

ACCOR GLOBAL DEVELOPMENT

FEBRUARY 2019

WHY INVEST IN



S O F I T E L
HOTELS & RESORTS



LIFE IS MAGNIFIQUE

Imagine modern luxury hotels where the essence of each destination is artfully blended with French art de vivre, creating chic experiences for modern voyageurs to indulge in and celebrate life's pleasures, the French way..

CHIC PASSIONATE INDULGED SPECIAL

SOFITEL TOP 3 USPs

ONLY INTERNATIONAL FRENCH LUXURY HOTEL BRAND

- Modern French "Art de Vivre" & local essence
- French chic & sophisticated modern design
- "Gastronomie Francaise" & authentic F&B rituals (cheese, breads, viennoiseries, wines...)

X

STRONG BRAND VALUE

- Most international network with > 120 hotels in key cities in > 40 countries
- Strong awareness > 60% in key feeder markets
- Strong PR coverage 378 million (net reach) and > 450 annual awards
- High perceived value for guests with strong brand experience (partnerships, events, concepts/markers)

=

INVESTORS' ASSURANCE

- > 50 years of brand heritage and "savoir-faire"
- French origin & luxury drives brand perception and preference
- High level of standards & service excellence drive customer satisfaction and reputation
- Brand value contributes to "sure-win" investment potential

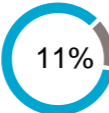
NETWORK AND PIPELINE

Official figures as of end 2018

AMERICAS

NETWORK
15 Hotels
3,512 Rooms

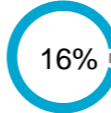
PIPELINE
3 Hotels
619 Rooms



EUROPE

NETWORK
20 Hotels
4,864 Rooms

PIPELINE
1 Hotel
245 Rooms



FRANCE

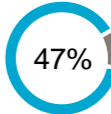
NETWORK
12 Hotels
1,610 Rooms

PIPELINE
0 Hotels
0 Rooms

ASIA PACIFIC

NETWORK
50 Hotels
14,308 Rooms

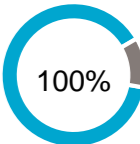
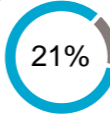
PIPELINE
7 Hotels
1,763 Rooms



AFRICA - MIDDLE EAST

NETWORK
24 Hotels
6,294 Rooms

PIPELINE
3 Hotels
1,210 Rooms



Geographical split

121

HOTELS

30,588

ROOMS

43

COUNTRIES IN 2018

14

NEW HOTELS BY 2023

3,837

NEW ROOMS BY 2023

OPERATING MODE



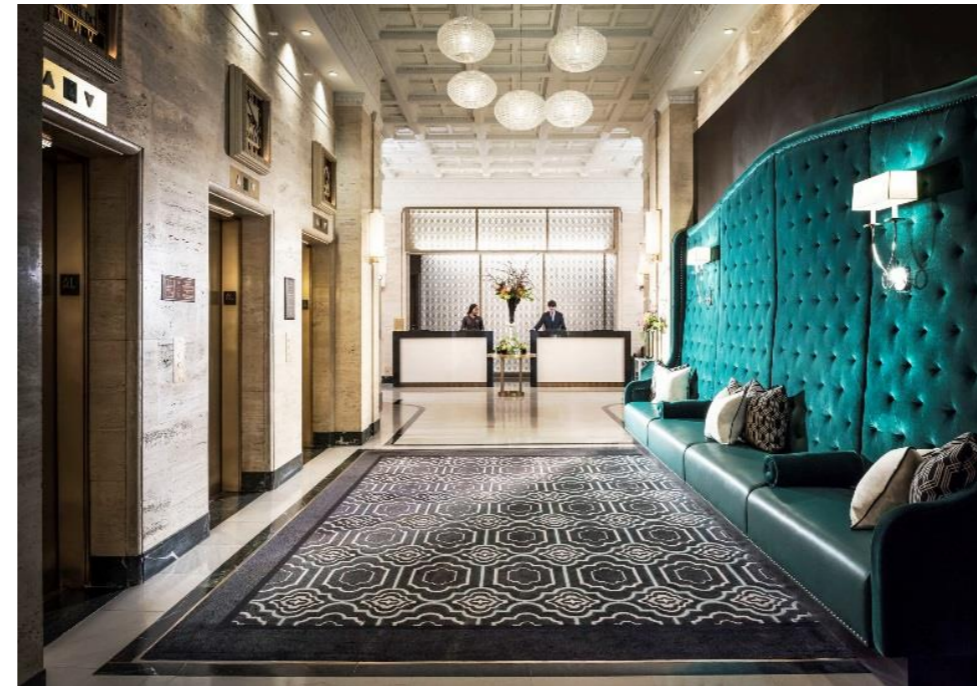
FLAGSHIPS

SOFITEL
HOTELS & RESORTS



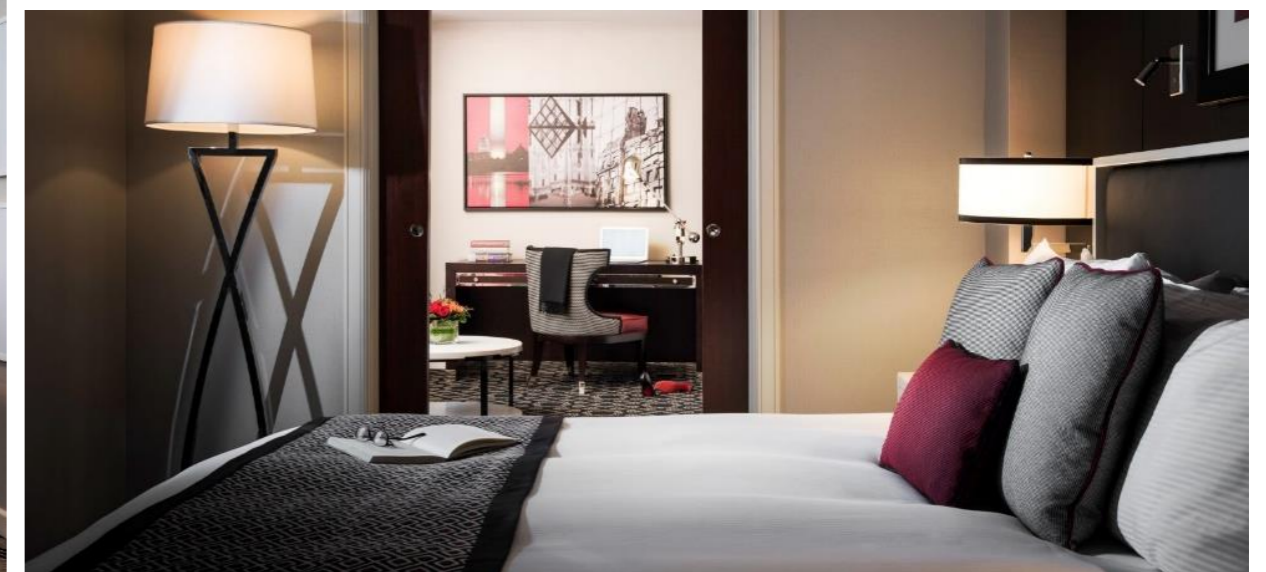
FLAGSHIPS

SOFITEL
HOTELS & RESORTS



SOFITEL WASHINGTON DC LAFAYETTE SQUARE
(UNITED STATES)

