

RAFFLES
HOTELS & RESORTS

**WHY INVEST IN
RAFFLES**

Accor Global Development
February 2019



AN OASIS FOR THE WELL TRAVELLED

A true pioneer of worldly elegance and hospitality. An iconic brand where each Raffles hotel offers gracious warm and discreet service, delivering emotional luxury to the well travelled guests. Legendary service since 1887.

Arriving at Raffles is a special experience. It should be warm, welcoming, generous in spirit and unique to the destination. From the doorman with impeccable manners and a warm personality, to the Raffles Bed, fit for royalty, grand, sumptuous and irresistible.

GRACIOUS

INTUITIVE

SUMPTUOUSLY PAMPERED

PERFECTLY UNDERSTOOD

Raffles Top 3 USPs

ICONIC DESTINATIONS

- Small exclusive portfolio of unique hotels in AAA locations in key cities
- Every hotel is a distinctive and remarkable landmark, an icon of its destination
- Every hotel is tailor made and enhances the owner's personal vision

X

EMOTIONAL LUXURY SUPPORTED BY LEGENDARY SERVICE

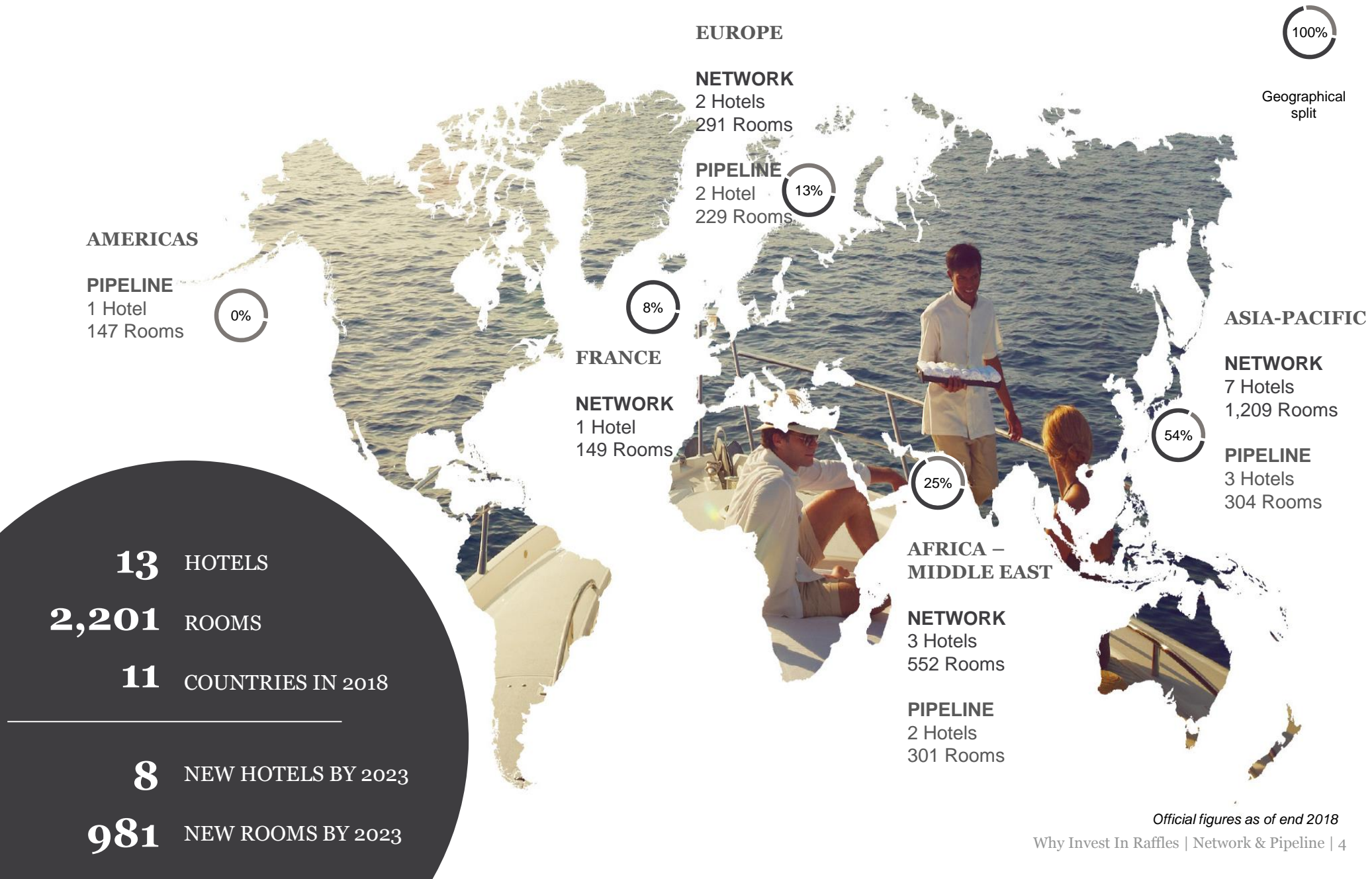
- High end luxury standards
- Dedicated teams sharing the same passion for excellence: from design & construction, training, operations, to personalised, intuitive, attentive & discrete service

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RAFFLES HOTEL PLUS BRANDED RESIDENCES FOR SALE LEVERAGES THE BRAND BUSINESS MODEL PROFITABILITY

- Unique value proposition driving additional revenue & fees and brand premium with
- Residential owners using hotel's paying services
- Home Owner Association operations & optional rental pools

