



# We turn each journey into a transformative Voyage

Experiencing Orient Express is a unique and multi-faceted exploration. A contribution to the myth, while indulging in the most diverse, magical and refined of atmoshperes.

We believe unusual and unexpected experiences are the gateway to enduring memories.

The eventful essence of Orient Express sparks something to remember each time a change happens, whether it is in the scenery, the light, the world or the voyager's mindset.





#### An iconic brand

#### I/A moving set of refined voyage experiences

Orient Express proposes a collection of ultra-luxury travel experiences linking trains, hotels and sailing yachts around the world for voyageurs driven by curiosity.

#### II/ Inspired by the Myth

Orient Express is a myth which goes back to 1883 – since then, the internationally renowned name has always been synonymous with luxury travel and refinement. Today, the brand is offering a resolutely modern interpretation of this Myth.

#### III/ Embodying the Ultra-Time

Orient Express invites travelers to take the time to explore and consider the world around them. We do not slowtime down, we expand and we transcend it. As we move through spaces and times alike, we reinvent them on a unique timeline.

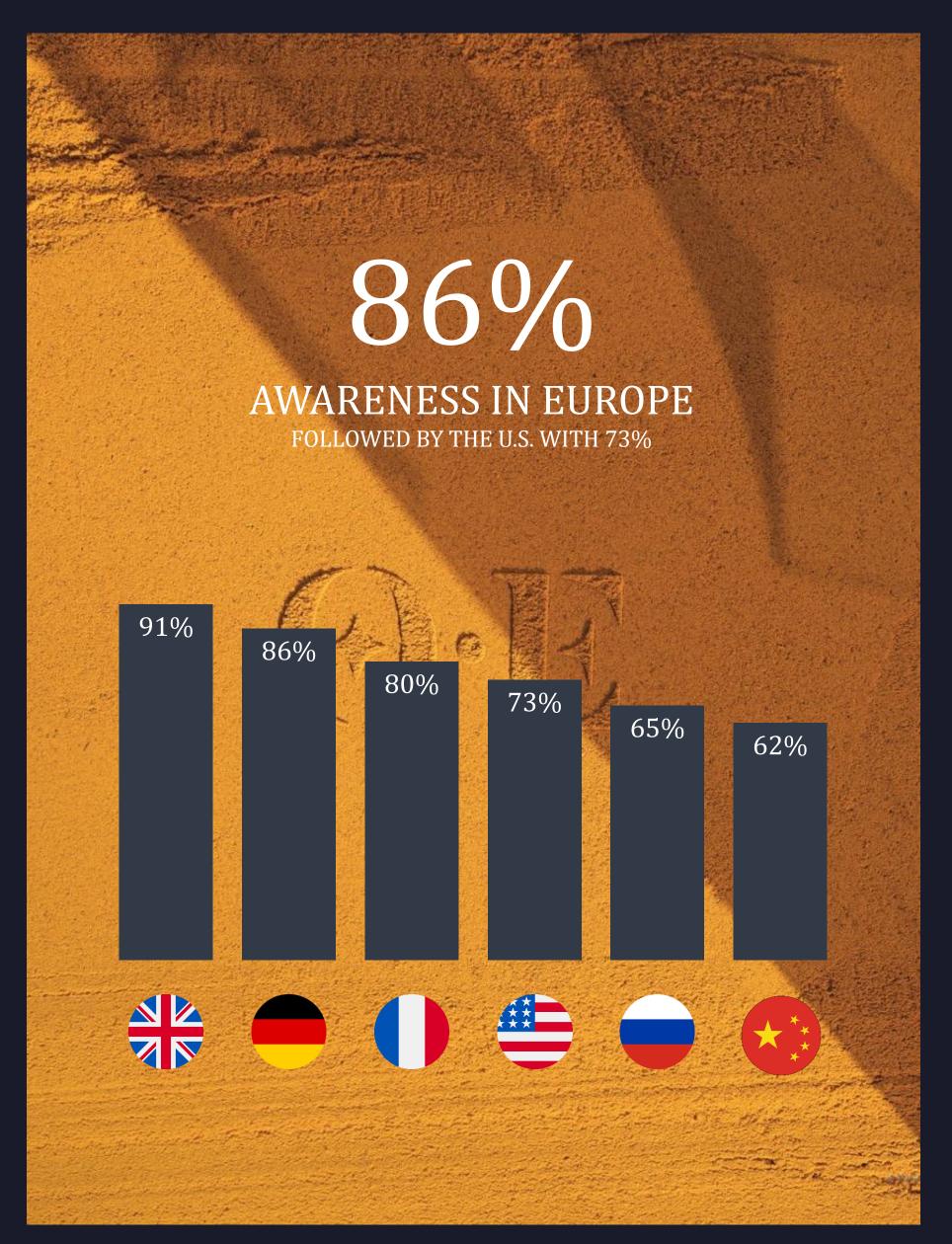




#### An unrivaled brand awareness

The "ORIENT EXPRESS" name enjoys incredible awareness around the world, with an average awareness rate of 86% in Europe (up to 91% in the UK) and more than 60% in key emitting markets (China, USA, Russia).

The U.S., key market for the Orient Express trains, as it represents the country with the biggest demand for tickets, after European countries, has an awareness reaching 73%.



2015 BCG quantitative survey - 1.500 respondents globally



### Brand signature programs

#### I/ The Great Transformation

Each day, as night falls, the hotel reveals itself. The mood shifts from local exoticism to more intimate, more mysterious atmospheres. All five senses are re-evoked, with changing light, scent, atmosphere, sound and experience.

