

WHY INVEST IN SWISSÔTEL

Accor Global Development

February 2019



A modern hotel room with a large bed, a balcony with a view, and a cowhide rug. The room features a large bed with white linens and multiple pillows. A balcony with a glass railing offers a view of a city and a lake. A cowhide rug is on the floor. The room has a contemporary design with a mix of wood, stone, and fabric textures.

Through quality, efficiency and care, our Swiss Hospitality gives guests peace of mind to explore the world and discover life's true rewards.

LIFE IS A JOURNEY. LIVE IT WELL.

FULL OF VITALITY
RELIABLE
AT EASE
RECHARGED

SWISSÔTEL TOP 3 USPs

SWISS HOSPITALITY

- Swiss efficiency
- Product quality
- Service reliability and care



UNIQUE VITALITY VALUE PROPOSITION

- Worry free stay for guests to enjoy quality time
- Vitality product and service offerings for body, mind and soul: Vitality Room, in-room fitness kit, Vitality food, drinks and coffee breaks, destination walks, and mindfulness podcasts ...
- Pürovel Spa & Sport concept with unique treatments and Swiss made products



EFFICIENT DESIGN & EFFECTIVE OPERATIONS

- Flexibility of space programming and services to best suit the guest needs
- Intelligent design
- Operational excellence

NETWORK AND PIPELINE

AMERICAS

NETWORK
1,281 Rooms
3 Hotels

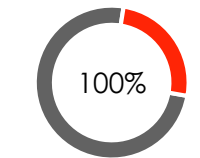
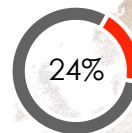
PIPELINE
368 Rooms
2 Hotels



