



RAFFLES

ACCOR GLOBAL DEVELOPMENT LUXURY
BRAND DEVELOPMENT BROCHURE - Q1 2026



Historically & architecturally
SIGNIFICANT
landmarks
WHERE IDEAS
are born.

Authentic to its heritage and culture, each Raffles property is meticulously curated and timeless in essence, capturing the spirit of the present while honouring the past.

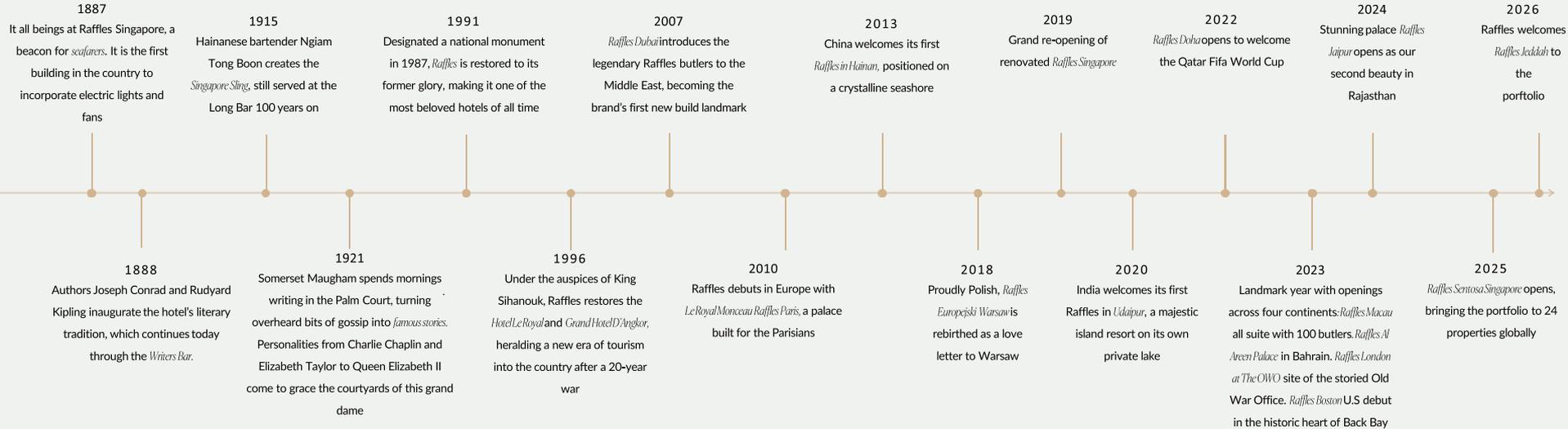
Part of the social fabric of each community, Raffles fosters deep connections and enduring bonds that contribute to its lasting allure.

*We shape our buildings,
thereafter they shape us."*

SIR WINSTON CHURCHILL



Our Stories of SIGNIFICANCE



The background image shows the Hotel Le Royal, a grand, multi-story building with a classical architectural style. The name "HOTEL LE ROYAL" is visible in gold lettering above the entrance. A large, prominent fan palm tree stands in the center foreground, partially obscuring the building's entrance. The scene is set against a clear sky, and the overall lighting is bright, suggesting a sunny day.

Raffles, DEFINED.

A legendary brand defined by cultural significance, elegance and a portfolio of globally revered landmark properties.

Raffles is recognized for delivering exceptional and deeply personalized service, ranking number one worldwide in guest satisfaction and setting the benchmark for ultra-luxury hospitality.

a LEGACY *of* DISTINCTION



Legendary
HERITAGE



Rare & EXCEPTIONAL
portfolio



The ART of
PERSONAL *service*



Cultural STEWARDSHIP
& asset VALUE

- ESTABLISHED IN 1887 WITH A LEGACY SHAPED BY HISTORY
- ONE OF THE WORLD'S MOST STORIED LUXURY HOSPITALITY BRANDS
- HERITAGE THAT IS LIVED & EXPRESSED ACROSS THE PORTFOLIO

- DELIBERATELY SELECTIVE & LIMITED PORTFOLIO OF LANDMARK PROPERTIES
- PRESENCE IN CULTURALLY SIGNIFICANT DESTINATIONS
- GROWTH STRATEGY FOCUSED ON RARITY, EXCLUSIVITY & LONG-TERM ASSET VALUE

- DEEPLY PERSONALIZED SERVICE PHILOSOPHY ROOTED IN DISCRETION & INTUITION
- RANKED NUMBER ONE WORLDWIDE IN GUEST SATISFACTION
- GLOBAL BENCHMARK FOR ULTRA LUXURY HOSPITALITY SERVICE STANDARDS

- STEWARDSHIP OF CULTURAL CONTEXT & ARCHITECTURAL INTEGRITY
- PROVEN EXPERTISE IN HERITAGE SENSITIVE & CULTURALLY LED DEVELOPMENT



A close-up photograph of a person in a white uniform with gold braided cords and buttons. The person's hand is resting on a wooden surface. The background is dark and out of focus.

A PLACE OF ENDLESS
POSSIBILITY WHERE YOU
arrive as a *guest*
leave as a *friend*
and return as *family*.

Leading Hotel Operator & Brand

HIGHEST GUEST SATISFACTION REPUTATION

Seven Years In A Row

Ahead of ultra-lux competitors Four Seasons,
Rosewood, Mandarin Oriental, Peninsula,
St Regis & Ritz-Carlton.

Brand most mentioned by individual colleague
names in guest reviews – showcasing highly
personalised engagement with guests.

