At Novotel, we believe that quality time is about making everyday moments matter. Everything has been thought to enhance our guests’ life balance, sense of wellbeing but also enjoyment.

Whether through our intuitive & modern design or our large range of rewarding experiences, everyone can disconnect from their busy life or make time to connect with their family, friends or colleagues.

This combination makes Novotel the perfect spot for travelers and locals to have a drink, a bite to eat, to work, play or just relax.

RELAXED   LIVELY   COMFORTED   ENERGIZED
The most well known & reliable brand of its category

Large global footprint of near 560 hotels in 65 countries & 156 hotels in pipeline

Strong brand awareness > 50% in > 10 feeder markets

Best-known & trusted upper midscale "full services brand“:

Sleep, Eat & Drink, Meet & Exercise
Intuitive & effective design

Flexibility within a framework – 4 new full hotel concepts developed by international designers

Brand fluidity, modularity & multifunctional Repositionable table/sofa-extra bed(s)

Optimized valued engineering = best construction & FFNE costs.
Family friendly

**BUSINESS DRIVEN**
Individuals/groups

**FAMILY FRIENDLY**
Best family offer on the market
> 2 million kids every year worldwide

Perfect mix of business / leisure,
Leveraging the occupancy in lower periods
(week ends & holidays)
Competition Matrix

POSITIONING

USP’S

NETWORK & PIPELINE

BRAND MARKERS

COMMUNICATION

PERFORMANCE

USP'S

NETWORK & PIPELINE

BRAND MARKERS

COMMUNICATION

PERFORMANCE

USP’S

NETWORK & PIPELINE

BRAND MARKERS

COMMUNICATION

PERFORMANCE

NOVOTEL

Why Invest
A GLOBAL FOOTPRINT OF 715 HOTELS OPEN AND IN THE PIPELINE

- **Network + Pipeline**: 559 hotels, 108,272 rooms
- **Franchise**: 27%
- **Management**: 73%

Breakdown network + pipeline by region is calculated by number of rooms.

**North, Central America & Caribbean**
- 22% network + pipeline
- 11 hotels, 2,230 rooms
- 3 hotels, 318 rooms

**Southern Europe**
- 17% network + pipeline
- 165 hotels, 23,193 rooms
- 5 hotels, 723 rooms

**Northern Europe**
- 2% network + pipeline
- 134 hotels, 25,693 rooms
- 29 hotels, 4,627 rooms

**South East Asia**
- 18% network + pipeline
- 67 hotels, 16,573 rooms
- 36 hotels, 8,404 rooms

**Greater China**
- 13% network + pipeline
- 39 hotels, 11,532 rooms
- 31 hotels, 7,214 rooms

**India, Middle East & Africa**
- 15% network + pipeline
- 64 hotels, 12,795 rooms
- 43 hotels, 8,950 rooms

**South America**
- 6% network + pipeline
- 38 hotels, 7,071 rooms
- 4 hotels, 735 rooms

**Pacific**
- 7% network + pipeline
- 41 hotels, 9,185 rooms
- 5 hotels, 749 rooms

All figures as of end December 2021
Flagships

NOVOTEL PARIS VAUGIRARD MONTPARNASSE, FRANCE – 187 ROOMS
Flagships

NOVOTEL MIAMI, USA – 275 ROOMS
Flagships

NOVOTEL LONDON BRIDGE, UK – 182 ROOMS
Flagships

NOVOTEL NEW YORK TIMES SQUARE, USA

NOVOTEL SINGAPORE ON STEVENS, SINGAPORE – 254 ROOMS

POSITIONING
USP'S
NETWORK
BRAND MARKERS
COMMUNICATION
PERFORMANCE
HOTEL DEVELOPMENT
DESIGN & TECHNICAL SERVICES
Latest openings

NOVOTEL SHANGHAI QINGPU, CHINA – 240 ROOMS
Latest openings

NOVOTEL MEXICO CITY TOREO, MEXICO – 168 ROOMS
Latest openings

NOVOTEL JUMEIRAH VILLAGE TRIANGLE DUBAI, UNITED ARAB EMIRATES – 375 ROOMS
Upcoming openings

NOVOTEL PHNOM PENH BEUNG KENG KONG, CAMBODIA – 253 ROOMS / OPENING DECEMBER 2022
Upcoming openings

NOVOTEL LIVING BANGKOK SUKHUMVIT LEGACY, THAILAND – 183 ROOMS / OPENING DECEMBER 2022
Take time

to rest, and relax – for you or your loved ones to refresh, reset and feel good.

