WHY INVEST IN IBIS BUDGET

Accor Global Development

JUNE 2020
Open to adventure

Hello to the go-getters, early-risers, the riders and the party lovers.
Hello to the movers and shakers, to the real deal finders.
Hello to the young and the young at heart, the daring, the street smart.
Who can make anywhere their home, while embracing the unknown.
Hello to those who find adventure in the everyday
And when the night comes, a sweet dream of their stay.

SMART          FUN          COOL
EASY GOING
BRAND USPs

PART OF IBIS FAMILY,
N° 1 EUROPEAN BRAND

ibis family powerful footprint of 2,420 hotels globally

635 ibis budget hotels in 25 countries, leader in Europe and Brazil and fast growing brand

Strong ibis brand awareness

Il y a UTD 634 hotels dans 63 pays
BRAND USPs

THE BEST VALUE FOR MONEY OF ITS CATEGORY

Best value for money of its category for 65% of travelers

Standardized 3 pax bedroom with bathroom

Qualitative product markers (Sweet Bed, high-end amenities, tasty breakfast)
BRAND USPs

HIGHLY PROFITABLE BUSINESS MODEL

- Highest profitability per sqm
- Ultra limited service offer
  - Super reduced space programming
  - Standardized concept
  - Low staff manning & maintenance
634 HOTELS
63,538 ROOMS
23 COUNTRIES IN 2020

54 NEW HOTELS
6,906 MORE ROOMS BY 2024

Official figures, June 2020
NETWORK AND PIPELINE – FIGURES AS OF END OF JUNE 2020

OPERATING MODE

- 53% Managed
- 47% Franchised

32% EUROPE

- NETWORK
  - 20,101 ROOMS
  - 179 HOTELS
- PIPELINE
  - 2,859 ROOMS
  - 21 HOTELS

43% FRANCE

- NETWORK
  - 27,172 ROOMS
  - 348 HOTELS
- PIPELINE
  - 968 ROOMS
  - 11 HOTELS

15% AMERICAS

- NETWORK
  - 9,822 ROOMS
  - 54 HOTELS
- PIPELINE
  - 2,843 ROOMS
  - 19 HOTELS

9% ASIA-PACIFIC

- NETWORK
  - 5,959 ROOMS
  - 49 HOTELS
- PIPELINE
  - 236 ROOMS
  - 3 HOTELS

1% ASIA-PACIFIC

- NETWORK
  - 484 ROOMS
  - 4 HOTELS
ibis budget Sao Paulo Paulista, Brazil | 399 Rooms
ibis budget Gent Dampoort, Belgium | 284 Rooms
FLAGSHIPS

ibis budget Moscow Panfilovskaya, Russia | 284 Rooms
ibis *budget* Ambassador Seoul Dongdaemun, South Korea | 195 Rooms
FLAGSHIPS

ibis budget Ambassador Busa Haeundae, South Korea | 177 Rooms
ibis budget Aguascalientes Norte, Mexico | 154 Rooms
ibis budget Agadir, Morocco | 121 Rooms
ibis budget Aguascalientes Norte, Mexico | 154 Rooms, May 2019
LATEST OPENINGS 2019

ibis budget Uberlândia, Brazil | 192 Rooms, January 2019
LATEST OPENINGS 2019

ibis budget Geneve Palexpo, Switzerland | 112 Rooms, January 2019
IBIS BUDGET SINGAPORE EMERALD, SINGAPORE | 126 ROOMS, OCTOBER 2019

LATEST OPENINGS 2019

ibis budget Singapore Emerald, Singapore | 126 Rooms, October 2019
## SECURED PIPELINE OVER 5 YEARS
### AS OF END DECEMBER 2019

### EUROPE

<table>
<thead>
<tr>
<th>Hotel Name</th>
<th>Location</th>
<th>Room Count</th>
<th>Opening Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ibis budget TBILISSI, Georgia</td>
<td>Georgia</td>
<td>220 rooms</td>
<td>April 2023</td>
</tr>
<tr>
<td>ibis budget TBILISSI, Georgia</td>
<td>Georgia</td>
<td>158 rooms</td>
<td>March 2021</td>
</tr>
<tr>
<td>ibis budget MANNHEIM, Germany</td>
<td>Germany</td>
<td>155 rooms</td>
<td>March 2022</td>
</tr>
<tr>
<td>ibis budget PORTO, Portugal</td>
<td>Portugal</td>
<td>102 rooms</td>
<td>February 2020</td>
</tr>
<tr>
<td>ibis budget VALANCIA, Spain</td>
<td>Spain</td>
<td>70 rooms</td>
<td>September 2021</td>
</tr>
<tr>
<td>ibis budget MADRID, Spain</td>
<td>Spain</td>
<td>154 rooms</td>
<td>October 2021</td>
</tr>
<tr>
<td>ibis budget LONDON, United Kingdom</td>
<td>United Kingdom</td>
<td>250 rooms</td>
<td>June 2023</td>
</tr>
<tr>
<td>ibis budget MANCHESTER, United Kingdom</td>
<td>United Kingdom</td>
<td>262 rooms</td>
<td>February 2022</td>
</tr>
</tbody>
</table>