Source :Trust You and BDRC



RAFFLES LANDMARK & LEGENDS

- PIPELINE PROPERTY
- CURRENT PROPERTY



RAFFLES 2022

RAFFLES 2026

RAFFLES 2030
network pipeline

18
HOTELS

4
RESIDENCES

2,838
ROOMS

14
COUNTRIES

23
HOTELS

6
RESIDENCES

3,678
ROOMS

18
COUNTRIES

36
HOTELS

16
RESIDENCES

5,350
ROOMS

22
COUNTRIES

AS OF JANUARY 2026



Six HERITAGE LANDMARKS



RAFFLES
SINGAPORE

RAFFLES
EUROPEJSKI
WARSAW



Imbued with history, celebrating their storied pasts, offering a style of hospitality that is in tune with the contemporary lives of their guests.

OTHER HERITAGE LANDMARKS
Raffles Hotel Le Royal Phnom
Penh, Raffles Grand Hotel
d'Angkor Siem Reap, Le Royal
Monceau Raffles Paris



RAFFLES LONDON
AT THE OWO





RAFFLES
BOSTON



RAFFLES
ISTANBUL



At the heart of vibrant cities, seamlessly blending urban sophistication and elegance.

OTHER URBAN ICONS
Raffles Jaipur, Raffles Dubai, Raffles Makkah Palace, Raffles Makati, Raffles Jakarta, Raffles Shenzhen, Raffles At Galaxy Macau

TEN URBAN *icons*



RAFFLES
DOHA



RAFFLES
UDAIPUR



RAFFLES AL AREEN
PALACE BAHRAIN

SEVEN *extraordinary* RESORTS



RAFFLES
SENTOSA

Set in breathtaking locations, seamlessly woven into their landscapes

OTHER EXTRAORDINARY RESORTS
Raffles Hainan, Raffles The Palm Dubai,
Raffles Seychelles, Raffles Bali





RECENT OPENING
RAFFLES
Sentosa

March 2025



UPCOMING OPENING
RAFFLES
Jeddah

PIPELINE *highlights*



RAFFLES LAKE COMO
Italy 2027



RAFFLES TOKYO
Japan 2029



RAFFLES ESTERA EAST CAPE
Mexico 2029





A Home Unlike Any Other RAFFLES RESIDENCES

Raffles' branded residences continue to set new market records, becoming the most sought-after addresses and a testament to the enduring strength of the brand.

Raffles Jakarta

37%
PRICE PREMIUM

Raffles London at The OWO

£1BN
OF REAL ESTATE,
A NEW RECORD IN UK

Raffles Makati

29%
PRICE PREMIUM

Raffles Boston

65%
PRE-SOLD

Raffles Shenzhen

€70K
HIGHEST PRICE PER
SQ METER EVER SOLD

Raffles Diriyah

90
DAYS TO SELL OUT



Flagship GASTRONOMY



Saison & Mauro Colagreco
Raffles London at The OWO



Yi by Jereme Leung
Raffles Singapore



Matagi
Raffles The Palm Dubai



Matsuhisa
Le Royal Monceau, Raffles Paris



Il Carpaccio
Le Royal Monceau, Raffles Paris



Flagship SPAs



LE ROYAL MONCEAU, RAFFLES
PARIS



RAFFLES SINGAPORE



RAFFLES DOHA



RAFFLES LONDON AT THE OWO



RAFFLES THE PALM DUBAI



Global Brand Recognition
PRESTIGIOUS AWARDS





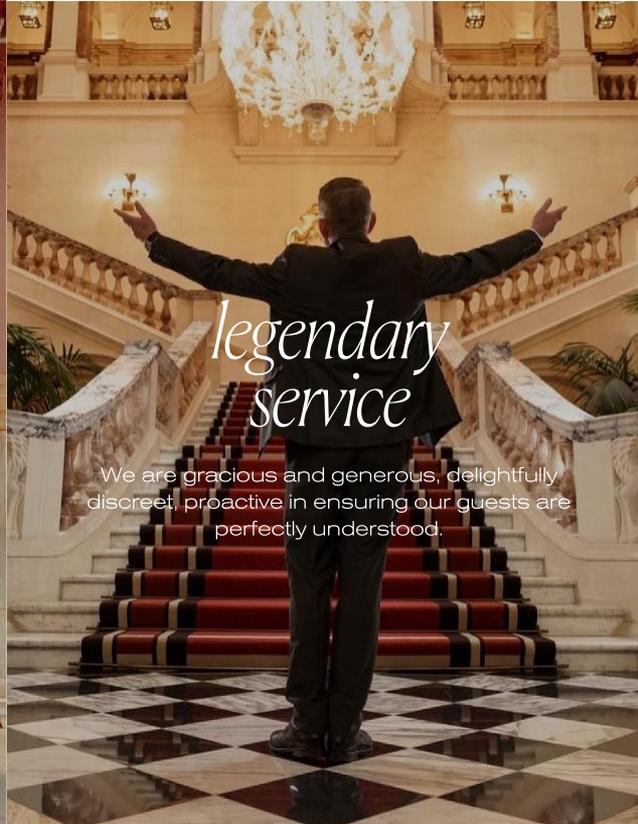
BRAND PILLARS
& *marketing activations*

OUR *pillars*



champions of culture

We celebrate and champion fine art and design, and foster culture in all its forms.



legendary service

We are gracious and generous, delightfully discreet, proactive in ensuring our guests are perfectly understood.



custodians of community

As the vibrant and authentic heart of a destination, loved by generations, we have an obligation to act as environmental and social leaders.



Our PASSIONS



GASTRONOMY
Taste, theater, savoir vivre



CULTURE & ART
Art, culture, community



WELLBEING
Emotional wellbeing, sumptuous
scape, nature



CELEBRATIONS
Gathering families and friends for
life milestones, memories



SUSTAINABILITY
Eco-certified, waste management,
women in leadership



Raffles ESG

FOR PROMOTING ETHICS AND LONG-TERM VIABILITY



SINGLE USE PLASTIC FREE



FOOD WASTE
MANAGEMENT



CARBON EMISSION
REDUCTION TARGETS



WASTE MANAGEMENT
& RECYCLING PROGRAM



PRESERVING LOCAL
CULTURAL & NATURAL
HERITAGE



40% WOMEN IN
LEADERSHIP



Brand Communication HIGHLIGHTS



GLOBAL COMMS
2025 generated Media Value of
~9.2 Million USD
PR Value ~ 27 Million USD
+65 media stays hosted
+632K Social Media Followers (+13.5% YOY)



SIGNATURE EXPERIENCES
Tailor-made experiences designed to bring the spirit of the global campaign to life through unique and truly exceptional offerings.