NETWORK AND PIPELINE





RAFFLES
SINGAPORE

*When at Raffles,
why not visit Singapore?*

103 rooms



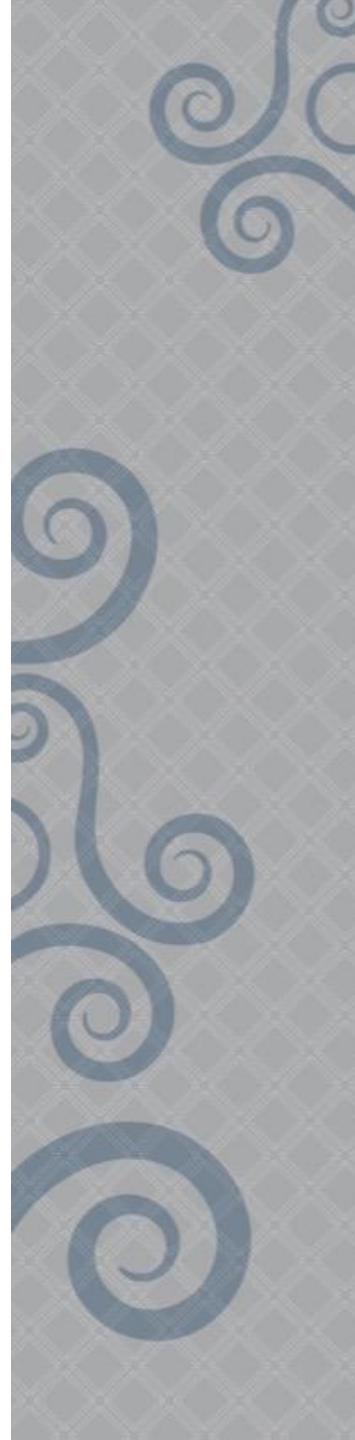


RAFFLES

LE ROYAL MONCEAU
PARIS

Palace & Parisian

149 rooms





RAFFLES

DUBAI

رافلز دبي

252 rooms



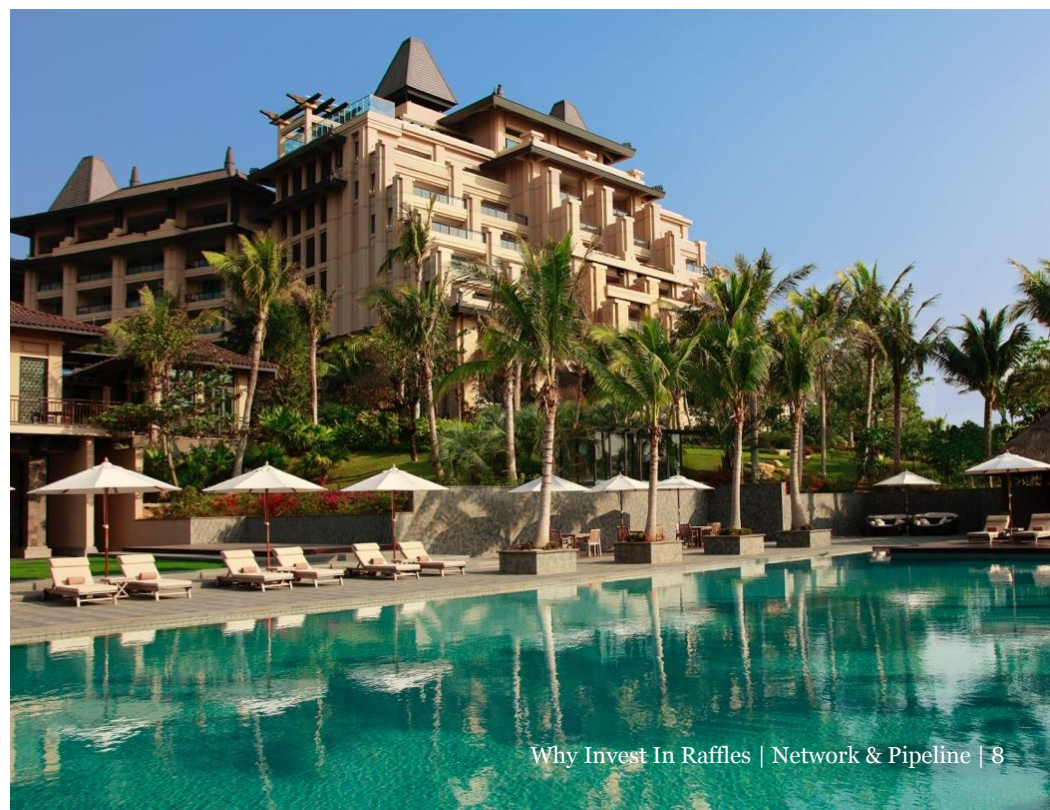


RAFFLES

HAINAN

海南莱佛士酒店

321 rooms





RAFFLES

PRASLIN
SEYCHELLES

86 rooms

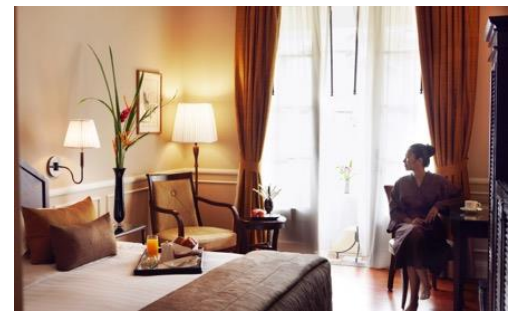




RAFFLES

HOTEL LE ROYAL
PHNOM PENH CAMBODIA

175 rooms





RAFFLES

GRAND HOTEL D'ANGKOR
SIEM REAP CAMBODIA

119 rooms

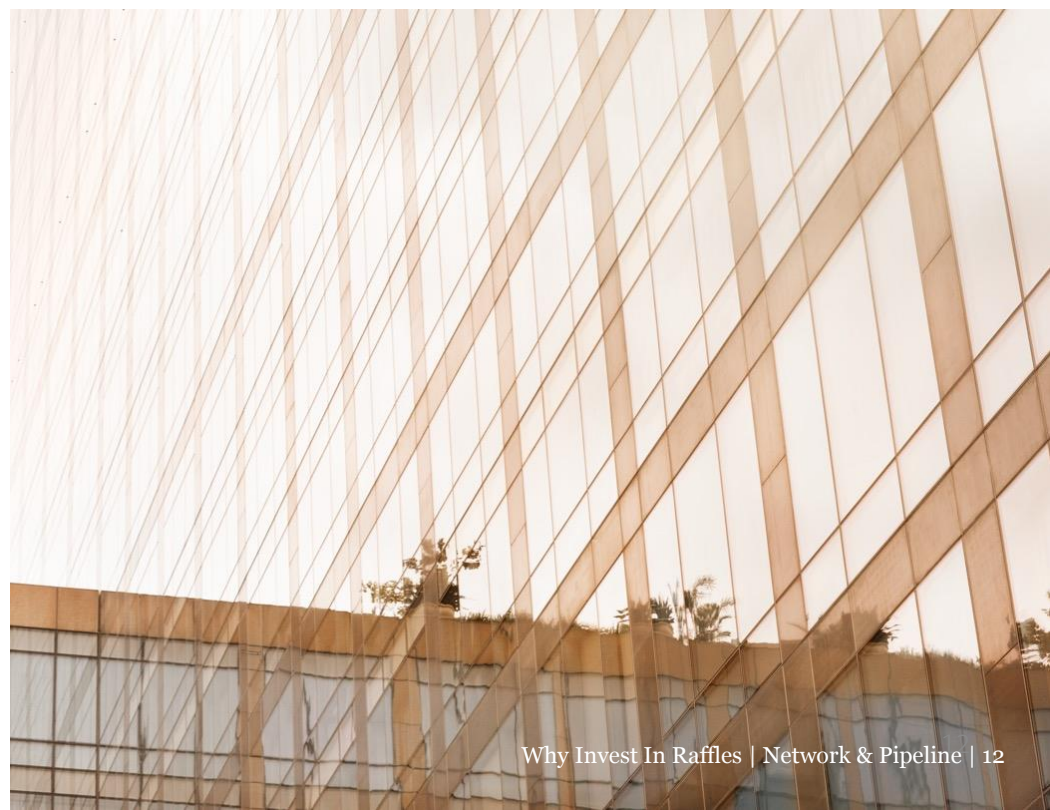
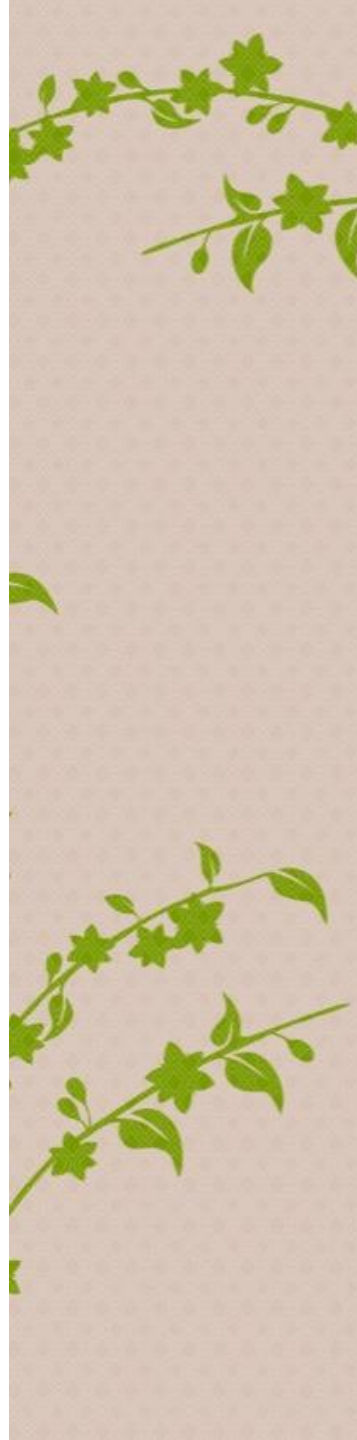




