



# Trait d'Union Accor

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SEPTEMBER 18, 2023



**PATRICK  
MENDES**

CEO PM&E ENA





Mercure Düsseldorf City Center, Germany

# Our transformation

# ➤ One transformation: **Get Focused**

## Get LIGHT

BOOSTER

2018

## Get BROAD

FRHI, Movenpick,  
Ennismore

2016 - 2022

## Get FIT

RESET

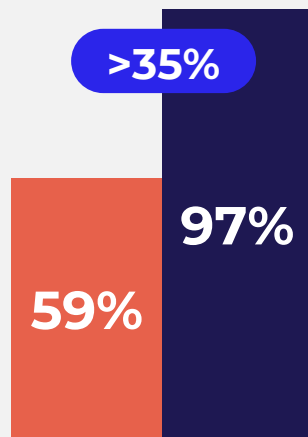
2020 - 2021

## Get FOCUSED

TURBO

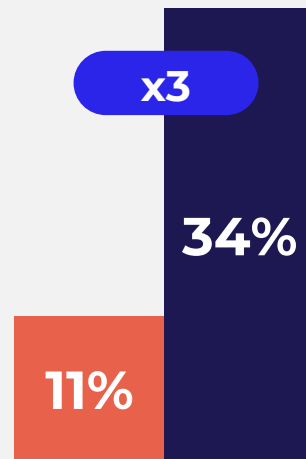