EUROPE

NETWORK
3,303 Rooms
12 Hotels

PIPELINE
802 Rooms
4 Hotels



Geographical
split

ASIA-PACIFIC

NETWORK
5,310 Rooms
12 Hotels

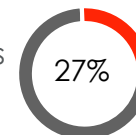
PIPELINE
1,856 Rooms
7 Hotels
40%



AFRICA - MIDDLE EAST

NETWORK
3,731 Rooms
4 Hotels

PIPELINE
1,484 Rooms
5 Hotels



OPERATING MODE

90%
Managed

10%
Franchised

31 HOTELS

13,325 ROOMS

18 COUNTRIES IN 2018

18 NEW HOTELS BY 2023

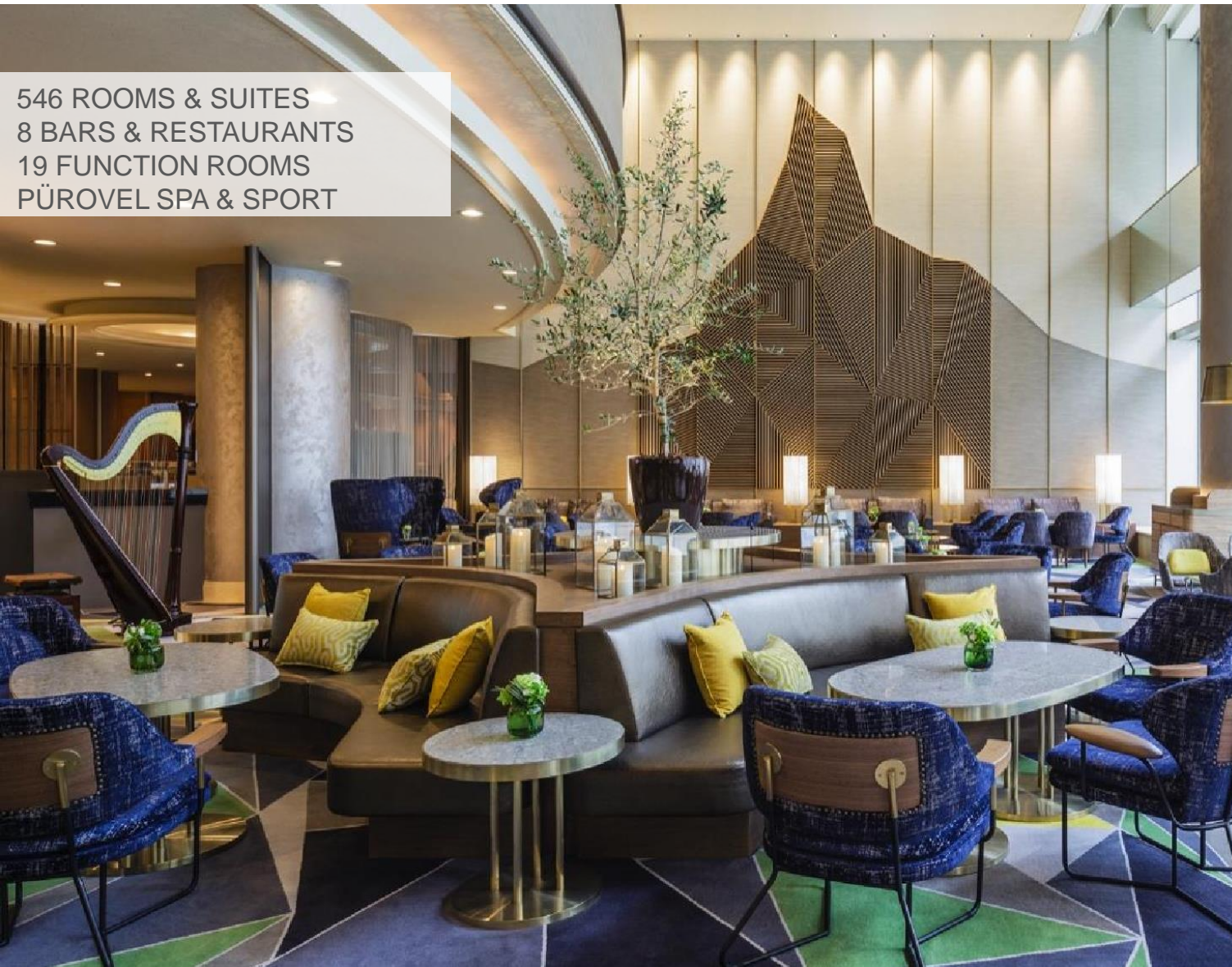
4,510 NEW ROOMS BY 2023

Figures as of end 2018

FLAGSHIPS

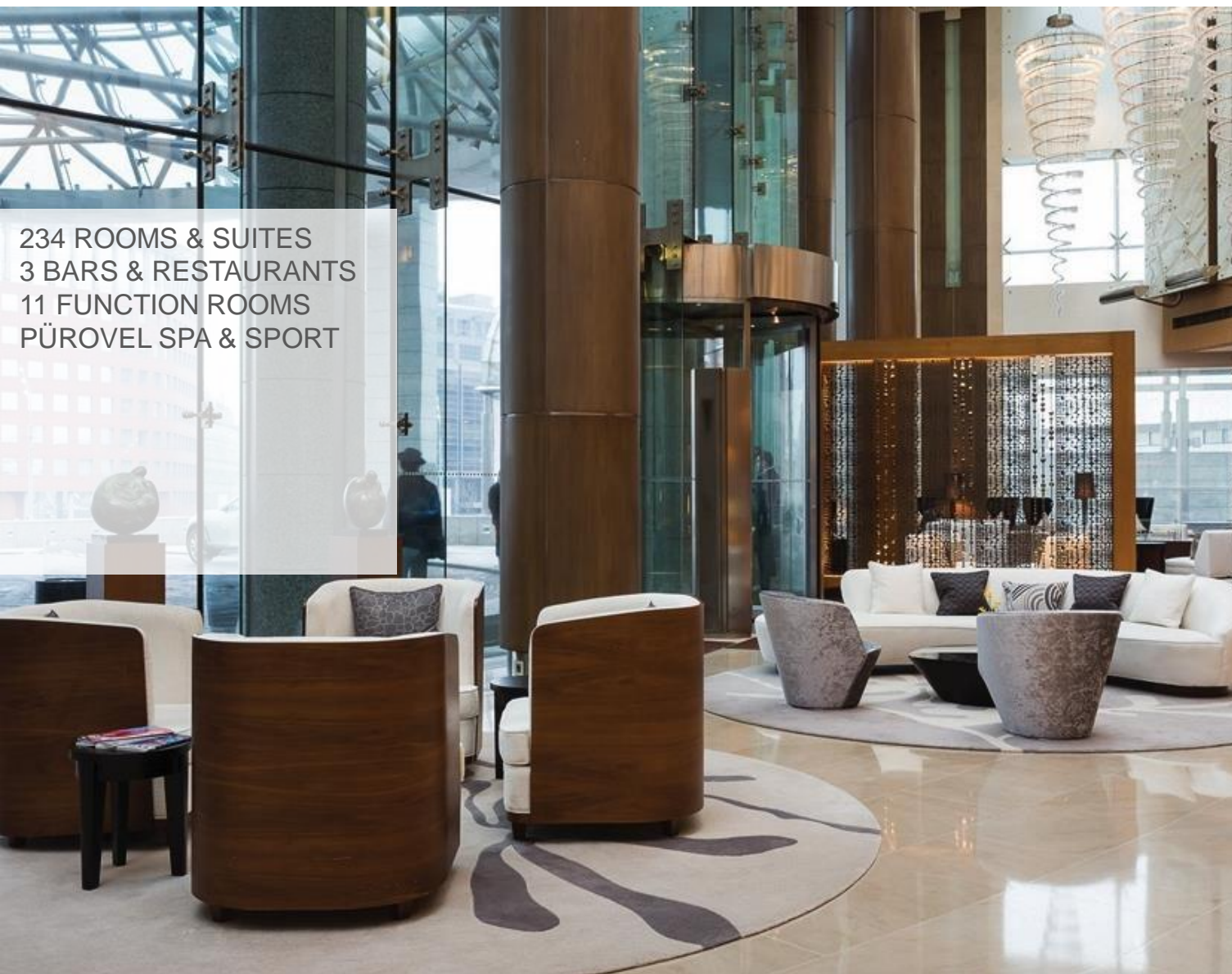
SWISSÔTEL NANKAI OSAKA, JAPAN

546 ROOMS & SUITES
8 BARS & RESTAURANTS
19 FUNCTION ROOMS
PÜROVEL SPA & SPORT



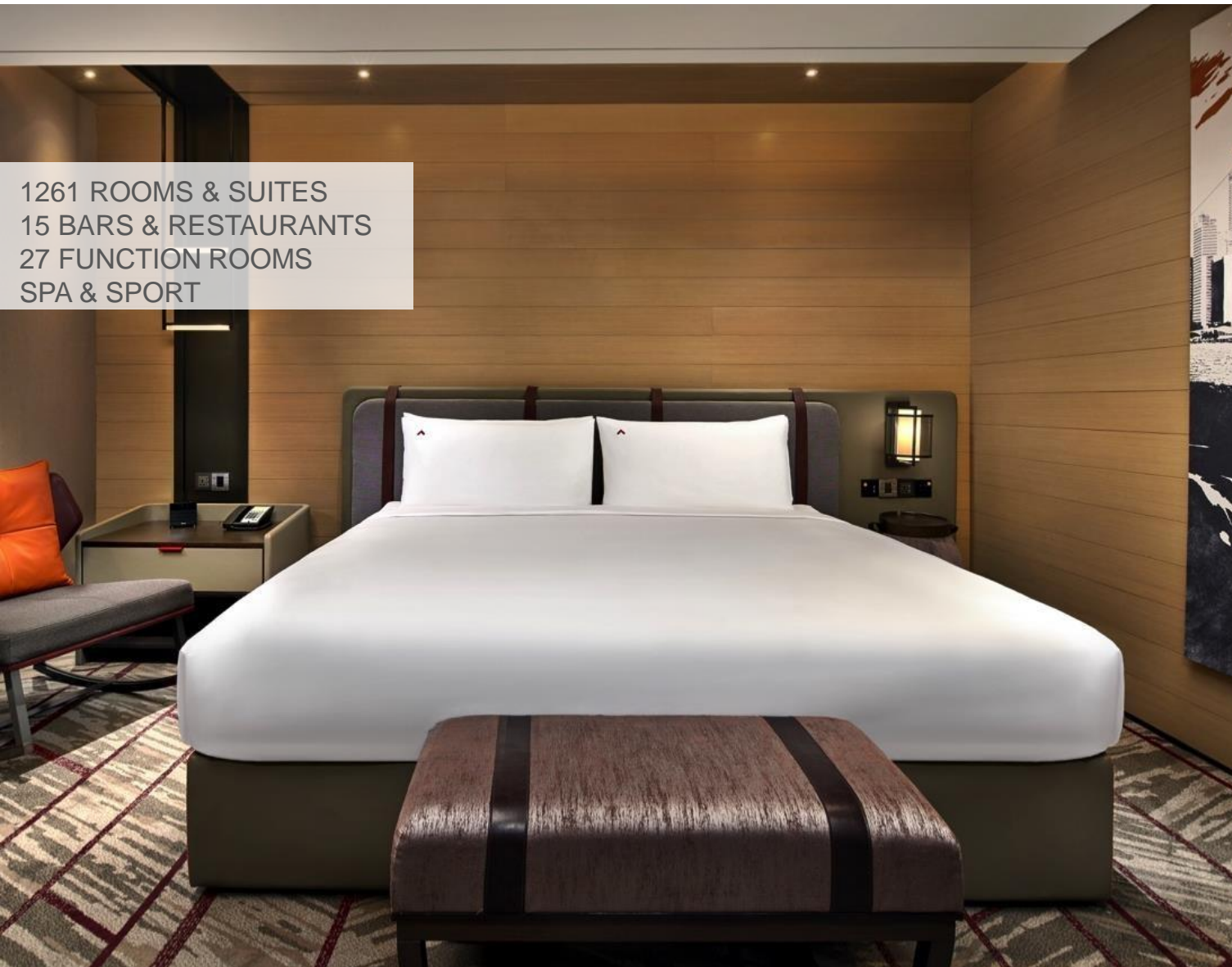
FLAGSHIPS

SWISSÔTEL KRASNYE HOLMY MOSCOW, RUSSIA



FLAGSHIPS

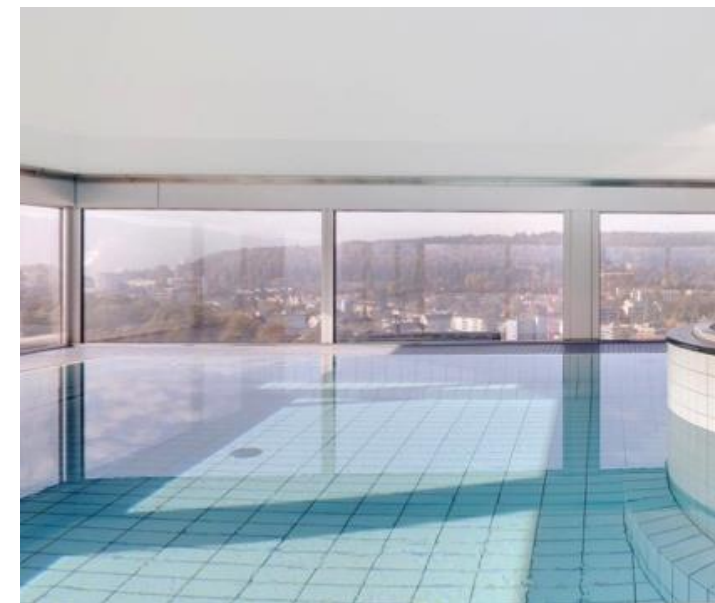