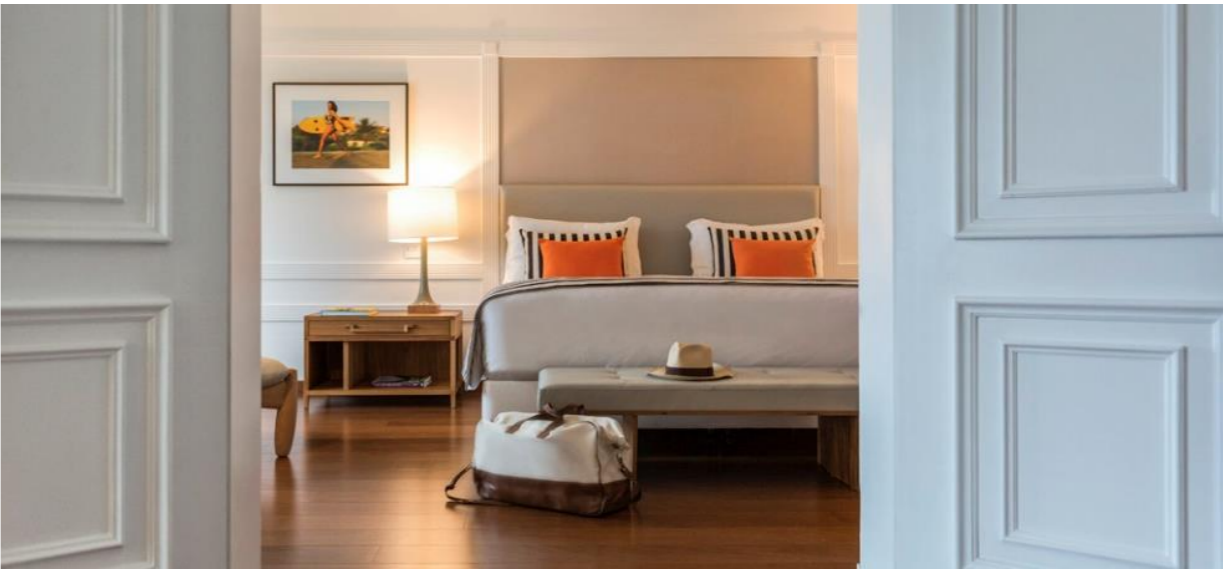
237 ROOMS



FLAGSHIPS

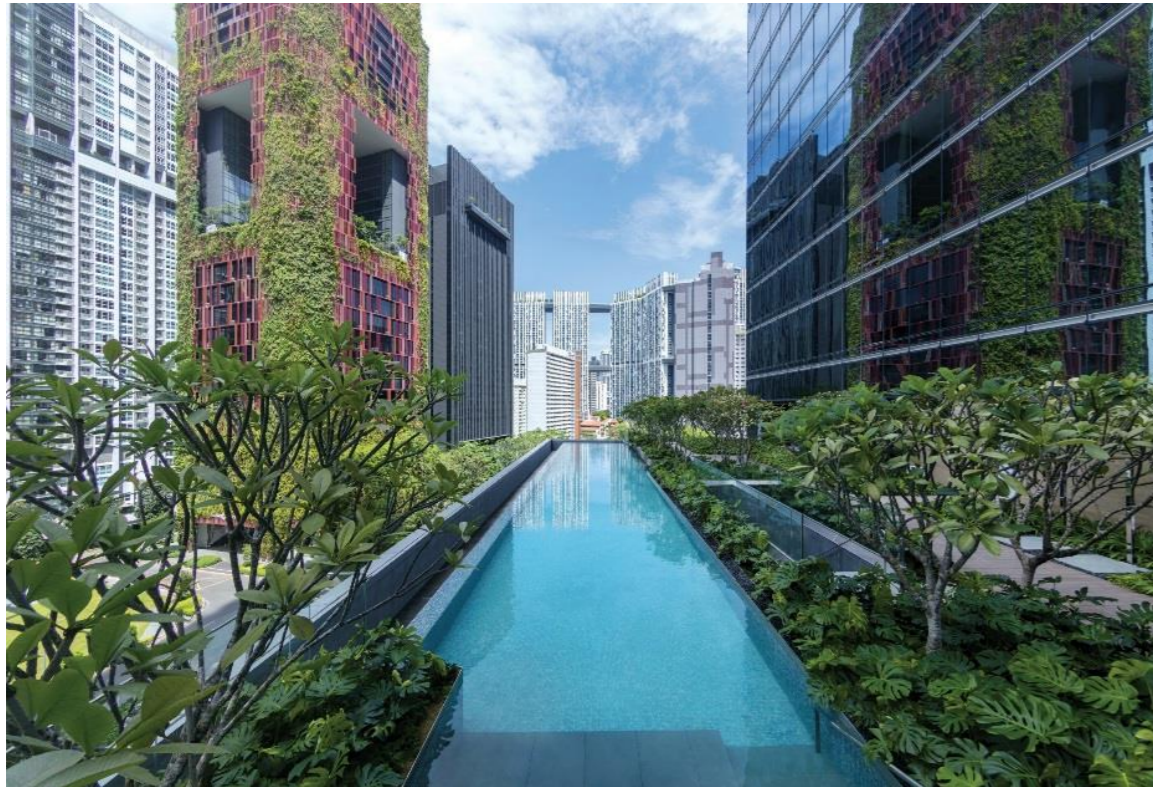
SOFITEL
HOTELS & RESORTS

SOFITEL RIO DE JANEIRO IPANEMA
(BRAZIL)
225 ROOMS



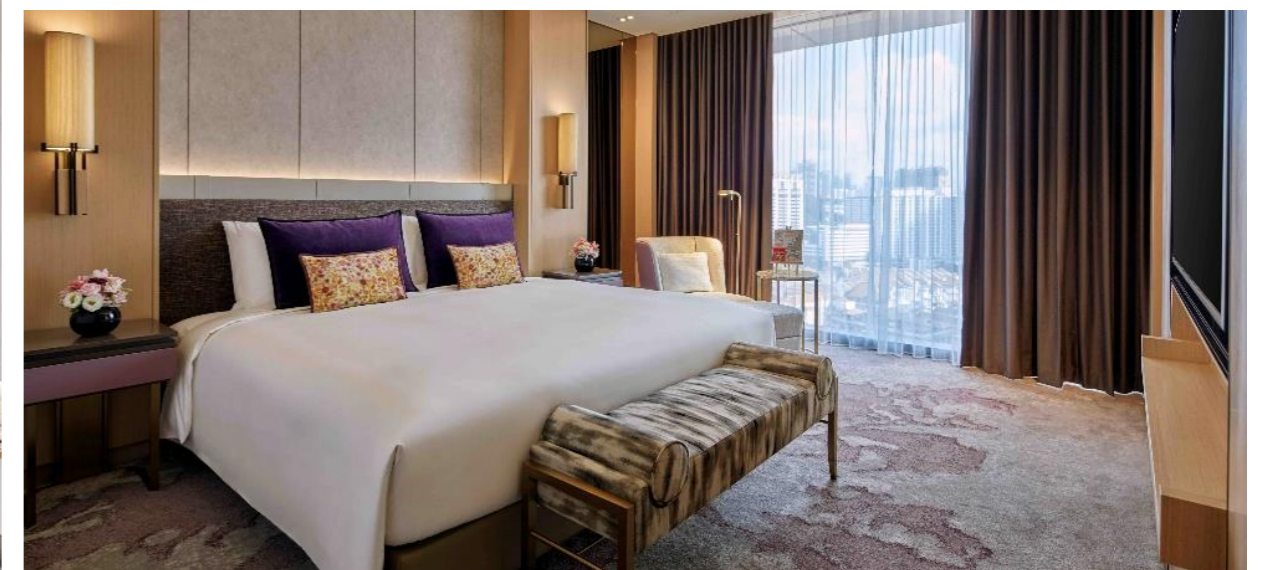
FLAGSHIPS

SOFITEL
HOTELS & RESORTS



SOFITEL SINGAPORE CITY CENTRE
(SINGAPORE)

223 ROOMS

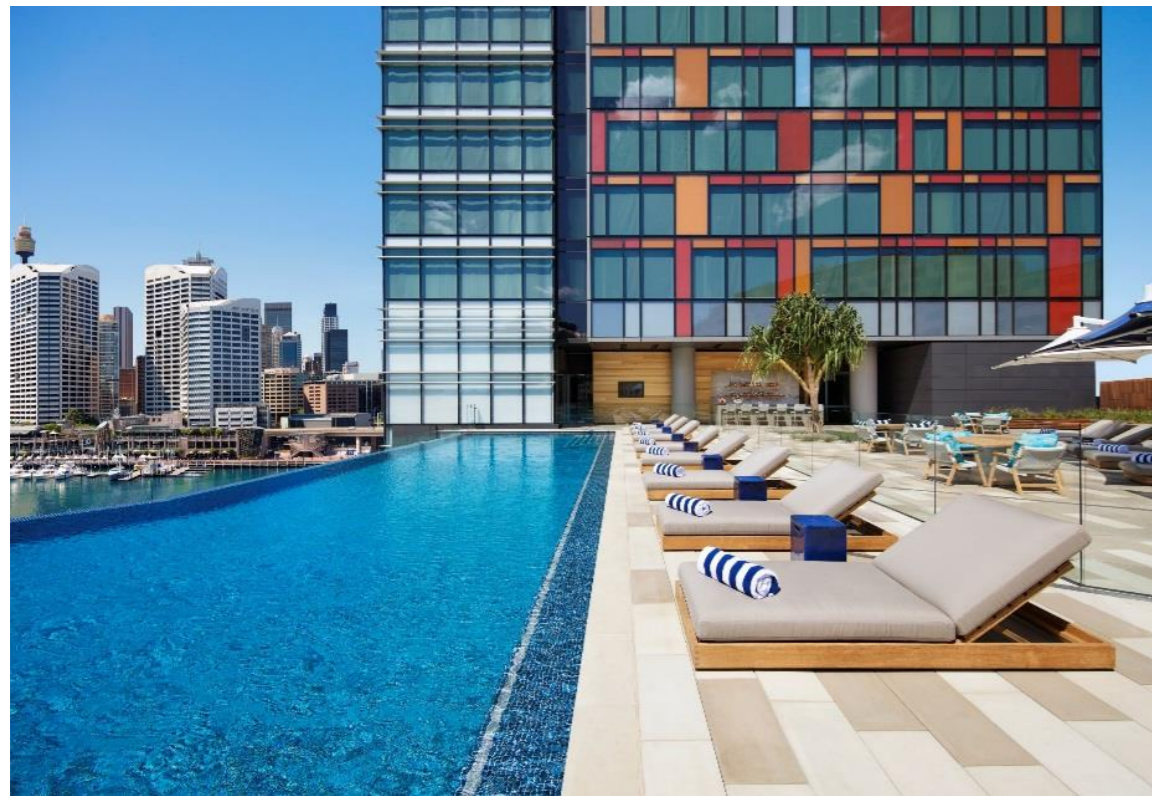


FLAGSHIPS

SOFITEL
HOTELS & RESORTS

SOFITEL SYDNEY DARLING HARBOUR (AUSTRALIA)