2023

**More  
asset-light**  
(% rooms)



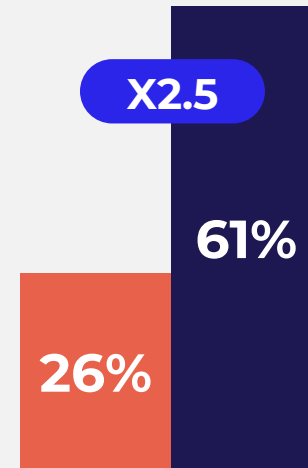
2013 Today

**More Luxury  
& Lifestyle**  
(% fees)



2013 Today

**More global**  
(Non-Europe %  
business volume)

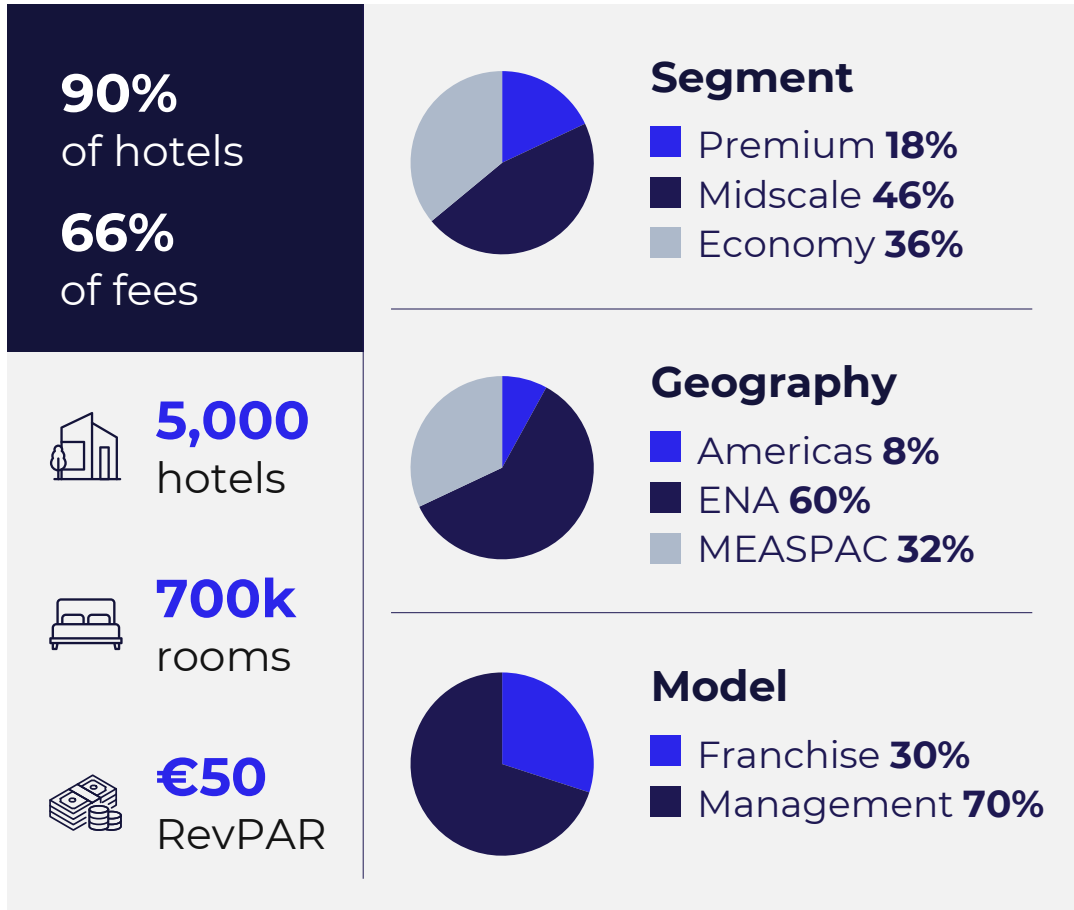


2013 Today

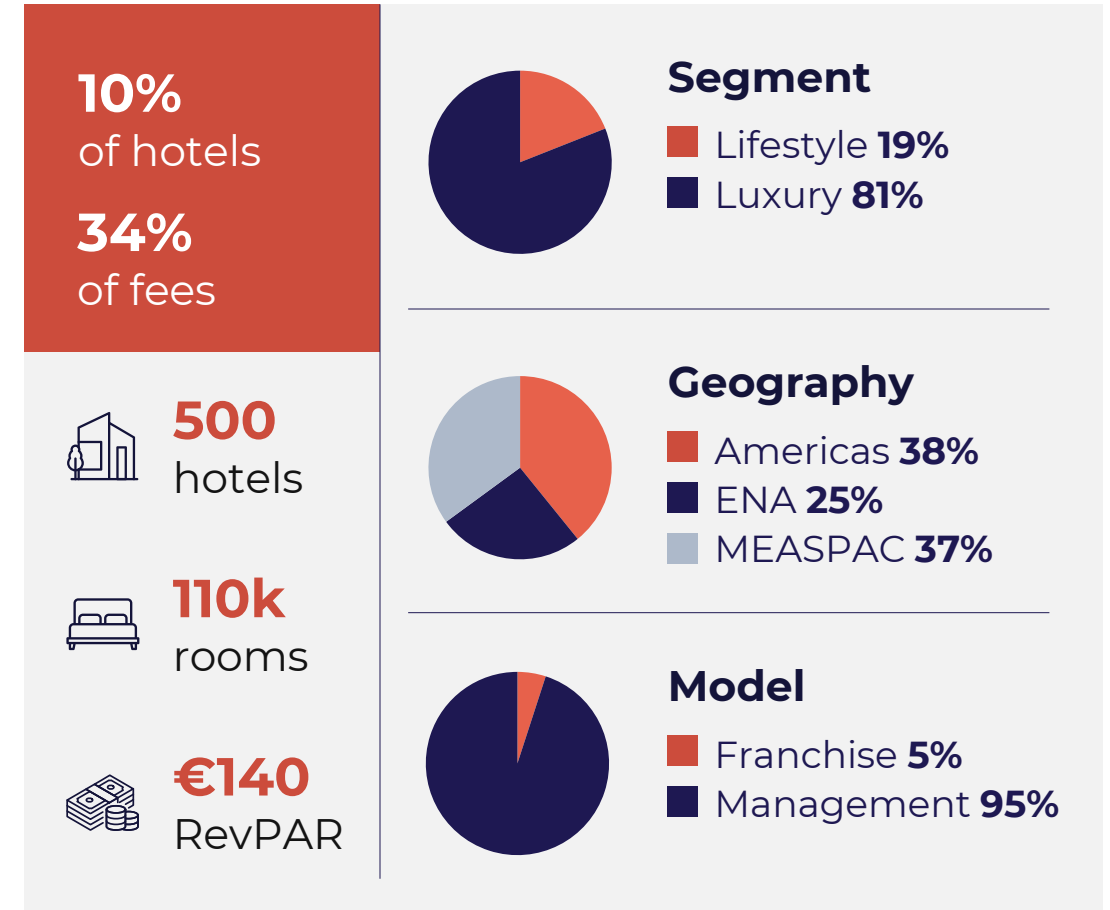
- ✓ **Focus & upskill**  
teams & brands
- ✓ **Simplify & optimize**  
op model & processes
- ✓ **Expand & deliver**  
profitable growth