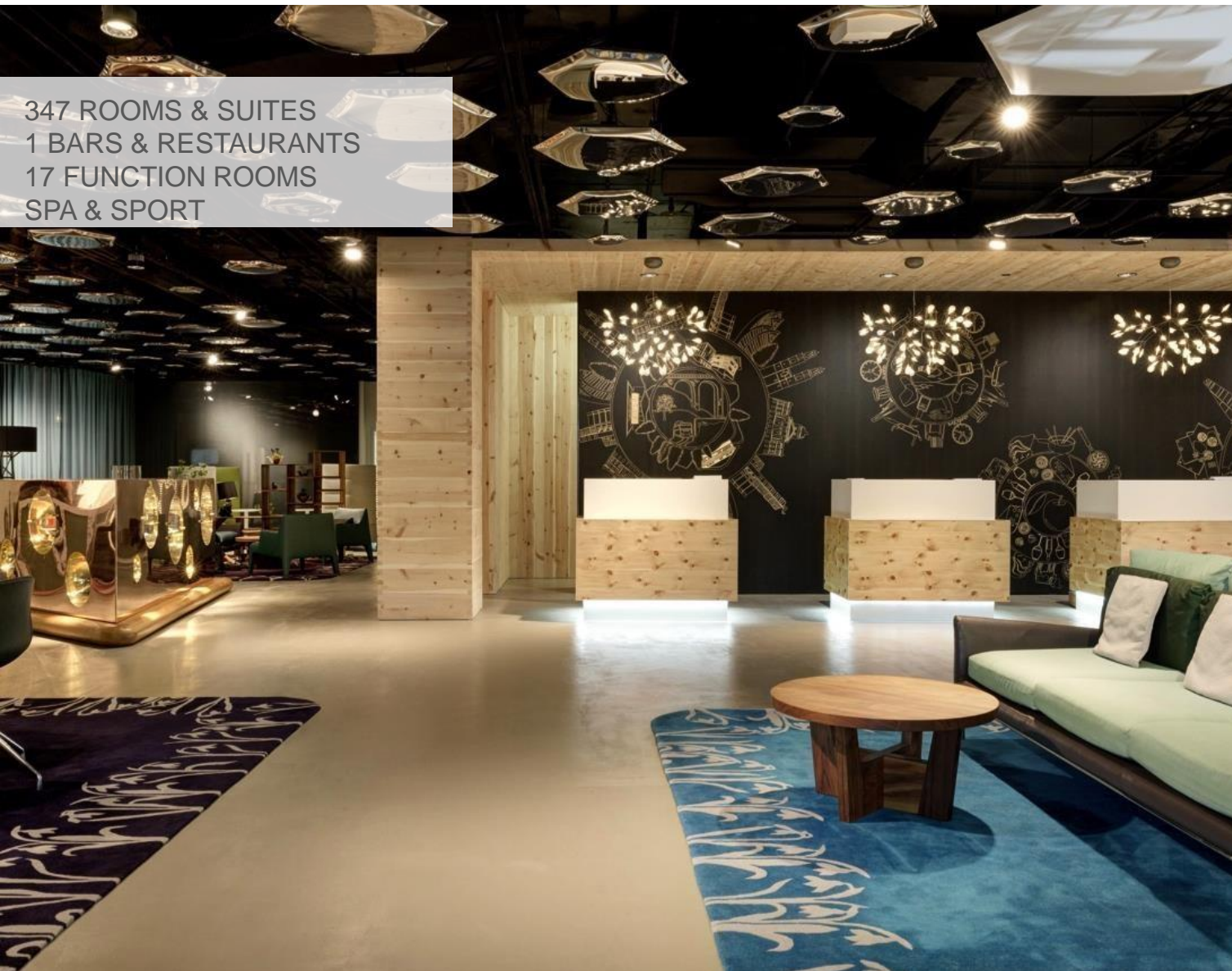
SWISSÔTEL THE STAMFORD, SINGAPORE



FLAGSHIPS

SWISSÔTEL ZÜRICH, SWITZERLAND

347 ROOMS & SUITES
1 BARS & RESTAURANTS
17 FUNCTION ROOMS
SPA & SPORT



FLAGSHIPS

SWISSÔTEL CHICAGO, USA



OPENING

SWISSÔTEL SARAJEVO, BOSNIA



KEY UPCOMING OPENINGS

EUROPE

SWISSÔTEL KOTOR, MONTENEGRO 130 ROOMS, SEPTEMBER 2019
SWISSÔTEL KURSAAL BERN, SWITZERLAND 171 ROOMS, JANUARY 2020
SWISSÔTEL KYRENIA NORTH CYPRUS, CYPRUS 225 ROOMS, FEBRUARY 2020
SWISSÔTEL BAT YAM TEL AVIV, ISRAEL 276 ROOMS, MARCH 2022

ASIA – PACIFIC

SWISSÔTEL GOLD COAST HOPE ISLAND RESORT, AUSTRALIA 166 ROOMS, JANUARY 2020
SWISSÔTEL JINAN, CHINA 249 ROOMS, OCTOBER 2021
SWISSÔTEL DHAKA, BANGLADESH 350 ROOMS, DECEMBER 2022
SWISSÔTEL BALI, INDONESIA 176 ROOMS, DECEMBER 2022
SWISSÔTEL JAIPUR, INDIA 160 ROOMS, JANUARY 2023

