



WHY INVEST IN FAIRMONT HOTELS & RESORTS

AccorHotels Global Development

August 2018





UNFORGETTABLE. SINCE 1907.

Celebrating the heart of the destination through charismatic service and thoughtful attention to detail, Fairmont leaves guests feeling cherished and exceptional. Experience Fairmont's grand presence through its distinctive public spaces with local design inspiration, classic cuisine or its history of hospitality and see why this brand has been unforgettable since 1907.

The Fairmont story began in 1907, with the opening of an iconic hotel — Fairmont San Francisco. That same year, Fairmont's New York hotel, The Plaza, opened. Since our founding, Fairmont has never been a brand that imposes itself upon a culture. Rather, we have ensured that each of our 70 hotels, from San Francisco to New York to London to Monte Carlo and on to Asia, captures and connects to each destination's distinctive spirit and becomes “the place to be”.



**CHARISMATIC
THOUGHTFUL
CHERISHED
EXCEPTIONAL**



FAIRMONT HAS TREMENDOUS VALUE WORLDWIDE

70%

Brand total awareness in the USA. **90%** in Canada

€70

Brand average rate premium versu independent hotels

72%

of guests say Fairmont makes them feel like
they are in the heart of the destination

Numbers as of end 2017



AN EVER EXPANDING PORTFOLIO

CURRENT

26

Countries

76

Hotels

30,013

Keys

15

Residences

100%

Managed Hotels



PIPELINE

15

Countries

20

Hotels

6,404

Keys

17

Residences

FAIRMONT PIPELINE

OPENINGS 2018 AND BEYOND

EUROPE

FAIRMONT MYKONOS, GREECE, 176 ROOMS (2021)

FAIRMONT MAYAKOVSKAYA, MOSCOW, 142 ROOMS (2021)

MIDDLE EAST & AFRICA

FAIRMONT RABAT, MOROCCO, 186 ROOMS (2019)

FAIRMONT TAGHAZOUT BAY RESORT, MOROCCO, 208 ROOMS (2019)

FAIRMONT AL JAZAYER BEACH, BAHRAIN, 213 ROOMS (2021)

FAIRMONT CITYSTARS SHARM EL SHEIKH, EGYPT, 414 ROOMS (2019)

FAIRMONT FOKAH NORTH COAST, EGYPT, 320 ROOMS (2021)

FAIRMONT RIYADH, SAUDI ARABIA, 304 ROOMS (2018)

FAIRMONT ABU DHABI MARINA RESORT AND RESIDENCES, UAE, 563 ROOMS (2019)

FAIRMONT JEDDAH, SAUDI ARABIA, 315 ROOMS (2022)

FAIRMONT CAIRO PYRAMIDS, EGYPT, 250 ROOMS (2022)

AMERICA

FAIRMONT CENTURY PLAZA LOS ANGELES, USA, 349 ROOMS (2019)

FAIRMONT ST LUCIA, SAINT LUCIA, 120 ROOMS (2021)

FAIRMONT COSTA CANUVA, MEXICO, 245 ROOMS (2021)

ASIA PACIFIC

FAIRMONT WUHAN, CHINA, 324 ROOMS (2018)

FAIRMONT GUIYANG, CHINA, 284 ROOMS (2019)

FAIRMONT MUMBAI, INDIA, 566 ROOMS (2022)

FAIRMONT AMBASSADOR SEOUL, SOUTH KOREA, 326 ROOMS (2020)

FAIRMONT KUALA LUMPUR, MALAYSIA, 690 ROOMS (2020)



