Brand Presentation
Accor Global Development
July 2020
INTRODUCTION

Raffles Hotels & Resorts boasts an illustrious history and some of the most prestigious hotel addresses worldwide. In 1887, Raffles Singapore set the standard for luxury hospitality, introducing the world to private butlers, the Singapore Sling and its enduring, legendary service.

Today, Raffles continues this tradition in leading cities and lavish resort locales, enchanting travellers with meaningful experiences and service that is both gracious and intuitive. Connoisseurs of life choose Raffles, not merely for its aura of culture, beauty and gentility, but for the extraordinary way they feel when in residence with Raffles. Each Raffles, be it Paris, Istanbul, Warsaw, Jakarta or the Seychelles, serves as a venerated oasis where travellers arrive as guests, leave as friends and return as family.
ICONIC DESTINATIONS

Small exclusive portfolio of unique hotels in top 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
EMOTIONAL LUXURY SUPPORTED BY LEGENDARY SERVICE

High end luxury standards

Dedicated teams sharing the same passion for excellence: from design & construction, training, operations, to personalized, intuitive, attentive & discrete service
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

16 HOTELS
2,378 ROOMS
13 COUNTRIES IN 2020

14 NEW HOTELS BY 2024
2,000 MORE ROOMS BY 2024

Official figures as of end June 2020
NETWORK AND PIPELINE

100% Managed

OPERATING MODE

EUROPE 12%*

NETWORK
2 Hotels
291 Rooms

PIPELINE
3 Hotels
645 Rooms

9%* FRANCE

NETWORK
2 Hotels
213 Rooms

AFRICA – MIDDLE EAST 26%*

NETWORK
4 Hotels
624 Rooms

PIPERLINE
6 Hotels
1,264 Rooms

ASIA-PACIFIC 53%*

NETWORK
8 Hotels
1,251 Rooms

PIPELINE
4 Hotels
245 Rooms

AMERICAS

PIPELINE
1 Hotel
147 Rooms

*Percentage of total room number
Official figures as of end June 2020
RAFFLES
SINGAPORE

103 rooms
RAFFLES DUBAI

252 rooms
321 rooms
RAFFLES
SEYCHELLES

86 rooms

NETWORK AND PIPELINE
RAFFLES
GRAND HOTEL D'ANGKOR
SIEM REAP CAMBODIA

119 rooms
RAFFLES
MAKATI

150 rooms

NETWORK AND PIPELINE
RAFFLES
MAKKAH PALACE
SAUDI ARABIA

214 rooms
185 rooms
RAFFLES

173 rooms

JAKARTA

NETWORK AND PIPELINE
RAFFLES
EUROPEJSKI
WARSAW

106 rooms
168 rooms
RAFFLES
MALDIVES
MERADHOO

37 rooms

NETWORK AND PIPELINE
Future Raffles Projects

**Indonesia**
Bali (2020) – 32 villas

**India**
Udaipur (2020) – 101 rooms

**Greece**
Mykonos (2022) – 104 rooms

**Saudi Arabia**
Jeddah (2022) – 181 rooms

**U.A.E.**
The Palm Dubai (2022) – 125 rooms

**U.K.**
London (2022) – 125 rooms

**U.S.A**
Boston (2022) – 147 rooms

Secured Pipeline from end of June 2020
A PASSION FOR 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 personalized experiences and intuitive service that is impeccable. A place where you arrive as guests, leave as friends and return as family.
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.
A PASSION FOR CULTURE FOR CONNOISSEURS

Raffles brings pleasure and joy, through sublime beauty, inspiring surprises, and crafted details ....capturing the true spirit of the place and the cultural heritage of the destination.
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.
A PASSION FOR 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.
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.
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.
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.
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.

### ARRIVAL & DEPARTURE
- **Raffles Grand Welcome**
- **Raffles Iconic Doorman**
- **Handwritten GM Welcome Card**
- **Secondary Device**
- **The Grand Hall**

### PUBLIC SPACES
- **Writer’s Bar**
- **Long Bar**
- **Raffles Magazine**
- **The Colonade**
- **The Verandah**
- **Gardens & Greenery**

### GUEST ROOMS
- **The Outstanding Guestroom**
- **Raffles Butler Personality Suite**
- **Bedtime Stories**
- **The Writer’s Desk**

### FOOD & BEVERAGE
- **Raffles Patisserie**
- **Singapore Sling & Destination Sling**
- **Raffles Sip Smith 1915 Gin**

### WELLNESS
- **Raffles Spa**
- **Emotional Wellbeing**

### LEISURE
- **Raffles Curator**
- **WOW Experiences**

### 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

Raffles Brand Presentation | 40
Core to our logo is the Traveller’s Palm. This is an iconic element of our brand and a symbol of our oasis. Folklore tells that the water stored in its base and orientation of its leaves gave thankful travellers much needed refreshment and direction.

As a portfolio of distinct and remarkable properties we are never bland. We reflect the mood, the culture, the heritage and the character of each location through an additional, individual element - the secondary device.
COMMUNICATION PLATFORM

GLOBAL COMMUNICATIONS CAMPAIGN
When in Raffles, why not visit...
New upcoming campaign for 2020.

SOCIAL MEDIA
170k followers on Facebook
61K followers on Twitter
90K followers on LinkedIn
32K Followers on Instagram

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.

