WHY INVEST IN 25HOURS

ACCOR GLOBAL DEVELOPMENT

FEBRUARY 2020
WE ARE PASSIONATE STORYTELLERS

- pioneer brand in storytelling
- narratives translated into design since 2003
- unique concepts inspired by the culture of its surroundings and shaped by designers, artists and creative minds
Elements and materials from naval architecture are rearranged with a pinch of irony and held together by sailor’s stories. During the development of the hotel 25 stories of seaman were collected and brought to paper in the logbook that can be found in every guest room. The logbook stories served as inspiration for the creation of the guest rooms’ wallpaper. For our guests browsing through the logbook a whole new world unfolds in front of them looking at the wallpaper – a world of dangerous crossings, romantic encounters and painful farewells.
At the 25hours Frankfurt The Goldman each of the initial 49 guest rooms has a different design that reflects the personality of the room’s patron. The patrons’ stories were written down in the book “Tausend tolle Sachen” that is placed in every guest room. The guests can skim through the book, look up the story behind their room they are staying in or pick the room of their upcoming stay.
YOU KNOW ONE, YOU KNOW NONE
**FOOD & BEVERAGE EXPERTISE**

- each hotel has unique made-to-measure restaurant & bar concepts
- variety of food & beverage partnerships drive additional value
- 40% of total revenue & 25 to 35% of departmental margin
F&B PARTNERSHIPS

NENI at the twenty five hours hotel

The Paris Club

Monkey Bar

Highballs and Music

The Boilerman Bar

SPE BAR
UPSCALE BUT LEAN

- no costly services that guests don’t appreciate, but partnerships and offerings that add value
- guests experience and consume services in the public areas
- reduced operational costs & increased revenues
URBAN MOBILITY

SCHINDELHAUER

BICYCLES FOR RENT
The Analogue Box is a journey through time back to when technology was made by hand and it helped our senses to fully concentrate on the actual experience: how music actually sounded, the bright flash of a Polaroid camera, the smell of freshly typed letters and the noise of a tube television.

The Analogue Box is a large suitcase full of analogue surprises – a polaroid camera, a typewriter, a vinyl record player and many more analogue features.
<table>
<thead>
<tr>
<th>NUMBER OF ROOMS</th>
<th>128</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPENING</td>
<td>2003</td>
</tr>
<tr>
<td>LANDLORD</td>
<td>HPV Hollmann &amp; Partner</td>
</tr>
<tr>
<td>DEVELOPMENT</td>
<td>conversion</td>
</tr>
<tr>
<td>OPERATING CONTRACT</td>
<td>lease agreement</td>
</tr>
<tr>
<td>ARCHITECTURE</td>
<td>Thomas Lau &amp; Mark Hendrik Blieffert</td>
</tr>
<tr>
<td>INTERIOR DESIGN</td>
<td>Dreimeta</td>
</tr>
</tbody>
</table>

**25HOURS NUMBER ONE**

Hamburg
NUMBER OF ROOMS
97

OPENING
2006

LANDLORD
Ardi Goldman
Ronny R. Weiner

DEVELOPMENT
conversion

OPERATING CONTRACT
lease agreement

ARCHITECTURE
BernjusGisbertSzajak

INTERIOR DESIGN
Delphine Buhro
Michael Dreher

25HOURS THE GOLDMAN Frankfurt
<table>
<thead>
<tr>
<th><strong>NUMBER OF ROOMS</strong></th>
<th>217</th>
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<tbody>
<tr>
<td><strong>OPENING</strong></td>
<td>2011</td>
</tr>
<tr>
<td><strong>LANDLORD</strong></td>
<td>JP Immobilien WertInvest</td>
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<tr>
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<td><strong>OPERATING CONTRACT</strong></td>
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<tr>
<td><strong>ARCHITECTURE</strong></td>
<td>BWM Architekten</td>
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<tr>
<td><strong>INTERIOR DESIGN</strong></td>
<td>Dreimeta</td>
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</table>