RAFFLES

MAKATI

150 rooms



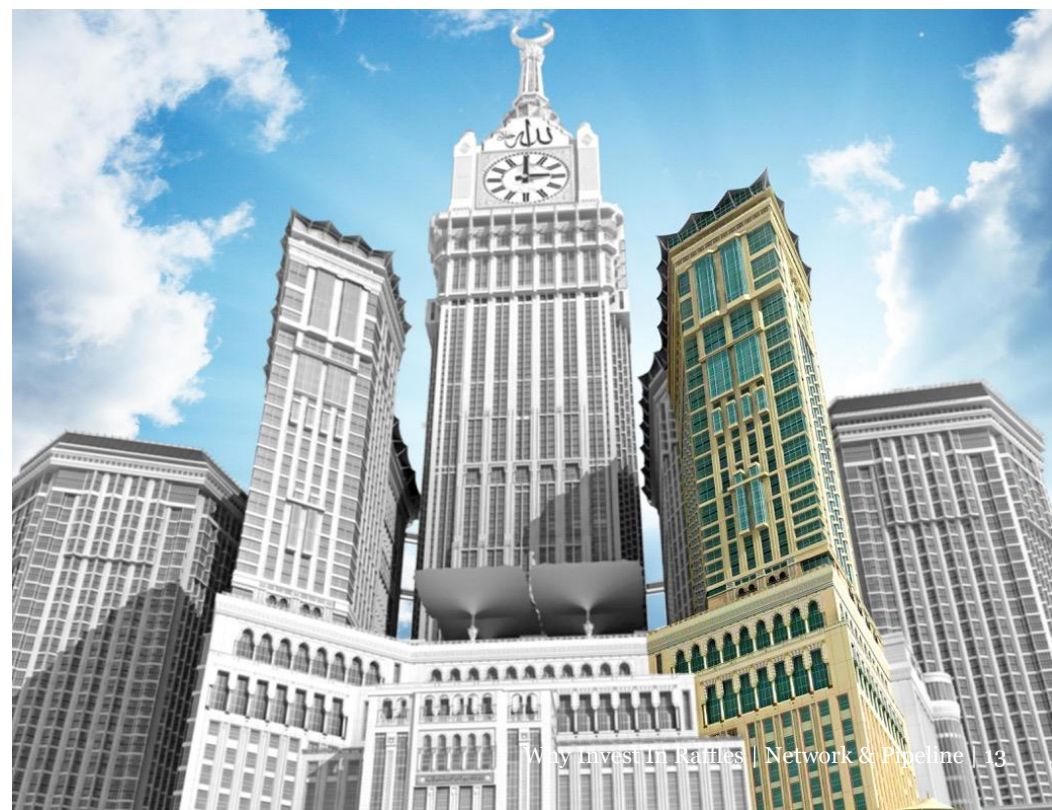
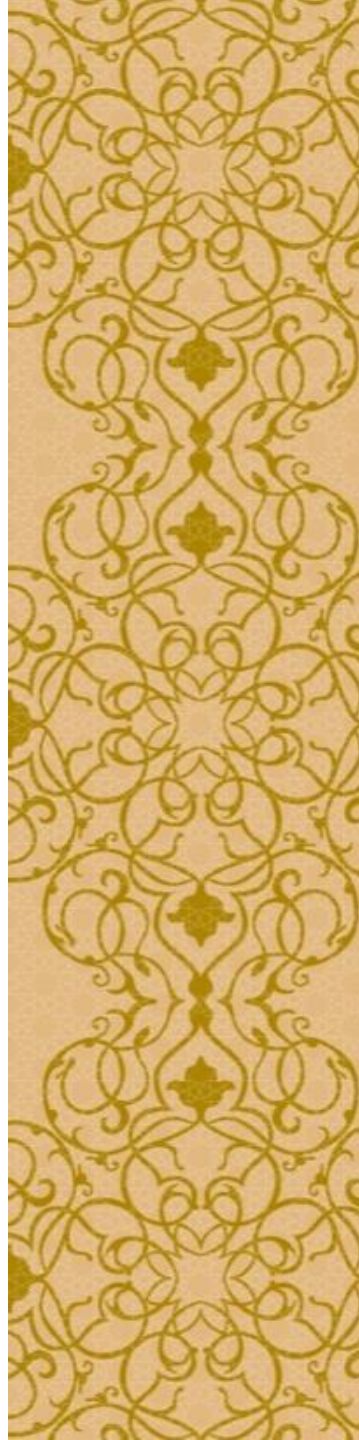