FAIRMONT
CENTURY PLAZA,
USA (Q3 2018)
394 rooms



FAIRMONT FLAGSHIPS



FAIRMONT BANFF SPRINGS,
BANFF, CANADA
764 rooms

FAIRMONT FLAGSHIPS



FAIRMONT PEACE HOTEL
SHANGHAI, CHINA
270 rooms



FAIRMONT FLAGSHIPS



THE SAVOY, A FAIRMONT MANAGED HOTEL, LONDON, UK

267 rooms

FAIRMONT FLAGSHIPS



THE PLAZA, A FAIRMONT MANAGED
HOTEL, NEW YORK, USA

282 rooms

FAIRMONT FLAGSHIPS



FAIRMONT THE PALM,
DUBAI, UAE
381 rooms

LATEST OPENINGS 2018



FAIRMONT AUSTIN, UNITED STATES OF AMERICA
1,048 ROOMS

FAIRMONT MALDIVES SIRRU FEN FUSHI, MALDIVES
112 ROOMS



TURNING MOMENTS INTO MEMORIES

Connection Between

FAIRMONT AND
DESTINATION

Connection Between

GUEST AND
DESTINATION

Connection Between

FAIRMONT AND
GUEST





FAIRMONT GOLD EXCLUSIVE EXECUTIVE FLOOR

- Fairmont Gold is a Hotel within a Hotel, where the art of exception service is elevated to create an exclusive personal experience, designed to fulfill the needs of the discerning business and leisure travelers.
- 42 hotels in 11 countries: Canada, U.S., Bermuda, Ukraine, Azerbaijan, Philippines, China, UAE, Kingdom of Saudi Arabia, Egypt and India.
- **Accounts for 10% to 15% of room inventory, but generates (on average) a rate premium of \$150 USD with minimal incremental operating costs.**





ICONIC MEETING AND EVENT SPACES

Event planners around the world seek out Fairmont as the leading operator of luxury hotels of scale: hotels that can accommodate midscale and large events at various price points, without compromising on luxury.

Loyal Following: Measured by JD Power (10 point scale)

- Satisfaction with Meetings 9.43
- Sales Index: 9.32 (on 10 point scale)
- 85% of meeting planners would definitely recommend the brand.

30%+ Global business

Significant F&B/ catering revenues





TOP-RANKED GOLF

- Associated by golfers from around the globe with the most inviting fairways and exhilarating shots
- Many courses designed by great names in the business: Robert Trent Jones, Jr.; Greg Norman; Sam Torrance and Stanley Thompson
- 12 managed courses in 6 countries (Canada, USA, Bermuda, Scotland, Morocco, Kenya) and partner courses in the U.S. and Mexico





BRAND ADVERTISING

- **1.5M EUR** spend on **building brand awareness** with high-net worth consumer in **UK, US, UAE and China**
- More balanced use of digital (**heavy video**) through on Programmatic, Youtube, and LinkedIn
- Focused **use of print**. Double pages insertions on Departures, Ultratravel + Chinese Media TBD
- **KPIs focused on Awareness**



4:12 PM

The moment Montreux brought history to life.

Dreaming of the Belle Époque in Montreux, experiencing Edwardian elegance in London, re-living the Jazz Age in Shanghai—when you stay with Fairmont, you're never far away from the history, culture and architecture that define the unique character of the places we call home. For truly inspired family or business trips, make Fairmont Le Montreux Palace, The Savoy or Fairmont Peace Hotel—or any of our 70+ destinations around the world—your home base for memories that last a lifetime.

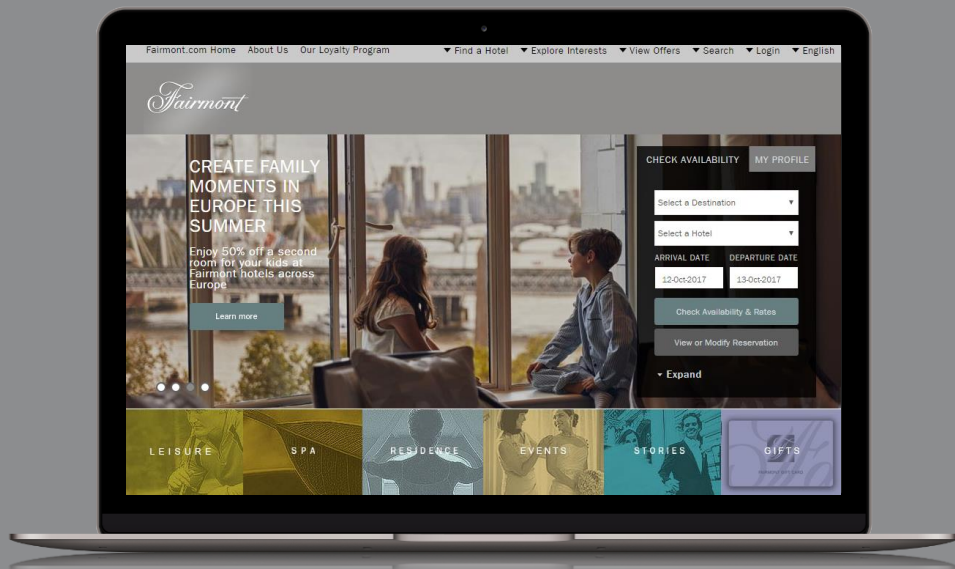
Gateway to your moment in over 20 countries. [fairmont.com](https://www.fairmont.com)

Fairmont

UNFORGETTABLE. SINCE 1907.