ASSOULINE
Launch Assouline book with celebrations in New York, London & Paris



RAFFLES 1887
40 new articles on Raffles 1887, the online features platform takes a deeper dive into the stories and conversations that shape the enchanted world of Raffles.



NEW BRAND STANDARDS
New guest experience programs—spanning OS&E, wet and dry amenities, and linen standards. Aligned with the new Raffles visual identity to elevate the Raffles guest experience globally.



Brand Campaign – The Butler Did It

HIGHLIGHTS



THE BUTLER DID IT CHAPTER TWO

Launch Chapter Two of *The Butler Did It* with Awareness Campaign shot at Raffles London at The OWO.

LAUNCH PARTY

VIPs, Influencers, Media celebrate the Launch Of Chapter Two at Raffles London at The OWO.



AIR MAIL PARTNERSHIP

London & New York Pop-ups to launch *The Butler Did It* With Air Mail Audience



FIRST CLASS JERK

The Butler Did It at Raffles Istanbul
Newsletter Feature
The Butler Did It Content
Raffles London Tour With Omer Acar



PR & COMMUNICATIONS

- 280 MILLION PR IMPRESSIONS
- 16.7 MILLION DIGITAL MEDIA IMPRESSIONS



Raffles PARTNERSHIPS

FOR EXPERIENCES THAT CATER TO THE MOST DISCERNING CLIENTELE



GLOBE-TROTTER



ASSOULINE



SMYTHSON



RANGE ROVER



CHRISTOFLE



RAFFLES *Key Initiatives*



RAFFLES x PRINTEMPS

1-MONTH EXCLUSIVE POP-UP IN NEW YORK & PARIS, WITH LAUNCH EVENTS AT BOTH LOCATIONS



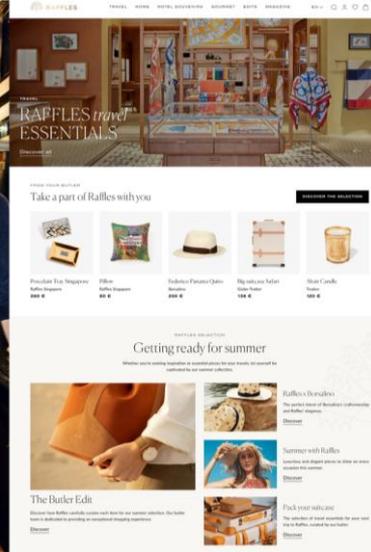
RAFFLES x CHRISTOFLE

A "TABLE BY CHRISTOFLE" EXPERIENTIAL DINING CONCEPT IN RAFFLES KEY DESTINATIONS INCLUDING CO-BRANDED PRODUCT.



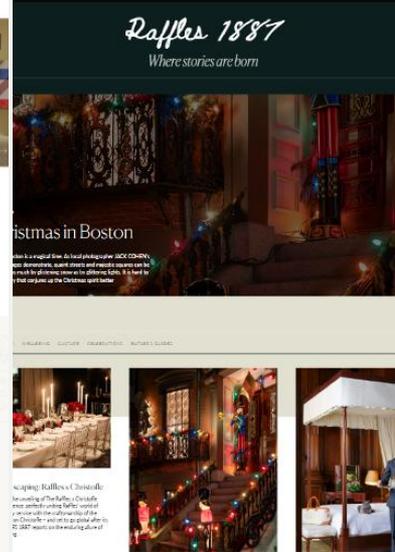
THE BUTLER DID IT

REIMAGINED BUTLER EXPERIENCES, ELEVATING SERVICE, STORYTELLING, AND GUEST ENGAGEMENT ACROSS THE PORTFOLIO.



E-RETAIL LAUNCH

RAFFLES REIMAGINES HOTEL BOUTIQUES FOR THE ULTRA-LUXURY GUEST, AND DEBUTS RAFFLES.COM E-COMMERCE.



RAFFLES 1887

OUR UNIQUE ONLINE MAGAZINE, REFRESHED QUARTERLY.

CONTINUING TO TELL OUR AUTHENTIC RAFFLES STORIES IN AN ENGAGING EDITORIAL WAY.



A photograph of the Raffles Hotel in Singapore, a grand white neoclassical building with a red-tiled roof and a central portico. The building is surrounded by lush tropical vegetation, including palm trees and large-leafed plants. In the foreground, there is a circular driveway with a central green island and several vintage cars parked. The sky is overcast. The text "THE BIRTHPLACE OF stories and legends SINCE 1887." is overlaid in white serif font on the building's facade.

“THE BIRTHPLACE OF
stories and legends
SINCE 1887.”



ACCOR

THE OWO

LUXURY BRANDS - OWNER VALUE PROPOSITION
GLOBAL DEVELOPMENT

Q1 2026

RAFFLES LONDON AT THE OWO
UNITED KINGDOM

A GLANCE AT ACCOR PORTFOLIO

Open & in the pipeline

+7100 HOTELS **+1,091,000** ROOMS

Accor network*

+5,700 HOTELS **+880,000** ROOMS

Accor pipeline*

+1,500 HOTELS **+255,000** ROOMS

+ 2,200 Hotels under management contract

+ 3,500 Hotels under franchise contract

41%* **24%***

EUROPE & NORTH AFRICA

NETWORK	PIPELINE
3,141 H. 360,126 R.	500 H. 61,549 R.

15%* **25%***

GREATER CHINA

NETWORK	PIPELINE
803 H. 129,966 R.	402 H. 63,826 R.

12%* **9%***

AMERICAS

NETWORK	PIPELINE
569 H. 107,270 R.	153 H. 21,969 R.