RAFFLES

MAKKAH PALACE
SAUDI ARABIA

قصر مكة رافلز

214 rooms

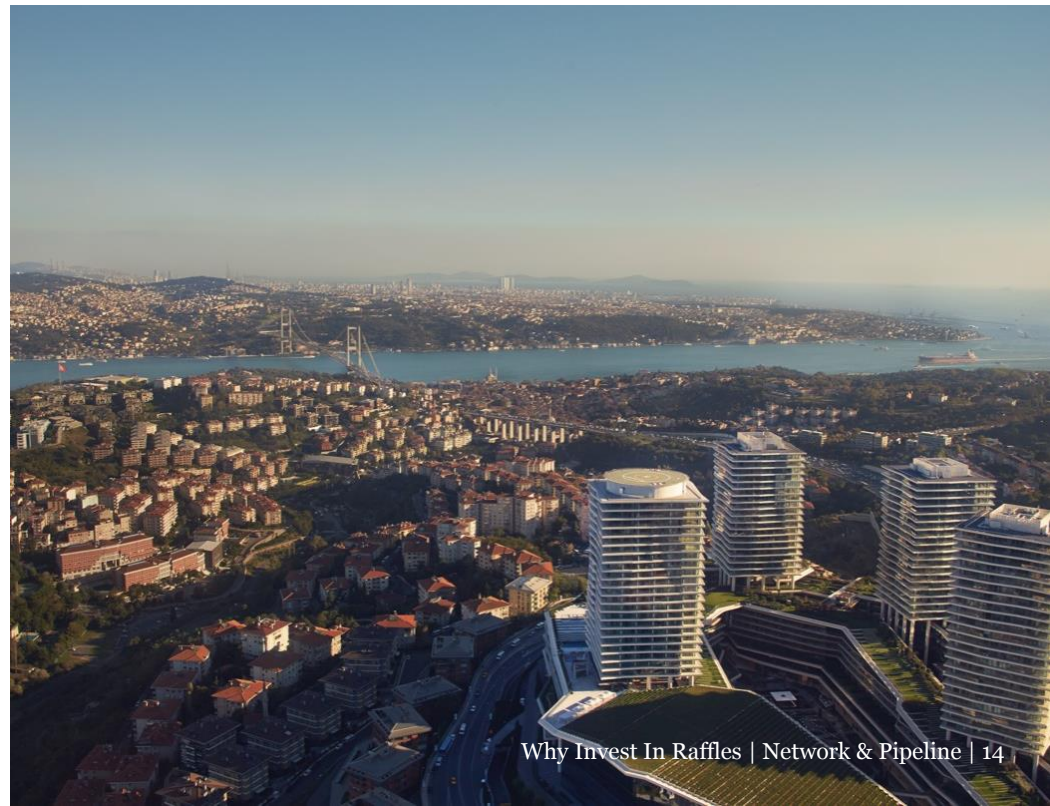




RAFFLES

ISTANBUL

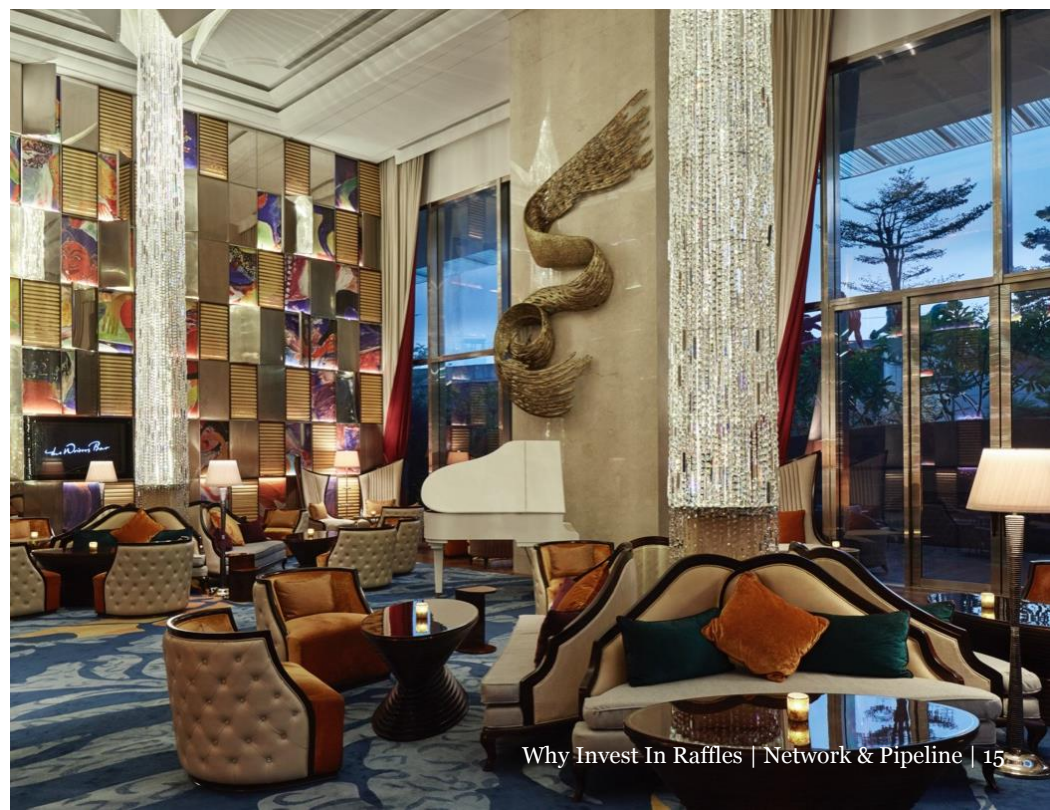
185 rooms





RAFFLES
JAKARTA

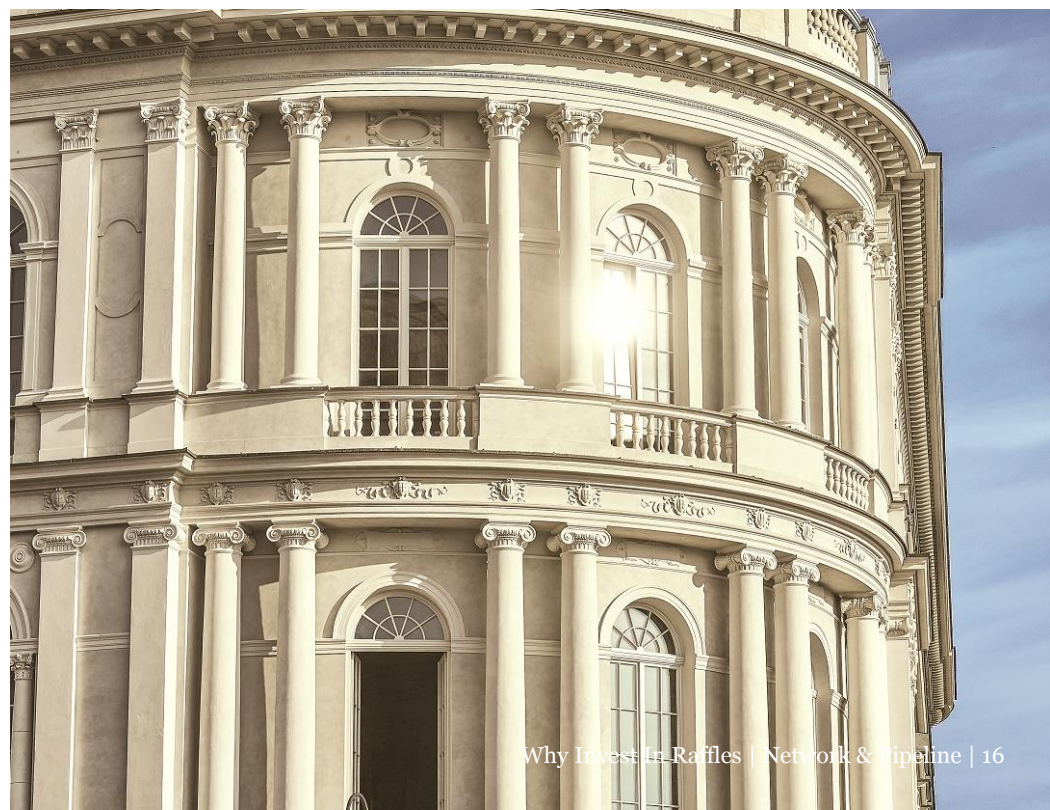
173 rooms





RAFFLES

EUROPEJSKI
WARSAW



Future Raffles Projects



China

Shenzhen (2019) – 154 rooms

China

Suzhou (2022) – 153 rooms

Greece

Mykonos (2021) – 104 rooms

India

Udaipur (2019) – 101 rooms

Saudi Arabia

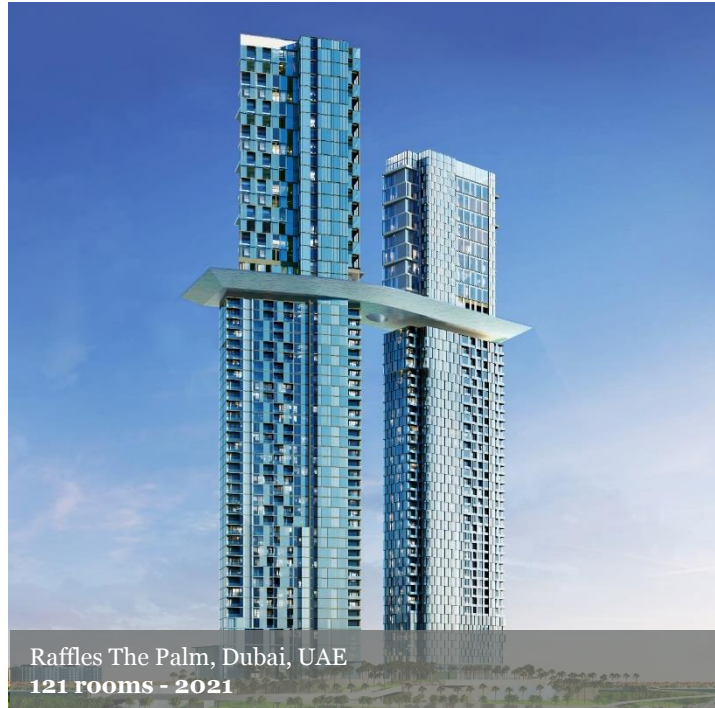
Jeddah (2020) – 181 rooms

U.A.E.

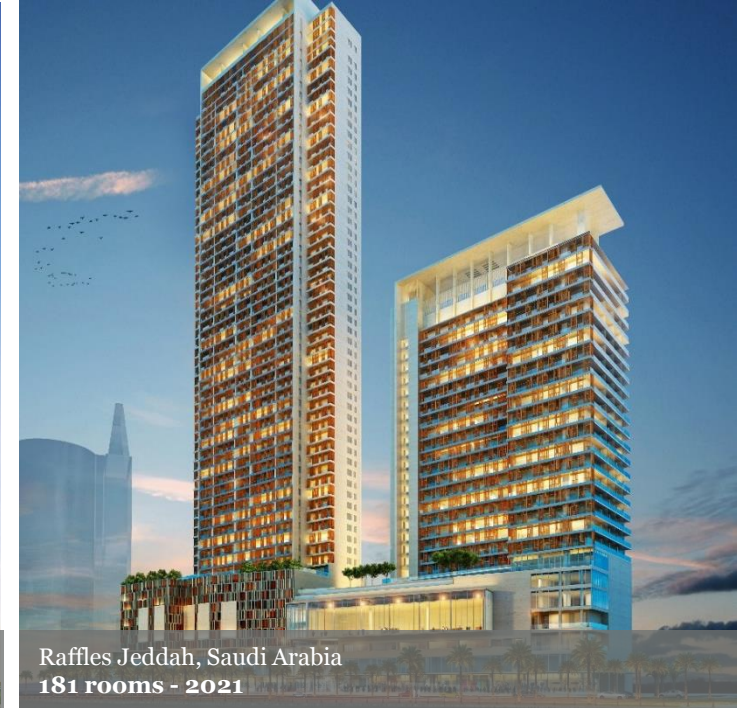
Dubai (2021) – 121 rooms

U.K.

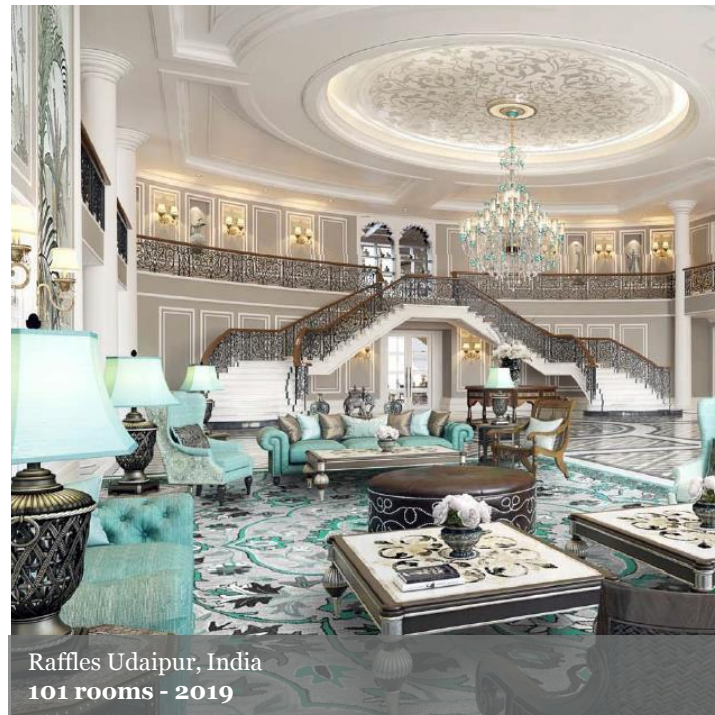
London (2021) – 125 rooms



Raffles The Palm, Dubai, UAE
121 rooms - 2021



Raffles Jeddah, Saudi Arabia
181 rooms - 2021



Raffles Udaipur, India
101 rooms - 2019



Raffles London, United Kingdom
125 rooms - 2020



DESIGN PHILOSOPHY

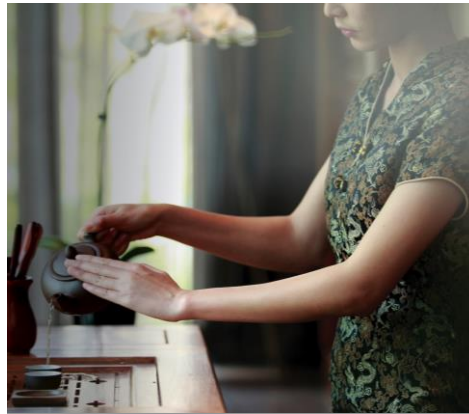
*Design Ambition: Iconic Design, Destination
Dining & Celebrations, Culture For Connoisseurs:*

Distinctive, every hotel is unique, not cookie cutter, never bland, reflect the local culture, heritage and character of each location, a cultural or historical landmark of its destination, authentic, horizontal not vertical, green spaces not concrete, space time privacy, tailored and bespoke, craftsmanship, sublime beauty and artistry.