DIGITAL COMMUNICATIONS

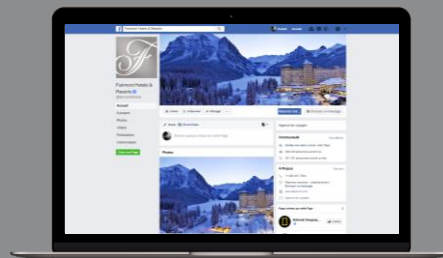


FAIRMONT.COM

Over **2.7 MILLION VISITS** per month

Over **10 MILLION** page view per month

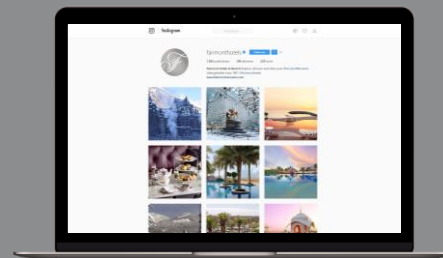
GROSS REVENUE \$276M



FACEBOOK

305,640+ likes

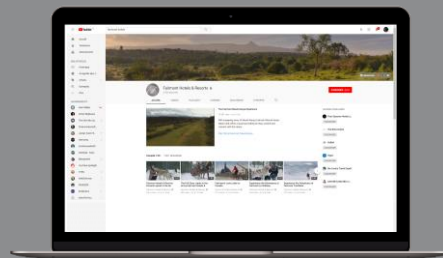
3,400+ per month



INSTAGRAM

93,200+ Followers

2000+ per month



YOUTUBE

4.46K subscribers

1.92M Total views



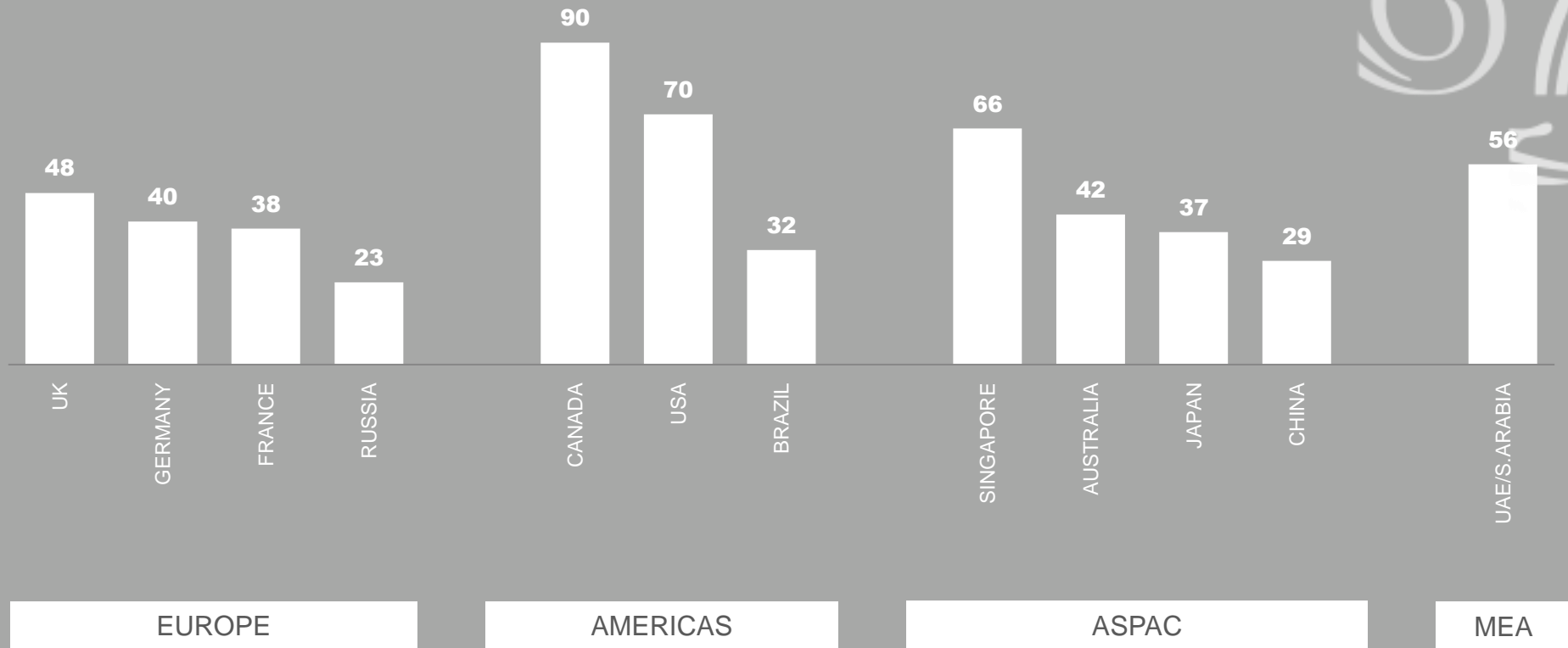
TWITTER

171,000 followers

900+ per month

FAIRMONT TOTAL AWARENESS