# Two divisions with two operational models

## Premium, Midscale & Economy



## Luxury & Lifestyle



Breakdowns by FY22 BTI fees; network as of end March 2023

# ... to unleash full Potential



## Premium, Midscale & Economy

**Market-led** organization  
21 brands

PULLMAN

MÖVENPICK

ADAGIO  
PREMIUM

swissôtel

GRAND MERCURE

THE  
SEBEL

Art Series  
PEPPERS

NOVOTEL

MERCURE

ADAGIO  
ORIGINAL

Handwritten

mantra

TRIBE

ibis

ibis  
STYLES

ibis  
budget

ADAGIO  
ACCESS

greet

BreakFree

hotelF1

**Predictability, Resilience & Cash-Generation**

## Luxury & Lifestyle

**Brand-led** organization  
25 brands, of which 17 for Ennismore

RAFFLES

ORIENT  EXPRESS

S O F I T E L

SOFITEL  
LEGEND

EMBLEMS

  
GALLERY

Fairmont

mantis

MAMA  
SHELTER

RIXOS

  
PARIS SOCIETY

  
25h

twenty five hours hotels

SO/

MORGAN'S  
ORIGINALS

SLS

JOE  
JOE

the hoxton

MONDRIAN

FAENA  
DELANO

HYDE

ANGSANA

GLENEAGLES

FAENA

BANYAN TREE

**Brand Content, Fast Growth, High Value**





Pullman Berlin Schweizerhof, Germany

# ➤ E&NA overview

# Europe & North Africa Overview

## Network



**45**  
countries



**2,950**  
Hotels opened

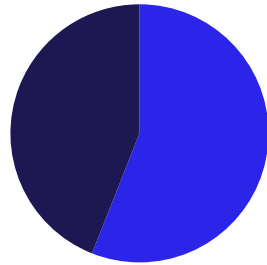


**330k**  
Rooms opened



**350**  
Hotels in pipeline

## Room breakdown

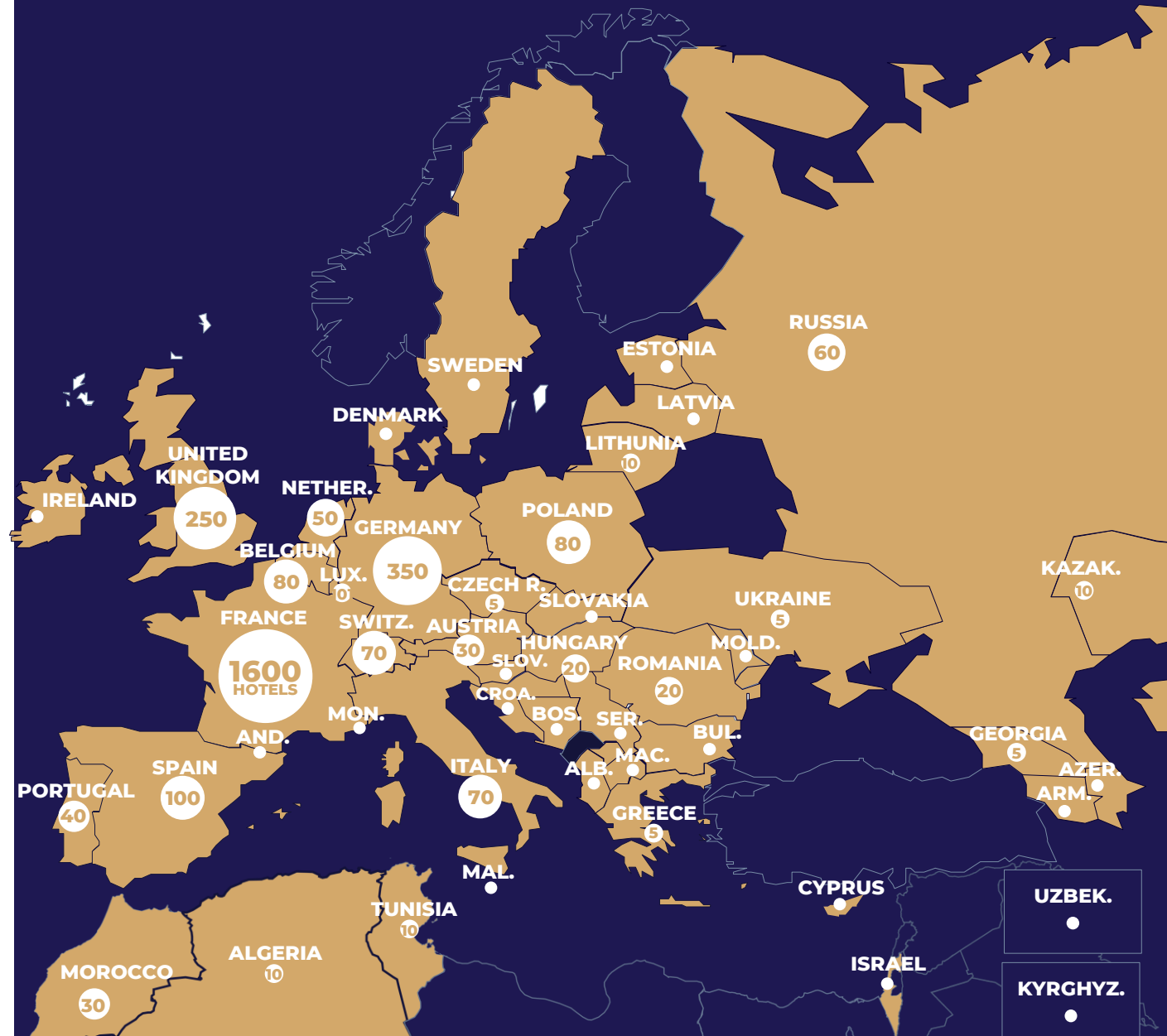


■ Franchised **56%**  
■ Managed **44%**

## Talents



**+100k**  
Heartists





# ► Europe & North Africa is market leader in midscale and Economy



## #1 in Economy

(~185k rooms)

