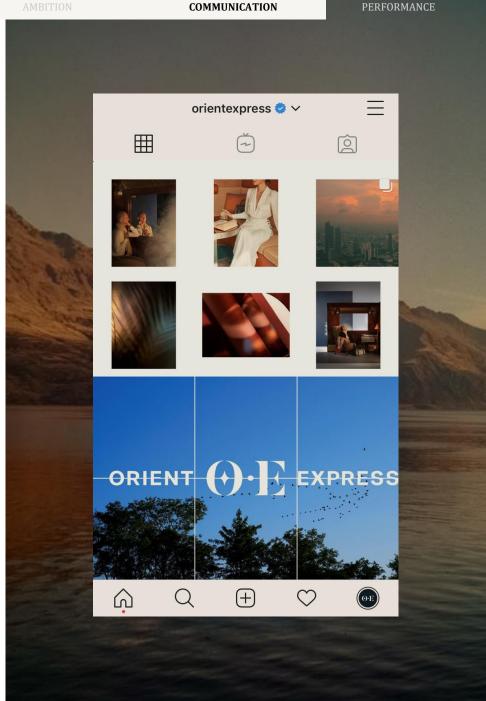
@orientexpress

24K followers

+5K followers in 2020

Orient Express continues to create engagement, while celebrating the refined sense of travel peculiar to the brand.

As the preferred social media of the brand, Instagram will naturally host a major communication campaign in order to arouse public interest.

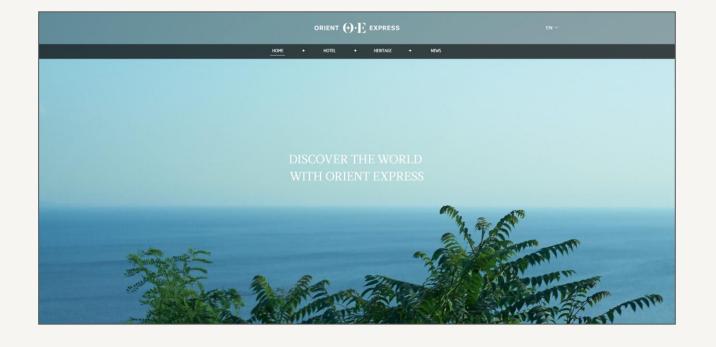




BRAND WEBSITE

A glimpse at www.orient-express.com

Highly inspirational, the stand-alone website of the brand launched in 2020 features all its distinct activities: starting with its hotels, but also the train, the heritage, a "High-Life" page (brand content) and an e-shop to come.





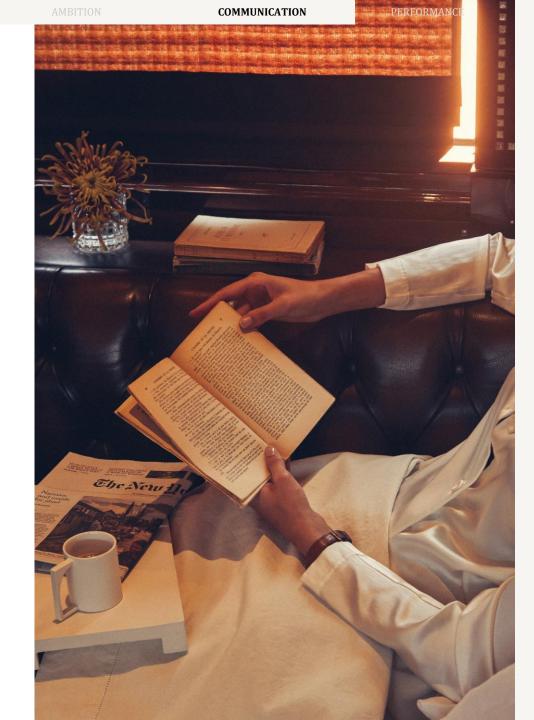
HIGH-LIFE

Orient Express' brand content

In 1883, Georges Nagelmackers invented a legendary train: the Orient-Express. On the journey from Paris to Constantinople, the High-Life lifestyle magazine distributed to travelers featured stories about the cities of the world, artistic life and beautiful craftsmanship.