AFRICA – MIDDLE EAST

SWISSÔTEL SHARM EL-SHEIK, EGYPT 387 ROOMS, DECEMBER 2020
SWISSÔTEL JEDDAH, SAUDI ARABIA 247 ROOMS, DECEMBER 2020
SWISSÔTEL FOKAH NORTH COAST, EGYPT 300 ROOMS, DECEMBER 2022
SWISSÔTEL ROYAL MEADOWS, EGYPT 250 ROOMS, DECEMBER 2022
SWISSÔTEL KATAMEYAH, EGYPT 300 ROOMS, DECEMBER 2023

AMERICAS

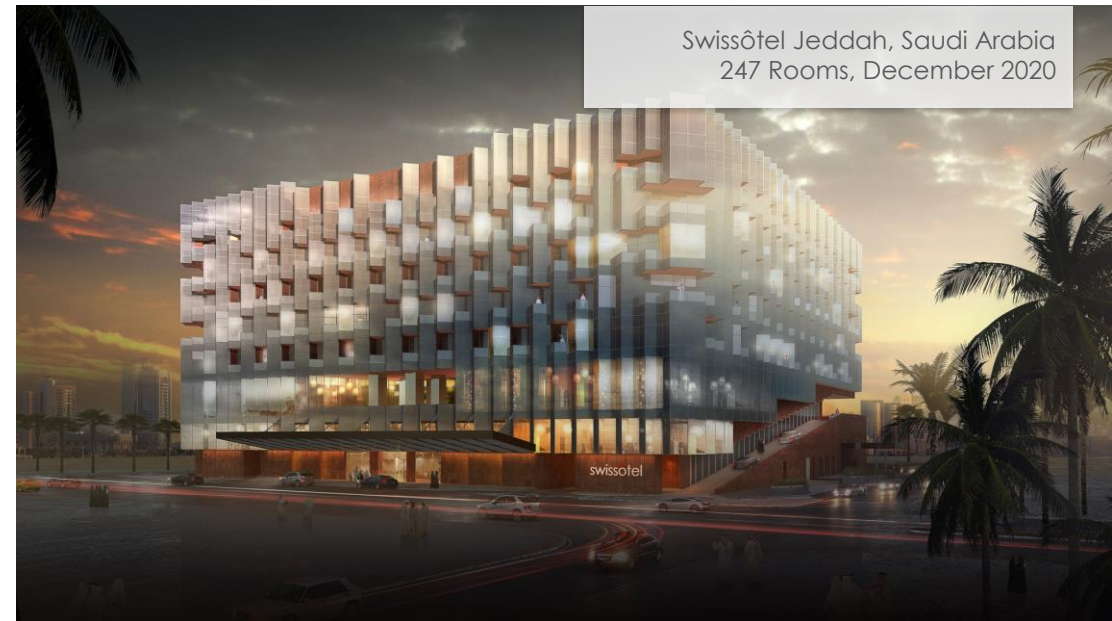
SWISSÔTEL SANTA CRUZ, BOLIVIA 138 ROOMS, OCTOBER 2019
SWISSÔTEL MEDELLIN, COLOMBIA 230 ROOMS, SEPTEMBER 2020

Committed pipeline as of end 2018

KEY UPCOMING OPENINGS



Swissôtel Katameyah, Egypt
300 Rooms, December 2023



Swissôtel Jeddah, Saudi Arabia
247 Rooms, December 2020



Swissôtel Sharm El-Sheikh Egypt
387 Rooms, December 2020

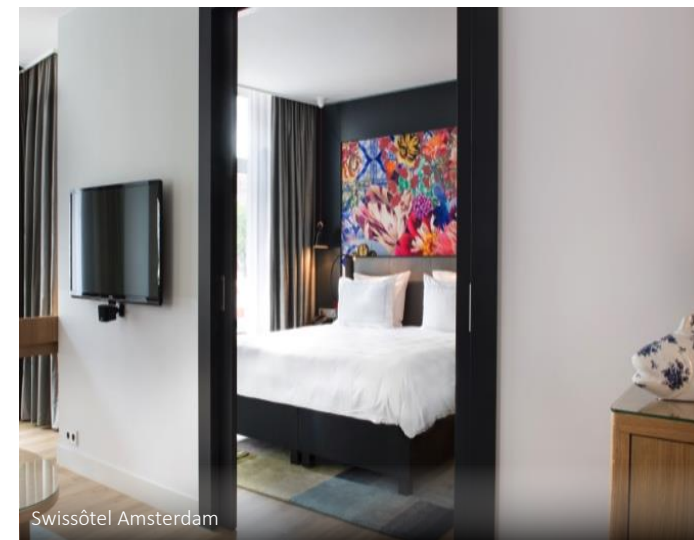
BRAND EXPERIENCE – DESIGN PHILOSOPHY

Modern - genuine materials, functionality, excellence in quality

Uncluttered - clean, understated, spacious

Sensitive - respectful of local traditions, comfortable interiors

Intelligent - smart, easy-to-use technology, meaningful innovation



THREE PASSIONS

VITALITY FOR BODY AND MIND

open
happy energetic
passionate

Our guests are like us.

Full of life. Energetic. Passionate. So it's no surprise that they appreciate our vitality. Because it's something they value in their everyday life too.



SUSTAINABLE EXCELLENCE

reliable
sincere
visionary
committed

Naturally, we like to please current guests. But thanks to our commitment to sustainable management, we also consider future guests.

It shows we value tomorrow as much as today, creating a brand that stands the test of time.

HIGH-QUALITY CRAFTSMANSHIP

genuine
innovative
intelligent
living tradition

Swiss hospitality represents efficiency and care. It is about crafting meaningful and engaging experiences.

Together with intelligent, distinct, and high-quality design that's inspired by local customs, it creates a welcoming atmosphere for guests from around the world.