#### II/ A Cast of Characters

Inspired by former conductors and staff of the legendary train, the Orient Express staff and their generous attentions become the highlight of the guest experience.

#### III/ The Wagon-Bar

Inspired by the original train design, the Wagon-Bar takes guests on a journey through time, once they've uncovered the mystery of the bar's secret location.

#### IV/ Ottoman Baths

Inspired by past traditions and Ottoman baths, Orient Express Spa learns from ancient wisdom to offer timeless rituals in places of extreme indulgence.

#### V/ The Local Treasures

A collection of experiences offering a chance to discover the hidden secrets and natural treasures of the locality.





### A unique design philosophy

The reinterpreted Art Deco as common thread...

The Art Deco aesthetic, which has shaped the history of the train since 1920, is reflected in Orient Express travel experiences in its essence rather than in its literal reproduction.

To keep valuing this style and lead it into the 21<sup>st</sup> century requires the involvement of exceptional craftsmen with authentic savoirfaire from all over the world.

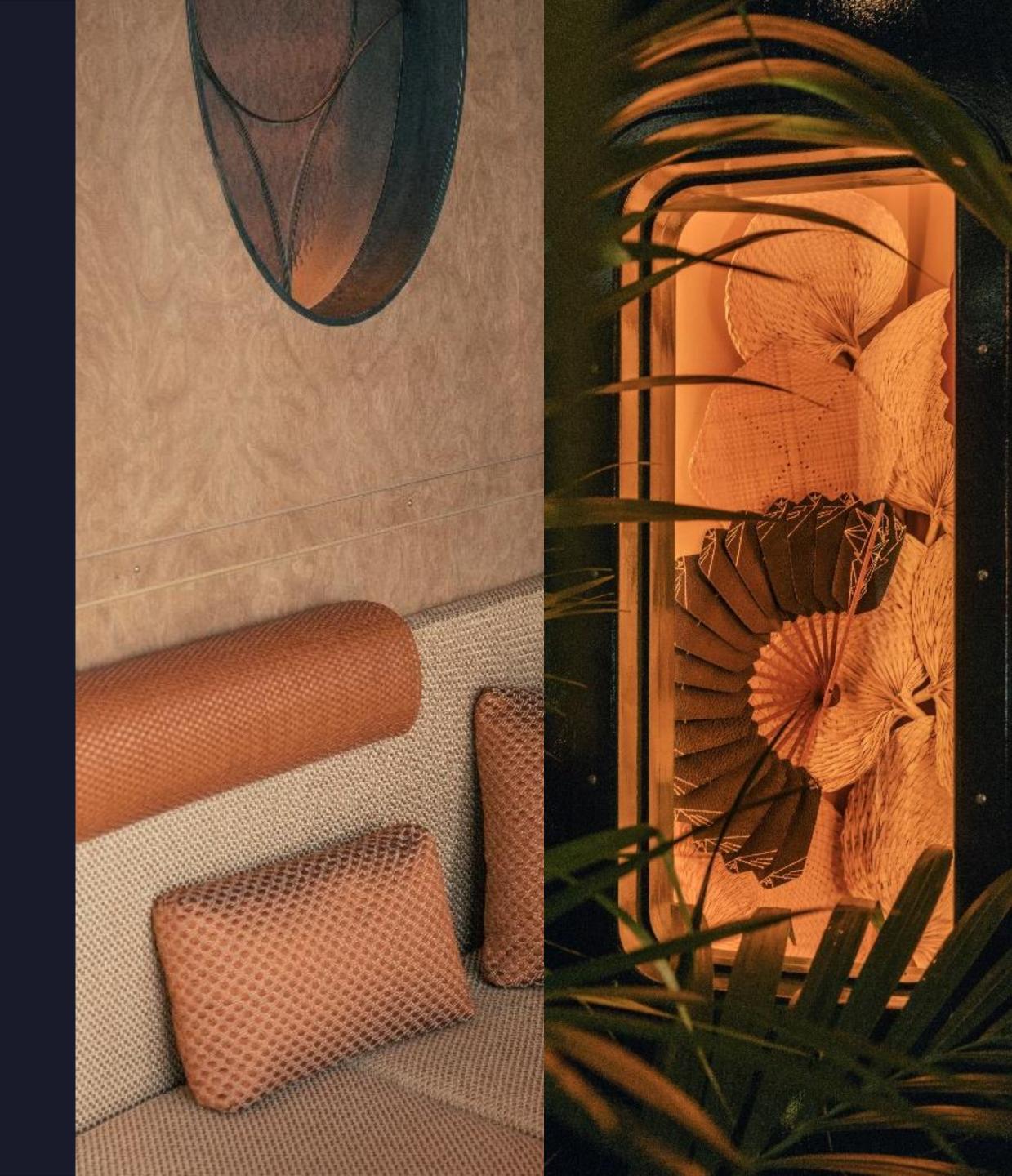
The main codes and values of Art Deco are now being revisited by Orient Express.

... blended with local exoticism as point of differentiation.

Orient Express has a strong and nomadic aesthetic that interacts with its environment, drawing inspiration from every culture to bring out their best.

The cultures blend harmoniously in the decoration, as they are subtly integrated, here and there throughout the hotel: local materials, fine details, colors symbolizing the destination, traditional savoir-faire, finishing touches, etc. Countless elements capable of telling captivating stories of places and cultures.

This exoticism must always be sophisticated and subtle yet remain evident to the cultured eye. Local peculiarities must be felt as soon as the guest enters the hotel, which is conceived as a celebration of the destination.