A STRONG AWARENESS >40% IN 7 KEY COUNTRIES

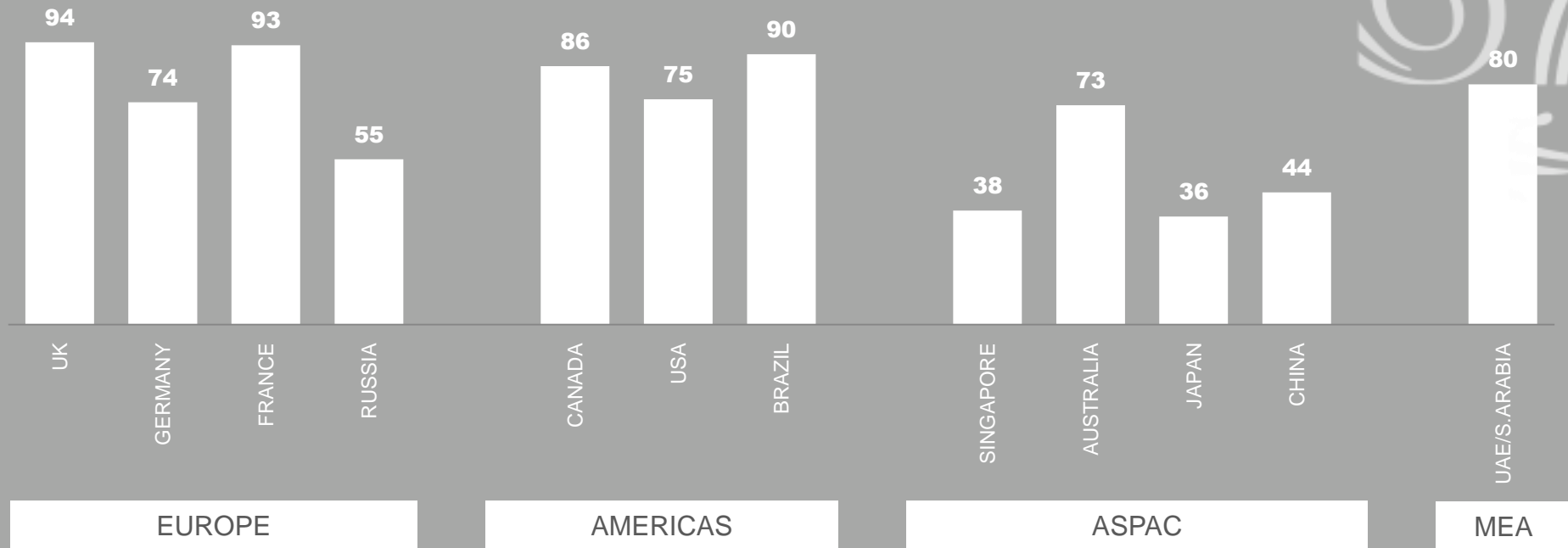


Source: BEAM - Brand Equity & Awareness Monitoring December 2017 |
Base: Affluent & Luxury hotel users = users having spent at least 1 stay in a luxury hotel over the last 12 months, 6 nights + in any type of paid-for accommodation, top 30% income within country

FAIRMONT BRAND MARGIN[®]

A STRONG RATE PREMIUM PERCEPTION, €70 WORLDWIDE

The best loved brand among its competitive set in Canada, China, Brazil, Australia and the Middle East, among affluent travellers