**ibis**

APARTHOTEL  
**ADAGIO**  
ACCESS

**ibis**  
STYLES

**hotelF1**

**ibis**  
budget

**greet**



## #1 in Midscale

(~130k rooms)

**NOVOTEL**  
**MERCURE**

**ADAGIO**  
APARTHOTEL

**TRIBE**

*Handwritten*  
COLLECTION

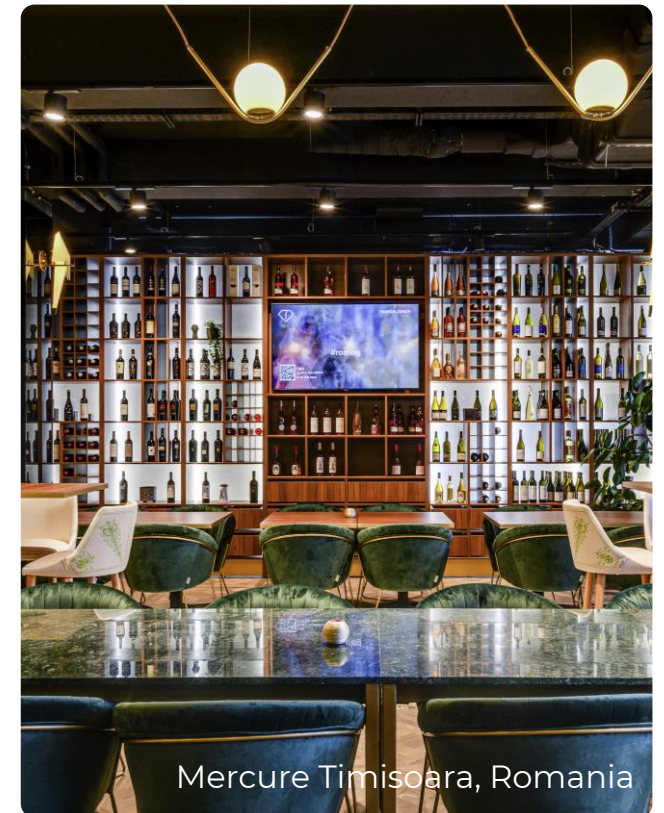
## #9 in Premium

(~15k rooms)

**pullman**

**swissôtel**

**MÖVENPICK**



Mercure Timisoara, Romania



# ➤ Leveraging strong brands across Europe



**+ 3pts**  
**of brand love** in 2022  
vs 2019 in UK & DE



**ibis n°1**  
**of brand awareness**  
in Europe\*



**greet**

**Upcoming**  
**brand love superstars**  
**greet** ahead of Premier Inn in UK  
& **Tribe** rank 1 in DE

**swissôtel**  
Hotels & Resorts



**MÖVENPICK**  
HOTELS & RESORTS



**Up to 16,1 €**  
**brand margin**  
in Europe

**MERCURE**  
HOTELS

**Top 3**  
**of most known**  
**midscale brands**  
(FR, DE)

**NOVOTEL**

**Always in top 5**  
**of brand awareness**  
**in Europe\***

**Swissôtel n°1**  
**in RPI performance,**  
Pullman & Mövenpick  
also in leading tier  
positions



Mercure Krakow Fabryczna City, Poland

# ➤ Strategic pillars



# It is in that context that E&NA has defined its long-term priorities

- 1 Modernize our network
- 2 Focus on profitable growth
- 3 Scale our services, activities & process