11%* **16%***

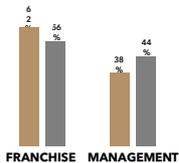
MIDDLE EAST AFRICA

NETWORK	PIPELINE
377 H. 97,984 R.	181 H. 41,880 R.

21%* **26%***

ASIA & PACIFIC

NETWORK	PIPELINE
946 H. 186,081 R.	291 H. 67,910 R.



All figures as of end of December 2025
 *Based on number of rooms for hotels and Extended Stay hotels, open and in the pipeline.
 Including MGallery Collection



A LOOK AT ACCOR PORTFOLIO

PREMIUM, MIDSACLE & ECONOMY

pullman		swissôtel		MÖVENPICK	
Handwritten	NOVOTEL	MERCURE	TRIBE	ADAGIO	
ibis		ibis styles		ibis budget	
REGIONAL BRANDS					
mantis	Art Series	GRAND MERCURE	ANGSANA	PEPPERS	
THE SEBEL	mantra	BreakFree	greet	hotelFT	

LUXURY & LIFESTYLE

ORIENT EXPRESS		RAFFLES		Fairmont	
SOFITEL LEGEND	EMBLEMS	SOFITEL		M GALLERY	
PARTNER BRANDS					
FAENA			BANYAN TREE		
ENNISMORE					
DJC	25h twenty five hours hotels	DELANO	GLENEAGLES	HYDE	
JO&JOE	MAMA SHELTER	MONDRIAN		MORGAN'S ORIGINALS	
OUR HABITAS	PARIS SOCIETY	RIKAS		RIXOS	
SLS	SO/	the hoxton	working from		

RESIDENTIAL & PRIVATE RENTAL

ACCOR ONE LIVING
onefinestay

WORKSPITALITY

WOWO
officeriders
MAMA WORKS

ENTERTAINMENT

POTEL&CHABOT
DALLOYAU
SAINTCLAIR
THEATRE DU-LIDO

BUSINESS ACCELERATORS

ASTORE d-edge SEKKO
VERYCHIC JOHN PAUL



A GLIMPSE INTO OUR LUXURY PORTFOLIO

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

Pipeline represents 40% of existing network in hotels

WELL balanced footprint

Open & in the pipeline

+530 HOTELS +114,000 ROOMS

Luxury network*

379 HOTELS 87,751 ROOMS

Luxury pipeline*

152 HOTELS 27,009 ROOMS

28% 13%*
AMERICAS
NETWORK PIPELINE
71 H. 12 H.
24,711 R. 3,493 R.

21%* 16%*
EUROPE & NORTH AFRICA
NETWORK PIPELINE
130 H. 41 H.
18,393 R. 4,298 R.

33%* 45%*
ASIA PACIFIC & GREATER CHINA
NETWORK PIPELINE
120 H. 65 H.
28,609 R. 12,139 R.

18%* 26%*
MIDDLE EAST AFRICA
NETWORK PIPELINE
58 H. 34 H.
16,038 R. 7,079 R.

All figures as of end of December 2025

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



OWNER VALUE PROPOSITION

ICONIC & DESIRABLE BRANDS

- **N°2** in Luxury & Lifestyle hospitality with **close to 600 hotels & > 136,000 rooms globally**
- **N°1** with **25 Luxury & Lifestyle brands globally**
- **3 brands over 120 years old**

DESIGN & PROGRAMMING

- **Holistic programming** approach from hotels, trains & yachts to branded residences, from restaurants & bars to wellness, from resorts to all-inclusive...
- Renowned Luxury & Lifestyle creative studios, expertise & partners
- 50+ dedicated team members

TRAILBLAZING FOOD & BEVERAGE

- **N°1** F&B in house platform ahead of competition with **> 2,500** F&B venues, concepts, brands & consulting capabilities
- F&B revenue between 35% and **45%** of total hotel revenue

BRANDED RESIDENCES ACCOR ONE LIVING

- **N°2** worldwide in number of residences & pipeline
- Only 360° residential platform from development to operations

ALL INCLUSIVE COLLECTION

- **N°2** global luxury all-inclusive platform
- Only 360° all inclusive platform from development to operations

ENVIRONMENT, SOCIAL & GOVERNANCE*

- **40% of women in leadership** in L&L hotels
- **76% of eco-certified** L&L hotels globally
- **50% food waste reduction** in L&L hotels
- **92%** in L&L hotels with **zero single use plastics**

* in YTD December 2025



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

Making every moment a celebration

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



Highly
Curated

Perfectly
Defined

Finely
Adaptive



THE ART OF DESIGN & PROGRAMMING

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

- Pre-Opening support
- Snagging
- Hand-Over

OPERATING

- CapEx** planning
- Asset Repositioning
- Continuous Relationship

All figures as of end of December 2025 *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.