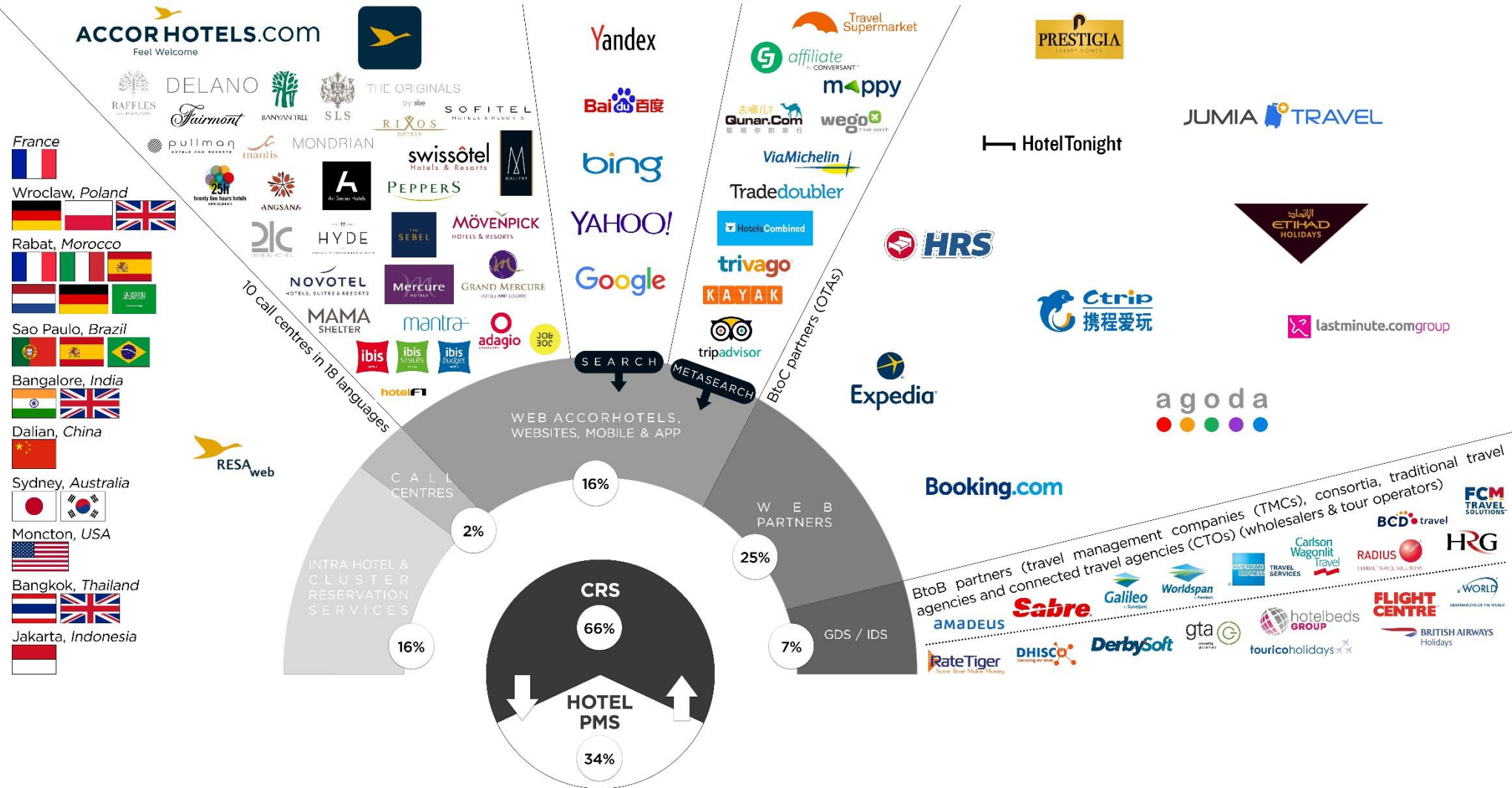
Brand Margin[®] in €

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 2017

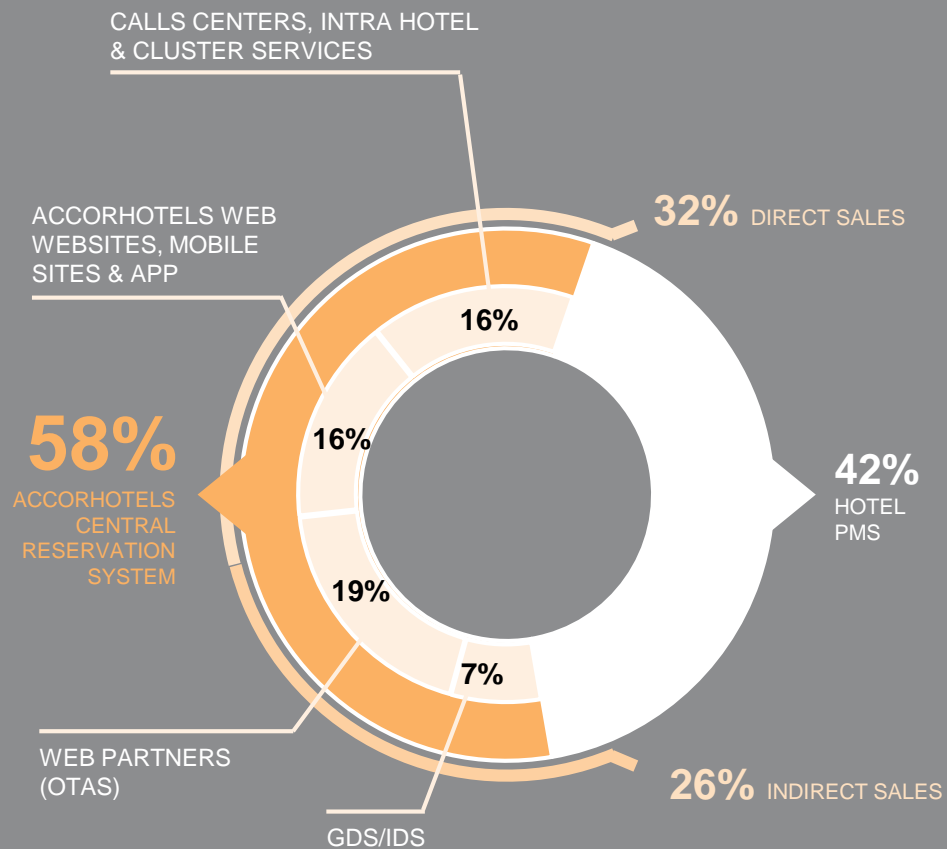
ACCORHOTELS DISTRIBUTION SOLUTION

ACCORHOTELS OFFERS >110 GLOBAL DISTRIBUTION PARTNERSHIPS AT BEST MARKET CONDITIONS





FAIRMONT DISTRIBUTION SOLUTIONS

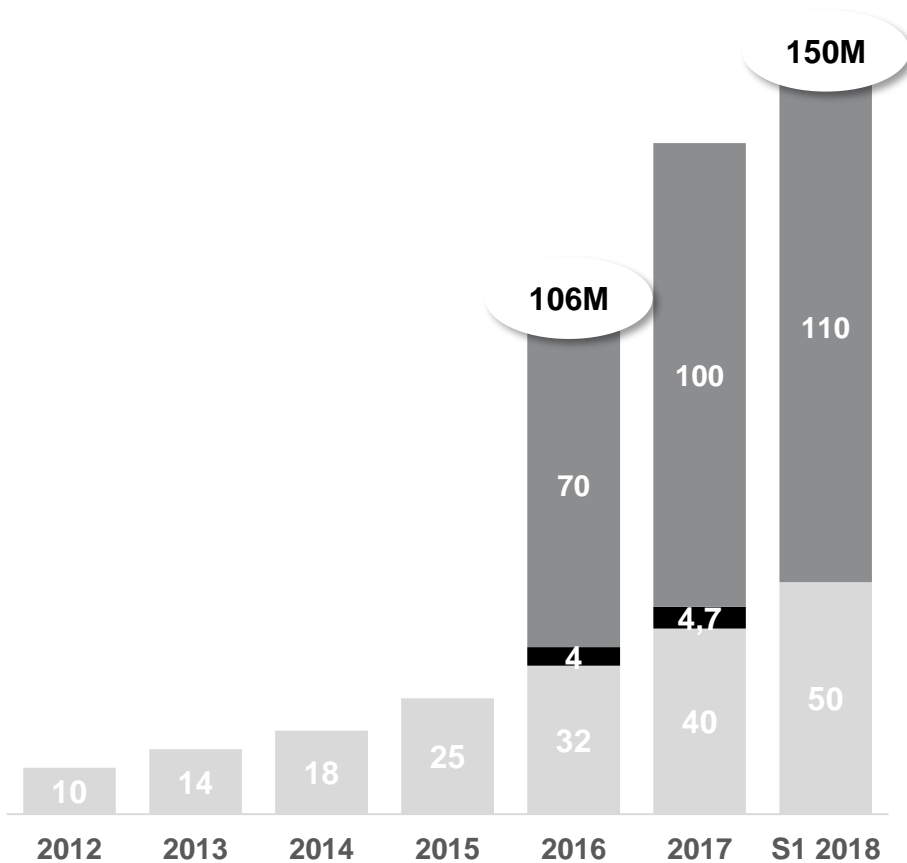


LE CLUB ACCORHOTELS

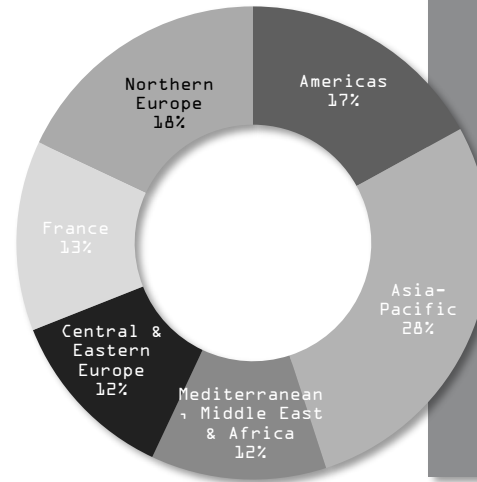
ACCORHOTELS OWNS THE MOST POWERFUL INTERNATIONAL PROGRAM

Loyalty members - Worldwide

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



Guests' origin - Worldwide



A Worldwide program:

- 14 brands
- 3,400 hotels in 93 countries
- Free enrollment
- 100% Web based program
- More than 23,000 new members every day
- Le Club AccorHotels represents 30.6% of AccorHotels revenue
