WHY INVEST IN

ACCOR GLOBAL DEVELOPMENT
FEBRUARY 2020
A vivid cocktail of sophistication and style. An audacious burst of local energy that is both luxurious and playful. An edge that sets the experience apart. Fashionable and social, it’s about being the place to be and be seen.
SO/ BRAND PRESENTATION

THE RISING
PLAYFUL LUXURY

Both luxurious & playful - best of both worlds in a surprising way & Avant-garde in design, sophisticated in feel

Local energy & vibrant scene – "the place to be & be seen"

Booming portfolio with over 20 hotels by 2023 triple-digit growth
THE ONLY FASHION-LED HOTEL BRAND

Distinctive fashion signature from a renowned designer for each address

High-impact fashion collection on guest perception

Positive impact on employee engagement
THE ATTRACTIVE BUSINESS MODEL

High perceived value for guests & high average room rate and brand premium

High PR value

Highly attractive for locals driving additional F&B revenue & bottom line
### NETWORK AND PIPELINE

<table>
<thead>
<tr>
<th></th>
<th>HOTELS</th>
<th>ROOMS</th>
<th>COUNTRIES IN 2019</th>
<th>NEW HOTELS BY 2024</th>
<th>MORE ROOMS BY 2024</th>
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<td>9</td>
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<td>1,349</td>
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<td>2,526</td>
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Official figures as of end 2019
NETWORK AND PIPELINE
Official figures as of end June 2020

19% AMERICAS
NETWORK
1 Hotel
250 Rooms
PIPELINE
1 Hotel
181 Rooms

29% EUROPE
NETWORK
3 Hotels
397 Rooms
PIPELINE
5 Hotels
1,121 Rooms

45% ASIA PACIFIC
NETWORK
4 Hotels
611 Rooms
PIPELINE
5 Hotels
943 Rooms

7% AFRICA-MIDDLE EAST
NETWORK
1 Hotel
92 Rooms
PIPELINE
3 Hotels
859 Rooms

OPERATING MODE
100%
Managed
FLAGSHIPS

SOY MAURITIUS
92 ROOMS

NETWORK & PIPELINE

Kenzo Takada
SO/ Mauritius
Mauritius
FLAGSHIPS

SO/ Bangkok
Thailand

P. 39

237 ROOMS
FLAGSHIPS

SO/ SINGAPORE

134 ROOMS
SOY HUA HIN
109 ROOMS
FLAGSHIPS

Benny Castles
SO/ Auckland
New Zealand

AUCKLAND
130 ROOMS
LATEST OPENING

Agatha Ruiz de la Prada
SO/ La Habana
Cuba

250 ROOMS

LA HABANA
UPCOMING OPENINGS

SO/Uptown Dubai
188 ROOMS
OPENING DECEMBER 2021

Tamara Ralph
SO/Uptown Dubai
UAE

NETWORK & PIPELINE
SO/ PARIS MORLAND
161 Rooms
March 2021
KEY UPCOMING OPENINGS
Secured Pipeline as of end 2019

EUROPE
SO/ Paris Champs-Elysée, France 101 Rooms, May 2021
SO/ Cascais, Portugal 115 Rooms, February 2021
SO/ Sotogrande, Spain 151 Rooms, June 2021

AFRICA – MIDDLE EAST
SO/ Uptown Dubai, United Arab Emirates 188 Rooms, January, 2022
SO/ Doha, Qatar 321 Rooms, December 2022

AMERICAS
SO/ Los Cabos, Mexico 200 Rooms, January 2022

ASIA – PACIFIC
SO/ Samui, Thailand 83 Rooms, January 2021
SO/ Kuala Lumpur, Malaysia 213 Rooms, July 2022
SO/ Zhengzhou, China 212 Rooms, January 2025
A PASSION FOR AVANT-GARDE DESIGN