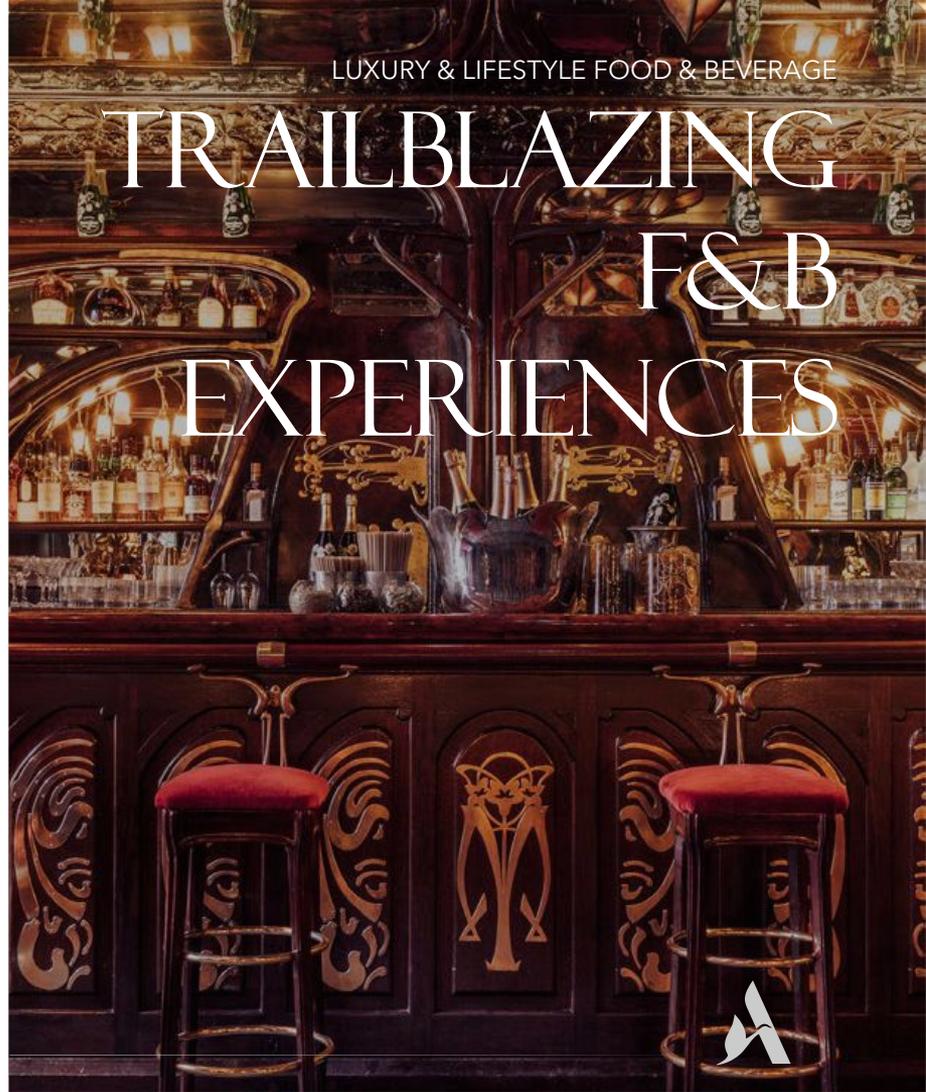
PARIS SOCIETY

ENNISMORE

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.

LUXURY & LIFESTYLE FOOD & BEVERAGE

TRAILBLAZING F&B EXPERIENCES



LUXURY & LIFESTYLE BRANDED RESIDENTIAL

REFINING THE ART OF LIVING

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*

55 Luxury & Lifestyle Branded Residences

130+ Luxury & Lifestyle Branded Residences open & in the pipeline**

18,000+ Luxury & Lifestyle Branded Residences units open & in the pipeline**

9,000+ 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 2025

**Based on branded residences for Luxury & Lifestyle and Premium, Midscale and Economy brands : 55 Network and 130+ Pipeline worldwide across 26 brands.*

***43 Luxury & Lifestyle Branded Residences and 6,400+ units & owners in the Network, 86 Luxury & Lifestyle Branded Residences and 11,900+ units & owners in the Pipeline.*



All Inclusive
COLLECTION

LEADING ALL INCLUSIVE RESORTS
COLLECTION WITH UNRIVALLED EXPERTISE
IN ESCAPISM & ENTERTAINMENT

#2 global luxury all-inclusive platform worldwide

53 hotels and >25,000 rooms open

13 hotels and over 5,800 rooms in the pipeline

All Inclusive Collection is a multi-branded platform, leveraging the expertise of Rixos to curate the best all-inclusive resorts from global brands reimagining the experience their way.

LUXURY

Fairmont
HOTELS & RESORTS

SOFITEL
HOTELS & RESORTS

RIXOS
HOTELS

ENNISMORE

SLS

SO

MONDRIAN

HYDE

LUXURY & LIFESTYLE ALL INCLUSIVE COLLECTION

ALL INCLUSIVE
ALL EXCLUSIVE



SUSTAINABILITY IS GOOD FOR BUSINESS

01

SECURE INVESTMENT GREEN FINANCING

Low Debt Cost
for ESG-linked loans

Hotel sustainable investment or upgrades make them attractive to banks and investors: mitigates future risk to revenue.

02

REDUCE REGULATORY RISK

20 to 30
new worldwide regulations
Expected to come in the 5 years

World class brands and hotels have no choice but to comply with new sustainability regulations to attract international guests.

03

INCREASE HOTEL REVENUE

70%
of business & leisure guests'
having sustainable expectations

Booking engines and OTAs are flagging eco-certified hotels (ALL.com, Google, Booking.com, HRS...).

04

BOOST PROFIT MARGINS

20%
utility savings on average for
energy efficient buildings

Decrease in utility consumption results in carbon emission reduction and costs.

05

INCREASE ASSET VALUE

+10 to 15%
green asset value premium

Sustainable hotels are more profitable today, more bankable tomorrow.



UNRIVALED SCALABILITY

DISTRIBUTION

- **77% contribution rate** to Luxury & Lifestyle Brands **from central reservation system**
- Guests' geographic mix diversity

LOYALTY

- **115 M** members worldwide
- **+40% contribution rate** in revenue to Luxury & Lifestyle brands
- **68%** of members outside Europe or North America, most robust international clientele

SALES

- **80+** Luxury & Lifestyle dedicated team in addition to **400** Accor sales representatives
- **> 300** Luxury & Lifestyle hotels in travel agencies' luxury programs

PROCUREMENT

- One stop shop with **best in class & sustainable products** at **best market conditions**
- 30+ luxury & lifestyle procurement experts across the globe