BRAND EXPERIENCE CONCEPTS, MARKERS & RITUALS

THROUGHOUT THE GUEST JOURNEY

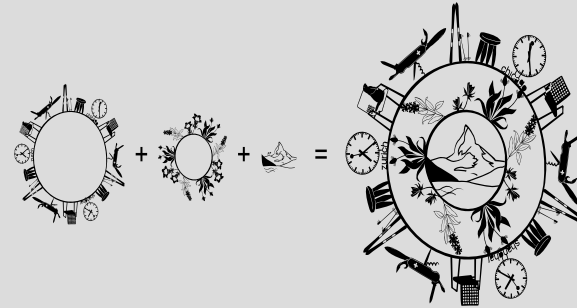
ARRIVAL	PUBLIC SPACES	GUEST ROOMS	FOOD AND BEVERAGE	WELLNESS FACILITIES	LEISURE FACILITIES	MEETINGS AND EVENTS	DEPARTURE
<ul style="list-style-type: none">• Swissôtel Circles• Doorman Uniform	<ul style="list-style-type: none">• Swissôtel Scent M	<ul style="list-style-type: none">• Vitality Room• Pürovel Care Products• Mindfulness postcards & podcast• Bed Experience	<ul style="list-style-type: none">• Vitality Breakfast M• Vitality Drinks M• Vitality Dishes M• The Quarter M• F&B Essentials M	<ul style="list-style-type: none">• Pürovel Massage Oils M• Vitality Jogging Maps M• Vitality In-room Fitness Kit M• Pürovel Spa & Sport M	<ul style="list-style-type: none">• Vitality In Movement	<ul style="list-style-type: none">• SOS Children's Villages Events• Vitality Day & Week March 21st / 1st week June M• August 1st Celebration• Vitality Meetings	<ul style="list-style-type: none">• Swissôtel Give Aways

- Vitality for body & mind
- Sustainable excellence
- High-quality Craftsmanship

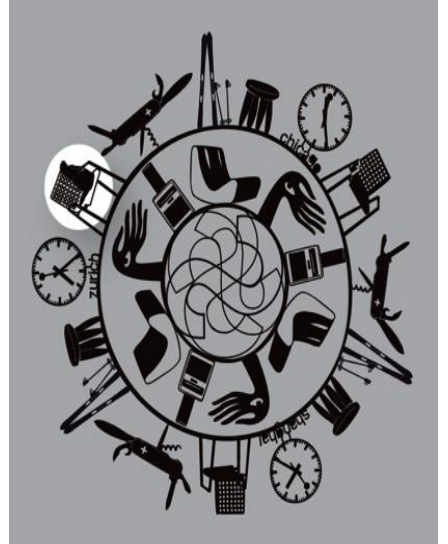
KEY PROGRAMS - ARRIVAL

SWISSÔTEL CIRCLES

The Swiss theme and destination circles are a strong visual elements of differentiation



Swissôtel Circles Theme Crossing –
Swiss design circle, Flora circle & Alps circle.



Swissôtel Zurich



KEY PROGRAMS – GUEST ROOMS

VITALITY ROOM

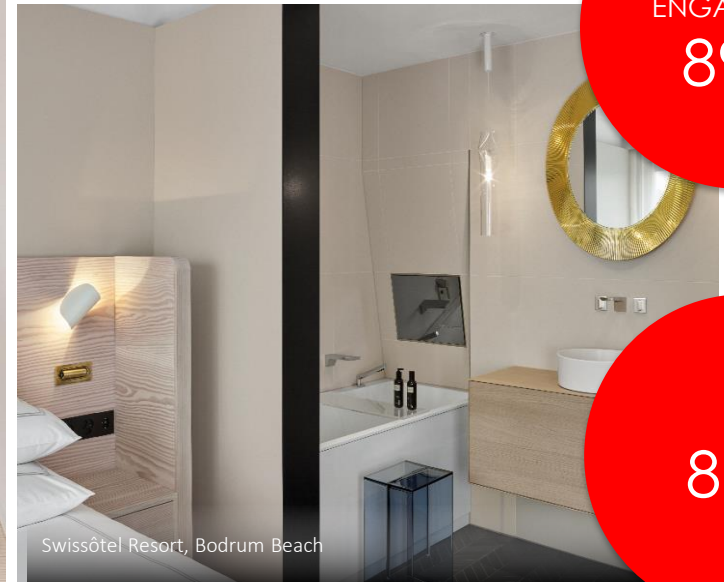
A new perspective on wellbeing and hospitality

- Well-being wall (reduced modules compared to the Vitality Suite)
- Experience shower
- Air purification system with silencer where the Air Quality Index exceeds 50
- Bio-adaptive/circadian lighting system
- Movable and height adjustable working desk (min. 100 x 100cm)
- Sound bar system
- Media panel with Bluetooth connectivity
- Hard surface flooring made from natural materials
- Vitality mini-bar



VITALITY ROOM
INCREMENTAL
IRR*
39%

COLLEAGUE
ENGAGEMENT
89%



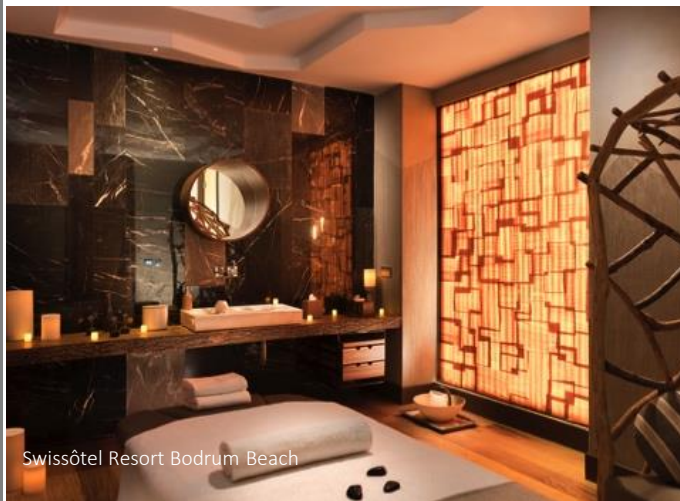
RPS
87%

*Based on 7 years depreciation

KEY PROGRAMS – GUEST ROOMS PÜROVEL

The Pürovel philosophy is derived from the origin of wellbeing and use of nature's resources.

The Pürovel essence is transfused in Pürovel Spa & Sport facilities, Pürovel bathroom amenities & Pürovel signature treatments.



PEOPLE ACTIVATION

We aim to provide quality in our people's lives. Every Heartist is an ambassador of our brand. We therefore encourage their development in being authentic, creative and asking "Why?".

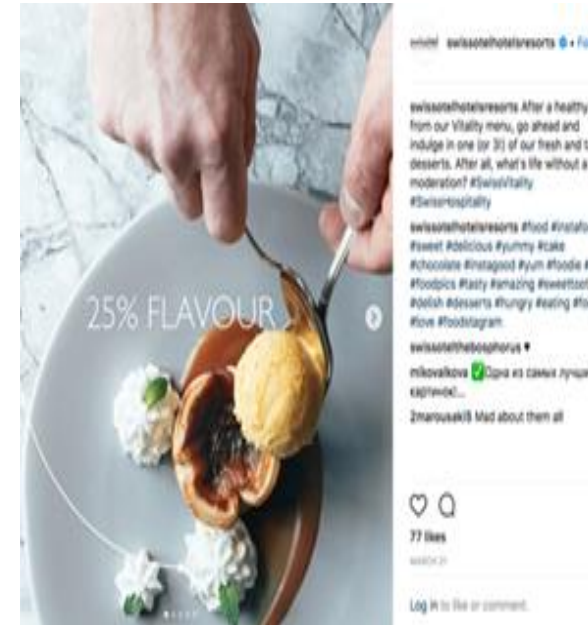
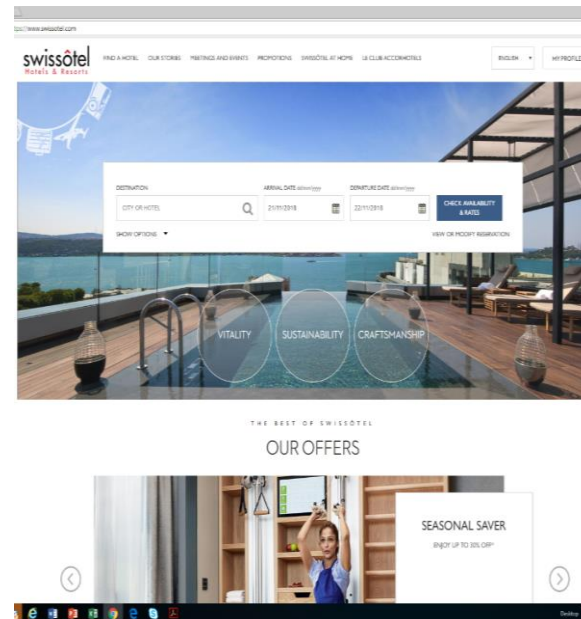
We put the accent on our people.