8 ICONIC ROUTES
ACROSS
14 REGIONS
FROM NORTHERN
TO SOUTHERN
ITALY

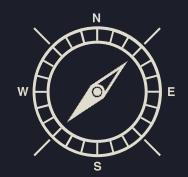




### ORIENT (+)-] EXPRESS







#### THE ROUTES

A MYTHIC TRAVEL ACROSS
CENTRAL EUROPE OR ALONG
THE ORIGINAL ROUTE OF
THE ORIENT EXPRESS.



#### CENTRAL EUROPE

FRANCE

GERMANY

AUSTRIA

HUNGARY

CZECH REPUBLIC



FRANCE

GERMANY

AUSTRIA

HUNGARY

ROMANIA

BULGARIA

TURKEY





ORIENT (+)-] EXPRESS

CORINTHIAN

53 ULTRA-LUXURY SUITES
A MONUMENTAL 1,415-SQUARE-METER
PRESIDENTIAL SUITE
220-METER-LONG
INTERIOR DESIGN BY MAXIME D'ANGEAC
FIRST VOYAGE IN 2026
ADR - 7000€/SUITE/NIGHT

140 years after the launch of its first luxury trains, the Orient Express legend continues with the unveiling of the world's largest sailing ship, Orient Express Silenseas.







PIONEERING THE ART OF
RESPONSIBLE HOSPITALITY,
CONNECTING CULTURES,
WITH HEARTFELT CARE.

This is our Purpose.



## A GLANCE AT ACCOR PORTFOLIO

Open & in the pipeline

HOTELS

+7000 +1,083,000

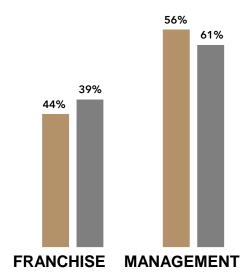
ROOMS

**Accor network\*** 

+5,600 +850,000 ROOMS HOTELS

Accor pipeline\*

+233,000 +1,300 HOTELS ROOMS



All figures as of end of December 2024

\*Based on number of rooms for hotels and Extended Stay hotels, open and in the pipeline. Including MGallery Collection

#### **EUROPE & NORTH AFRICA**

PIPELINE NETWORK 466 H. 3,123 H. 357,346 R. 59,565 R. + 2,400 Hotels under management contract

+ 3,300 Hotels under franchise contract

14%\* 25%\*

#### **GREATER CHINA**

PIPELINE **NETWORK** 354 H. 736 H. 121,062 R. 57,406 R.

#### **AMERICAS**

**PIPELINE NETWORK** 558 H. 138 H. 19,711 R. 103,728 R.

11%\* 13%\*

#### **MIDDLE EAST AFRICA**

**PIPELINE** NETWORK 140 H. 364H. 91,276 R. 31,156 R. 21%\* 28%\*

#### **ASIA & PACIFIC**

**PIPELINE** NETWORK 283 H. 65,361 R. 176,873 R.



# A GLIMPSE INTO OUR LUXURY

PORTFOLIO

Open & in the pipeline

+119,000 +550 HOTELS **ROOMS** 

**Luxury & Lifestyle network\*** 

85,668 382 ROOMS HOTELS

**Luxury & Lifestyle pipeline\*** 

33,730 168 HOTELS ROOMS

**AMERICAS** 

**PIPELINE NETWORK** 72 H. 14 H. 24,983 R.

16%\*

5,332 R.

N°2 Accor is the second global player in the world

40% Pipeline represents 40% of existing network in rooms

WELL balanced footprint

#### **EUROPE & NORTH AFRICA**

**PIPELINE NETWORK** 36 H. 121 H. 17,263 R. 4,636 R.

32%\* 50%\*

#### **ASIA PACIFIC & GREATER CHINA**

**PIPELINE NETWORK** 78 H. 116 H. 16,828 R. 27,127 R.

19%\* 21%\*

#### **MIDDLE EAST AFRICA**

**NETWORK PIPELINE** 73 H. 40 H. 16,295 R. 6,934 R.

## OWNER VALUE PROPOSITION

#### DESIGN & ICONIC & TRAILBLAZING BRANDED ENVIRONMENT, DESIRABLE BRANDS PROGRAMMING SOCIAL & FOOD & BEVERAGE RESIDENCES GOVERNANCE ACCOR ONE LIVING N°1 F&B in house platform ahead of • N°2 in luxury & lifestyle hospitality **HOLISTIC PROGRAMMING** > 60% of L&L eco-certified hotels • N°2 WORLDWIDE in number with > 560 hotels & > 127,000 **APPROACH** from hotels, trains competition with > 2,500 F&B of residences & pipeline in 2024 venues, concepts, brands & & yachts to branded residences, from rooms globally Target of 75% of L&L eco-certified • Only 360° residential platform from restaurants & bars to wellness, from consulting capabilities hotels in 2025 • N°1 with 25 luxury & lifestyle resorts to all-inclusive... development to operations brands globally • F&B revenue between 35% and 45% Achievement of 100% L&L eco-Renowned luxury & lifestyle creative of total hotel revenue certified hotels in 2026 3 brands over 120 years old studios, expertise & partners 50+ dedicated team members

## LUXURY BRAND PORTFOLIO

The Accor Luxury division offers an unrivaled opportunity for partners to invest in a diverse portfolio of iconic and desirable brands covering a broad range of options, from luxury to ultra-luxury, from finely adaptive to perfectly defined or highly curated brands.