- Partnerships with large Airlines loyalty program: Skyteam, One World, Star Alliance...

>50 MILLION
MEMBERS
WORLDWIDE

+23,000
MEMBERS EVERY
DAY

LE CLUB
ACCORHOTELS
REPRESENTS

30.6%
OF HOTEL GLOBAL
REVENUE

FAIRMONT PERFORMANCE

REVPAR INDEX AS OF END 2017

WORLDWIDE
with revPAR index = 112,6

NCA
with revPAR index = 117,1 / up to 196

EUROPE
with revPAR index = 97,1 / up to 154

GREATER CHINA
with revPAR index = 94,1 / up to 125

MIDDLE EAST
with revPAR index = 110,7

INDIA
with revPAR index = 107,7

MIS
with revPAR index = 98,2

NORTH AMERICA
with revPAR index = 117,3

Figures as of end 2017 – Str Or Hospitality On Source: Only Subsidiary Or Managed Hotel Rgi Versus Its Competitive Set

FAIRMONT DEVELOPMENT CRITERIA

HOTEL

RESORT

	AAA ultra city center location, historic conversion	WORLDWIDE
RECOMMENDED NUMBER OF ROOMS	200 – 300 keys	300 – 400 keys
ROOM AVERAGE SIZE	-10%/-15% of worldwide	40 sqm and +
TGFA / ROOM	-10%/-15% of worldwide	100 – 140 sqm
RECOMMENDED NUMBER OF ROOMS	150 keys and +	200 keys and +
ROOM AVERAGE SIZE	40 sqm + balcony	45 sqm + balcony
TGFA / ROOM	100 – 120 sqm	120 – 160 sqm

FOOD & BEVERAGE
 3 restaurants
 Speciality restaurant⁽¹⁾
 1 lobby lounge bar
 1 speciality bar

WELL-BEING
 Fairmont spa
 Extensive fitness⁽¹⁾
 Swimming pool

MEETINGS
 Meeting room⁽¹⁾
 Ballroom⁽¹⁾
 Business centre

(1) On market demand



NEW-BUILT AND CONVERSION

PRIME LOCATIONS **SECONDARY LOCATIONS** **AIRPORTS SUBURBS**

INTERNATIONAL CAPITALS
 KEY CITIES &
 RESORTS



MAJOR DOMESTIC DESTINATIONS



OTHER CITIES &
 ATTRACTIVE TOURISTIC DESTINATIONS