### AMERICAS

<table>
<thead>
<tr>
<th>Hotel Name</th>
<th>Location</th>
<th>Room Count</th>
<th>Opening Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ibis budget MEXICO, Mexico</td>
<td>Mexico</td>
<td>150 rooms</td>
<td>June 2021</td>
</tr>
<tr>
<td>ibis budget BELO HORIZONTE, Brazil</td>
<td>Brazil</td>
<td>240 rooms</td>
<td>September 2020</td>
</tr>
<tr>
<td>ibis budget RECIFE, Brazil</td>
<td>Brazil</td>
<td>220 rooms</td>
<td>April 2021</td>
</tr>
<tr>
<td>ibis budget LIMA, Perou</td>
<td>Peru</td>
<td>162 rooms</td>
<td>November 2020</td>
</tr>
<tr>
<td>ibis budget GARULHOS, Brazil</td>
<td>Brazil</td>
<td>270 rooms</td>
<td>January 2023</td>
</tr>
<tr>
<td>ibis budget SAO PAULO, Brazil</td>
<td>Brazil</td>
<td>104 rooms</td>
<td>January 2025</td>
</tr>
<tr>
<td>ibis budget BOGOTA, Colombia</td>
<td>Colombia</td>
<td>120 rooms</td>
<td>March 2021</td>
</tr>
</tbody>
</table>

### ASIA – PACIFIC

<table>
<thead>
<tr>
<th>Hotel Name</th>
<th>Location</th>
<th>Room Count</th>
<th>Opening Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ibis budget SINGAPORE IVORY, Singapore</td>
<td>Singapore</td>
<td>38 rooms</td>
<td>December 2020</td>
</tr>
<tr>
<td>ibis budget SINGAPORE CLARKE QUAY, Singapore</td>
<td>Singapore</td>
<td>101 rooms</td>
<td>October 2020</td>
</tr>
<tr>
<td>ibis budget SYDNEY CENTRAL, Australia</td>
<td>Australia</td>
<td>97 rooms</td>
<td>September 2020</td>
</tr>
</tbody>
</table>
IBIS BUDGET X RED BULL CAN YOU MAKE IT?

To bring to life its passion for Urban Sport and foster daily adventures, ibis budget is the exclusive hospitality partner of the Red Bull Can You Make It? 2020 edition.

600 students will live the adventure of a lifetime, crossing Europe with only red Bull cans as currency, facing fun challenges in and outside our hotels.

An ibis budget staff team will be part of the competition and raise money for Accor Diversity.
SOCIAL HUB

DESIGN CONCEPT

The design concept is standardized yet flexible though programming.

Social hubs design is contemporary and inspired by the urban sport universe.
Our hotels provide small sport equipment for individual practice in all areas.

A running map is available to encourage the guests to explore the surroundings of the hotel.

Fun training tips are displayed across the hotel. Everywhere becomes a playground.
NEST 2.0

**DESIGN CONCEPT**

The rooms can welcome 1, 2, 3 or up to 6 pax. They have been designed to ensure a maximum of comfort for our guests and are inspired by the urban sport universe.
NEW ENRICHED F&B OFFER

- BREAKFAST TO GO
- BREAKFAST BUFFET
- MINI MARKET
- THE BEER BAR BY IBIS BUDGET
The following list contains the key brand concepts & markers. Specific and detailed guidelines with rich elements & content bring each experiences to life in the guest journey.

Brand standards as of end 2019, might be subject to changes.

Arrival & departure
- Dress code
- Welcome-in

Social hub
- Design concept
- Small sport equipment
- Training tips
- Running map

Guest rooms
- NEST 2.0 room design concept
- Sweet Bed by ibis budget
- Branded amenities

F&B
- Breakfast buffet
- Breakfast to go
- Mini market
- The beer bar by ibis budget
HEARTIST®

A MOTIVATING AND ENGAGING PROGRAM THAT AIMS TO UNLOCK THE CREATIVITY AND INITIATIVE IN ALL OUR EMPLOYEES.

What does it mean to be an ibis budget Heartist®?
• Be an expert of my brand
• Make our guest feel active and savvy
• Share the brand passion for Urban Sport
A NEW ENERGETIC VISUAL IDENTITY

The visual identity embodies ibis budget’s new positioning of smart basecamps for in & out adventure with a passion for Urban Sport.

It is inspired by sports ground lines, plays with lines & curves and includes:
- A fresh color palette
- A smart and modern font
- A lifestyle iconography with dynamic gestures and poses

Let’s get into the game!
WE ARE OPEN

Ibis brands have taken a major turn in communication with a new global lifestyle brand campaign celebrating all ibis values, underlined by the new signature "We Are Open“ message.