#### THE CULTURAL VOYAGE

#### Elevate ultra-luxury travel to culture

#### THE LANDMARKS

A world of elegance and enchanted glamour

#### **SOCIAL EPICENTERS**

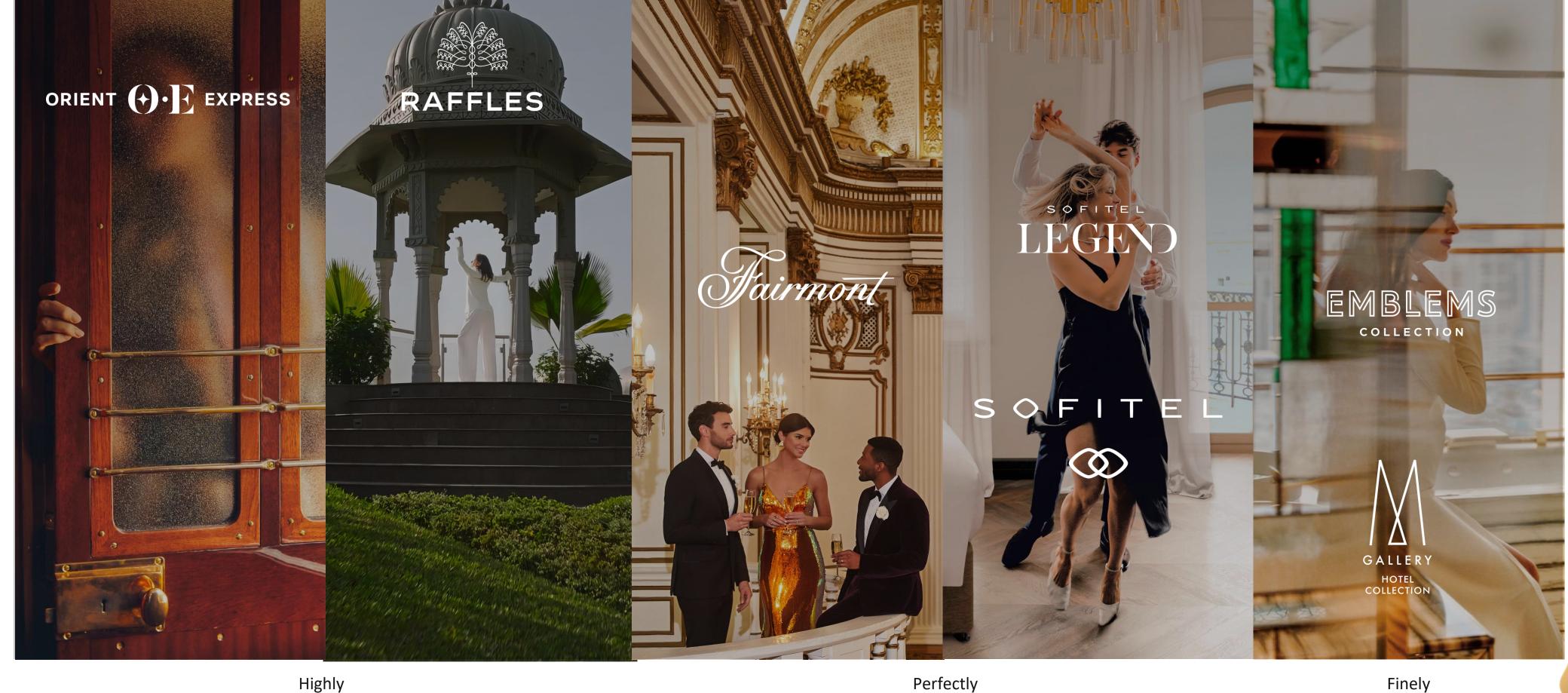
Turning moments into special memories

#### THE FRENCH ZEST

Heartfelt hospitality with a French Zest

#### THE COLLECTIONS

Charismatic collections of boutique-style hotels offering one-of-a-kind experiences



Ultra Luxury

Entry Luxury

22

# THE ART OF DESIGN & PROGRAMING

200+ Luxury & Lifestyle hotel and residential projects

50+ Luxury & Lifestyle D&TS experts worldwide in 10 countries

1+ Luxury & Lifestyle opening per week

Our dynamic, brand-led teams deploy their great savoir-faire to ensure the highest quality of craftsmanship at each stage of the project, through a global Hotel Consultancy Services Agreement (HCSA).

We work with the most renowned creative studios to conceive innovative, highly curated, interior designs.

#### PROGRAMMING

Feasibility Studies

Brand & Design
Standards Introduction

Facilities Area Program

Key Consultants recommendations – Scope of work advise

Design Brief(s)