590 ROOMS



LATEST OPENING

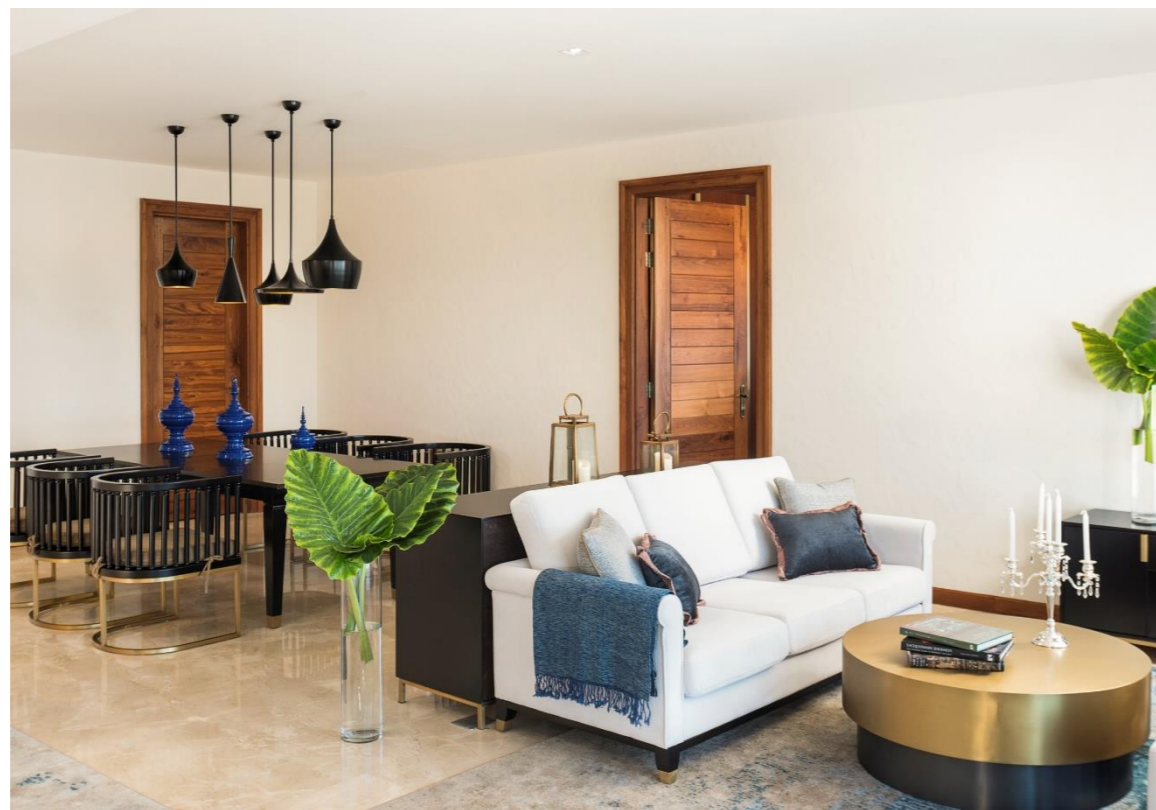
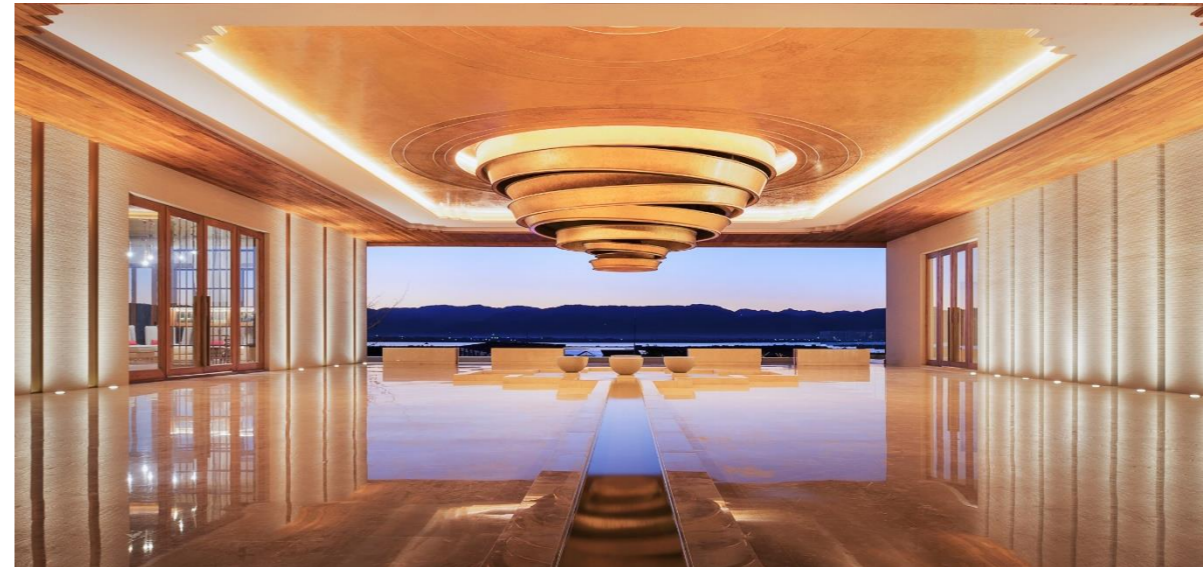
SOFITEL
HOTELS & RESORTS

SOFITEL INLE LAKE

(MYANMAR)

OPENING MARCH 2018

101 ROOMS



KEY UPCOMING OPENINGS

SOFITEL
HOTELS & RESORTS

AFRICA – MIDDLE EAST

SOFITEL DUBAI WAFI, UNITED ARAB EMIRATES 598 ROOMS, JANUARY 2020
SOFITEL THALASSA ALGER, ALGERIA 182 ROOMS, JANUARY 2021

AMERICAS

SOFITEL MEXICO CITY REFORMA, MEXICO 275 ROOMS, JULY 2019
SOFITEL PANAMA LEGEND, PANAMA 157 ROOMS, OCTOBER 2019
SOFITEL BARU, COLOMBIA 187 ROOMS, NOVEMBER 2020

ASIA – PACIFIC

SOFITEL ADELAIDE, AUSTRALIA 250 ROOMS, NOVEMBER 2020
SOFITEL WUHAN, CHINA 301 ROOMS, DECEMBER 2023
SOFITEL XINGYI, CHINA 400 ROOMS, DECEMBER 2023



UPCOMING OPENINGS

SOFITEL PANAMA LEGEND
(PANAMA)