Pullman Berlin Schweizerhof, Germany



# Modernizing the network

## GUEST EXPERIENCE

1



**Service Culture eLearning S2 2023**  
New way of interacting with the customer



**Digital Room Directory**  
New hotel services experience

## SPIRIT & ATMOSPHERE

2



**Design, Playlist, F&B&E concepts**  
Lobby, F&B, meeting rooms



## SOCIAL HOTELS

3



**Strong Brand Experience Pillars**



**Entertainments in hotels**  
Pop Up, 360 events, Destination Happenings



# ► Each brand to provide unique experience pillars

LIFE IN BALANCE



SMART SPORT



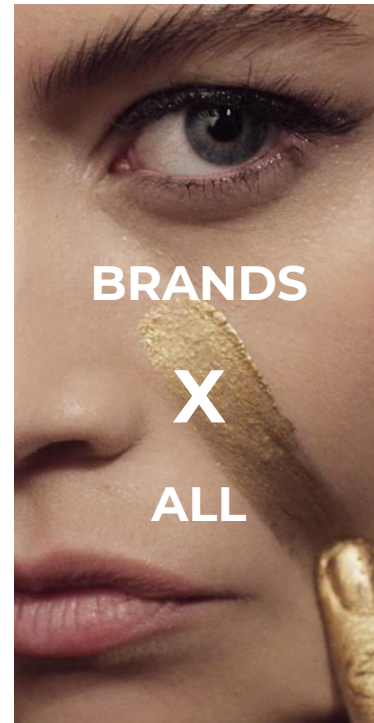
ibis MUSIC



BRANDS

X

ALL



 pullman  
HOTELS AND RESORTS

ALWAYS IN MOTION



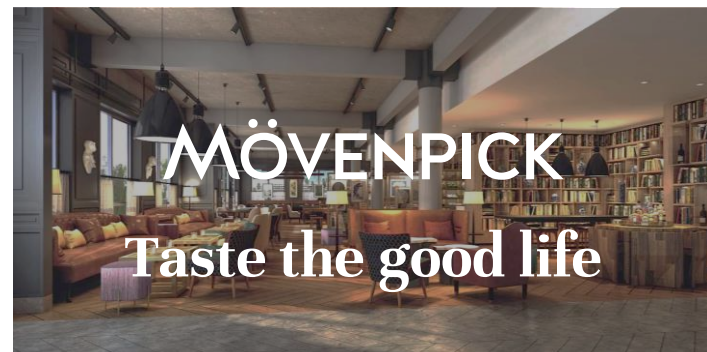
swissôtel  
Vitality



MERCURE



MÖVENPICK  
Taste the good life



CIRCULAR  
ECONOMY



greet

ALWAYS  
MAKING AN  
IMPRESSION.

ibis  
STYLES



Handwritten  
COLLECTION

OWNER'S  
PASSION





# ► Premium | Brand rejuvenation – Pullman



**BLENDED BUSINESS**



**SOCIAL HUB**



**INNOVATIVE SPIRIT**



# ► Premium | Communicating on our brands

Mövenpick Hotels & Resorts  ...   
Sponsored · 

To celebrate our anniversary, Mövenpick offers you an additional €50 off food and drink during your next stay. Because life tastes better when it's shared!



movenpick.accor.com  
Savour €50 off food & drink

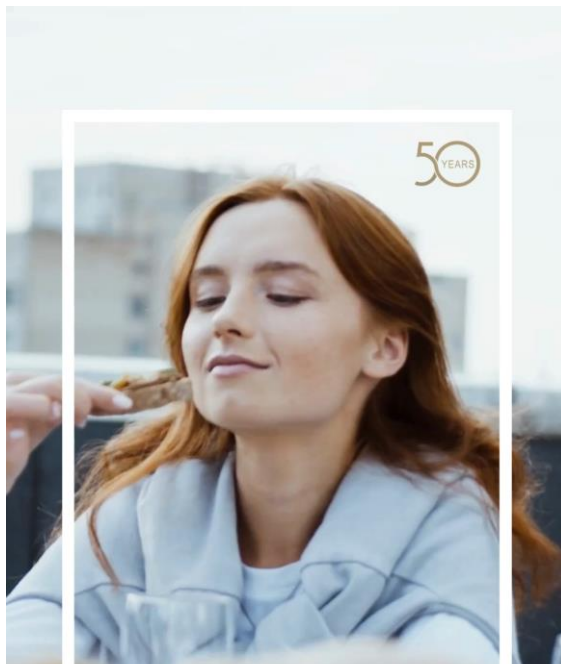
[Book now](#)



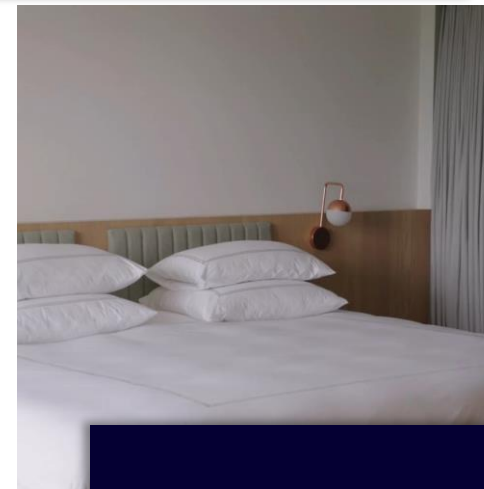
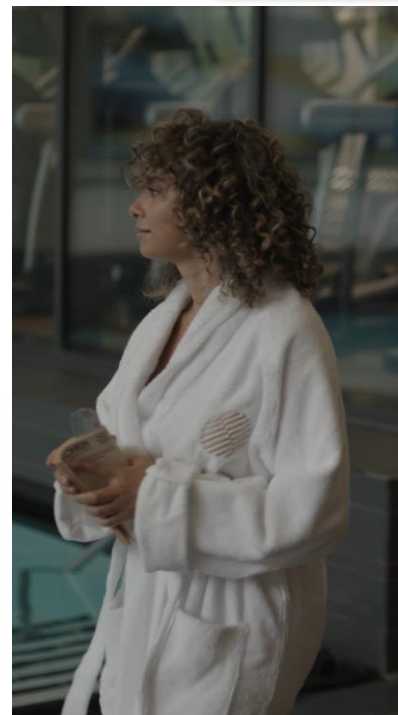
movenpick.accor.com  
Savour €50 off food & dr