Budgets & Timeline alignment

**Procurement Strategy** 

#### DESIGN

Project kick-off

Brand & Design Standards Immersion

Operational Planning FoH/HoH zoning, staffing guide

Architecture & Interior Design Lighting/Graphics/Art

Engineering & Sustainability

Food & Beverage
Banqueting & Events

Wellness Gym & Spa

OS&E / FF&E / EQS / EQT\*

Value Engineering

#### CONSTRUCTION

Samples & Mock-up Reviews

Supplier & Manufacturer visits

Design Development Package reviews

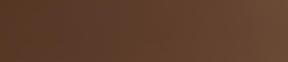
Tender & Procurement

Site Inspections

**Quality Control** 

Testing & Commissioning ~

#### HAND-OVER

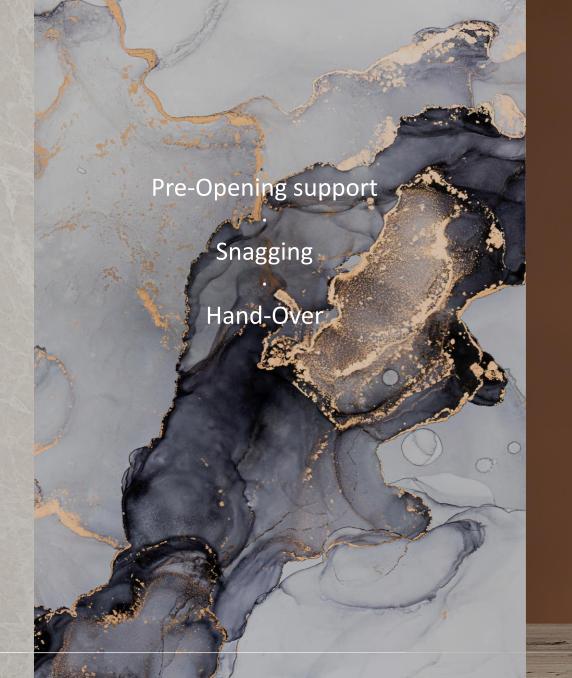


**OPERATING** 

CapEx\*\* planning

**Asset Repositioning** 

Continuous Relationship



All figures as of end of September 2024 \*Operating Supplies & Equipment / Fixtures, Furniture & Equipment / Specialized Equipment (IT ) / Technical Equipment (Fit out)

\*\* Hotel Capital Expenditures



# IN HOUSE FOOD & BEVERAGE PLATFORM BOOST LUXURY & LIFESTYLE HOTELS' REVENUE

2,500+ Restaurants and bars in Luxury & Lifestyle brands

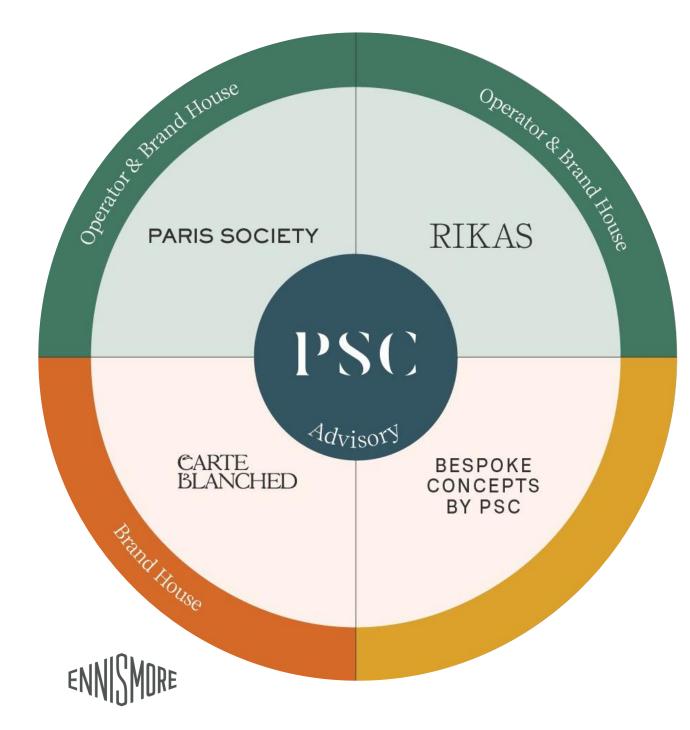
Between 35% to 45% F&B contribution to total hotel revenue

### Luxury Brands' Original F&B Concepts

Our mission is to make F&B
the heart and soul of our luxury hotels
by thinking like restaurateurs and
delivering an experience that is
excellent, relevant and authentic.