25HOURS AT MUSEUMSQUARTIER

Vienna
<table>
<thead>
<tr>
<th><strong>NUMBER OF ROOMS</strong></th>
<th>170</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OPENING</strong></td>
<td>2011</td>
</tr>
<tr>
<td><strong>LANDLORD</strong></td>
<td>Hines</td>
</tr>
<tr>
<td><strong>DEVELOPMENT</strong></td>
<td>greenfield</td>
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<tr>
<td><strong>OPERATING CONTRACT</strong></td>
<td>lease agreement</td>
</tr>
<tr>
<td><strong>ARCHITECTURE</strong></td>
<td>Böge Lindner K2 Architekten</td>
</tr>
<tr>
<td><strong>INTERIOR DESIGN</strong></td>
<td>Stephen Williams Associates, Conni Kotte Interior</td>
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</tbody>
</table>
**NUMBER OF ROOMS**
126

**OPENING**
2012

**LANDLORD**
Credit Suisse

**DEVELOPMENT**
conversion

**OPERATING CONTRACT**
lease agreement

**ARCHITECTURE**
ADP Architekten

**INTERIOR DESIGN**
Alfredo Hâberli Design

**25HOURS ZURICH WEST**
149
2014
Bayerische Hausbau
conversion
lease agreement
Hild und K Architekten
Studio Aisslinger

25HOURS BIKINI BERLIN
### NUMBER OF ROOMS

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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<tbody>
<tr>
<td>49</td>
<td></td>
</tr>
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</table>

### OPENING

2016

### LANDLORD

Groß & Partner  
HPV Hollmann & Partner

### DEVELOPMENT

conversion

### OPERATING CONTRACT

lease agreement

### ARCHITECTURE

Boiles + Wilson

### INTERIOR DESIGN

Dreimeta

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**25HOURS ALTES HAFENAMT**  
Hamburg
<table>
<thead>
<tr>
<th><strong>NUMBER OF ROOMS</strong></th>
<th>170</th>
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<tbody>
<tr>
<td><strong>OPENING</strong></td>
<td>2017</td>
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<td><strong>INTERIOR DESIGN</strong></td>
<td>Studio Aisslinger</td>
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</table>
**NUMBER OF ROOMS**
165

**OPENING**
2017

**LANDLORD**
INKA

**DEVELOPMENT**
conversion

**OPERATING CONTRACT**
lease agreement

**ARCHITECTURE**
Ochs & Schmidhuber Architekten

**INTERIOR DESIGN**
Dreimeta

**25HOURS THE ROYAL BAVARIAN**
Munich
<table>
<thead>
<tr>
<th><strong>NUMBER OF ROOMS</strong></th>
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<tbody>
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<table>
<thead>
<tr>
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<tr>
<td>2018</td>
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<table>
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<tr>
<th><strong>LANDLORD</strong></th>
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<tbody>
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<td>Patrizia Immobilien</td>
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<tbody>
<tr>
<td>lease agreement</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>ARCHITECTURE</strong></th>
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<tbody>
<tr>
<td>HPP Architekten</td>
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</table>

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<thead>
<tr>
<th><strong>INTERIOR DESIGN</strong></th>
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</thead>
<tbody>
<tr>
<td>Studio Aisslinger</td>
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</table>
NUMBER OF ROOMS
207

OPENING
2018

LANDLORD
Proximus Real Estate
Quantum Immobilien

DEVELOPMENT
conversion

OPERATING CONTRACT
lease agreement

ARCHITECTURE
O&O Baukunst

INTERIOR DESIGN
Studio Aisslinger

25HOURS THE CIRCLE
Cologne
<table>
<thead>
<tr>
<th>NUMBER OF ROOMS</th>
<th>152</th>
</tr>
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<tbody>
<tr>
<td>OPENING</td>
<td>2018</td>
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</tbody>
</table>
| LANDLORD         | Ardi Goldman  
|                  | Ronny R. Weiner |
| DEVELOPMENT      | conversion |
| OPERATING CONTRACT | lease agreement |
| ARCHITECTURE     | Karl Dudler Architekten |
| INTERIOR DESIGN  | Michael Dreher  
|                  | Morgen Interiors |