FOUR PASSIONS

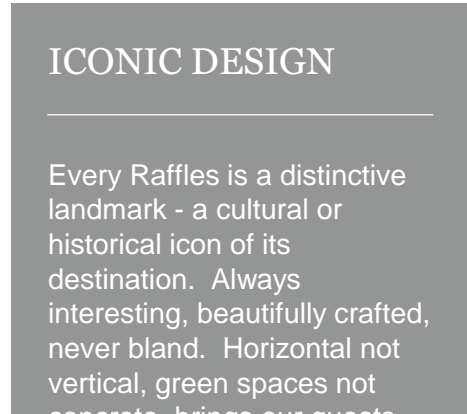
LEGENDARY SERVICE

Raffles has long set the standards for luxurious and personal hospitality. An elegant and graceful home away from home, an oasis offering tailored personalised experiences and intuitive service that is impeccable. A place where you *arrive as guests, leave as friends and return as family.*



CULTURE FOR CONNOISSEURS

Raffles brings pleasure and joy, through sublime beauty, inspiring surprises, and crafted detailscapturing the true spirit of the place and the cultural heritage of the destination.



ICONIC DESIGN

Every Raffles is a distinctive landmark - a cultural or historical icon of its destination. Always interesting, beautifully crafted, never bland. Horizontal not vertical, green spaces not concrete, brings our guests space, privacy and time. Tailored and bespoke, detailed craftsmanship, sublime beauty and artistry.



A PASSION FOR DESTINATION DINING & CELEBRATIONS

At the heart of the city, Raffles is a place for socialising and celebrations. F&B experiences are distinctive and iconic, both reflecting the place in which it is based and bringing together the best of the world for the local community.

BRAND PROGRAMS : EXHAUSTIVE LIST



ARRIVAL & DEPARTURE

- RAFFLES GRAND WELCOME (M)
- RAFFLES ICONIC DOORMAN (M)
- HANDWRITTEN GM WELCOME CARD (M)
- SECONDARY DEVICE
- THE GRAND HALL



PUBLIC SPACES

- WRITER'S BAR (M)
- LONG BAR (M)
- RAFFLES MAGAZINE (M)
- THE COLONNADE (M)
- THE VERANDAH
- GARDENS & GREENERY



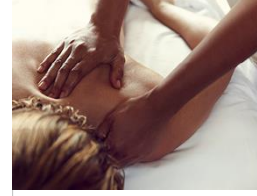
GUEST ROOMS

- THE OUTSTANDING GUESTROOM (M)
- RAFFLES BUTLER (M)
- PERSONALITY SUITE
- BEDTIME STORIES
- THE WRITER'S DESK



FOOD & BEVERAGE

- RAFFLES PATISSERIE (M)
- SINGAPORE SLING & DESTINATION SLING
- RAFFLES SIP SMITH 1915 GIN



WELLNESS FACILITIES

- RAFFLES SPA (M)



LEISURE FACILITIES

- RAFFLES CURATOR



MEETINGS & EVENTS

- ANNUAL RAFFLES WINE, FOOD & CULTURE EVENT
- THE GRAND BALLROOM

- A passion for Legendary Service
- A passion for Culture For Connoisseurs
- A passion for Iconic Design
- A passion for Destination Dining & Celebrations
- (M) Mandatory

KEY PROGRAM – *PUBLIC SPACES*

DESTINATION DINING & CELEBRATIONS

Long Bar

The vibrant heart of the hotel - a lively destination bar with a warm welcoming atmosphere where local community and hotel guests come together to celebrate the life of the destination. Signature long bar, signature cocktails & rituals connected to the hotel and location.



KEY PROGRAM – *GUEST ROOMS*

LEGENDARY SERVICE

The Butler

“Service like a Gentle Breeze” You never realize they are there, but you always miss them when you leave. A personal assistant who anticipates your needs, personalises your stay and transforms your experience into one of pure emotional luxury. Perfectly discreet, perfectly attentive.



KEY PROGRAM – *GUEST ROOMS*

ICONIC DESIGN

Personality Suite

Named after historical luminaries relevant to hotel history or culture. Showcases art, literature, photographs, memorabilia, music or movies related to the luminaries and their passions.

KEY PROGRAM – *LEISURE FACILITIES*

CULTURE FOR CONNOISSEUR

Raffles Curator

Be it the Resident Historian, Art Concierge or Marine Biologist, each Raffles has a curator who brings to life the historical or cultural heritage of the hotel, and its role in the cultural landscape of the destination.



COMMUNICATION PLATFORM



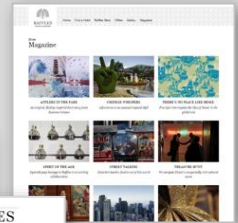
SOCIAL MEDIA

169k followers on Facebook
61 K followers on Twitter
45K followers on LinkedIn
19K Followers on Instagram



RAFFLES MAGAZINE

More than 60,000 copies
circulated globally.



Online

GLOBAL COMMUNICATIONS CAMPAIGN

When in Raffles, why not visit...



KEY MOMENTS CAMPAIGN

Based on themes around brand passions – e.g. *Beautifully Curated* to communicate on craftsmanship and heritage + *Celebrations* to capture the spirit of intimate to grand celebrations at Raffles.



Print



AWARDS

68 prominent awards across 8 properties, including:

Forbes Five Star

Le Royal Monceau, Raffles Paris

Conde Nast Reader's Choice Award 2018

For The Best Hotels in The World

Raffles Jakarta

Forbes Travel Guide Four-Star Rating

Raffles Makati

Time Magazine's World's Greatest Places 2018

Raffles Europejski Warsaw

Smart Travel Asia

TOP 10 Business Hotel in Asia

Raffles Makati

Most awarded property is

Raffles Hainan

with 24 notable awards

Top region is Asia Pacific with 52 awards



BRAND PERFORMANCE

Brand Awareness

An undisputed world leading high-end luxury brand Raffles enjoys good levels of awareness and familiarity among affluent travellers

> Total awareness is above 50% among affluent travellers in 4 key markets Singapore 76% - Australia 58% - Japan 56% - UK 50%

> 72% of affluent travellers aware of Raffles feel familiar with the brand

Top Results:

Russia 82%
Singapore 78%
China 77%
Middle-East 77%,
France 74%
Japan 72%

Our objective is to increase brand awareness and knowledge of footprint among affluent travellers

Source: BEAM by end of 2018

Brand Perception

The best loved high-end luxury hotel brand in Asia Pacific

> In average, Raffles' brand love score is 34% above that of competitors in AsPac

An iconic brand, with admired tradition & history

> 84% of frequent guests recognise Raffles as an "iconic" brand

Verbatims:

"An iconic experience steeped in history", "A legend in the world of luxury hotels", "An iconic institution"

Our objective is to drive brand performance and prestige.