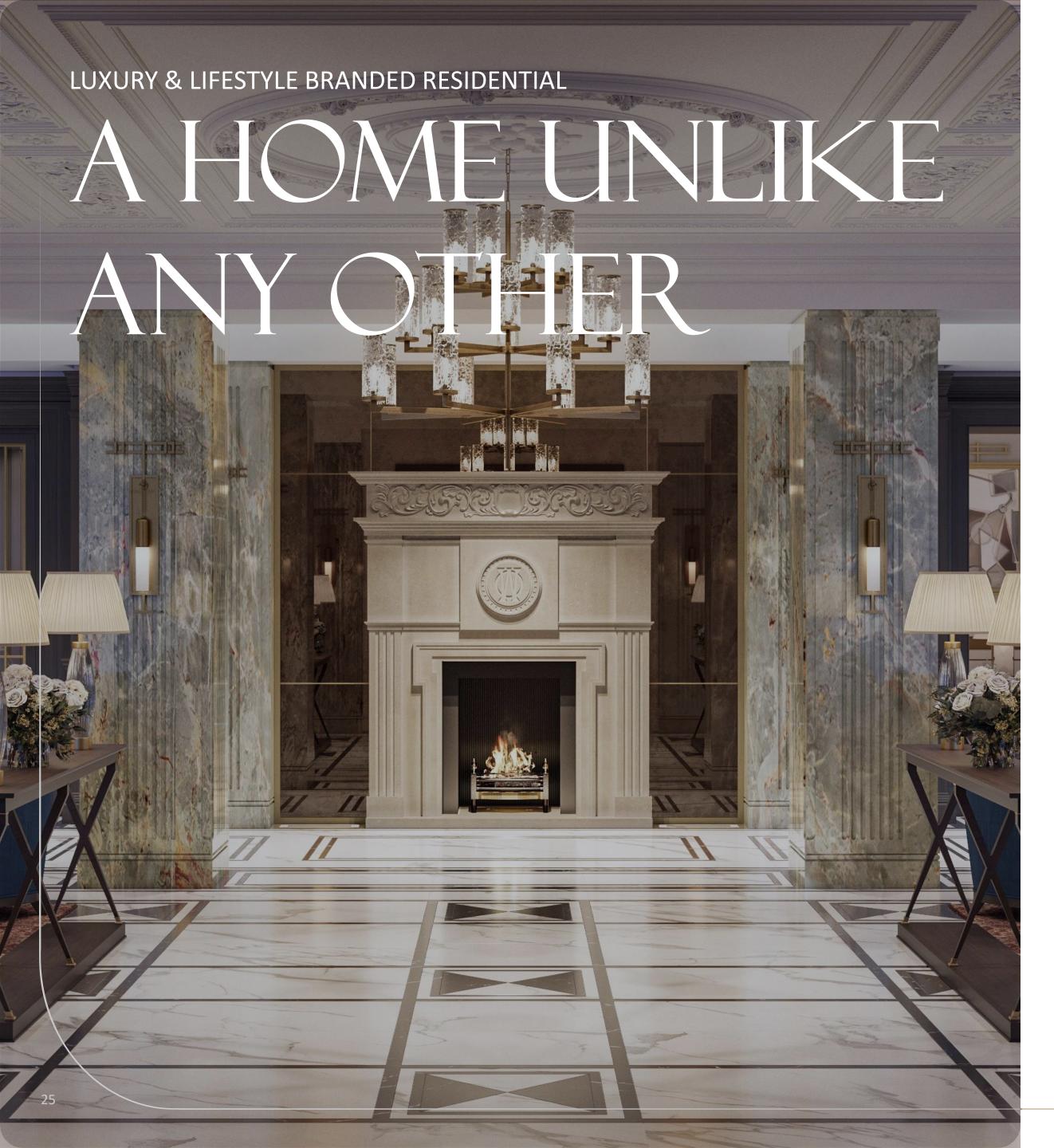
#### POTEL CHABOT

Legendary French cuisine for contemporary events. Potel et Chabot has been reinventing the art of gastronomic catering since 1820.



Ennismore has created an F&B Platform through targeted acquisitions and in-house development to bring together a unique collection of brands with industry-leading advisory and operating capabilities.





#### ACCOR ONE LIVING

# OUR EXPERTISE IN LUXURY & LIFESTYLE BRANDED RESIDENTIAL LEVERAGES HOTEL DEVELOPMENT PROFITABILITY

#2 global operator & developer worldwide\*

c.\$2B residences sold annually under Accor brands\*

40 Luxury & Lifestyle Branded Residences

120 Luxury & Lifestyle Branded Residences open & in the pipeline\*\*

19,000 Luxury & Lifestyle Branded Residences units open & in the pipeline\*\*

5,000 Luxury & Lifestyle owners\*\*

Industry-first residential expertise brings iconic brands and legendary service to private home ownership, offering 360° turnkey solution: from project planning and development to sale and operating.