2020 celebrated the rebirth of High-Life. An exploration of the world as seen by a new generation of artists, creators and photographers. From postcards, inner journeys, moments of stillness and creative rendez-vous to aftermidnight adventures, High-Life tells stories reserved for those who love to dream.

To read and discover on our Instagram page (@orientexpress) and of course, www.orient-express.com.





A GREAT BRAND AWARENESS around the world

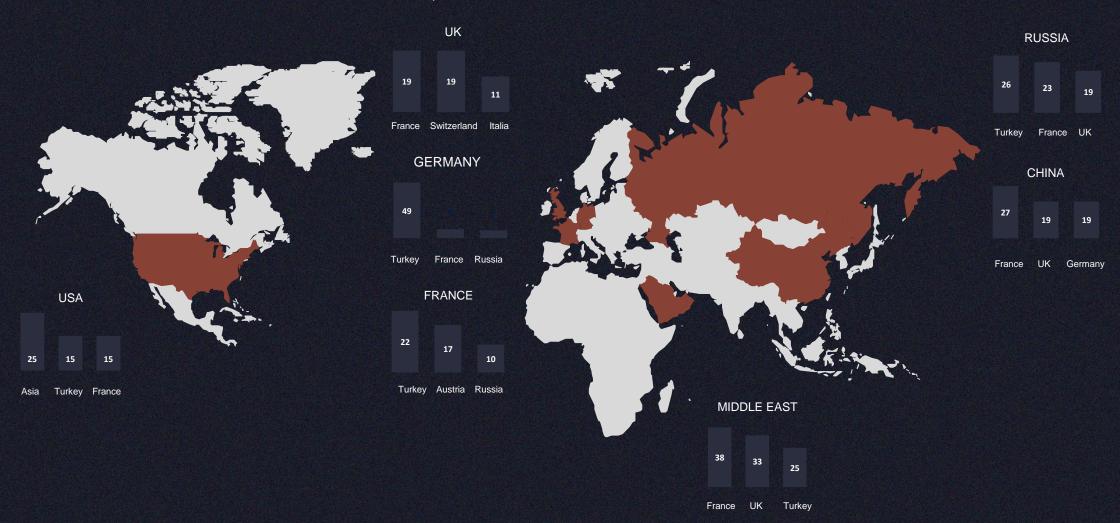


The name "ORIENT EXPRESS" enjoys incredible brand awareness around the world. The brand is notably associated with the words "travel", "luxury" or "refinement".



AN UNIVERSAL NAME perceived as a bridge between East and West

TOP 3 COUNTRIES / REGIONS ASSOCIATED TO ORIENT EXPRESS BY COUNTRY



1. Note

2. Source

Several answers possible to the questions: What are the countries or regions most associated to the name Orient Express? 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).

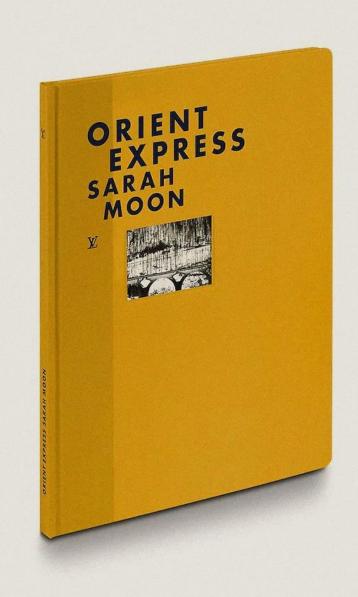




BRAND PERCEPTION

A powerful cultural presence

2014	Exhibition <i>Once upon a time the Orient Express</i> 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 <i>Murder on the Orient Express</i>
2018	Documentary Orient Express, le voyage d'une légende
2019	Louis Vuitton Fashion Eye – Orient Express by Sarah Moon
2020	Exhibition Once Upon A Time on The Orient Express in Singapore
2021	Exhibition at the Rencontres d'Arles photography festival



PERFORMANCE

ORIENT EXPRESS Fashion Eye Orient Express, 2019 30



BRAND PERCEPTION

Once Upon A Time on The *Orient Express, in Singapore*

The Pop-Up Exhibition Once Upon A Time on The Orient Express arrived in Singapore at Gardens by the Bay - West Lawn in December 2020.