**25HOURS THE TRIP**  
Frankfurt
<p>| NUMBER OF ROOMS | 237 |
| OPENING         | 2019 |
| LANDLORD        | Hua Kee |
| DEVELOPMENT     | re-branding |
| OPERATING CONTRACT | management agreement |
| ARCHITECTURE    | Axel Schönert Architects |
| INTERIOR DESIGN | Dreimeta |</p>
<table>
<thead>
<tr>
<th><strong>NUMBER OF ROOMS</strong></th>
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<tr>
<td><strong>OPENING</strong></td>
<td>2020</td>
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<td><strong>LANDLORD</strong></td>
<td>Dubai World Trade Center</td>
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<td><strong>OPERATING CONTRACT</strong></td>
<td>manchise agreement</td>
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<td><strong>ARCHITECTURE</strong></td>
<td>Hopkins</td>
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<tr>
<td><strong>INTERIOR DESIGN</strong></td>
<td>Woods Bagot</td>
</tr>
</tbody>
</table>

**PIPCLINE**

25HOURS DUBAI ONE CENTRAL

Dubai
25h development presentation

- **NUMBER OF ROOMS**
  - 171

- **OPENING**
  - 2020

- **LANDLORD**
  - Art-Invest Real Estate

- **DEVELOPMENT**
  - conversion

- **OPERATING CONTRACT**
  - lease agreement

- **ARCHITECTURE**
  - GLA

- **INTERIOR DESIGN**
  - Paola Navone

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**PIPELINE**

25Hours Florence San Paolino

Florence
<table>
<thead>
<tr>
<th>NUMBER OF ROOMS</th>
<th>243</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPENING</td>
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<td>Hines</td>
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<td>OPERATING CONTRACT</td>
<td>lease agreement</td>
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<tr>
<td>ARCHITECTURE</td>
<td>BBL</td>
</tr>
<tr>
<td>INTERIOR DESIGN</td>
<td>MBDS</td>
</tr>
</tbody>
</table>

**PIPELINE**

25HOURS AT THE ROUND TOWER

Copenhagen
**25h Development Presentation**

**NUMBER OF ROOMS**
128

**OPENING**
2024

**LANDLORD**
CØ PS

**DEVELOPMENT**
greenfield

**OPERATING CONTRACT**
lease agreement

**ARCHITECTURE**
COBE

**INTERIOR DESIGN**
Stylt Trampoli

**PIPELINE**

**25HOURS PAPER ISLAND**

Copenhagen
NUMBER OF ROOMS
200

OPENING
2022

LANDLORD
Caydon

DEVELOPMENT
greenfield

OPERATING CONTRACT
manchise agreement

ARCHITECTURE
Caydon

INTERIOR DESIGN
Stylt Trampoli

25HOURS CREMORNE GARDEN

Melbourne
**TIER 1**

**EMEA**

**ASIA PACIFIC**
Bangkok, Hong Kong, Shanghai, Singapore, Sydney, Tokyo

**AMERICAS**
Boston, Los Angeles, Miami, New York, Rio de Janeiro, San Francisco, Sao Paulo

**TIER 2**

**EMEA**
Abu Dhabi, Athens, Beirut, Berlin, Bordeaux, Cape Town, Casablanca, Dublin, Edinburgh, Geneva, Helsinki, Istanbul, Johannesburg, Lisbon, Marrakech, Monaco, Moscow, Munich, Reykjavik, St. Petersburg, Tel Aviv, Venice, Warsaw

**ASIA PACIFIC**
Auckland, Beijing, Delhi, Jakarta, Kuala Lumpur, Kyoto, Manila, Melbourne, Mumbai, New Delhi, Osaka, Queenstown, Sapporo, Seoul, Taipei

**AMERICAS**
Bogotá, Chicago, Lima, Mexico City, Santiago de Chile, Seattle, Toronto, Vancouver, Washington D.C.

**TIER 3**

**EMEA**
Antwerp, Belgrade, Brussels, Bucharest, Budapest, Cairo, Doha, Glasgow, Jerusalem, Liverpool, Luxembourg, Lyon, Manchester, Marseille, Naples, Nice, Palma, Porto, Prague, Rotterdam, Sevilla, Tbilisi, Valencia

**ASIA PACIFIC**
Brisbane, Hanoi, Ho Chi Minh City

**AMERICAS**
Atlanta, Austin, Buenos Aires, Dallas, Detroit, Nashville, Montreal, Philadelphia, Portland, San Diego
MICRO LOCATION

sought after features:

- lively micro-location
- urban vibe (restaurants, bars, shops, nightlife)
- proximity of demand generators
- high visibility
- vicinity to public transport

not of interest:

- airports
- trade fairs
- exhibition centers
- business districts
PROPERTY FEATURES

hard facts:
- minimum of 6,000 sqm GFA
- minimum of 100 guest rooms
- standard guest room size between 24 and 28 sqm
- about 60 sqm total GFA per guest room
- generous public areas
- food & beverage: at least one restaurant and one bar

what we love:
- old buildings with character
- rooftops
- outdoor areas / terraces
PRODUCT

must haves:
- lobby
- restaurant(s)
- bar
- living room
- kiosk / retail
- fitness
- wellbeing
	nice to haves:
- meeting rooms
- worklabs
- pool
- car park
ACCOR DISTRIBUTION SOLUTION*

*All Accor brands excluding recently integrated: Delano, SLS, The House of Originals, Mondrian, Hyde, greet, Mantis, Tribe

125+ PARTNERS*

*included search/metasearch/OTA/GDS/IDS

1 all.accor.com multi-brand portal
18 BRAND WEBSITES
1 MOBIL APP
35 point of sales
animated by countries
900 SALES AGENTS
operate in
9 CALL CENTERS
in 20 languages
1,470 HOTELS
use Cluster facilities
1,500+ HOTELS
use "ARS for their own bookings

17% WEB ACCOR
& APP
INFLUENCED
HOTEL DIRECT*
*Hotel & Cluster
Information Members
CRS
69%
WEB PARTNERS
26%
GDS / IDS
7%
HOTEL PMS
31%

125+ PARTNERS*

*included search/metasearch/OTA/GDS/IDS

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7%
HOTEL PMS
31%
Figures as of end 2019. Distribution for Accor luxury & premium brands.
NEW BOOKING ENGINE & APP

1 MULTIBRAND PORTAL
ALL.ACCOR.COM

- 300M Website + App visits
- 2200 Destinations
- 18 Languages

1 LIFESTYLE COMPANION APP

- 46% Mobile and App visits*
- 1 Download every minute

18 BRAND.COM WEBSITES

- Plugged to ALL.ACCOR.COM
NEW LOYALTY PROGRAM

THE ONLY LIFESTYLE LOYALTY PROGRAM

NEW LIMITLESS EXPERIENCES AND EXTENDED OPPORTUNITIES TO EARN & REDEEM POINTS

NEW BENEFITS
- 2 New tiers (diamond & limitless hidden tier)
- 34 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

- **64M** Loyalty members worldwide
- **31%** Loyalty contribution rate
- **X 2** Members stay twice more
- **X 2** Members spend twice more

THE MOST GLOBAL LOYALTY PROGRAM

- **215M** Members
- **64M** Loyalty members worldwide
- **31%** Loyalty contribution rate
- **X 2** Members stay twice more
- **X 2** Members spend twice more

- **South America** 8%
- **Central Europe** 6%
- **Northern Europe** 12%
- **France** 12%
- **North & Central America, Caribbean** 17%
- **ASAPC** 31%
- **Other Europe, Middle-East & Africa** 20%
## Development Criteria

### AAA Ultra City Center Location, Worldwide Historic Conversion

<table>
<thead>
<tr>
<th>Recommended Number of Rooms</th>
<th>100 – 250 keys</th>
<th>100 – 250 keys</th>
</tr>
</thead>
<tbody>
<tr>
<td>Room Average Size</td>
<td>24 – 28 sqm</td>
<td>24 – 28 sqm</td>
</tr>
<tr>
<td>TGFA/Room</td>
<td>60 – 80 sqm</td>
<td>60 – 80 sqm</td>
</tr>
</tbody>
</table>

### Food & Beverage

1 Local restaurant concept
1 destination bar
Additional speciality venues*  

### Well-Being

Well being area
Fitness centre
Swimming pool (nice to have)

### Meetings

Meeting rooms & Work Labs
Living Room - Co-working public space
Retail Kiosk
Kids Club*

* On Market Demand

### Prime Locations

### Secondary Locations

### Airports

### Suburbs

### International Capitals

### Key Cities & Resorts

### Major Domestic Destinations

### Other Cities & Attractive Touristic Destinations
DESIGN & TECHNICAL SERVICES

25h Brand Presentation
Can be used before HCSA is signed

25h Minimum Planning Standards
Can be used after HCSA is signed

25h Brand Video
Can be used before HCSA is signed

25h Style Book
Can be used before HCSA is signed

25h Brand Presentation
Can be used before HCSA is signed

25h Minimum Planning Standards
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