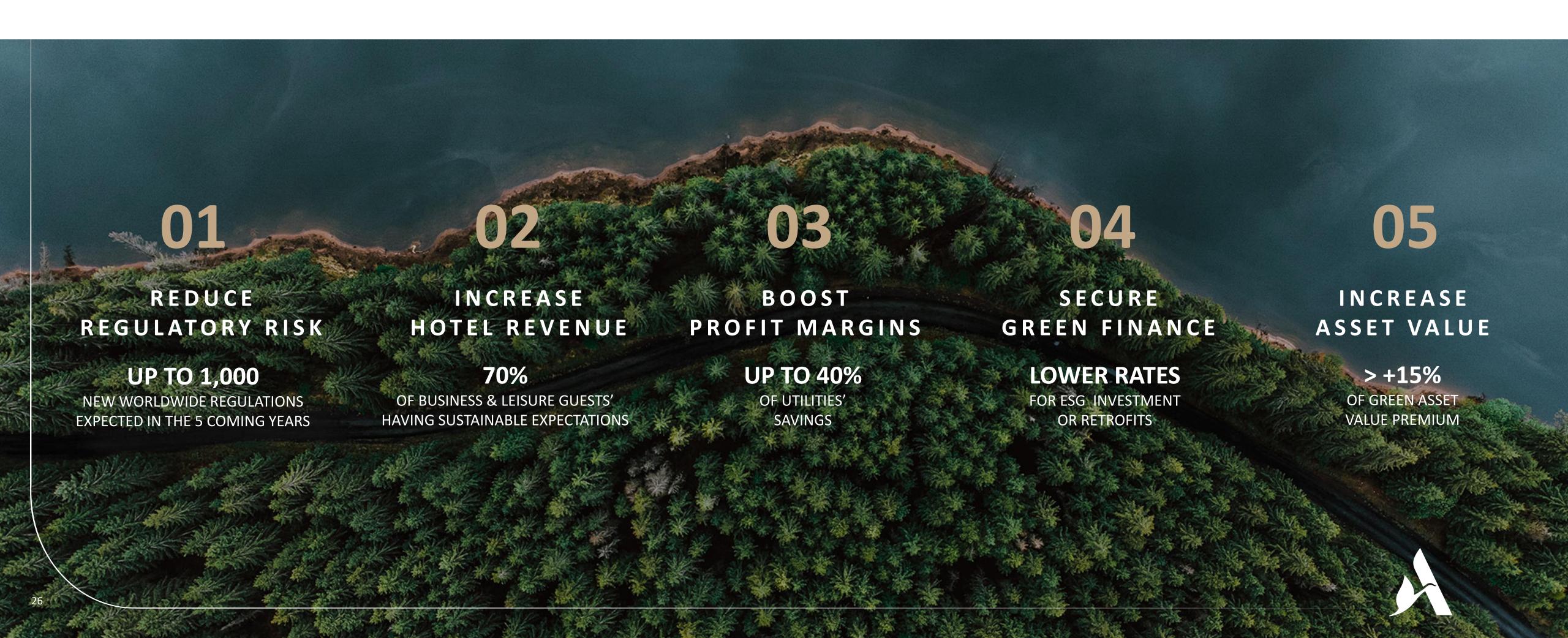


All figures as of end of December 2024

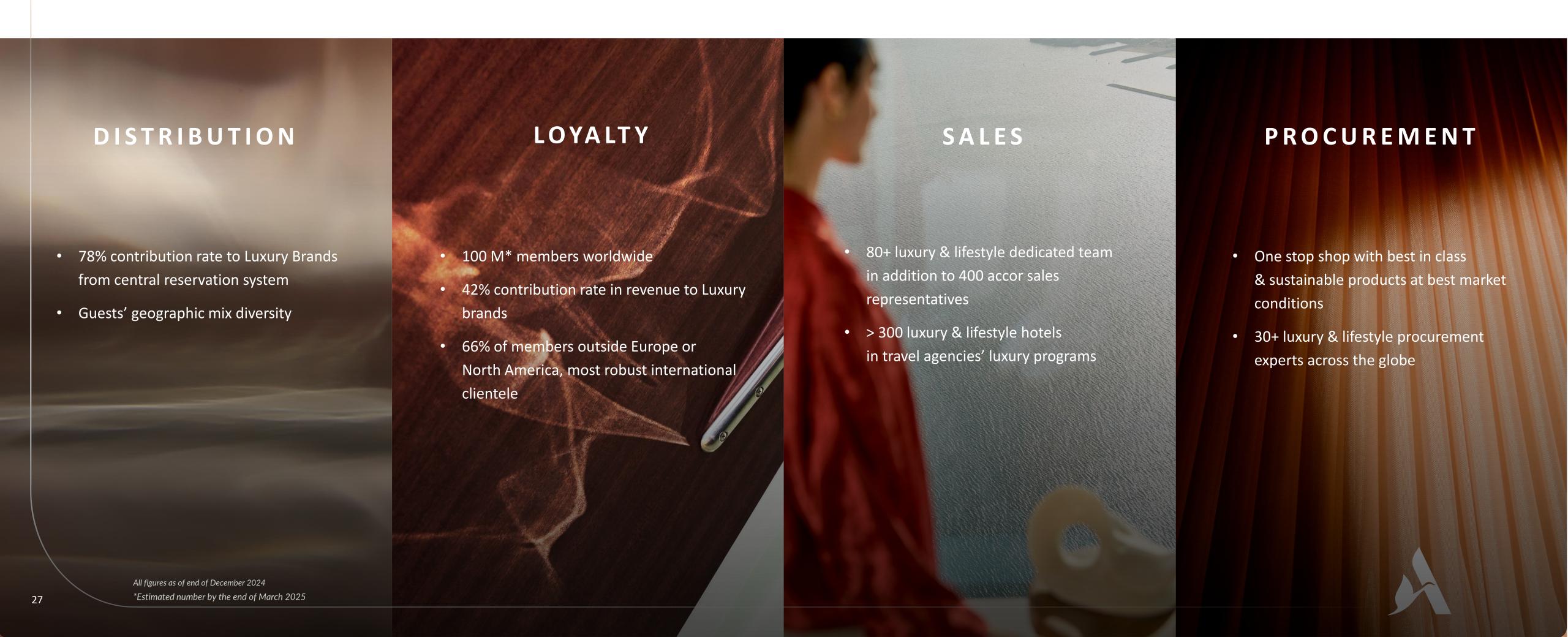
<sup>\*</sup>Based on branded residences for Luxury & Lifestyle and Premium , Midscale and Economy brands : 49
Network and 131 Pipeline worldwide across 26 brands.

<sup>\*\*41</sup> Luxury & Lifestyle Branded Residences and 5,900units & owners in the Network, 81 Luxury & Lifestyle Branded Residences and 12,900 units & owners in the Pipeline.

# SUSTAINABILITY BY NARRATIVE



## UNRIVALED SCALABILITY



# TEL BUSINESS DEVELOPMENT

#### ACCOR DIRECT WEB

**MAXIMIZES HOTEL** DIGITAL NET REVENUE

ACCOR LIVE LIMITLESS

LOYALTY

**DRIVES INCREMENTAL** STAYS AND RETAINS DEMAND

**42%** 

100 100M+\*

loyalty contribution rate in revenue Local & global partnerships

Members

SALES

**DEVELOPS SALES REVENUE** 

160K+

Managed

accounts

> 400+

Accor sales representatives spread all over the world

> 80+

Luxury & Lifestyle sales experts

42% **78**%

> LUXURY & LIFESTYLE CENTRAL RESERVATION

SYSTEM\* 20%

300M+

Visits per year

23%

18

Brands.com websites

international flows

46%

REVENUE **MANAGEMENT** 

LEVERAGES REVENUE MANAGEMENT SYSTEMS POWER

+3%

1,200

Incremental revenue (independent hotels joining Accor)

RM experts around the world

#### OTAS

**NEGOTIATES ATTRACTIVE COMMERCIAL CONDITIONS** 

65M€

Investment in data in 5 years 20

>35M

Partnerships with major OTAS **Room Nights** 

DIGITAL MARKETING

**ATTRACTS & ENGAGES CUSTOMERS** 

1,6Bn 6Bn

Emails sent to customers per year SoMe Impressions

Requests

**17** 1,000 **7M** 

**ACCELERATES BUSINESS** 

People covering Languages all time zones over 12 locations

CONTACT CENTRES

AND IMPROVES CUSTOMER SATISFACTION

Based on revenue: figures as of end of December 2024 \*Estimated number by the end of March 2025