**Mövenpick 50 years celebration campaign Social media, online & in-Hotels**  
NL, DE, UK, BE

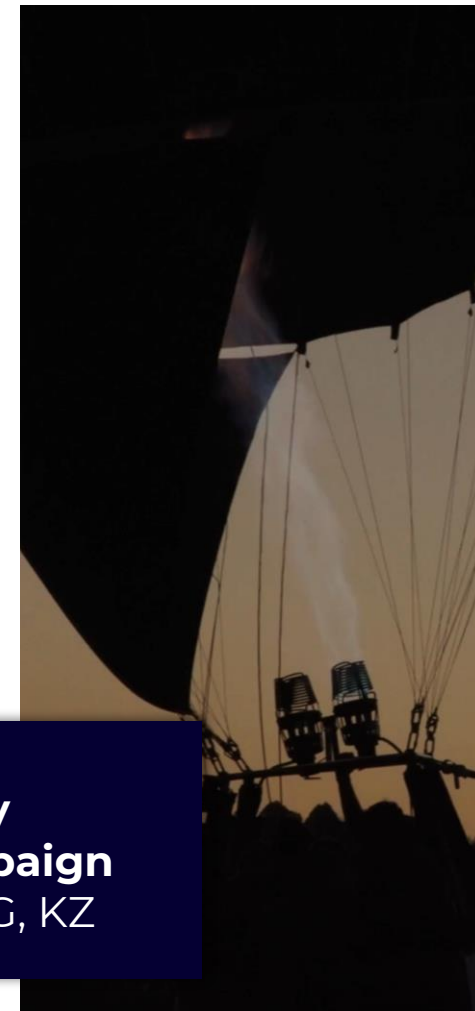
 Like  Comment  Share



**Pullman brand awareness campaign Social Media, Newsletter & In-Hotels**  
DE



**Swissôtel Vitality influencers campaign**  
EE, CH, NL, BA, PG, KZ



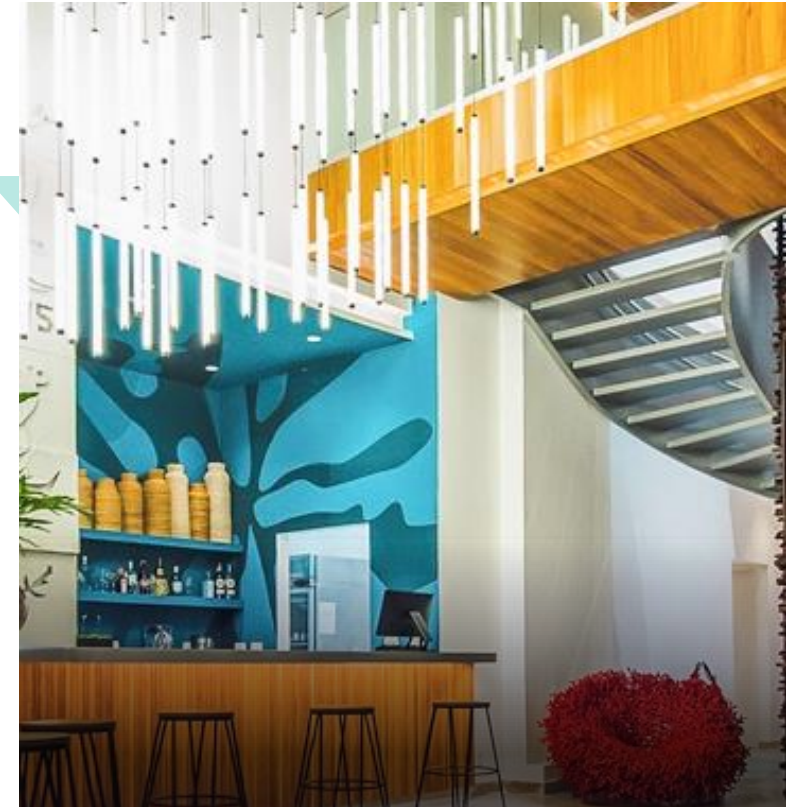
# ► Midscale | Brand rejuvenation – Novotel