BRAND COMMUNICATION PLATFORM



Website
New Website
relaunched Q1/ 2018



Social Media
New strategy
relaunched Q1/ 2018



AWARDS

**52 PROMINENT AWARDS ACROSS 13
PROPERTIES, INCLUDING :**

**Netherland's Leading Boutique Hotel 2018
from World Travel Awards**
Swissôtel Amsterdam

World Gourmet's Baker of the Year Swissôtel
Kunshan

**MOST AWARDED PROPERTY IS
SWISSÔTEL FOSHAN
WITH 10 NOTABLE AWARDS**

**TOP REGION IS ASIA PACIFIC
WITH 42 AWARDS**



BRAND PERFORMANCE

BRAND AWARENESS

Total awareness among affluent travellers above 30% in **10 countries**.

Very high awareness in:

Singapore: **77%**

Germany: **59%**

Australia: **56%**

BRAND PERCEPTION

For **73%** of guests, Swissôtel is associated with **the quality and care of Swiss hospitality**.
For **60%** of guests, Swissôtel is associated with **contemporary hotels**.

BRAND MARGIN

€53

Price premium vs. independent hotels

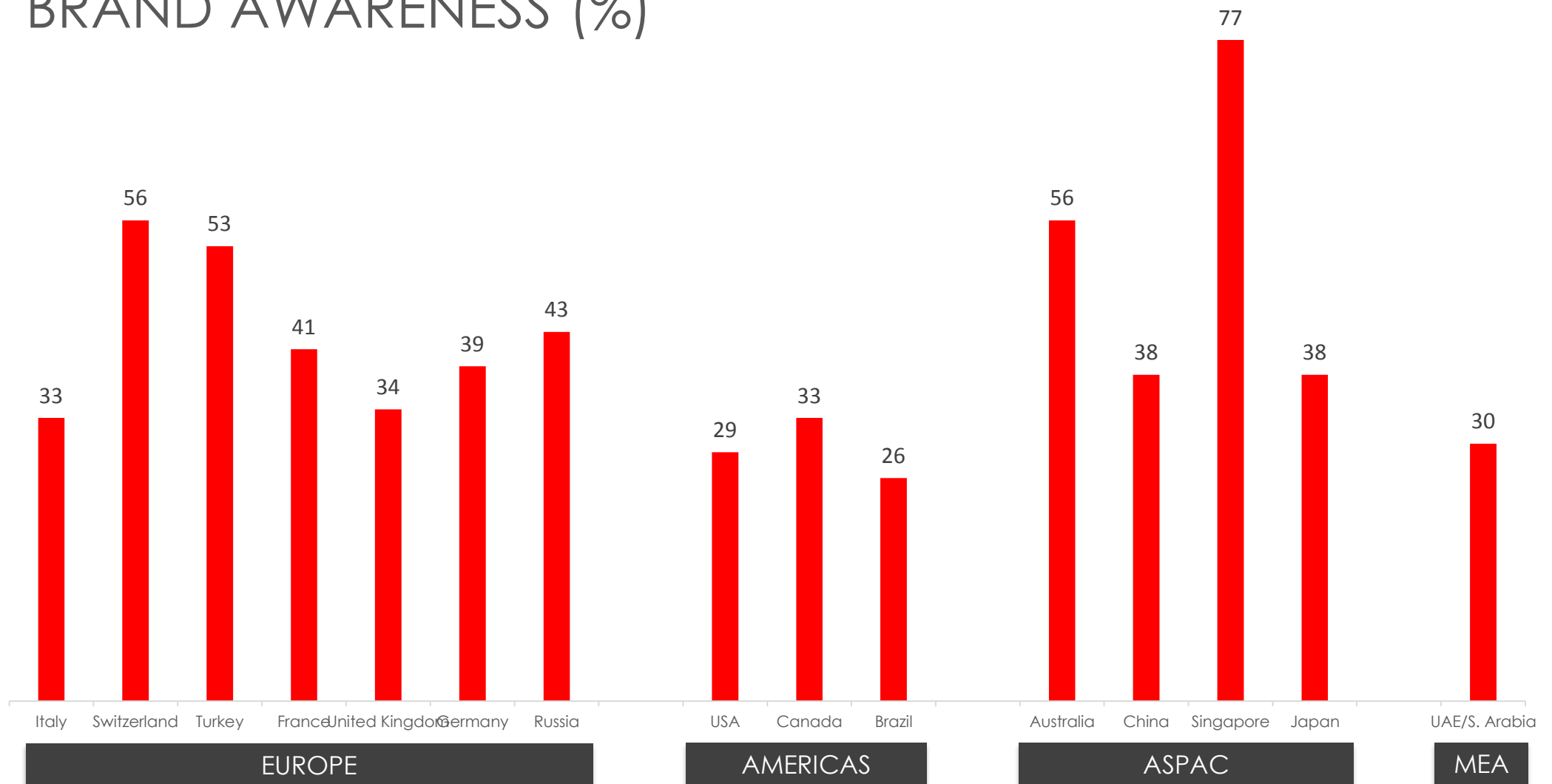
REPUTATION PERFORMANCE SCORE

87,0

Very good.