### ALL LOYALTY PROGRAM

100M\* OF ALL LOYALTY MEMBERS WORLWIDE

#### POWERFUL BUSINESS ALLY



X2

Members stay twice more than non-members



+10% ADR

Members spend more than non-members



>80%

of all.com bookings are from members

#### **AUGMENTED OPPORTUNITIES**

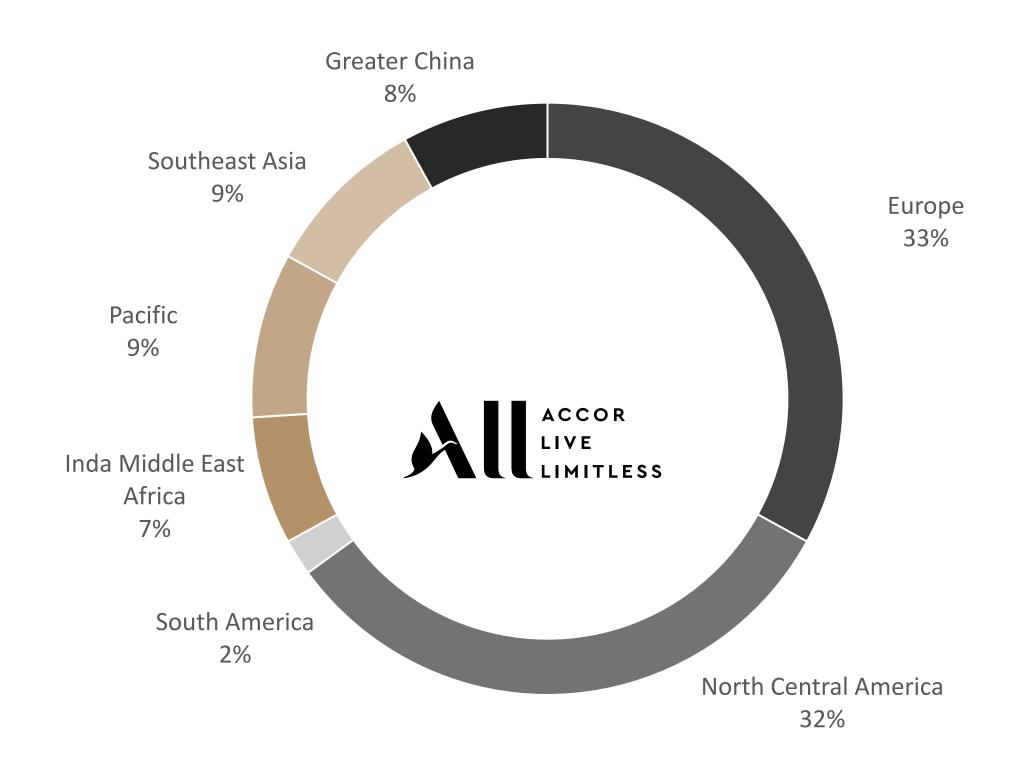
Earn & redeem points with global partnerships around our guests' three main passions: sport, F&B and entertainment.







#### MEMBERS' PLACE OF RESIDENCE





# GLOBAL SALES REACH LUXURY & LIFESTYLE

### LUXURY PROGRAMS GATHERING PREFERRED LUXURY TRAVEL AGENTS

Luxury Programs, Prestigious Travel Networks & Partnerships with Credit Cards Travel Programs.

5,000

Luxury travel agencies

18

**Luxury Programs** 

300+

Luxury & Lifestyle hotels in Luxury Programs











Hotels' Sales Teams



Global Sales Luxury & Lifestyle **80 experts** 

+

Worldwide
Accor Sales Teams
400 experts

#### NEW APPROACH OF STRATEGIC ULTRA LUXURY CLIENTS

Dedicated key account directors covering all the client's needs, worldwide management and business development.

#### **IDENTIFIED LUXURY COMPANIES**

LVMH, Kering, Chanel, Hermès... & the associated agencies

#### **BUSINESS DEVELOPMENT**

Law firms, private banking, jewelry, fine watchmaking...

#### **ENTERTAINMENT**

Film/Music production, artist, specialized agencies

#### STRATEGIC ACCOUNTS

EXCOM and High-end Meetings & Events (in collaboration with Accor Sales teams)



# ASTORE BY ACCOR IS A LEADING PROCUREMENT ORGANIZATION DELIVERING VALUE TO HOTELS AND OWNERS

3B€+ managed spend worldwide

5,000 suppliers' partners globally

250 category management experts in 20 countries

30+ dedicated Luxury & Lifestyles Procurement experts across the globe

Astore by Accor is a leading hospitality Group Procurement Organization and a one stop shop covering luxury & lifestyle hotel needs, OPEX and CAPEX, from daily purchasing of products & services to supporting construction and renovation projects.

Astore actively contributes to the achievement of Accor Sustainability Commitments.

Accor as well as Hilton, IHG, Marriott and Radisson are co-founders of HARP: Hospitality Alliance for Responsible Procurement.



NEW ORGANIZATION DEDICATED TO LUXURY & LIFESTYLE BRANDS & OWNERS

# LEADERSHIP OF PROCURENT



RESTAURANT, BAR & ENTERTAINMENT



OS&E AND FF&E PARTNERSHIP



PROFESSIONAL SERVICES & IT



**ENERGY** 



TECHNOLOGY



PRE OPENING & REFURBISHMENT SUPPORT