Make time

for those you know or those you don’t, to get together to try something new or just have fun.
A COLLECTION OF NEW DESIGN CONCEPTS

Flexibility for renovation and new built with 4 full hotel concepts developed by international designers.

42 projects with new designs

RF STUDIO
Europe

SUNDUKOVY SISTERS
Middle East

METRO
South America

HYPOTHESIS
Asia
Make the lobby a social hub, a lively and relaxed place open to all; guests and locals alike.

**3 major principles:**
flexible, multi-function, a lobby that invites the outside in

**4 mandatory zones:**
- WELCOME AREA
- LIVING AREA
- FAMILY ZONE
- FOOD BAR
MODULAR & SPACIOUS

A universal and customizable design offering a sense of space and modernity. 4 different designs are now available.

From one size fits all to freedom in a frame
• from 20 to 30 sqm
Customer journey : F&B

BREAKFAST

Breakfast is the most important meal of the day and a key touchpoint for the guest.

This new breakfast experience is focused around 4 signatures:
• Breakfast bowl (sweet or savoury)
• Superfood toppings station
• Healthy fresh drink station
• Breakfast tea station & menu

ALL DAY DINING APPROACH

The All-Day Dining approach articulated around sharing, taking time, healthy options and customisation can be enjoyed throughout the day:
• Breakfast and brunch on weekends
• Zen Lunch
• Afternoon tea
• Aperitivo
• Relaxing dinner

ALL DAY DINING PHILOSOPHY

Novotel creates the Slow FoodBar, an all-day-long Slow Food & Beverage concept dedicated to the Social Hub:
• #TakeTime to relax with a selection of alcoholic and non-alcoholic infused drinks, including a variety of tea-based drinks and a healthy sweet or savoury snack anytime
• #MakeTime to share a lunch with your colleagues, a tea-based afterwork cocktail with your friends, a dinner with your family, or a brunch with your kids - fresh & tasty food made with good, clean and fair products
Customer journey: Novotel Experiences

NOVOTEL RESORTS
Designed to escape

To keep on surprising and remain increasingly attractive for every kind of family or group of friends, the new resort offer transforms guests’ ordinary stay into unforgettable holidays.

Family Time By Novotel
Designed for unique bonding experiences

Though our 3 pillars (Make it Easy, Make Time to strengthen connections and Take Time to create memories), and a very competitive offer, we guarantee families memorable moments at Novotel.

BOOKING: Kids stay free in parents’ room 50% off the 2nd room for children
CHECK IN & OUT: Welcome gift & late check-out
STAY: Family play area & baby equipment
ROOM: Family rooms including dedicated TV channels
FOOD & BEVERAGE: Kids’ menu and free breakfast
HEARTIST® is a motivating and engaging programme that aims to unlock the uniqueness and potential in all our employees.
It stems from a very concrete drive to transform the company.

What does it mean to be a Novotel Heartist®?
- Be an expert of my brand
- Make our guest feel relaxed and cared for
- Share the brand passion for Time well spent
Social Media

A COLLECTION OF INSPIRING CONTENT & ACTIVATIONS PROMOTING QUALITY TIME IN SAFE HAPPY PLACES AND LEVERAGED THROUGH PARTNERSHIPS AND INFLUENCERS.

- 79K followers
  - Global page
  - Hotel pages

- 5,15K fans
  - Global page

- 619K fans
  - Global page
  - 11 Country pages
  - Hotel pages

- 63,9K followers
  - Global page
  - Hotel pages
11 GEOLOCATED VERSIONS
1.2M SUBSCRIBERS TO THE NEWSLETTER
MORE THAN 900K ROOMNIGHTS BOOKED
21,5M€ REVENUE GENERATED
+200 MAILINGS PER YEAR

Official figures 2019 – Yearly basis
We measure success through the evolution of:

**BRAND AWARENESS**

57%

Our primary asset: high brand awareness of over 50% in 11 countries.

---

**BRAND PERCEPTION**

Novotel is recognized as a 'relaxed' and 'lively' brand, making people feel 'comforted', by more than the half of its frequent customers.

---

**BRAND MARGIN**

+€24

Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative.