Source: BEAM by end of 2017

Brand Margin

€ 90.9

Our objective is to increase the brand margin potential and achieve a RevPar Index Performance of 107,0

Source: BEAM by end of 2018

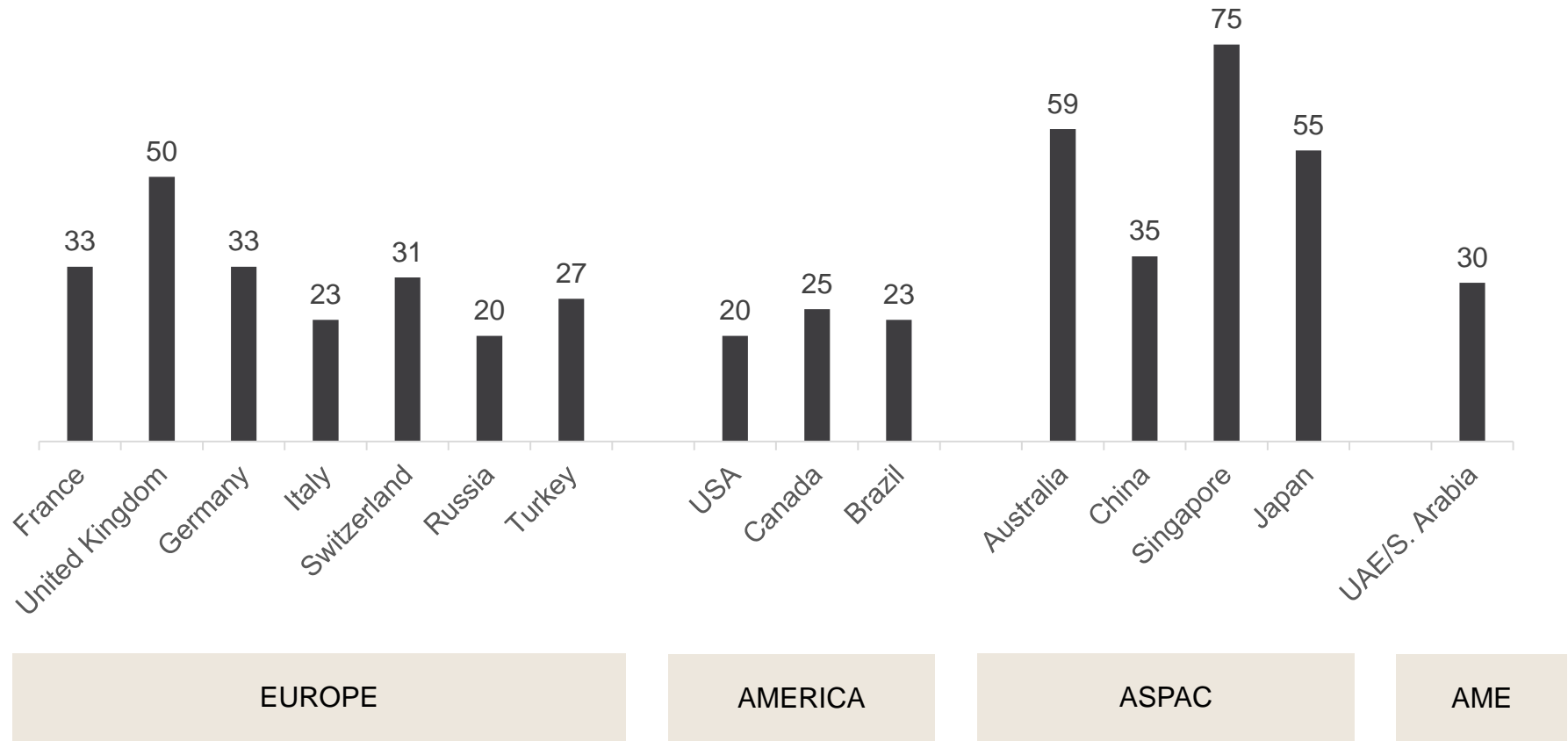
Reputation Performance Score

93,3%

Our objective is to reach 93,0 in 2019

Source: TrustYou by end of 2018

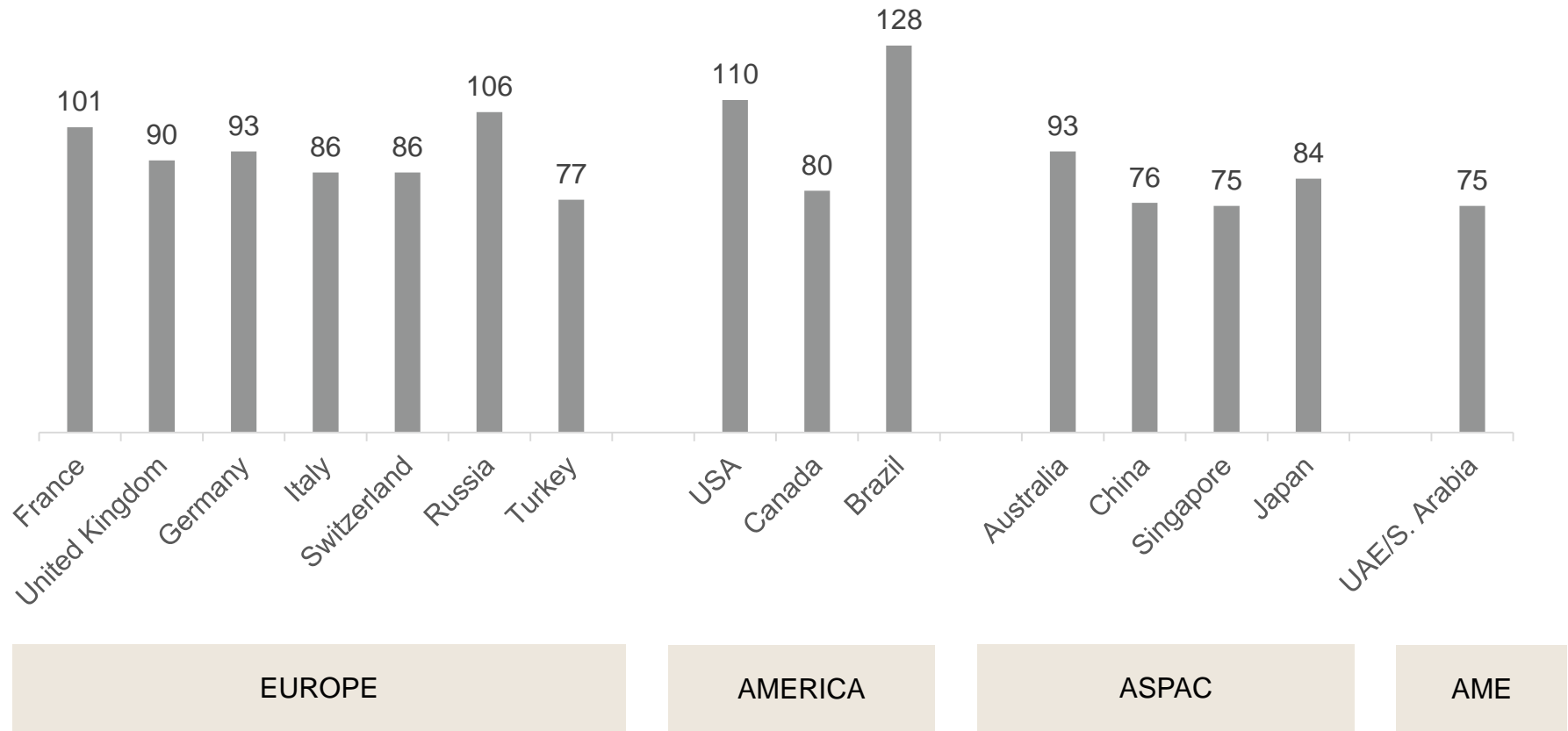
BRAND AWARENESS (%)



Source: BEAM - Brand Equity & Awareness Monitoring December 2018 |

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 (€)



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 ». Figures as of end 2018.