Our objective is to reach 87,5 in 2019

BRAND AWARENESS (%)

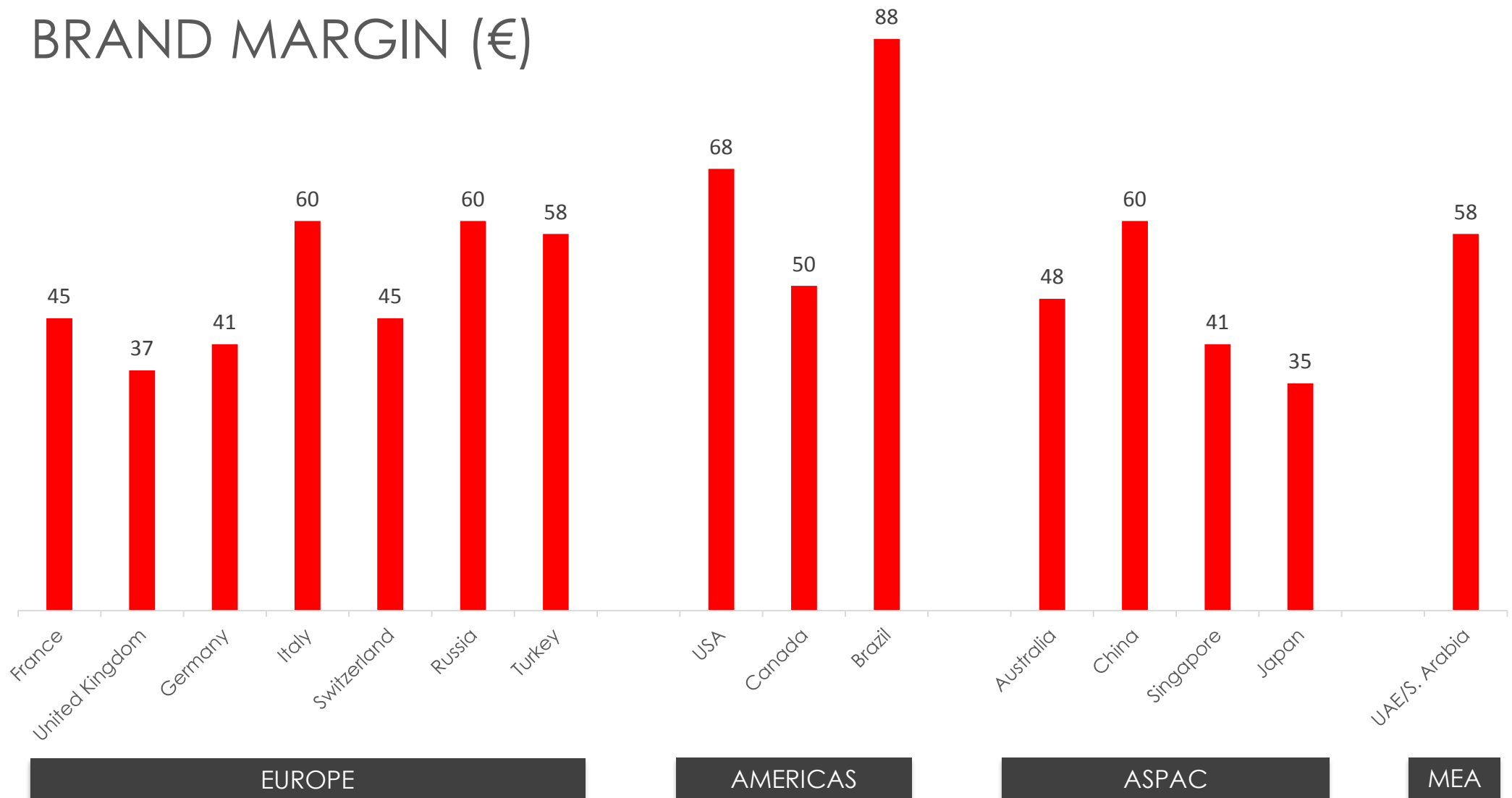


Source: BEAM - Brand Equity & Awareness Monitoring December 2018 |

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

Research conducted by BDRC Continental. Figures as of end 2018

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

REPUTATION SCORE YTD

**SWISSOTEL
AVERAGE
RPS
87.14**

**NORTH AND
CENTRAL
AMERICA &
CARAIBES**

84%

EUROPE

89%

ASPAC

87%

AMO

84%

SOUTH AMERICA

91%

Figures as of end 2018

SWISSÔTEL REVPAR INDEX



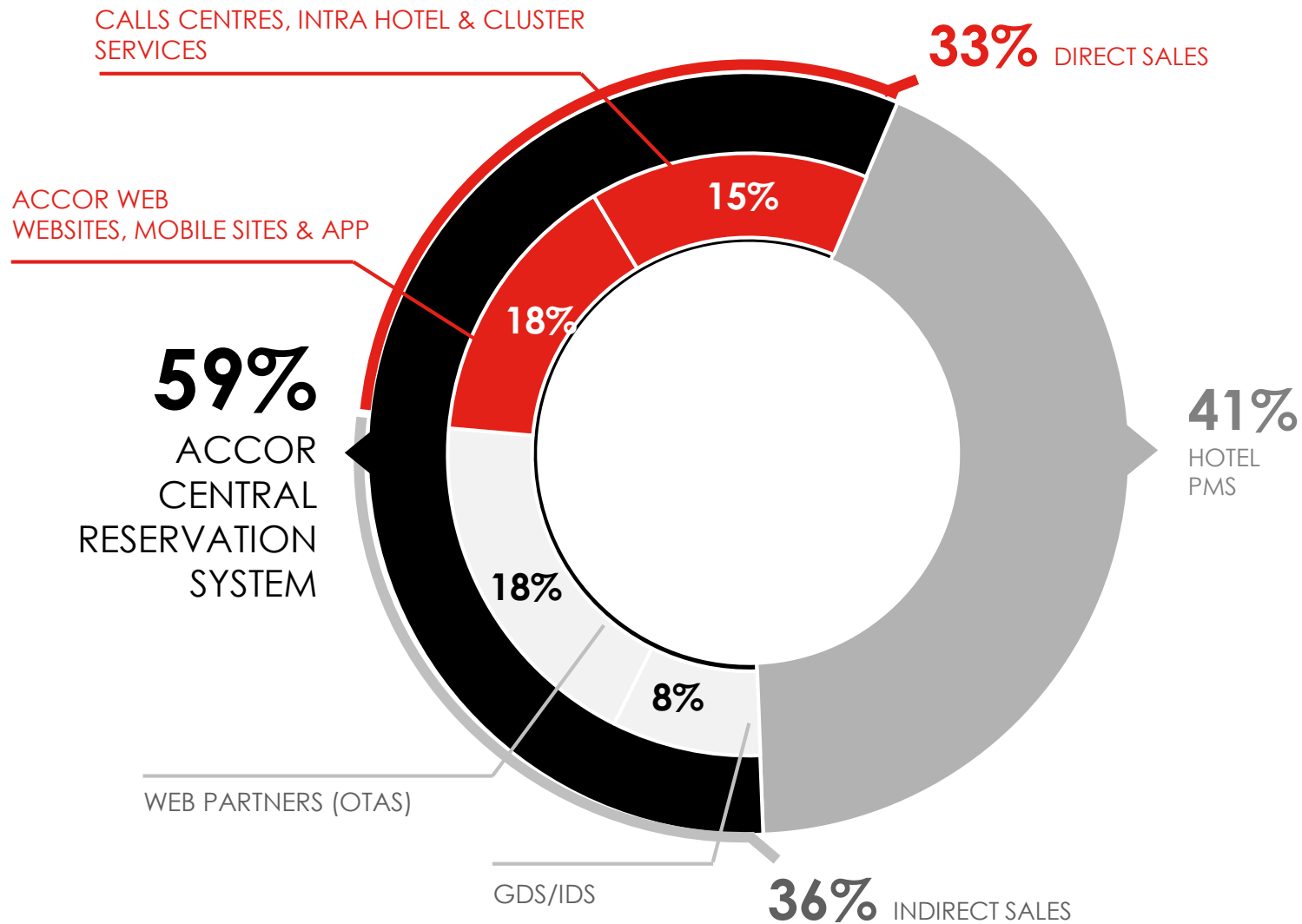
Figures as of end 2018

ACCOR OFFERS > **110** GLOBAL DISTRIBUTION PARTNERSHIPS AT BEST MARKET CONDITIONS



SWISSÔTEL DISTRIBUTION PERFORMANCE

POWERED BY ACCOR FOR LUXURY & PREMIUM BRANDS



FOCUS ON WEB

36%

Luxury & premium
room revenue

122M€

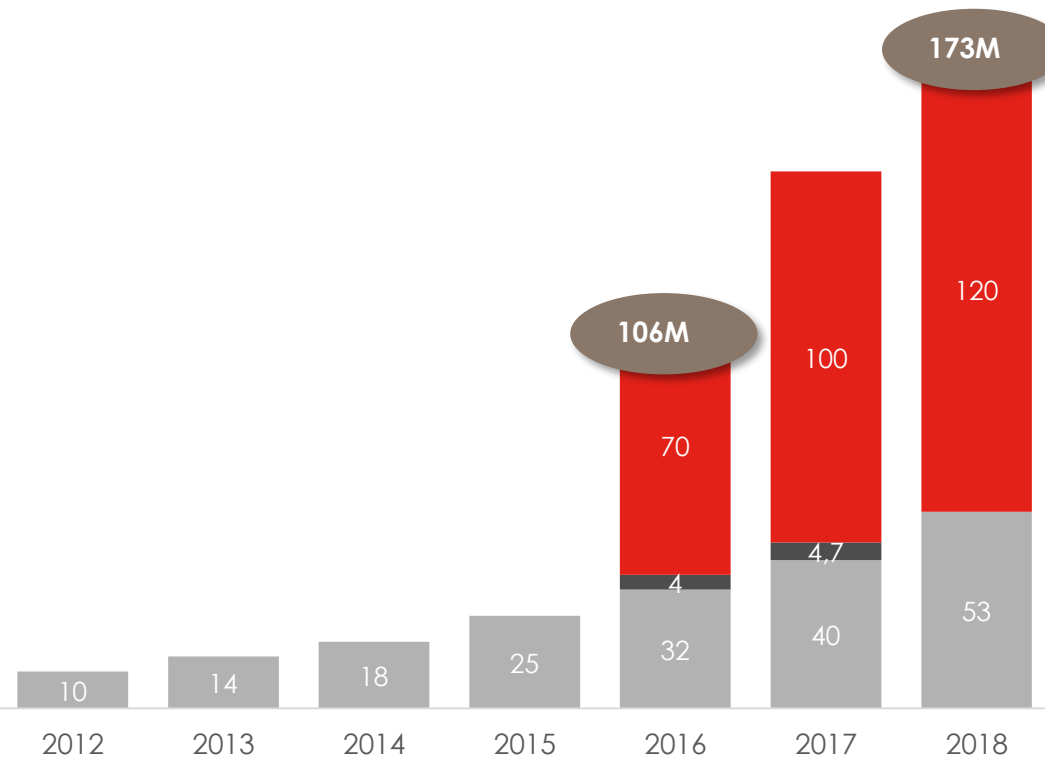
Swissôtel Room
revenue

LE CLUB ACCORHOTELS

ACCOR OWNS THE MOST POWERFUL INTERNATIONAL PROGRAM

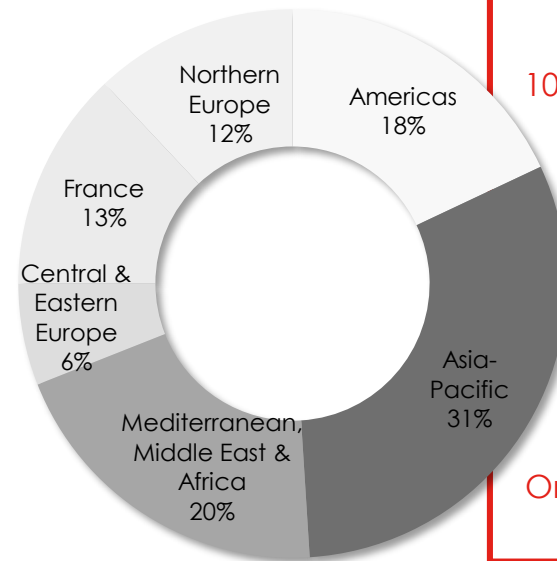
Loyalty members - Worldwide

■ Le Club AccorHotels ■ FRS loyalty program ■ Huazhu loyalty program



Figures as of end 2017. Swissôtel will join Le Club AccorHotels on July, 2nd 2018

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...