---

**REPUTATION PERFORMANCE SCORE**

84.22 pts

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.

---

Source: BEAM 2019  
Source: BEAM 2019  
Source: BEAM 2019  
Source: TrustYou 2021

---

Our objective is to maintain current awareness levels.

Our objective is to improve our image of modernity and create emotional connections between the brand and its customers.

Our objective is to maintain this price premium.

Our objective is to increase RPS by 0.4 pts in 2022.
Central Brand Delivery Powered by Accor

Novotel Room Nights based

- Loyalty Direct Hotel: 6%
- OTA: 22%
- All Accor.com, Brands.com, Voice: 16%
- B2B Global Sales (incl. GDS): 29%
- 73.4%

Central Brand Delivery: CBD (%)

CBD measures the business in room nights brought by Accor to the hotel through the 3 main group levers: Distribution (through Central Reservation System - CRS), Loyalty & Sales. A 70% CBD means that 70% of the room nights of a hotel are driven by Accor & Brand Sales, Distribution (all channels powered by the CRS) & Loyalty ecosystem.

FOCUS WEB
(ACCOR WEB + WEB PARTNER)

- 9M Room Nights
- €1 079M Room Revenue

Figures as of YTD DECEMBER 2019
Direct Bookings: Accor Digital Platform

- **300M** Website + App visits
- **2,200** Destinations
- **18** Languages

**NEW in 2020:**
- **All Safe label visibility** on digital experience to rest-assure guests during the pandemic
- Launch of **Apartment & Villas** website dedicated to Branded Residences and Extended Stay hotels

- **> 50%** Mobile and App visits
- **1** Download every minute
- **> 4,3/5** app ratings
  - iOS: 4,5/5 & Android: 4,3/5

- Plugged to **ALL.COM**

Official figures as of end 2019
Direct Bookings: Accor loyalty program

THE ONLY LIFESTYLE LOYALTY PROGRAM

NEW LIFESTYLE & AUGMENTED HOSPITALITY FRAMEWORK
OFFERING EXTENDED OPPORTUNITIES TO EARN & REDEEM POINTS

NEW BENEFITS
- 38 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

- **73M** Loyalty members worldwide
- **37%** Loyalty contribution rate in RN
- **x 3.6** Members stay twice more than non-members

THE MOST GLOBAL LOYALTY PROGRAM

North & Central America, Caribbean 11%
Southern Europe 22%
North & Central America, Caribbean, Caribbea n 11%

Official figures as of end 2019
Development Criteria - Programming

### Hotel

<table>
<thead>
<tr>
<th>AAA Ultra City Center Location, Historic Conversion</th>
<th>Worldwide</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recommended Number of Rooms</strong></td>
<td>150 keys and more</td>
</tr>
<tr>
<td><strong>Room Average Size</strong></td>
<td>20 - 30 sqm</td>
</tr>
<tr>
<td><strong>TGFA / Room</strong></td>
<td>45 - 56 sqm</td>
</tr>
</tbody>
</table>

| **Recommended Number of Rooms** | 120 keys and + | 150 keys and + |
| **Room Average Size** | 30 sqm | 32 – 36 sqm + balcony |
| **TGFA / Room** | 45 – 50 sqm | 55 – 70 sqm |

### Resort

<table>
<thead>
<tr>
<th><strong>Food &amp; Beverage</strong></th>
<th>1 restaurant (preferably connected to bad)</th>
<th>1 Gourmet Bar (Hotel) or Boutique Gourmande (Novotel Suites)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Well-Being</strong></td>
<td>Fitness center In Balance (50 sqm min.)</td>
<td>Swimming pool (nice to have)</td>
</tr>
<tr>
<td></td>
<td>Spa(1)</td>
<td></td>
</tr>
<tr>
<td><strong>Meetings</strong></td>
<td>Meeting room(1)</td>
<td>Web Corner</td>
</tr>
</tbody>
</table>

[1] Based on market demand

### Positioning

<table>
<thead>
<tr>
<th><strong>Hotels</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Prime Locations</td>
</tr>
<tr>
<td>Secondary Locations</td>
</tr>
<tr>
<td>Airports/Suburbs</td>
</tr>
</tbody>
</table>

- International Capitals
- Key Cities & Resorts
- Major Domestic Destinations
- Other Cities & Attractive Touristic Destinations