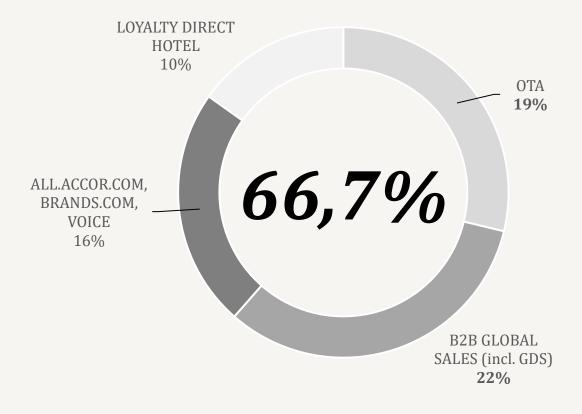
Following the 2014 exhibition in Paris that detailed the history of the Orient Express, Singapore has been chosen by the Orient Express as the first destination outside of France to kick-start a series of showcase that unveils a fantastic universe related to travel, culture and gastronomy.

A historical and educational presentation for all ages spearheaded by the Arab World Institute (IMA), the pop-up attraction Once Upon A Time on The Orient Express will attract people from Singapore and abroad until June 2021.





CENTRAL BRAND DELIVERY POWERED BY ACCOR For Luxury brands, Room Night based





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 a 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



1 LIFESTYLE COMPANION APP ACCOR ALL





- 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



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

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



plugged to **ALL.ACCOR.COM**



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

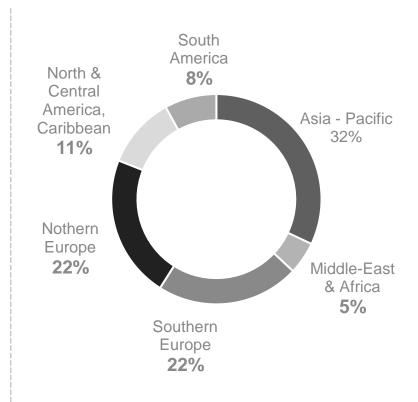
- 68M Loyalty members worldwide
- 37% Loyalty contribution rate in RN
- X 3,6 Members stay twice more than non-members



+

THE MOST GLOBAL

LOYALTY PROGRAM





ACCOR DISTRIBUTION SOLUTIONS*

Accor offers > 110 global distribution channels at best market conditions



DEVELOPMENT CRITERIA

Programming & Development

70 to 200 rooms 45 sqm* and more

SIZE

TGFA

110 - 150 sqm*

*For AAA Ultra City Center, Historic Conversion, the room size and areas can go down by 10-15%, for luxury brands only

LOCATION

AAA unique situation

A gateway to the destination with luxury facilities, such as:

- 1 Signature Restaurant
- 1 Specialty Dining**
- 1 Private Dining**
- 1 Destination Bar with Wagon-Bar
- Rooftop Terrace (preferred) / terrace / courtyard
 / garden**

FUNCTION

- Orient Express Spa by Guerlain
- Luxury Fitness
- Exclusive Orient Express Retail & Concierge
- Swimming pool (mandatory for resorts)
- Executive Meeting rooms**



^{**} on market demand

GUEST JOURNEY

- NOMADIC DESIGN
- UNEXPECTED ENCOUNTERS
- SPIRIT OF THE ORIENT EXPRESS
- ELEMENTAL WELLBEING
- ICONIC ELEMENTS
 - *SIGNATURE PROGRAMS (MANDATORY)





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



ORIENT EXPRESS CONSTRUCTION
AND RENOVATION STANDARDS
Can be used after HCSA is signed

What's happening in 2021?

38

- Orient Express MICE concept
- Art & Styling Guidelines