157 ROOMS
OCTOBER 2019



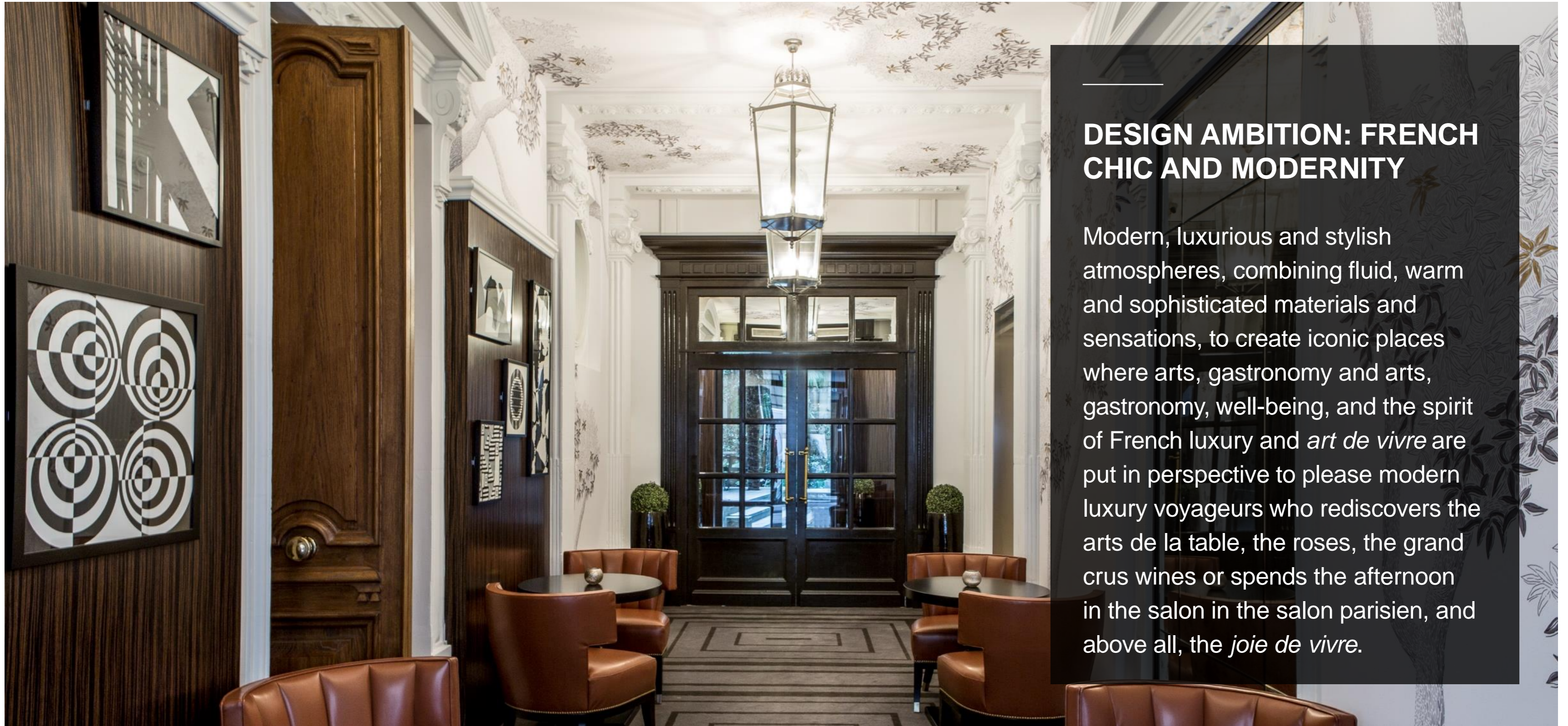
UPCOMING OPENINGS

SOFITEL DUBAI WAFI
(UNITED ARAB EMIRATES)

598 ROOMS
JANUARY 2020



DESIGN PHILOSOPHY



DESIGN AMBITION: FRENCH CHIC AND MODERNITY

Modern, luxurious and stylish atmospheres, combining fluid, warm and sophisticated materials and sensations, to create iconic places where arts, gastronomy and arts, gastronomy, well-being, and the spirit of French luxury and *art de vivre* are put in perspective to please modern luxury voyageurs who rediscovers the arts de la table, the roses, the grand crus wines or spends the afternoon in the salon in the salon parisien, and above all, the *joie de vivre*.

4 PASSIONS



AUTHENTIC & LIVELY F&B

(WITH KEY FRENCH ELEMENTS)

Whether it is French haute cuisine or re-interpreted gastronomical traditions, our skillful chefs create enticing, inspired dining that is enriched by each destination's unique aromas, textures, ingredients, flavors and secret recipes. At Sofitel, guests are treated to *Gastronomie Française* from finest breads and delectable pastries to premium wines (e.g. Sofitel Wine Days) and cheeses from around the world.



ARTS & CULTURE

(WITH A FRENCH ATTITUDE)

Inventive art displays, traveling photography showcases, exhilarating musical performances (e.g. La Nuit by Sofitel), poetic literary exhibits and more, Sofitel blends local and international artistic expressions to create celebratory cultural journeys that promise to both delight and inform.



INDULGENT WELLNESS

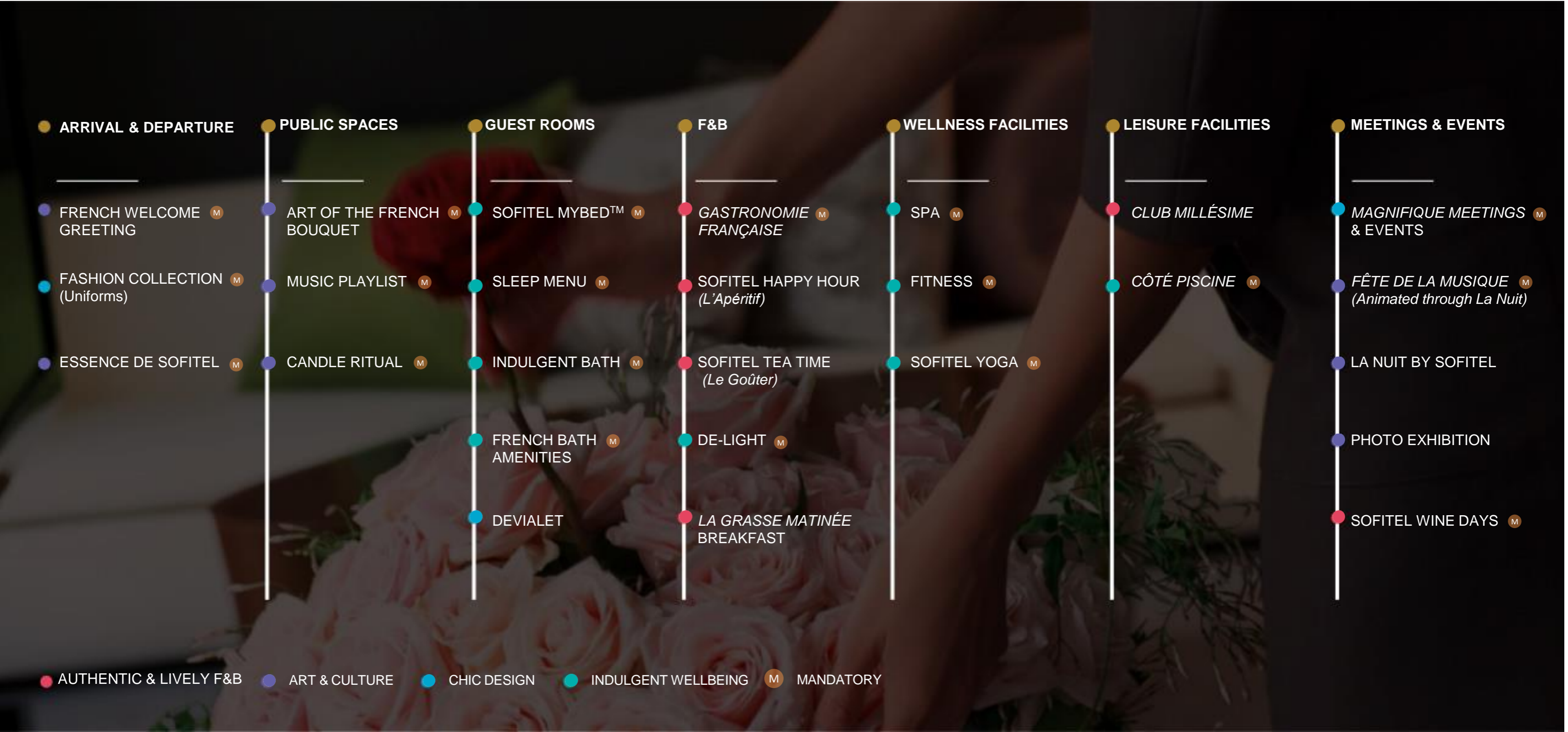
Sofitel embraces the art of wellness holistically, offering a wealth of relaxation and rejuvenation benefits through its signature spa and fitness concepts and De-Light wholesome foods. In the rooms, guests get to indulge in the blissful Sofitel MyBed™ sleep-time experience, soothing bath rituals and generous offers of premium bath amenities from French brands like Hermès and Lanvin.



CHIC DESIGN

From timeless, elegant settings of Sofitel Legend to sophisticated, chic designs of Sofitel Hotels & Resorts, every Sofitel address is a work of art by masterly architects and designers like **Didier Gomez** (Sofitel Paris Le Faubourg), **Pierre-Yves Rochon** (Sofitel London St James), **Andrée Putman** (Sofitel Paris Arc de Triomphe), **Richard Francis-Jones** (Sofitel Sydney Darling Harbour) and many more.

EXHAUSTIVE PROGRAMS



KEY PROGRAMS



Sofitel Sydney Darling Harbour



AUTHENTIC
& LIVELY F&B

GASTRONOMIE FRANÇAISE

Sofitel brings to life celebrated French gastronomy through the modern reimagining of culinary traditions. From the kitchens of famed boulangeries and the cellars of storied vineyards, guests are served fine breads, delectable pastries, and premium wines and cheeses from across the globe.

KEY PROGRAMS



ART & CULTURE

LA NUIT BY SOFITEL

Sofitel's signature, multi-sensory party concept combines the best of Parisian nightlife with local culture, bringing guests together through leading musical acts, dynamic DJ sets, experimental cocktails and strikingly creative lighting and visual effects.