**FAMILY & FRIENDS  
TOGETHER**



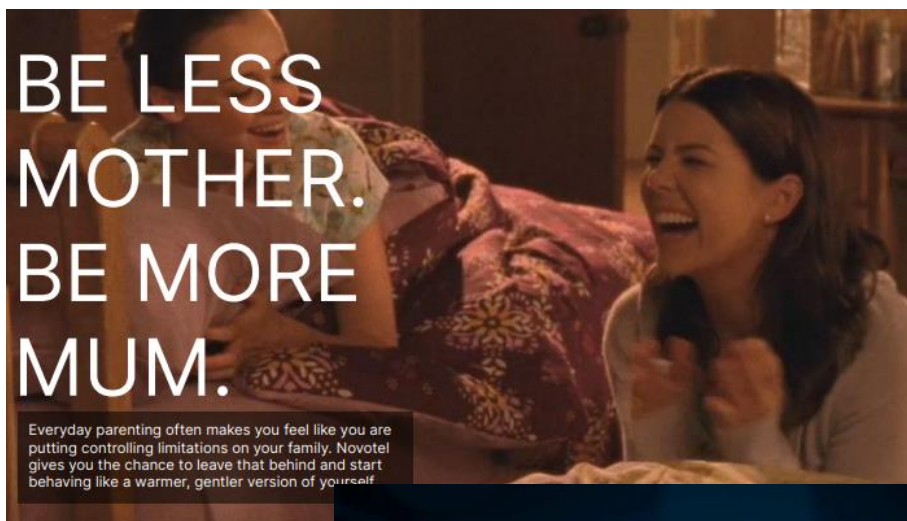
**BUSINESS  
EFFICIENT AND FLEXIBLE**



**BALANCED  
LIFESTYLE**



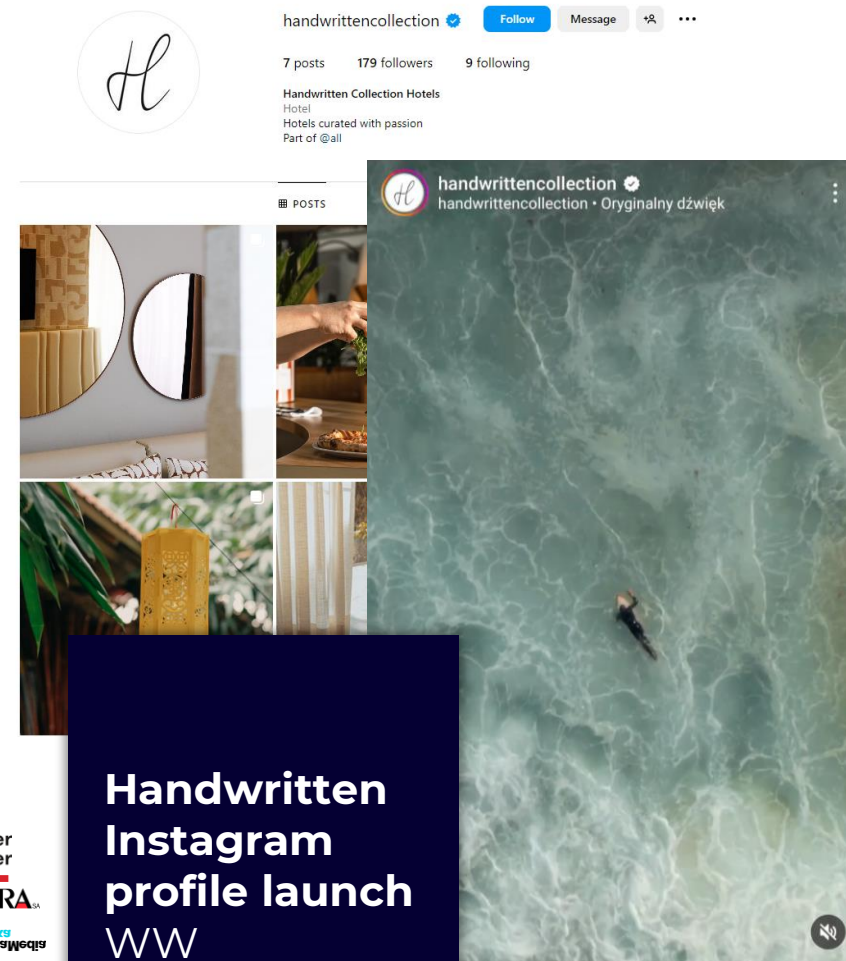
# ► Midscale | Communicating on our brands



**Novotel**  
radio  
campaign  
UK, DE, PL



**Mercure**  
Q3 brand  
campaign  
Print & Digital  
UK, DE, PL



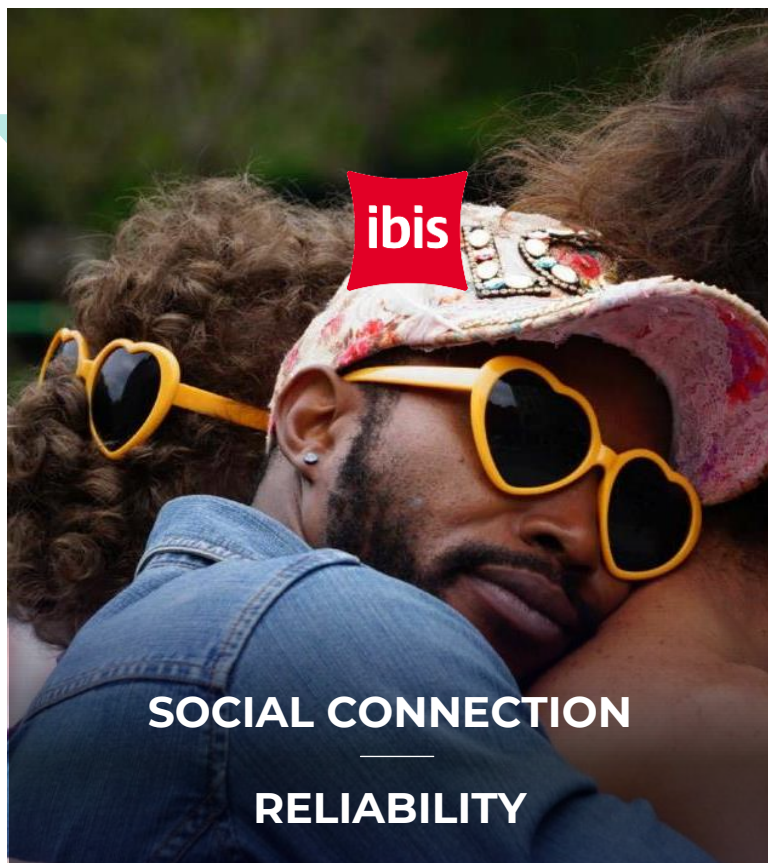
**Handwritten**  
Instagram  
profile launch  
WW