REPUTATION PERFORMANCE SCORE

RAFFLES
REPUTATION
PERFORMANCE
SCORE

93.3%

EUROPE
93%

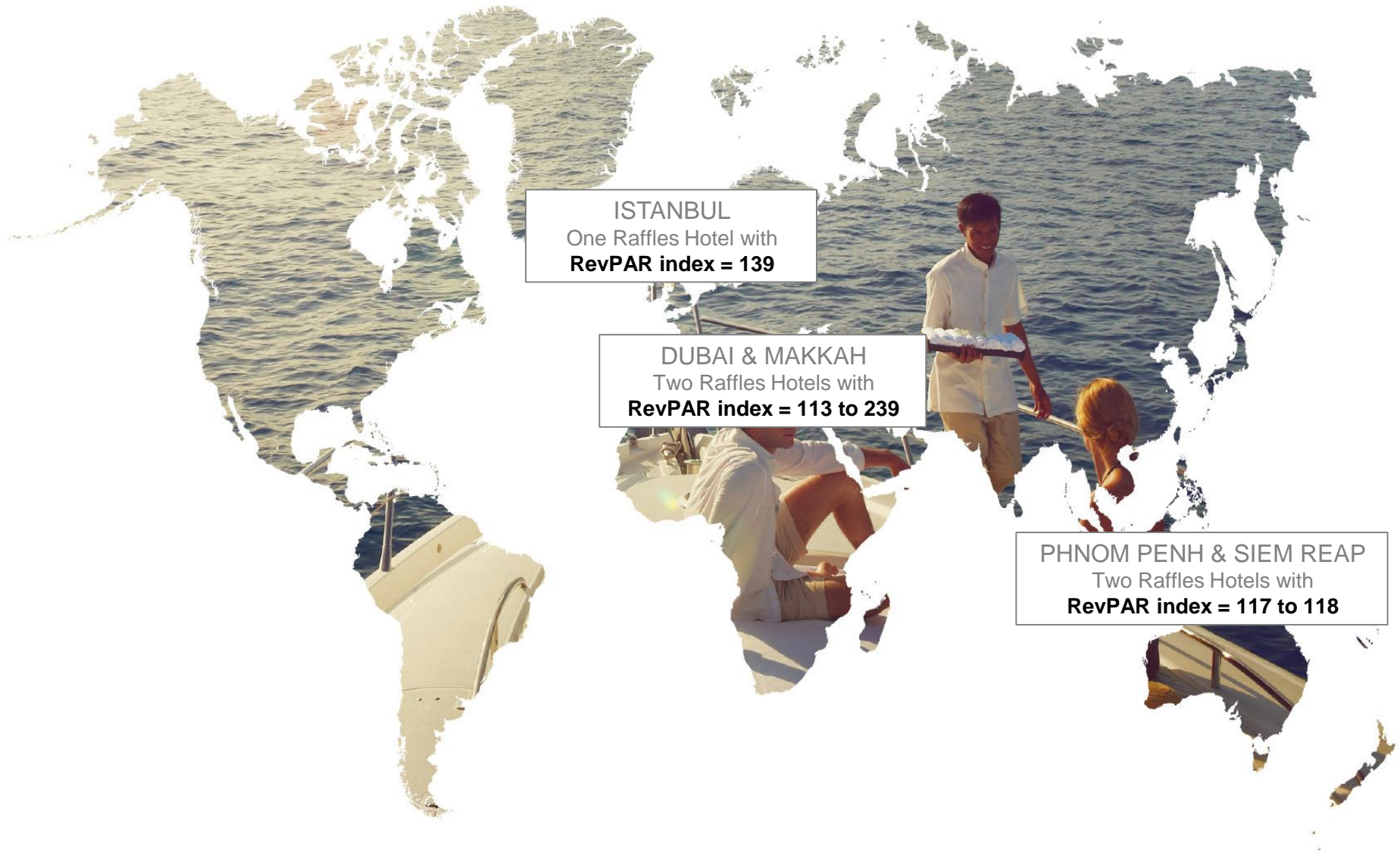
**ASIA -
PACIFIC**
94%

**AFRICA &
MIDDLE EAST**
93%

Source: TrustYou by end of 2018

RAFFLES REVPAR

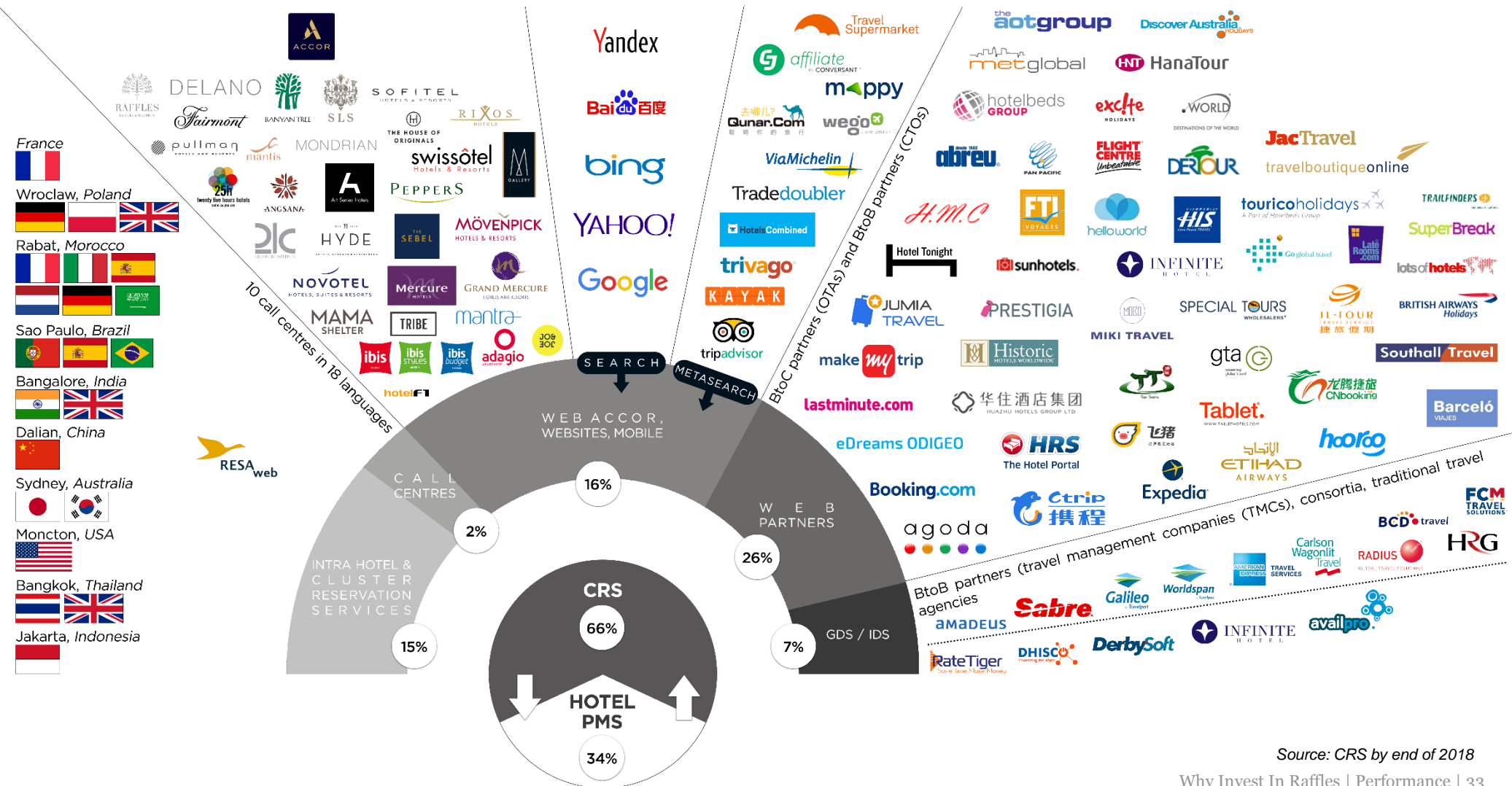
REVPAR INDEX AS OF END 2018



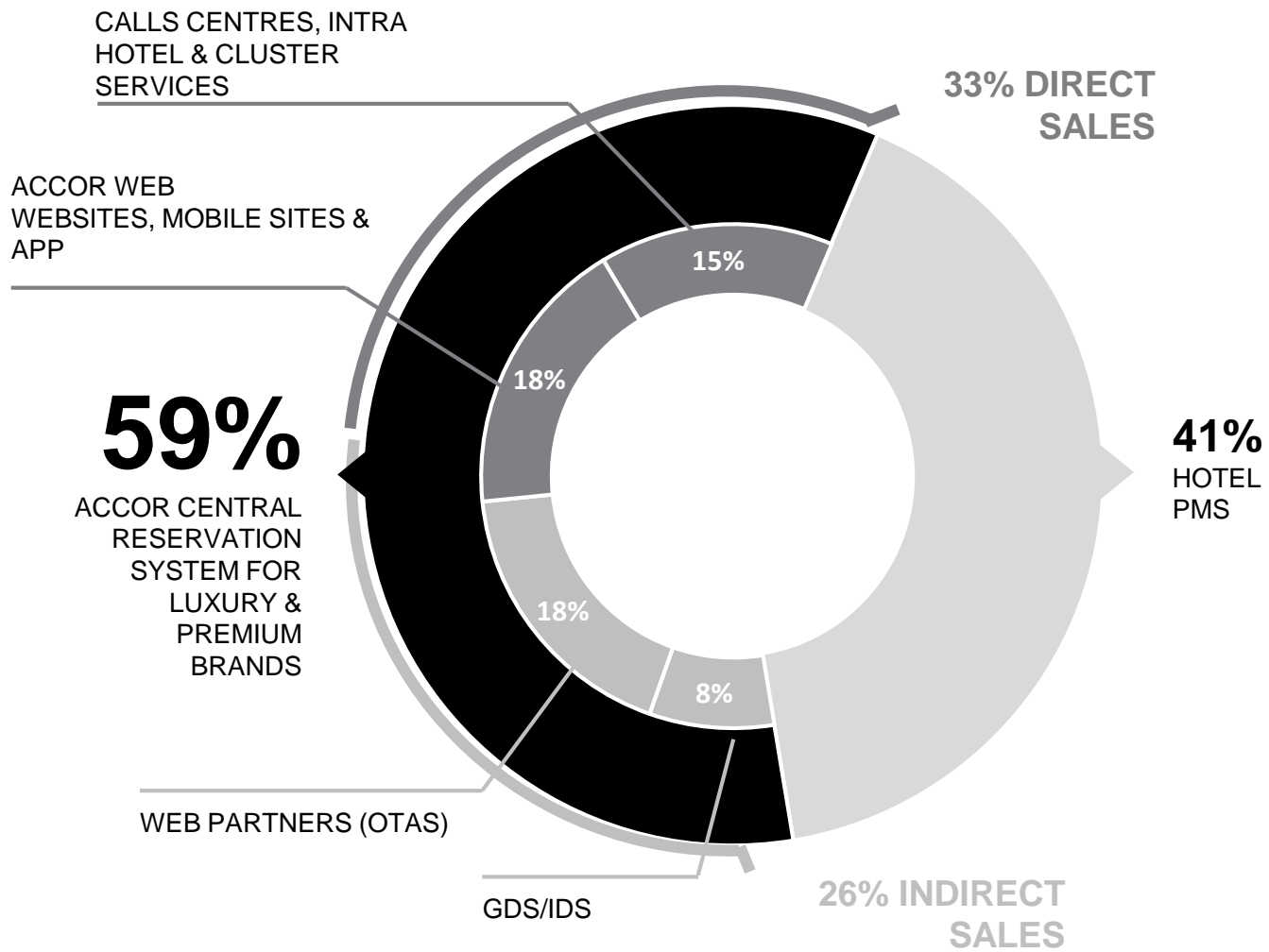
ACCOR DISTRIBUTION SOLUTION

ACCOR OFFERS > 110 GLOBAL DISTRIBUTION CHANNELS

AT BEST MARKET CONDITIONS



DISTRIBUTION SOLUTION POWERED BY ACCOR FOR LUXURY & PREMIUM BRANDS



FOCUS ON WEB
AccorHotels.com + brands.com
+ mobile websites + partner websites

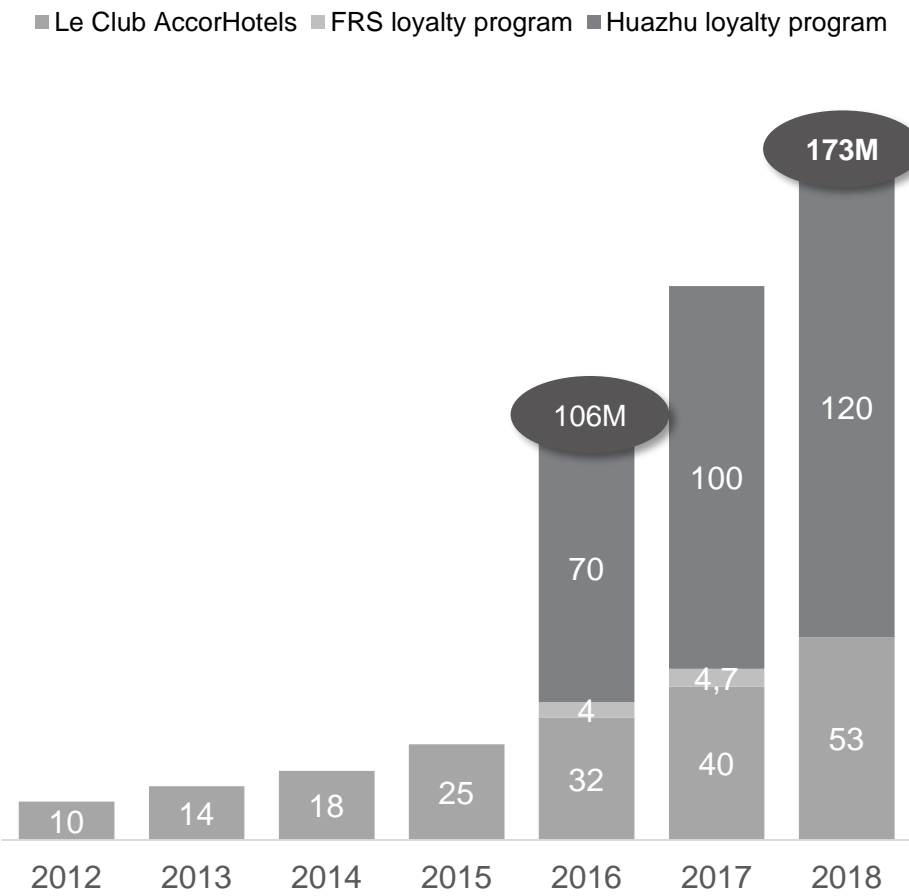
36%
WEB ACCORHOTELS & PARTNERS
ONLINE SALES FOR LUXURY & PREMIUM BRANDS

1,786M€
ONLINE ROOM REVENUE
LUXURY & PREMIUM BRANDS

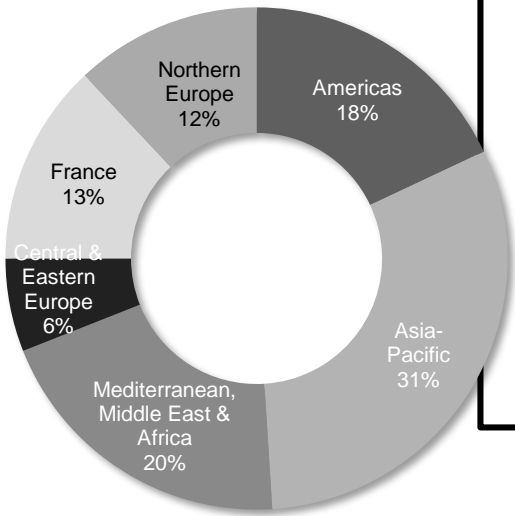
LE CLUB ACCORHOTELS

ACCOR OWNS THE MOST INTERNATIONAL AND FAST GROWING LOYALTY PROGRAM

Loyalty members - Worldwide



Guests' origin - Worldwide



A Worldwide program:

20 brands

3,500 hotels in 100 countries

Free enrollment

100% Web based program

More than 27,700 new members every day

Le Club AccorHotels represents 34.6% of all roomnights