KEY PROGRAMS

Over 55,00 Sofitel MyBed™ products sold on Sofitel Boutique (sofitelboutique.com)



INDULGENT
WELLBEING




SOFITEL
MYBED™

SOFITEL MYBED™

Designed to provide ultimate in-sleep-time bliss, Sofitel MyBed™ ushers a whole new concept in relaxation. This multi-sensorial experience ensures all guests have a luxurious rest and wake up feeling refreshed.

Sofitel MyBed™ lulls guests to sleep with plush beddings, comforting tea, aromatherapy scents inspired by the destination.

KEY PROGRAMS



INDULGENT
WELLBEING

SOFITEL
MYBED™

SLEEP MENU & INDULGENT BATH

As part of the Sofitel MyBed™ Sleep Menu offers, this signature in-room service transforms the bathroom into a private sanctuary with luxurious options for relaxation. Guests can choose between two complimentary baths – a therapeutic Soothing Bath that invites a lazy soak with calming essential oils and curative bath salts or a Bubble Bath that injects fun into the bath time experience.

KEY PROGRAMS



CHIC DESIGN

SOFITEL FASHION COLLECTION

As the Sofitel Brands create “*Magnifique*” experiences and weave bonds with guests, our Ambassadors are the most important links and actors of this success. Accordingly, the Sofitel line of uniforms illustrates the essence of luxury, good taste and French elegance. It evokes a timeless sense of style.

The designer, **Léa Peckre** is a young French fashion creator who studied in the renowned school of “*La Cambre*” in Brussels. After working for the prestigious houses of **Jean Paul Gaultier**, **Givenchy** and **Isabel Marant**, she created her own brand in 2013.

PEOPLE ACTIVATION

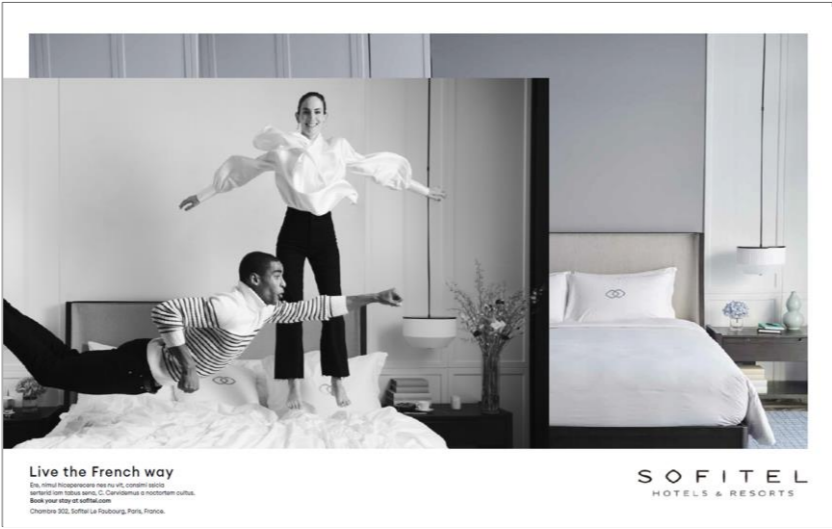


Sofitel Heartists / Ambassadors around the world are passionate about heartfelt hospitality, delivering genuinely caring and thoughtfully personalized service right from the heart. This is the service culture of Sofitel - Cousu Main, a mark of service excellence that Sofitel guests have come to recognize and appreciate over the years.

COMMUNICATION PLATFORM

GLOBAL COMMUNICATION CAMPAIGN (2019)

Live the French way



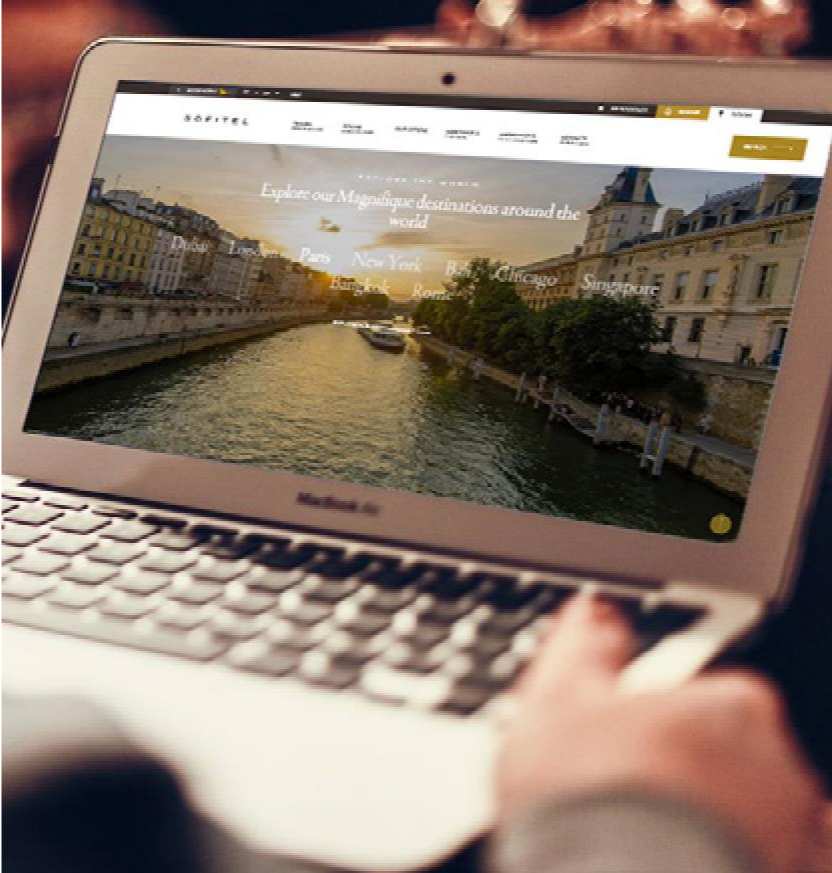
CAMPAIGN PRINT (2019)

Spontaneous, free, careless with an elegant touch of *joie de vivre* and “*désinvolture*”, this is how we describe the hedonist French way of living.

BRAND WEBSITE:

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

Sofitel.com



SOCIAL MEDIA

- Over 1.3 million followers.
- Almost 83,000 followers.
- Over 104,000 followers.
- Over 10,600 followers.

Sofitel is also presented on

AWARDS

**410 PROMINENT AWARDS ACROSS 52
PROPERTIES, INCLUDING :**

Michelin Star, Das Loft
SO/ Vienna

World Travel Awards Indonesia’s Leading Resort
Sofitel Bali Nusa Dua Beach Resort

Expedia’s Most Wanted
Sofitel Bogota Victoria Regia

Travel + Leisure - World's Best Awards
Sofitel Legend Santa Clara, Cartagena

Smart Travel Asia’s Best Luxury Hotels in Asia
Sofitel Legend Metropole Hanoi

**MOST AWARDED PROPERTY IS
SOFITEL LEGEND METROPOLE HANOI
WITH 34 NOTABLE AWARDS**

TOP REGION IS ASIA PACIFIC WITH 317 AWARDS



SOFITEL LEGEND METROPOLE HANOI



BRAND PERFORMANCE

BRAND AWARENESS

A truly international recognition in the luxury segment

- The #1 luxury brand in terms of awareness and preference in France, Australia & Brazil
- Total awareness above 50% in 10 countries, among affluent travellers
 - Australia
 - France
 - Brazil
 - UK
 - Germany
 - Singapore
 - USA
 - China
 - Middle East (UAE + S. Arabia)
 - Switzerland

Our objective is to increase brand awareness in the top markets: US, China, Middle East and UK

Source : BEAM by end of 2018

BRAND PERCEPTION

Sofitel is recognized for...