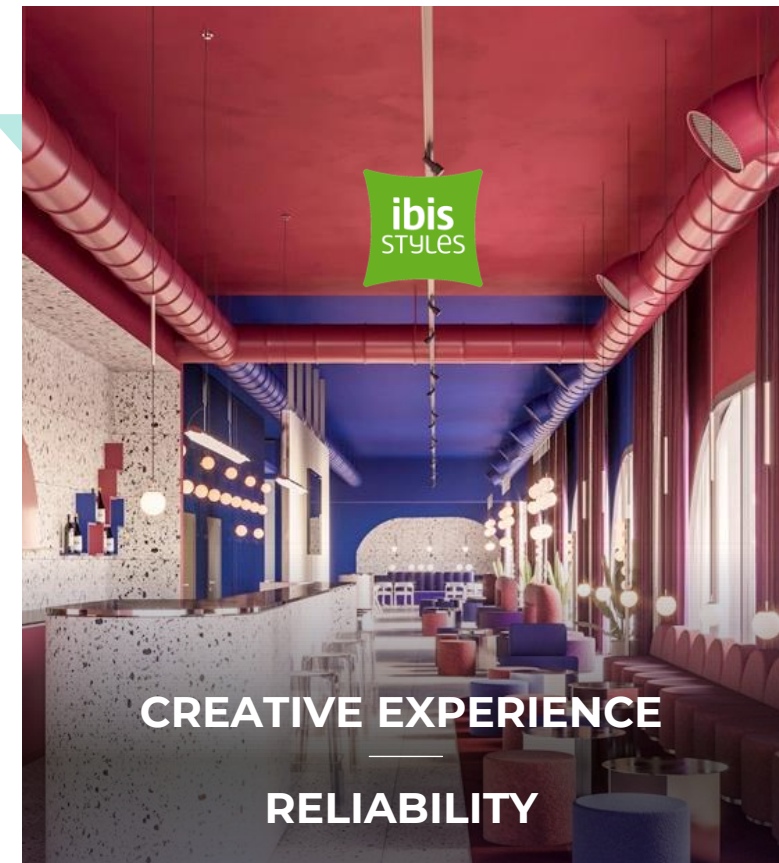
# ➤ Economy | Brand rejuvenation – ibis



OPEN TO ADVENTURES



OPEN HOME



OPEN TO CREATIVITY

# ► Economy | Communication on our brands

**ibis**  
TV/Online  
campaign  
UK, DE, PL

we are open  
**ibis**  
zarezerwuj teraz na [ibis.pl](https://www.ibis.pl)

**ibis Styles**  
TV brand  
campaign  
DE, PL



**VOUS POURREZ  
TERMINER VOTRE  
PETIT-DÉJEUNER  
DEMAIN.**

Dans les hôtels greet,  
nous réutilisons les produits  
du jour pour réinventer  
les recettes du lendemain.

**greet**

réservez votre séjour

**greet**  
press  
& digital  
campaign  
FR, DE, BNL

l'hôtel prend  
un nouveau sens.

[greet.com](https://www.greet.com)

**ibis budget**  
social media  
campaign  
UK, DE



# ► Modernization increases guests' satisfaction and REVPAR



**Renovation increases guest satisfaction**

**+8pts**

Hotels can gain up to 8 points in RPS due to room renovation



**Renovation increases REVPAR**

**+15%**

RevPAR gained after room renovation on average



Greet Darmstadt, Germany



It takes 20 years  
to build a  
*reputation*  
& five minutes  
to ruin it

- WARREN BUFFET



# ► Takeaways – Priorities

- **Increase leadership in E&NA** and reach our fair share in Premium
- **Rejuvenate our brands**, notably through a modernized network
- **Be the preferred partner** for owners and franchisees
- **Continue to build pride** in working for Accor





A modern interior design studio with various furniture pieces like armchairs, sofas, and tables, along with shelves and a large lamp.

# QUESTIONS ANSWERS