This is an ode to openness in the form of a slam that shows how togetherness, curiosity and inclusiveness are at the core of its values.

- A straight forward expression claiming that an open world is a better world
- The expression of a shared desire for new encounters, new experiences, new cultures
- An invitation to come and live the ibis experience
SOCIAL MEDIA

2020: a great ambition for social media strategy

1 global Instagram account
INSTAGRAM.COM/IBISBUDGET

Regional Facebook pages
FACEBOOK.COM/IBIS

World-class YouTube channel
YOUTUBE.COM/IBIS

Activation with Red Bull partnership
IBIS.COM

14 000 000 users
78 000 000 page views in 13 languages

4% conversion rate

2019 figures
IBIS BUDGET AWARDS 2019

➢ Best international brand – Spain
➢ Best Midscale/Economy Hotel Brand – British Travel Awards 2019
WE MEASURE SUCCESS THROUGH THE EVOLUTION OF:

**Brand Awareness**

35%

Above or nearly 40% of total awareness in 5 countries

Our objective is to increase awareness by +1 to 4 pts.

Source: BEAM

**Brand Perception**

49%

of travelers see ibis budget as a smart brand

Ibis budget’s strongest perception hook is its ‘good value’; it has positive scores on ‘consistent quality standard’ and ‘staff with caring attitude’ but fails to own ‘quality breakfast’ or ‘comfortable rooms’

Our objective is to raise awareness of our position as the premium low-cost hotel brand.

Source: BEAM

**Brand Margin**

+€5

Price premium vs. independent hotels in France.

Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative

Our objective is to strongly increase this price premium.

Source: BEAM

**Reputation Performance Score**

77.25 %

The Reputation Performance Score measures the overall hotel online reputation based on several sources: Guest Satisfaction Survey (GSS & Net Promoter Score), Trip Advisor, Booking, Ctrip etc. It is the most representative hotel’s reputation KPI, requires at least 100 guests’ feedback and give positive reputation score out of 100%

Our objective is to reach 78.4 pts in 2020.

Source: BEAM
BRAND AWARENESS (%)
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». Figures as of end 2019.
ibis budget
Average RPS
77.2%

NORTH & CENTRAL AMERICA
83%

EUROPE
76.8%

AFRICA
81.2%

SOUTH AMERICA
79.4%

ASIA - PACIFIC
77.8%

MIDDLE EAST
Accor offers > 110 global distribution channels at best market conditions.
IBIS BUDGET DISTRIBUTION PERFORMANCE BY ACCOR

ROOM REVENUE BASED

CALL CENTERS, INFLUENCED HOTEL DIRECT*  
*Hotel & cluster services

68% OF IBIS BUDGET ROOM REVENUE COMES THROUGH ACCOR CENTRAL RESERVATION SYSTEM

7% ACCOR WEB WEB SITES, MOBILE SITES & APP

35% WEB PARTNERS (OTA'S)

25% GDS/IDS

32% DIRECT SALES

36% INDIRECT SALES

32% HOTEL PMS

8,4M ROOM NIGHTS

€491M ROOM REVENUE

60% FOCUS WEB (ACCOR WEB + WEB PARTNER)

PERFORMANCE
NEW BOOKING ENGINE & APP

#1 MULTIBRAND PORTAL
ALL.ACCOR.COM

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

DAILY COMPANION APP

- 56% Mobile and App visits*
- 1 Download every minute

BRAND.COM WEBSITES

- Plugged to ALL.ACCOR.COM
- 78M Pages viewed on ibis.com

*year 2019 + from dec 2019-to Mid Feb 2020, since launch of ALL
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)
- 44 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

- Central Europe 6%
- North & Central America, Caribbean 11%
- France 12%
- Other Europe, Middle East & Africa 20%
- ASPAC 31%
- Asia 31%
- Other Asia 10%
### Development Criteria - Programming

#### Recommended Number of Rooms
- **Franchise**: >80 keys
- **Management**: >125 keys
- 100 keys and +

#### Room Average Size
- 12.5 sqm
- 12.5 – 13.5 sqm
- 22 – 25 sqm

#### TGFA / Room
- 15% - 20% of worldwide
- 22 – 25 sqm

#### Food & Beverage
- No restaurant but breakfast room and vending machine
- No bar

#### Well-Being
- No fitness center
- No swimming pool
- No spa

#### Meetings
- No meeting room

#### Locations
- **Prime Locations**
- **Secondary Locations**
- **Airports Suburbs**

- **International Capitals**
- **Key Cities & Resorts**
- **Major Domestic Destinations**
- **Other Cities & Attractive Touristic Destinations**
What's happening in 2020?

Ibis budget new design concept
THANK YOU