1. A luxurious experience, especially though exceptional bed comfort
2. Standing out for its contemporary and elegant style & design
3. Loved for its inimitable French identity

- Almost 2/3 of guests associate Sofitel with “French art de vivre”, experienced especially through
 - Gastronomy
 - Design
 - Culture

Our objective is to enhance brand perception in all key feeder markets (modern French *art de vivre* and luxury positioning)

Source : BEAM by end of 2018

BRAND MARGIN

67€

Our objective is to increase brand margin potential

Source : BEAM by end of 2018

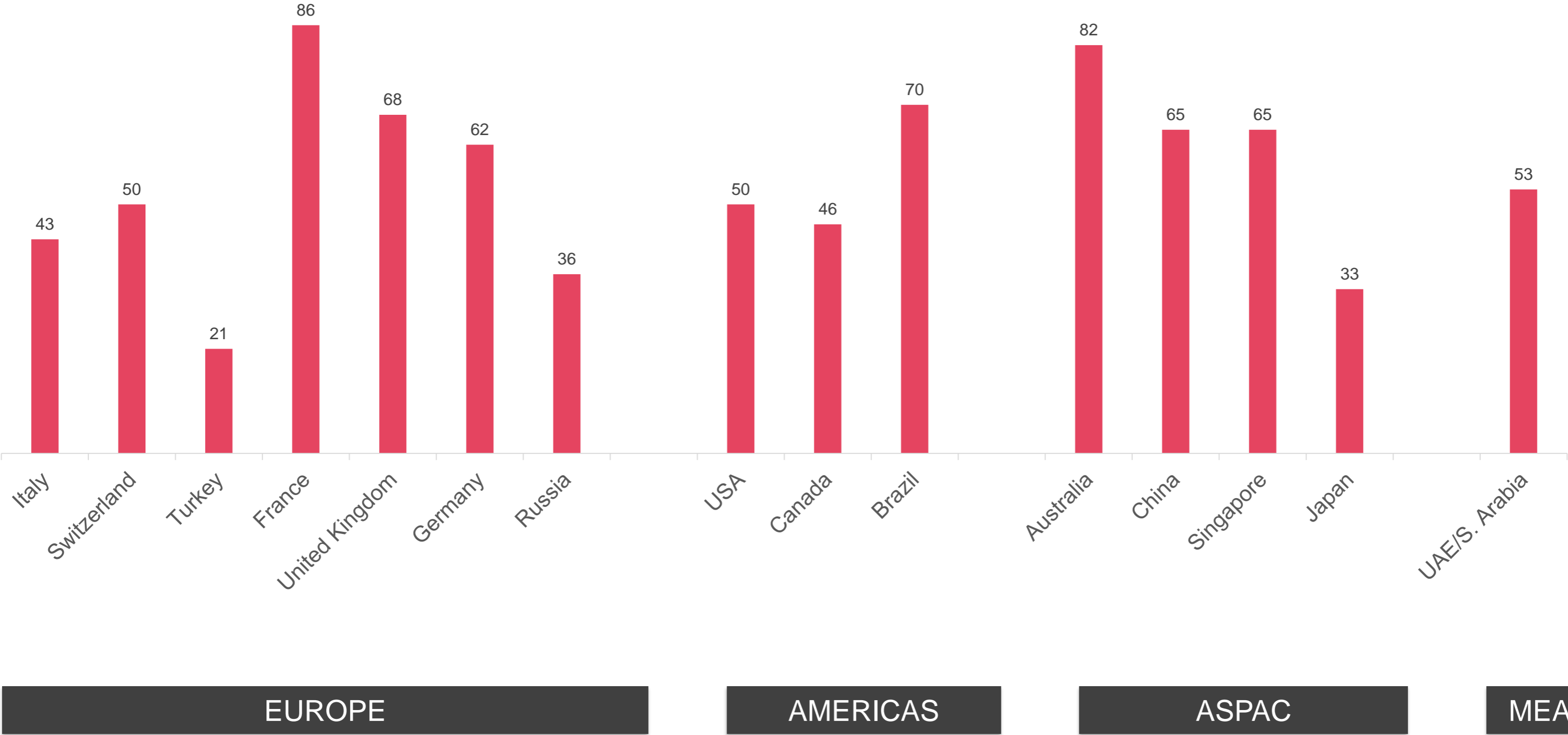
REPUTATION PERFORMANCE SCORE

88,7 %

Our objective is to reach and to a ComIndex of above 1.00 vs. global competition

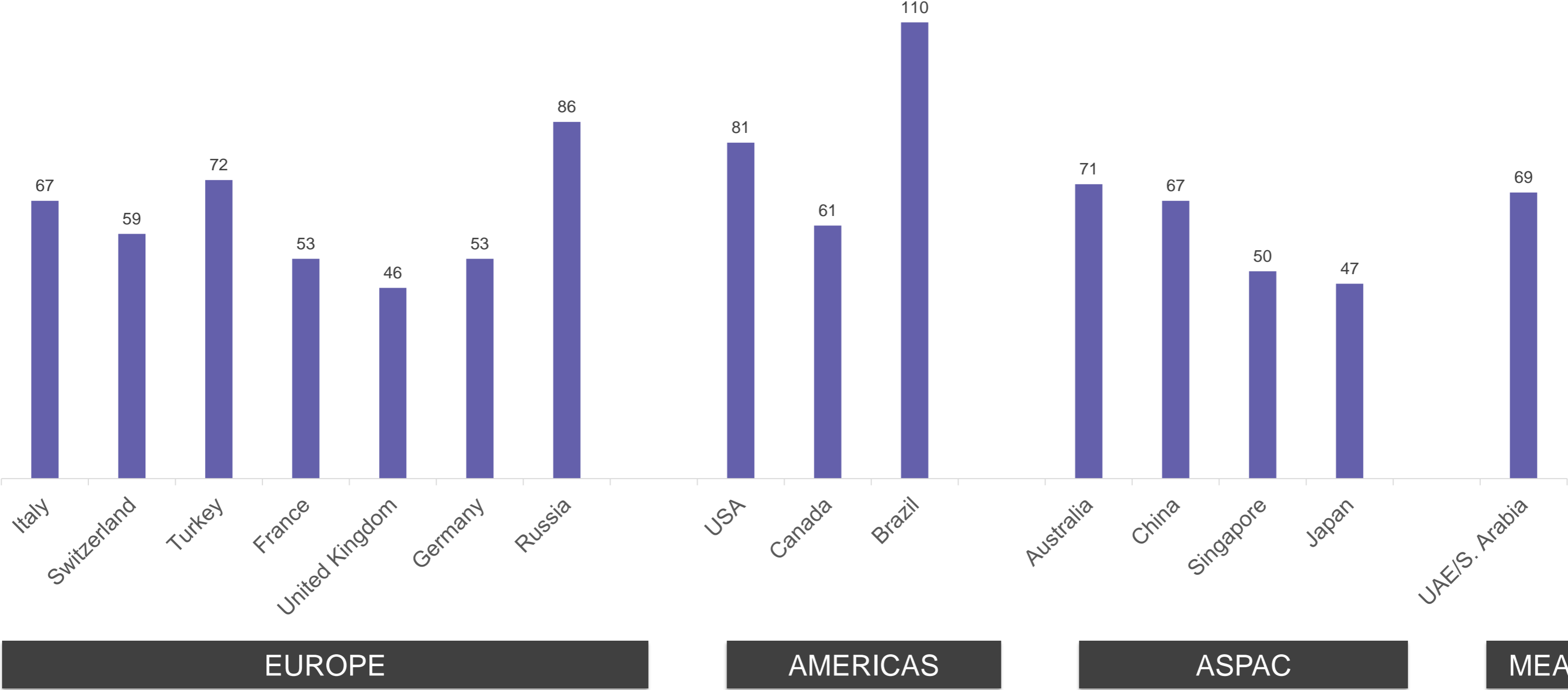
Source : TrustYou by end of 2018

TOTAL 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 ». Base: people having stayed in paid-for accommodation in the last 12 months and somewhat/very familiar with the brand