Every SO/ address is an avant-garde and masterpiece, embellished with vivid design elements, textures, colors and influences of the destination, giving each hotel a one-of-a-kind personality and style.
Every SO/ is a combination of the destination style and the hotel or resort’s soul. A fusion of the destination’s vibe and the hotel’s ambition, the brand equation serves as the “go-to” source of inspiration for bringing the actual experience to life in the hotel. Most importantly, it bestows upon the hotel a truly unique personality.
A PASSION FOR
PLAYFUL
ENTERTAINMENT

SO/ is where locals and travellers meet in like-mindedness to experience the energy of ‘the place’, to be energized and entertained. At SO/, guests are thrilled with fashionable and social luxury experiences that capture the vivacity and vibe of the locale - the trendiest of local scene.
DESTINATION DINING SOCIETY
Experiential dining with a unique vantage point – be it over a notable park or a casual cove on the seaside. Led by a notable chef, the restaurant aims to bring stylish guests and locals together over innovative sharing plates, creative drinks and stimulating conversation.

HI-SO ROOFTOP BAR
An iconic destination in the city, HI-SO rooftop bar and ultra-lounge is focused on offering glamorous cocktails and on-trend music while playing host to hotel guests and some of the locale’s most notable residents.
SO/ is an artistic vision brought to life by a celebrated name from the ever vibrant and expressive world of fashion. From internationally renowned names like Christian Lacroix (SO/ Bangkok) to Kenzo Takada (SO/ Mauritius) to Karl Lagerfeld (SO/ Singapore), each hotel is a fashion statement in its own rights; from unique hotel emblem to signature fashion collection (uniforms) to iconic art or decorative piece designed by the appointed Fashion Designer.
FASHION SIGNATURE (SO LOOK)

SO/ is an artistic vision brought to life by a celebrated name from the ever so stylish, vibrant and expressive world of fashion. From internationally renowned names like Christian Lacroix (SO/ Bangkok) to Kenzo Takada (SO/ Mauritius) to Karl Lagerfeld (SO/ Singapore), each hotel is a fashion statement in its own rights (unique hotel emblem, signature fashion collection (uniforms), iconic art or decorative piece etc. designed by the appointed Fashion Designer).
The following list contains the key brand concepts & markers. Specific and detailed guidelines with rich elements & content bring each experience to life in the guest journey. Brand standards as of end 2019, might be subject to changes.

**WELCOME**
- Fashion Signature (M)
- SO Greeting (M)
- Welcome Drink (M) *(with storytelling & staging)*

**PUBLIC SPACE**
- Hotel Signature Scent (M)
- Rhythm & Tunes (M)
- MIXO lobby lounge & bar (M)
- Club Signature (executive lounge) (O)
- SO Guru (M)

**GUEST ROOM**
- Complimentary personal minibar (M)
- HIS & HER Amenities (M)
- RESET Turndown service (M)
- Club Signature (executive lounge) (O)
- SO Guru (M)

**F&B**
- Fashionably Late Breakfast (M)
- [COLOR/ OVEN] all-day dining (M) *(e.g. Red Oven, White Oven)*
- [VIEW / LOCATION] SOCIETY destination dining (M) *(e.g. Park Society, Harbour Society)*

**WELLNESS FACILITIES**
- SO/ SPA (O)*
- SO/ FIT (M)

**LEISURE FACILITIES**
- HI-SO rooftop bar (M)

**MEETING & EVENTS**
- SO/ (Monthly) Parties & Events (M)
- Social Meetings (O)

**SO/ BRAND PRESENTATION**
- Fashion
- Playful Entertainment
- Avant-Garde Design

**GUEST EXPERIENCE**
- [COLOR/ OVEN] all-day dining (M) *(e.g. Red Oven, White Oven)*
- [VIEW / LOCATION] SOCIETY destination dining (M) *(e.g. Park Society, Harbour Society)*

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*SO/ SPA is MANDATORY for all SO/ Resorts*
COMMUNICATION PLATFORM

GLOBAL COMMUNICATION TAGLINE

FEEL THE PULSE

SO/ VISUAL IDENTITY

Amplifies SO’s unconventional attitude towards lifestyle luxury hospitality; playful and audacious, sophisticated and vibrant.