RAFFLES MAGAZINE
More than 60,000 copies circulated globally.
AWARDS

60 LEADING AWARDS TRACKED ACROSS 11 PROPERTIES
Top Region: Asia Pacific (not including China) with 30 awards

Conde Nast Traveler 2019 Readers’ Choice Awards – 3 Awards
Forbes Travel Guide – 2 Awards
Global Luxury Hotel Awards – 2 Awards
TIME – 1 Award
Travel + Leisure 2019 World’s Best Awards – 1 Award
TripAdvisor Travelers’ Choice Awards – 10 Awards
Ultra Travel Awards – 1 Award
World Luxury Hotel Awards – 2 Awards
BRAND PERFORMANCE

Brand Awareness

> 50%

Of total awareness among affluent travellers in 3 key markets Singapore, Australia, Japan
> 72% of affluent travellers aware of Raffles feel familiar with the brand
An undisputed world leading high-end luxury brand Raffles enjoys good levels of awareness and familiarity among affluent travellers

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

Source: BEAM by end of 2019

Brand Perception

> 84%

Of frequent guests recognise Raffles as an “iconic” brand Iconic 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

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 2019

Brand Margin

€98

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 drive brand performance and prestige.

Source: BEAM by end of 2019

Reputation Performance Score

93,6%

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. It is the most representative hotel’s reputation KPI, requires at least 100 guests’ feedback and give positive reputation score out of 100%

Our objective is to reach 94,0 in 2020

Source: TrustYou by end of 2019
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
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 2019.
REPUTATION PERFORMANCE SCORE

- EUROPE: 94%
- ASIA - PACIFIC: 94%
- AFRICA & MIDDLE EAST: 94%

Source: TrustYou by end of 2019
ACCOR DISTRIBUTION SOLUTION*

Accor offers > 110 global distribution channels at best market conditions

- Erdoski, Madame Tussauds, Novotel, Le Méridien, Sofitel, Grand Mercure, MGallery, ibis Styles, ibis, Movenpick, Swissôtel, Pullman, Novotel Suites, Adapt Hotel, TRIBU
- 1,470 hotels use Cluster for their own bookings
- 1,500+ hotels use TAR for their own bookings
- 900 sales agents operate in 9 call centers in 20 languages
- 1,897 brands
- 125+ partners

*All Accor brands excluding recently integrated: Delano, SLS, The House of Originals, Mondrian, Hyde, greet, Mantis, Tribe

Source: CRS by end of 2019
DISTRIBUTION SOLUTION POWERED BY ACCOR
(Room Revenue based)

67% of Raffles room revenue comes through Accor Central Reservation System.

50% DIRECT SALES

33% HOTEL PMS

18% FOCUS WEB
(ACCOR WEB + WEB PARTNER)

59,055 ROOM NIGHTS

€23M ROOM REVENUE

17% INDIRECT SALES

VOICE

5% ACCOR WEB
ALL.ACCOR.COM + APP BRAND.COM

44% WEB PARTNERS (OTAs)

13% GDS/IDS

Influenced hotel direct*
*E-mails & cluster services

Official figures as of end 2019
NEW BOOKING ENGINE & APP

1 MULTIBRAND PORTAL
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

- Plugged to ALL.ACCOR.COM

Official figures as of end 2019

*year 2019 + from dec 2019 to Mid Feb 2020, since launch of ALL
NEW LOYALTY PROGRAM

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

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

Official figures as of end 2019
COMPETITION

MANDARIN ORIENTAL
ST REGIS
FOUR SEASONS
ROSEWOOD
THE PENINSULA
## DEVELOPMENT CRITERIA

### Programming & Development

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<thead>
<tr>
<th>AAA ultra city center location, historic conversion</th>
<th>WORLDWIDE</th>
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<tbody>
<tr>
<td><strong>HOTELS</strong></td>
<td></td>
</tr>
<tr>
<td>RECOMMENDED # OF ROOMS</td>
<td>70 – 200 keys</td>
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<tr>
<td>ROOM AVERAGE SIZE</td>
<td>-10/-15% of worldwide</td>
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<tr>
<td>TGFA / ROOM</td>
<td>100 – 120 sqm</td>
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<tr>
<td>RECOMMENDED # OF ROOMS</td>
<td>100 – 200 keys</td>
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<tr>
<td>ROOM AVERAGE SIZE</td>
<td>60 sqm and +</td>
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<tr>
<td>TGFA / ROOM</td>
<td>130 – 150 sqm</td>
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<tr>
<td><strong>RESORTS</strong></td>
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<td>RECOMMENDED # OF ROOMS</td>
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<td>ROOM AVERAGE SIZE</td>
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<td>TGFA / ROOM</td>
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<td><strong>FEATURES</strong></td>
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<tr>
<td>FOOD &amp; BEVERAGE</td>
<td>1 Signature restaurant (inc. Breakfast)</td>
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<tr>
<td></td>
<td>1 Specially restaurant(1)</td>
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<tr>
<td></td>
<td>1 Long Bar (urban only)</td>
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<tr>
<td></td>
<td>1 Writers Bar</td>
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<tr>
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<td>Raffles Patisserie</td>
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<tr>
<td>WELL-BEING</td>
<td>Raffles Spa(1)</td>
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<tr>
<td></td>
<td>Luxury fitness centre</td>
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<td>Swimming pool</td>
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<td>Meeting rooms(1)</td>
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<tr>
<td>MEETINGS</td>
<td>Bellroom (1)</td>
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<td></td>
<td>Raffles Library</td>
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<tr>
<td></td>
<td>Business Centre available</td>
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### PRIME LOCATIONS

- INTERNATIONAL CAPITALS
- KEY CITIES & RESORTS

### SECONDARY LOCATIONS

- MAJOR DOMESTIC DESTINATIONS

### AIRPORTS SUBURBS

- OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS
WHAT’S HAPPENING IN 2020?

- Emotional Wellbeing Guidelines
- Harmonious Design throughout the Guest Journey
- Raffles MICE Concept