L&L COMMERCIAL VALUE PROPOSITION POWERED BY ACCOR

LOYALTY

DRIVES INCREMENTAL STAYS AND RETAINS DEMAND

42% Luxury & Lifestyle loyalty room night contribution

+140 Local & global partnerships

115M+ Members

DIGITAL MARKETING

ATTRACTS & ENGAGES CUSTOMERS

1.2Bn Emails sent to customers per year

6.7Bn Social Media Impressions

>5M Followers on Accor TikTok account

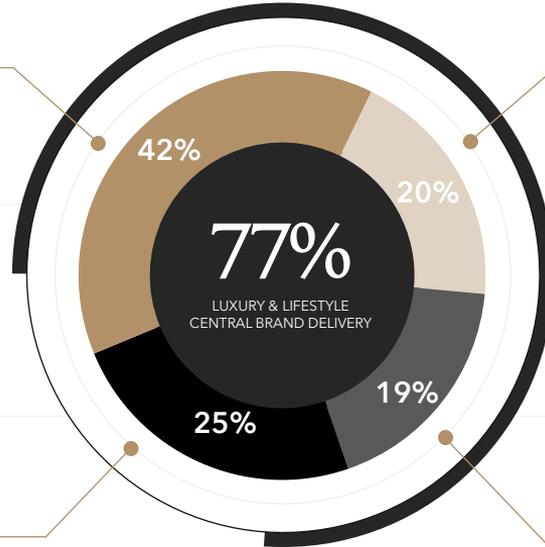
SALES

DEVELOPS SALES REVENUE

30K+ Managed accounts

400 Accor sales representatives spread all over the world

80 Luxury & Lifestyle sales experts



RESERVATION CENTRES

ACCELERATES BUSINESS AND IMPROVES CUSTOMER SATISFACTION

6M Yearly contacts

+30% ADR vs intra hotel thanks to upsell

92% LQA guest satisfaction

ACCOR WEB DIRECT

MAXIMIZES HOTEL DIGITAL NET REVENUE

27% International flows

11 Brands.com websites

300M+ Visits per year

REVENUE MANAGEMENT

LEVERAGES REVENUE MANAGEMENT SYSTEMS POWER

+3% Incremental revenue (independent hotels joining Accor)

> 1,200 RM experts around the world

OTAS & CONNECTED LEISURE ACCOUNTS

NEGOTIATES ATTRACTIVE COMMERCIAL CONDITIONS

4 Exclusive wholesalers: Expedia, HotelBeds, WebBeds & Infinite

51M Stayed Room Nights

+25 Connected OTAs

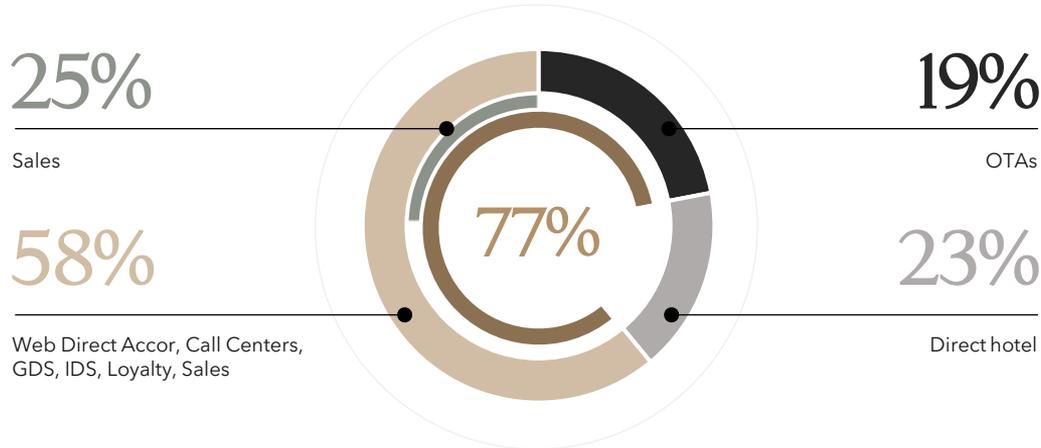
Based on revenue: figures as of end of December 2025



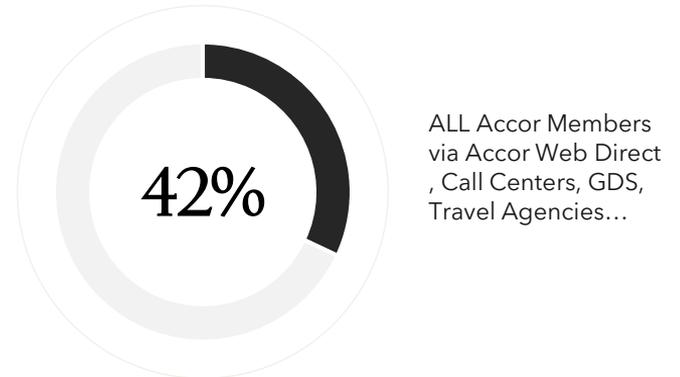
UNRIVALED SCALABILITY TO MAXIMIZE YOUR BUSINESS

77% of a Luxury & Lifestyle hotel revenue is driven by Accor Distribution, Loyalty & Sales Ecosystem on average.

REVENUE CONTRIBUTION GENERATED BY ACCOR



ROOM NIGHT CONTRIBUTION GENERATED BY ALL ACCOR LOYALTY PROGRAM



CBD (Central Brand Delivery) measures the business in revenue brought by Accor to the hotel through the 3 main group levers: Distribution (through Central Reservation System - CRS), Loyalty & Sales. Figures as of end 2025 - Data from UPE

WEB DIRECT & OTAS, A WINNING DUO

WEB DIRECT: ALL.COM + BRANDS.COM IS THE 1ST WEB CHANNEL AT ACCOR TO BOOST YOUR PROFITABILITY

WEB DIRECT & INDIRECT REVENUE

90% Of Web Direct bookings are made by **ALL Accor members** benefiting from member's rate (5% to 10% discount)