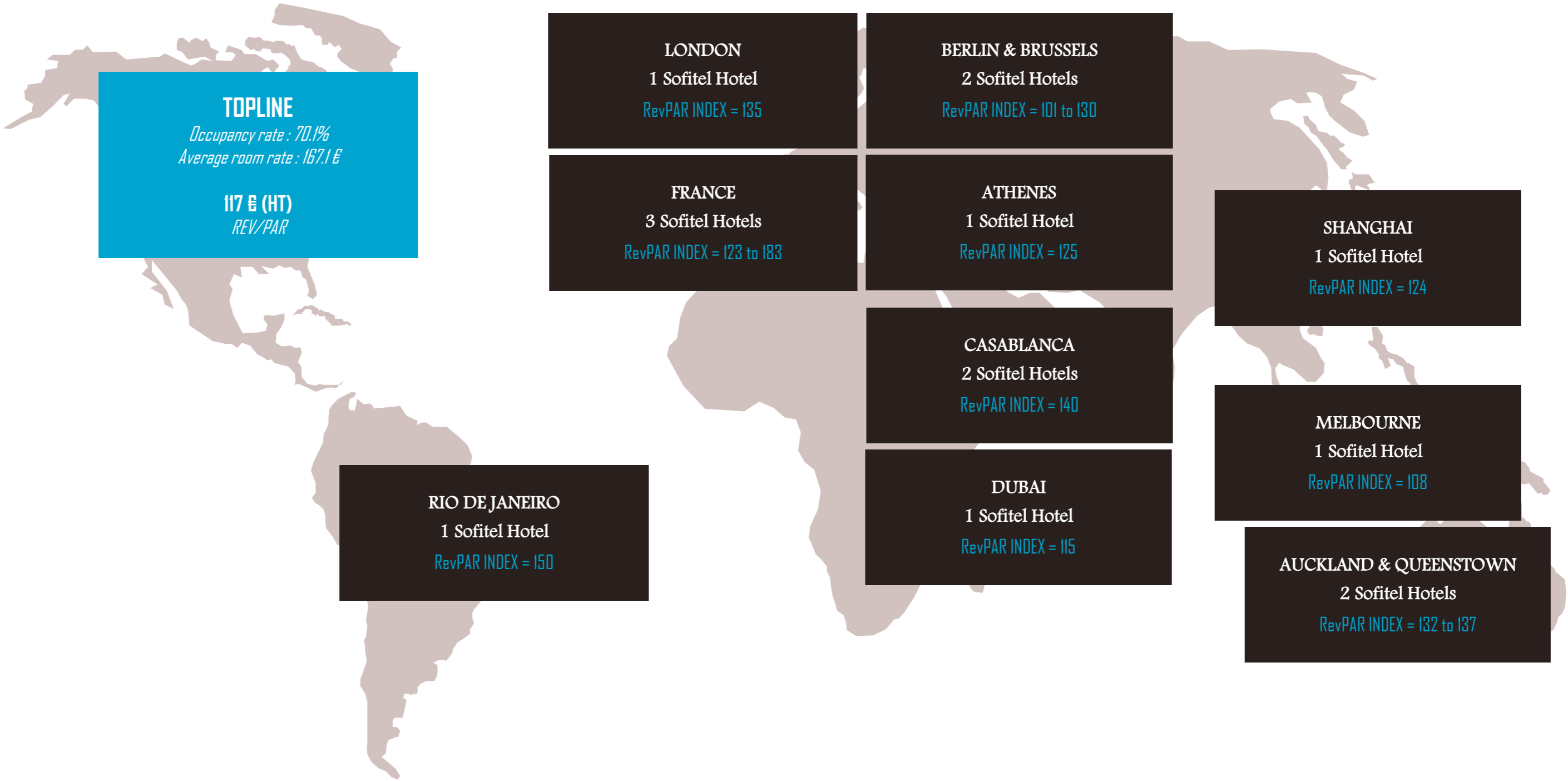
Brand Margin ® in €. Traveller representative
Figures as of end 2018