53M
Members
worldwide

34,6%
Of all
roomnights

+27,700
new members
every day

Figures as of end 2018

DEVELOPMENT CRITERIA

PROGRAMMING AND DEVELOPMENT RECOMMENDATIONS

		AAA ultra city center location, historic conversion	WORLDWIDE
HOTEL	RECOMMENDED NUMBER OF ROOMS	200 keys and more	200 keys and more
	ROOM AVERAGE SIZE	-15%/-20% of worldwide	30 – 36 sqm
	TGFA / ROOM	60 – 90 sqm	75 – 110 sqm
RESORT	RECOMMENDED NUMBER OF ROOMS	150 keys and more	200 keys and more
	ROOM AVERAGE SIZE	-15%/-20% of worldwide	36 - 42 sqm + balcony
	TGFA / ROOM	90 – 118 sqm	100 -130 sqm
FOOD & BEVERAGE		Breakfast Restaurant “The Quarter” Speciality Restaurant 1 Bar at a minimum, Vitality coffee breaks, dishes & drinks	
WELL-BEING		Swimming Pool (optional) >250 keys = Pürovel Spa and Sport (more than 4 treatment rooms and 4 spa amenities) ⁽¹⁾ <250 keys = Pürovel Sport (minimum 2 treatment rooms but less than 4 and 3 spa amenities)	
MEETINGS		Club Gold Swiss & Executive Club Rooms Key Meeting rooms Ballroom ⁽¹⁾ Business center ⁽¹⁾ Kids Club ⁽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	●		

Figures as of end 2018



THANK YOU

#SwissVitality
#SwissHospitality

swissôtel
Hotels & Resorts

Swissôtel Resort, Bodrum Beach