BRAND WEBSITE

Informative and inspiring, the brand website provides seamless research-to-reservation journey anytime, anywhere.

SOCIAL MEDIA

- Over 23k followers
- sohotelsandresorts
AWARDS

30 LEADING AWARDS ACROSS 6 PROPERTIES IN 2019
Top region: Asia Pacific (not including China) with 24 awards

Forbes Travel Guide
1 Awards

Haute Grandeur Global hotel Awards
6 Awards

Luxury Restaurant Awards
1 Awards

Michelin Guide
1 Award

World Luxury Hotel Awards
1 Award
Our objective is to reach 90.5 and to a ComplIndex of above 1.00 vs. global competition.
ACCOR DISTRIBUTION SOLUTION*
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

Source: CRS Official figures as of end 2019
SO/ DISTRIBUTION POWERED BY ACCOR (Room Revenue based)

Official figures as of end 2019

- **38% DIRECT SALES**
- **26% HOTEL PMS**
- **12% GDS/IDS**
- **14% WEB PARTNERS (OTAs)**
- **19% VOICE**
- **72% OF SO/ ROOM REVENUE COMES THROUGH ACCOR CENTRAL RESERVATION SYSTEM**
- **28% FOCUS WEB (ACCOR WEB + WEB PARTNER)**
- **25% INDIRECT SALES**
- **1% INFLUENCED HOTEL DIRECT* (*E-mails & cluster services)**

**45%**

**99,534 ROOM NIGHTS**

**€20M ROOM REVENUE**
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

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

Source: Official figures as of end 2019
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

Source: Official figures as of end 2019
## DEVELOPMENT CRITERIA

### AAA ULTRA CITY CENTER LOCATION, HISTORIC CONVERSION

<table>
<thead>
<tr>
<th>Recommended Number of Rooms</th>
<th>Worldwide</th>
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<tbody>
<tr>
<td>100 – 200 keys</td>
<td>200 – 250 keys</td>
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<table>
<thead>
<tr>
<th>Room Average Size</th>
<th>Worldwide</th>
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<tr>
<td>-10/-15% of worldwide</td>
<td>40 sqm and +</td>
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</table>

<table>
<thead>
<tr>
<th>TGFA / Room</th>
<th>Worldwide</th>
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<tbody>
<tr>
<td>-10/-15% of worldwide</td>
<td>90 – 110 sqm</td>
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### FOOD & BEVERAGE

- 2 restaurants
- 1 signature rooftop bar
- SoSpa
- SoFit
- Swimming pool
- Magnifique meetings & events
- Ballroom (1)
- Business Centre available

### WELL-BEING

- SoSpa
- SoFit
- Swimming pool
- Magnifique meetings & events
- Ballroom (1)
- Business Centre available

### MEETINGS

- Magnifique meetings & events
- Ballroom (1)
- Business Centre available

### PRIME LOCATIONS

- International capitals
- Key cities & resorts
- Major domestic destinations

### SECONDARY LOCATIONS

- Airports
- Suburbs

### AIRPORTS SUBURBS

- International capitals
- Key cities & resorts
- Major domestic destinations

- Other cities & attractive touristic destinations

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Source: Official figures as of end 2019
WHAT’S HAPPENING IN 2020?

• Construction and renovation standards
• Design brief
• Art & Styling guidelines
• So/ Glow

SO/ DESIGN BRIEF
Can be used before HCSA is signed

SO/ STYLE BOOK
Can be used before HCSA is signed

SO/ FIT CONCEPT
Can be used after HCSA is signed

SO/ SPA GUIDELINES
Can be used after HCSA is signed