BRAND PERCEPTION

SOFITEL
AVERAGE RPS
88,76%



SOFITEL PERFORMANCE – REVPAR INDEX AS OF END 2018

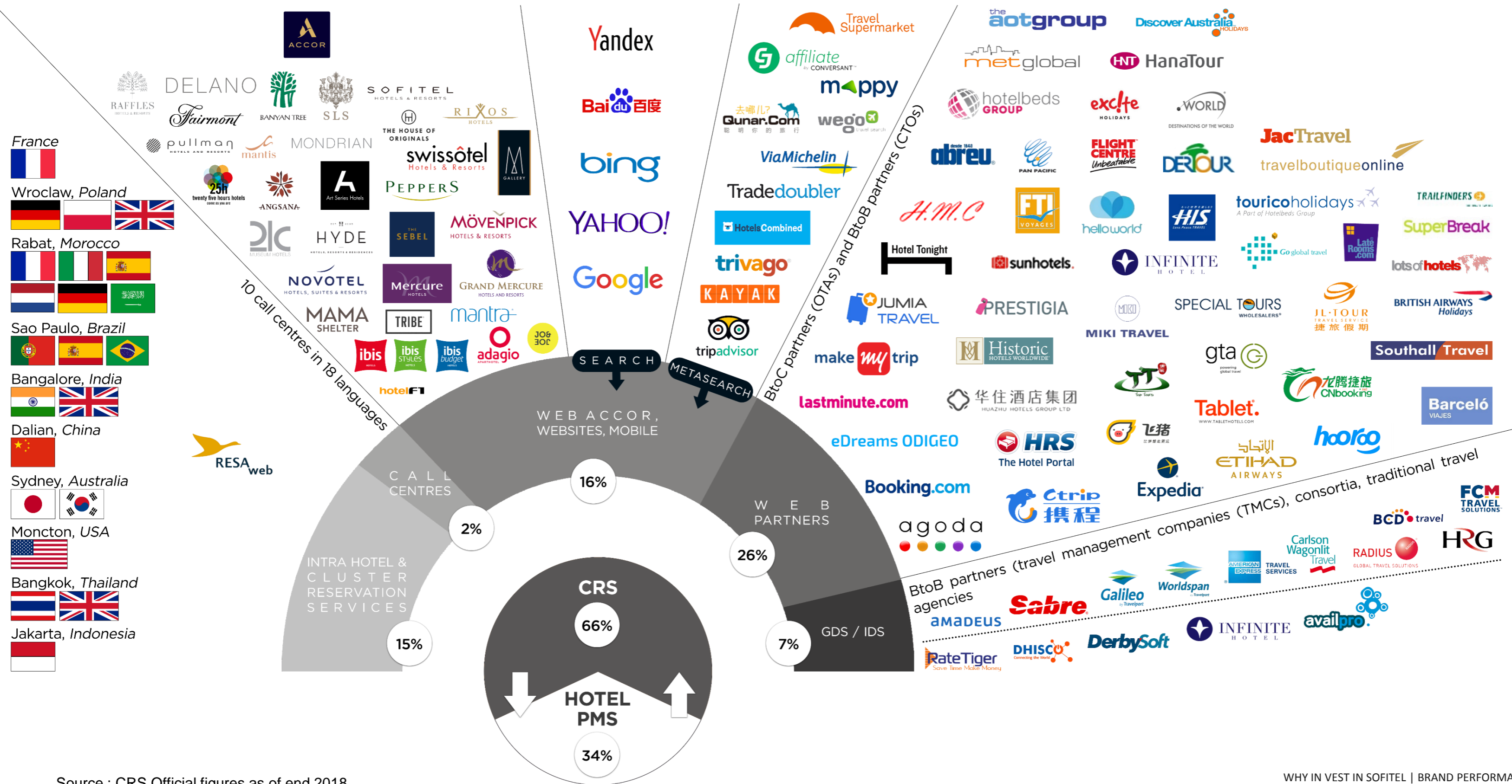


Source : STR Performance by end of 2018



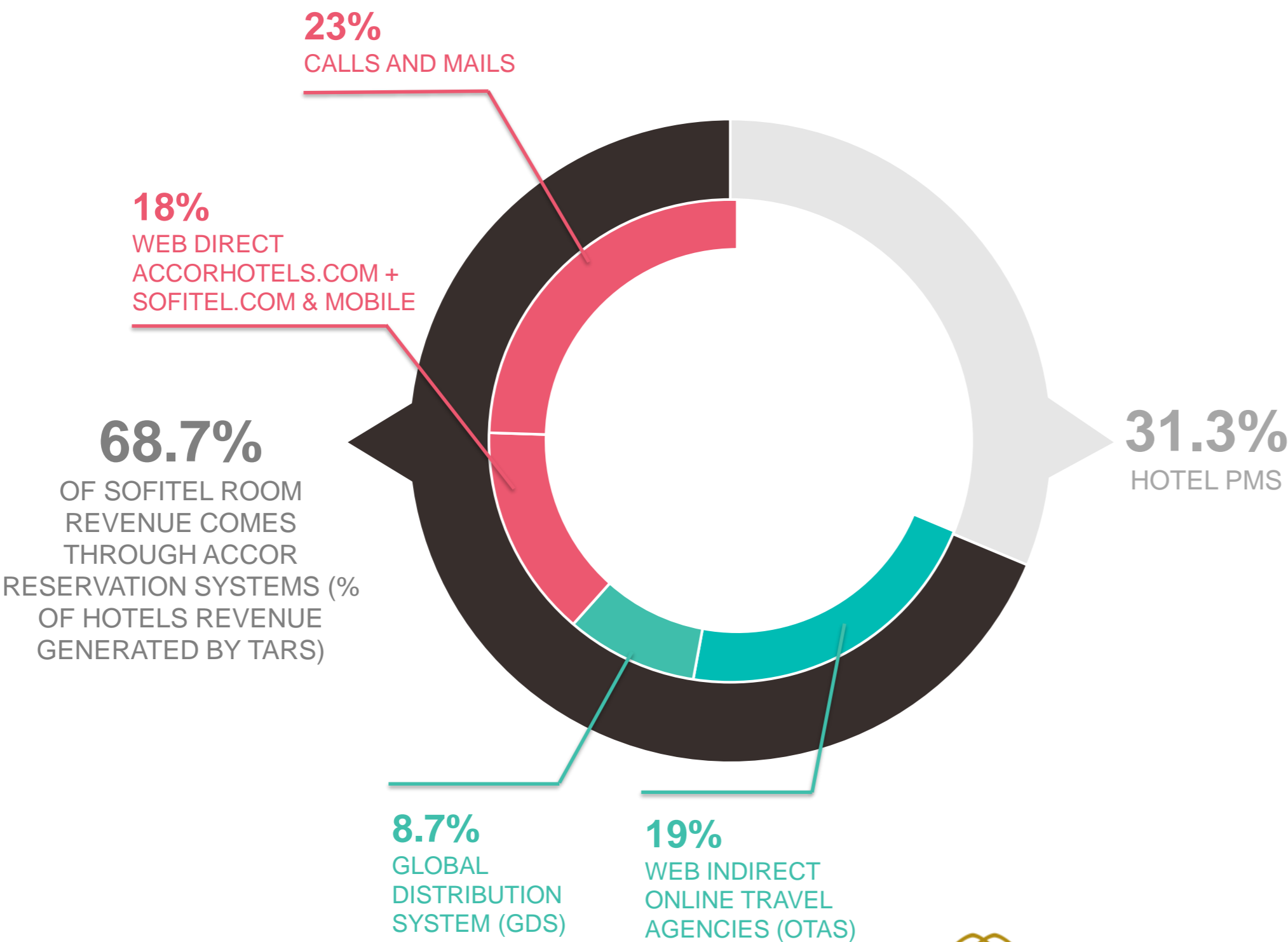
ACCOR DISTRIBUTION SOLUTION

ACCOR OFFERS >110 GLOBAL DISTRIBUTION PARTNERSHIPS AT BEST MARKET CONDITIONS




SOFITEL DISTRIBUTION POWERED BY ACCOR

SPLIT OF HOTELS REVENUE PER DISTRIBUTION CHANNELS



68.7%
OF SOFITEL ROOM
REVENUE COMES
THROUGH ACCOR
RESERVATION SYSTEMS (%
OF HOTELS REVENUE
GENERATED BY TARS)



FOCUS WEB
SOFITEL.COM
+ ACCORHOTELS.COM
+ MOBILE WEBSITES
+ PARTNERS WEBSITE

2M

€459M

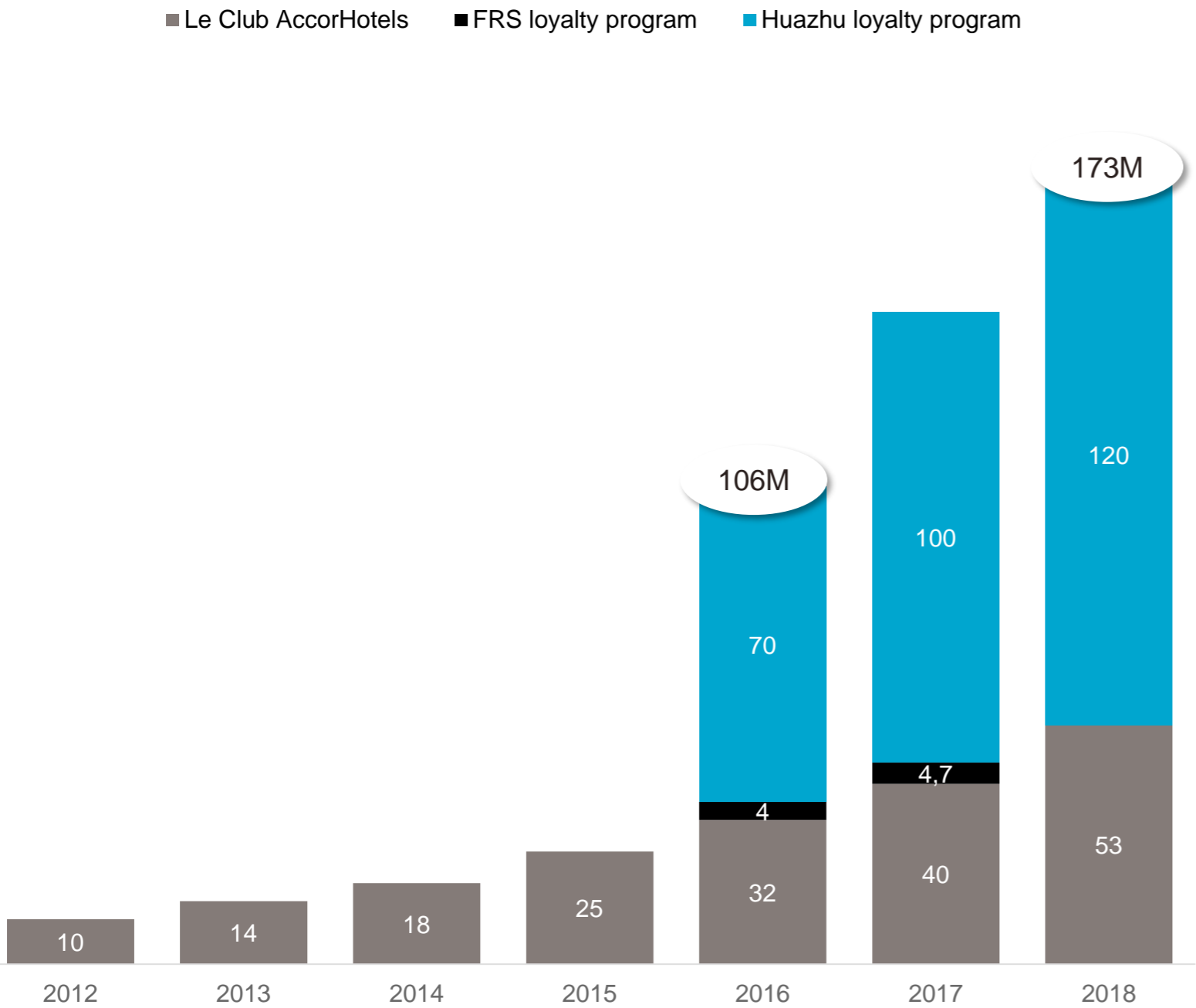
SOFITEL ROOM SOLD

SOFITEL ROOM REVENUE

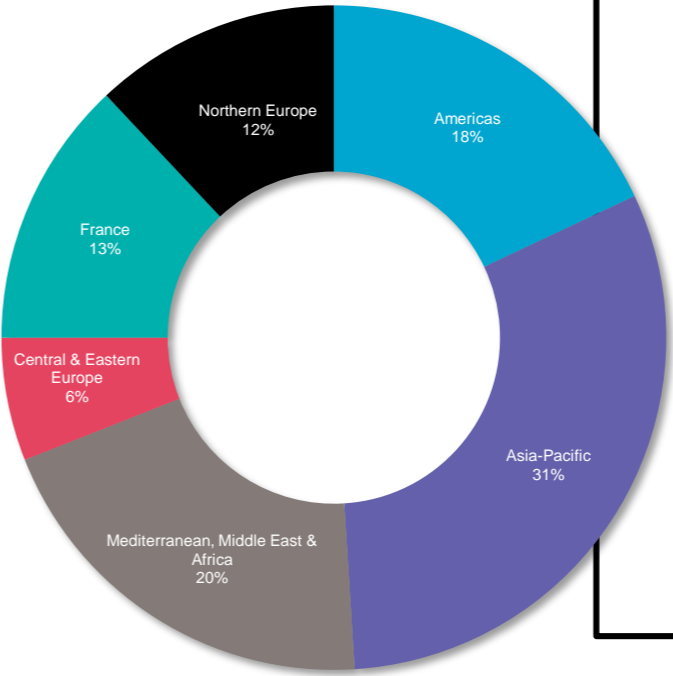
LE CLUB ACCORHOTELS

ACCOR OWNS THE MOST INTERNATIONAL & 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

LE CLUB ACCORHOTELS REPRESENTS

34.6% OF ALL ROOMNIGHTS

LE CLUB ACCORHOTELS MEMBERS AVERAGE REVENUE SPENT PER NIGHT IN 2017

€216.6



DEVELOPMENT CRITERIA

HOTEL		AAA ultra city center location, historic conversion	WORLDWIDE
	RECOMMENDED NUMBER OF ROOMS	150 – 250 keys	200 – 250 keys
	ROOM AVERAGE SIZE	-10/-15% of worldwide	40 sqm and +
	TGFA / ROOM	75 – 90 sqm	90 – 110 sqm
	RECOMMENDED NUMBER OF ROOMS	150 – 250 keys	200 – 250 keys
	ROOM AVERAGE SIZE	40 sqm + balcony	45 sqm + balcony
	TGFA / ROOM	110 – 150 sqm	120 – 165 sqm
	FOOD & BEVERAGE	1 Breakfast Restaurant 1 Destination Restaurant 1 Destination Bar Additional F&B ⁽¹⁾	
	WELL-BEING	SoSpa SoFit Swimming pool	
	MEETINGS	Club Milesime Magnifique meetings & events Ballroom ⁽¹⁾ Business Centre available Kids Club (Le Petit Prince / Villa des Enfants) ⁽¹⁾	

(1) Based on market demand

	PRIME LOCATIONS	SECONDARY LOCATIONS	AIRPORTS SUBURBS
INTERNATIONAL CAPITALS KEY CITIES & RESORTS	●	●	
MAJOR DOMESTIC DESTINATIONS	●		
OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS			