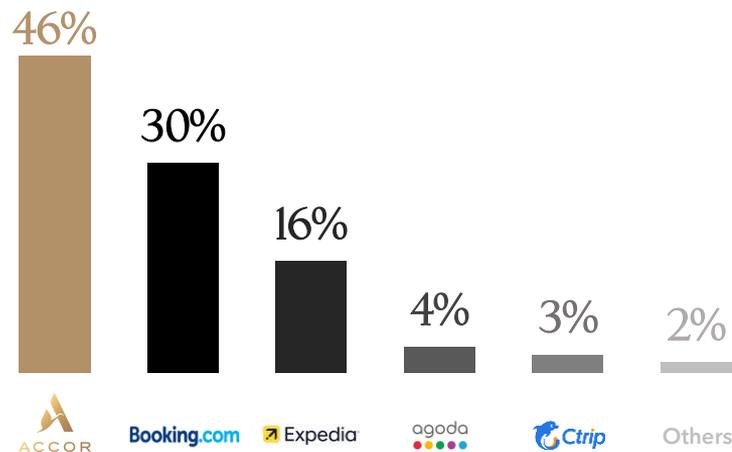
Share of web direct or web indirect revenue in total web revenue
YTD December 2025

+15% ADR vs Web indirect

X 2 ROI vs Web indirect

→ **Well-known customers, boosted to stay at your hotels through**

- **1.2Bn** email campaigns, **172M** push app notifications, SMS, push web
- **6K** digital marketing campaigns per year worldwide
-  n°2 travel account with 194Bn impressions and 1.3M followers,  n°4)
- App investments, the fastest growing channel **+23%** vs LY, **7** downloads per minute



WEB DIRECT & OTAS, A WINNING DUO

+25 OTAS PREFERRED PARTNERS TO PROVIDE MASSIVE VISIBILITY ON UNTAPPED NEW GUESTS AT BEST PRICE

Lower dependency to Expedia / Booking, targeting **key markets** as well as **niche** ones

Boost your topline at the best price :

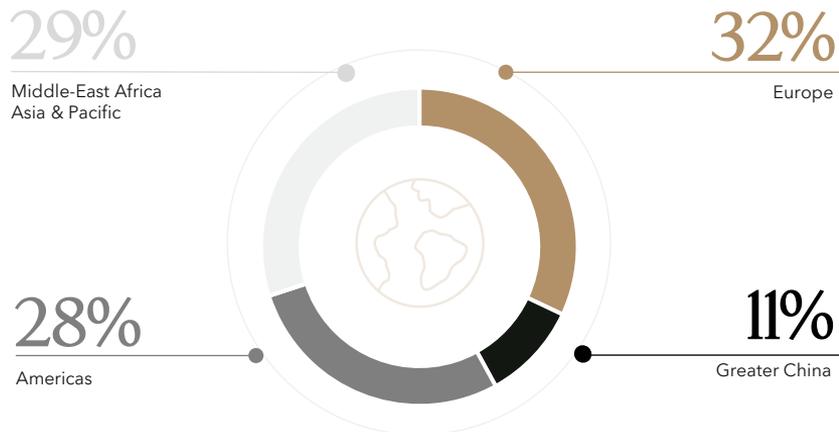
- **Best-in-class commissions** rate available on the market
(Below competition in EU & ASPAC for economy & midscale brands, matching competition for others)
- Frequent negotiated **marketing incentives**
- **No last-room availability** requirements enabling yield management
- Package, Opaque and Dayuse availability
- Strict **rate parity & compliance rules** enforced contractually with OTA partners.



ALL ACCOR GLOBAL LOYALTY PROGRAM

Joining Accor grants you direct access to +115 million members, poised to fill 42% of your hotel's rooms...

A WORLDWIDE PLATFORM OF 115+ MILLION MEMBERS



ALL ACCOR MEMBERS' PLACE OF RESIDENCE

HAVING BOOKED AT LEAST ONCE A LUXURY & LIFESTYLE HOTEL

POWERFUL BUSINESS MULTIPLICATOR



ALL ACCOR LIFESTYLE LOYALTY PROGRAM

... Elevated through experiences, making ALL Accor the most praised & understood program

CAN'T BUY EXPERIENCES & RICHEST RANGE OF PARTNERS

AUGMENTED OPPORTUNITIES

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



LEVERAGE BENEFITS & OFFERS

140+ partners network where our loyalty currency is valued and can be either earned and/or burned.