Partnerships with large Airlines loyalty program: Skyteam, One World, Star Alliance...

>53 MILLION MEMBERS WORLDWIDE

+27,700 MEMBERS EVERY DAY

34.6%

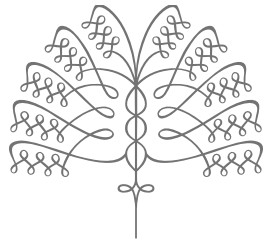
OF ALL ROOMNIGHTS

DEVELOPMENT CRITERIA

PROGRAMMING & DEVELOPMENT

		AAA ultra city center location, historic conversion	WORLDWIDE			
HOTEL	RECOMMENDED NUMBER OF ROOMS	70 – 200 keys	100 – 200 keys	PRIME LOCATIONS	SECONDARY LOCATIONS	AIRPORTS SUBURBS
	ROOM AVERAGE SIZE	-10/-15% of worldwide	60 sqm and +			
	TGFA / ROOM	100 – 120 sqm	130 – 150 sqm			
RESORT	RECOMMENDED NUMBER OF ROOMS	60 – 80 villas	60 – 100 villas	INTERNATIONAL CAPITALS KEY CITIES & RESORTS	MAJOR DOMESTIC DESTINATIONS	OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS
	ROOM AVERAGE SIZE	-10/-15% of worldwide	90 sqm indoor +outdoor			
	TGFA / ROOM	150 – 170 sqm	170 – 210 sqm			
FOOD & BEVERAGE		1 Signature restaurant (inc. Breakfast) 1 Specialty restaurant ⁽¹⁾ 1 Long Bar (urban only) 1 Writers Bar Raffles Patisserie				
WELL-BEING		Raffles Spa ⁽¹⁾ Luxury fitness centre Swimming pool				
MEETINGS		Meeting rooms ⁽¹⁾ Bellroom ⁽¹⁾ Raffles Library Business Centre available				
⁽¹⁾ Based on market demand						

(1) Based on market demand



RAFFLES
HOTELS & RESORTS