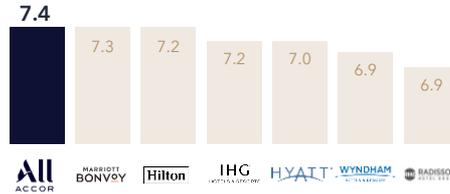


MOST PRAISED PROGRAM



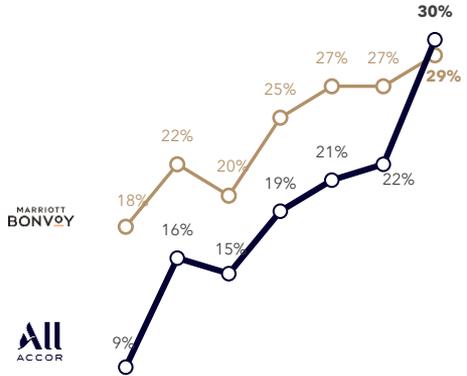
Nb of & won since its creation in 2019

MOST LOVED BRAND



Brand Love score

HISTORIC INCREASE IN AWARENESS IN 2025



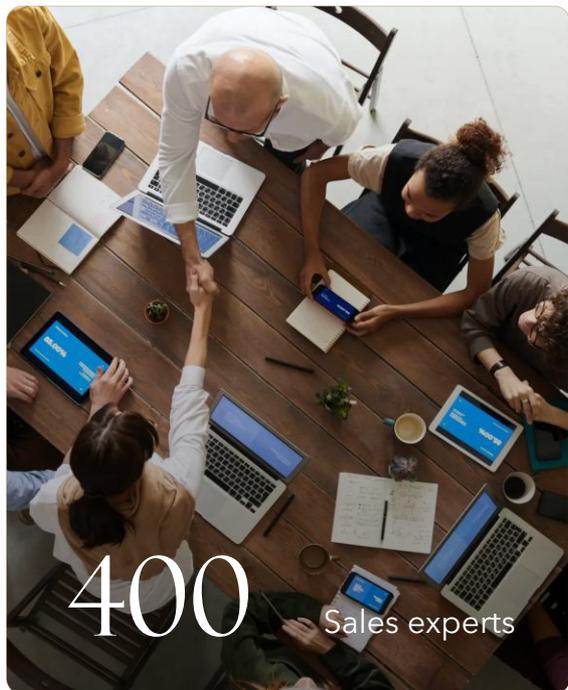
2019 2020 2021 2022 2023 2024 2025

Brand Awareness for hotel users

Source: BEAM Study September 2025. Among Hotel users for hotel brands only. The overall scores in this slide, both for ALL Accor and other brands, represent an arithmetic mean of scores from France, Germany, the UK, the USA, China, Brazil, Australia, and the UAE. No weight was assigned to individual countries in calculating the global scores.



ACCOR SALES TEAMS DRIVE AN ADDITIONAL 25% OF HOTEL TOP-LINE



400 Sales experts

10K Premier & Strategic Accounts

					TA & TMC (1)				
					LEISURE CONNECTED TO (2)				
									MEETINGS & EVENTS
									CORPORATE
									AIRLINE CREWS

(1) TA = Travel Agencies // TMC = Travel Management Companies
 (2) TO = Tour Operators



L&L SALES EXPERTS GRASP HIGH CONTRIBUTION MARKETS

LUXURY TRAVEL AGENCIES

STAFF: 19

AMERICAS: 5
EUROPE & AFRICA: 6
IME-APAC: 8

HIGH CONTRIBUTION
LEISURE INDIVIDUAL



STRATEGIC L&L CLIENTS

STAFF: 29

NORTH AMERICA: 22
EUROPE: 7

LUXURY CORPORATES,
M&E, ENTERTAINMENT



LEISURE OPERATORS L&L

STAFF: 5

BASED IN
NORTH AMERICA

HIGH CONTRIBUTION
LEISURE FIT & GROUP



HERA B2B TRAVEL AGENCIES LOYALTY PROGRAM

STAFF: 6

BASED
IN PARIS

HIGH CONTRIBUTION
LEISURE INDIVIDUAL



B2B COMMUNICATION & EVENTS

STAFF: 9

BASED
IN PARIS

+40 WORLDWIDE SALES
TRADSHOWS & 200
ACTIVATIONS



SUPPORTED BY 8 PEOPLE IN CROSS FUNCTIONS



CALL CENTERS TAILORED FOR L&L

DELIVERING A POWERFUL RANGE OF SERVICES, EASING OPERATIONS

4 ACTIVITIES

RESERVATION | OVERFLOW | CUSTOMER CARE | CARE VIP DESK

18 LANGUAGES

12 SITES

2 dedicated to Luxury

24/7 SERVICE



6M Contacts



75% Sales Conversion

TO DRIVE REVENUE GROWTH AT THE LOWEST COST WITH THE BEST QUALITY OF SERVICE

IMPROVE HOTEL P&L...

📈 Boosting Sales

30% Higher ADR than Intra-Hotel Through upsell

💰 At the lowest cost

- Competitive fee
- Reduce operations cost

RESULTING IN POSITIVE P&L CONTRIBUTION

...AT THE BEST QUALITY OF SERVICE

👍 Strong Quality

92% Guest satisfaction /LQA

- Extremely selective recruitment
- Expert training in Accor brands, hotel knowledge, and culture
- Tailored sales pitches for each hotel

Figures as of end of December 2025



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 PROCUREMENT



RESTAURANT, BAR & ENTERTAINMENT



OS&E AND FF&E PARTNERSHIP



PROFESSIONAL SERVICES & IT



ENERGY



TECHNOLOGY



PRE OPENING & REFURBISHMENT
SUPPORT



ENTER THE AUGMENTED HOSPITALITY ERA WITH ARTIFICIAL INTELLIGENCE - AI

AI GUEST & UPSELL ASSISTANT

AVAILABLE

WHERE PERSONALIZED SERVICE MEETS INTELLIGENT UPSSELL

For the guest:

- Make any **request anything**, from towels to restaurant bookings...

For the staff:

- The AI automatically **routes and updates requests** in the hotel's task system
- It provides personalized **upsells recommendations** with one-tap acceptance to send the guest

- + ✓ Effortless service for the guest
- + ✓ Incremental revenue for the hotel

AI TRAVEL CONCIERGE

LAUNCH DEC. 25



TURNING TRAVEL INSPIRATION INTO DIRECT BOOKINGS

For the guest:

- Explore destinations and **receive curated suggestions** based on their habits, past stays, and lifestyle
- **Receive personalized offers** (e.g., family resorts, romantic escapes, business stays)

- + ✓ Increased booking conversion
- + ✓ Incremental revenue for the hotel

AI BUTLER - STAFF ASSISTANT

UPCOMING

EMPOWER EVERY HOTEL EMPLOYEE WITH AI

For the staff:

- **Ask questions or give commands:** "How do I reset my password?", "Translate this message."
- **For questions:** the AI butler instantly executes, explains, or drafts the right answer
- **For actions:** the AI butler accelerates routine tasks and knowledge access

- + ✓ Less admin time and errors
- + ✓ More time to deliver exceptional guest experiences

M&E SALES ASSISTANT

UPCOMING

TRANSFORMING MEETING & EVENT LEADS INTO LASTING REVENUE

For the sales teams:

- The AI assistant analyzes incoming inquiries (emails, forms) and **highlights the most promising opportunities**
- **It drafts personalized answers** (pricing, packages, and room availability) – ready for quick review and send.

- + ✓ Slow manual responses turned into revenue efficiency





ACCOR

THE OVO

