WHY INVEST IN JO&JOE
ACCOR GLOBAL DEVELOPMENT
AUGUST 2020
Manifesto

« Do it your way! »

We created a new hybrid accommodation concept where travelers and locals can meet to brunch, drink, enjoy an evening and stay for the night. Whether you are coming in from around the corner or arriving from the other side of the world, come as you are and join the family.

It’s all about sharing the same mindset: travelling is no longer about finding the right flights or accommodation, it’s about feeling a part of something, about emotions and encounters, about sharing and having fun...
The Open House concept:
Bridging the gap between hostels and hotels
REDEFINING HOSPITALITY

• The fun of a hostel & the comfort of a hotel

• Unique open design & strong brand touch points

• The best affordable place to sleep or eat at a destination (w/ family/friends or solo travelling)
SHORT AND LOCALLY SOURCED

• Local F&B concepts (affordable, fresh & homemade)

• Permanent line up and unexpected experiences (entertainment & activities)

• Friendly - one of a kind teams
A PROFITABLE BUSINESS MODEL

• Diversity of targets leisure & business with a range of accommodation options (private rooms & dorms)

• Maximization of beds per sqm (2 to 10 pax per dorms)

• Rethink of the ground floor for augmented FB footprint
JO&JOE | WHERE DO WE STAND TODAY NETWORK AND PIPELINE

3 HOTELS
748 BEDS IN 2020
15 UPCOMING HOTELS
9 COUNTRIES
We’re coming!

- HOSSEGOR 2017
- PARIS GENTILLY 2019
- PARIS BUZENVAL 2020
- RIO LARGO BOTICÀRIO 2021
- LIVERPOOL 2021
- BUDAPEST 2022
- MEDELLIN 2022
- GLASGOW 2022
- VIENNA 2022
- MOSCOW 2022
- ROME 2022
- PARIS-ORLY 2023
- LONDON 2023
- BUCHAREST 2023
- BORDEAUX 2023
JO&JOE PARIS-GENTILLY (FRANCE)

485 BEDS
JO&JOE | WHERE DO WE COME FROM?

FLAGSHIP

JO&JOE HOSSEGOR (FRANCE)

117 BEDS
UPCOMING OPENING - OCTOBER 2020

JO&JOE PARIS-NATION (FRANCE)

162 BEDS
JO&JOE | WHERE DO WE COME FROM?

UPCOMING OPENING IN 2021

JO&JOE RIO DE JANEIRO
(BRAZIL)

335 BEDS
JO&JOE LIVERPOOL (UK)

350 BEDS

UPCOMING OPENING IN 2022
UPCOMING OPENING IN 2022

JO&JOE VIENNA
(AUSTRIA)

345 BEDS
The decision to use simple design featuring raw materials takes center stage at JO&JOE. This design is both unique and recognizable and has resulted in the creation of four iconic components:

- the BAR
- the COMMON AREAS
- the PERMANENT STAGE
- and the BEDS

JO&JOE wanted to break with the conventional vertical distribution of spaces and functions and each location will have their own ‘WOW’ design factor.

The accommodation options have been designed to offer greater freedom and flexibility – and to encourage customer attachment. Spaces are flexible so that they can be adapted quickly and easily to suit each person’s situation, pace and budget.

The brand has open plan spaces to promote interactions and living together making the bar/restaurant areas the central elements of the experience. Opening out onto both the exterior and the interior, everyone feels welcome.
A LINE UP OF EVENTS

Permanent stages to have event throughout the day and night
You can find a variety of events adapted for all.
Organized and scheduled with the local community

AUTHENTIC & LIVELY F&B

Homemade meals, local food, affordable & generous meals at reasonable prices

The bar & restaurant:
The heart of the JO&JOE Experience
JO&JOE IN A FEW NUMBERS

• + 30% till 60% of F&B revenue in total turnover, depending on location

• Big events that regenerate huge F&B turnover (Quick Pro Hossegor 2019: 3000 pax, 55K€ of turnover from 6pm to 12 am)

• Strong ability to attract local for extra revenue (Hossegor 95% of external guests for the FB)
JO&JOE Open Houses, first and foremost, is a place for people to connect. It was a natural choice for JO&JOE to work with local graffiti street artists. Whether they grew up on the streets of France, or in another country, the graffiti artists have been chosen for what they have in common: a wish to communicate their art, to prompt questioning and debate, and, in this way, to (re)create connection.
LOCAL PARTNERSHIPS

Local partnerships are one of the key aspect of the JO&JOE experience. Building authentic relationships with the various communities is a priority and every Open House should fit in the movement of the local life (farmers market, beach clean up etc.).

ECO FRIENDLY

The brand is committed to lead environmental sustainability initiatives, sustainable practices and leading environmentally-conscious
OUR TEAM BECOMES YOUR FRIENDS

They are a melting pot of various personalities, experiences and talent that recreates the heart and soul of the JO&JOE brand. They instigate unforgettable memories and unbreakable bonds creating the DNA of each Open House.

Positive, fun and without fuss, JO&JOE is just like its guests, created purely and simply to challenge convention.
BAR & RESTAURANT/STAGE
A the center of the guest experience.
A friendly and genuine atmosphere

OUTDOOR SPACES

Unexpected MEETING ROOMS

HAPPY HOUSE (private chill/snacking place for guest)
HAPPY HOUSE

- SNACKING AREA
- VENDING MACHINE 24/7
- COSY LOUNGE : SCREENS, GAMES...

You can live at your own pace, just like home: a private space for travellers only

COMMON SPACES

- LOCKERS

HAPPY FLOORS

Sleeping spaces tailored to everyone’s needs and means: private bedrooms / shared rooms
LARGE DORMS
- 8 to 10 beds / 34 to 40 m²

PRIVATE ROOMS
- 2 pax | 12m²

SMALL DORMS
- 4 to 6 beds / 18 to 23 m²

CUSTOMER JOURNEY GUEST ROOMS

CABINS / OOO
JO&JOE | VISUAL IDENTITY

The brand’s identity color is YELLOW. It represents good humor and a zest for life.

The pictograms form a genuine universal language. They allow locals & travelers to enjoy and easily make the most of any location regardless of their language.

JO&JOE is a blend of two personalities, two ways of seeing the world and travelling across it. Together they represent our guests.

JO&JOE’s identity is generative, feeding on the duality of two fictitious hosts who have given their names to the brand. Our identity shows who we are...
SOCIAL MEDIA

A balanced communication based on two pillars:
Influence & community.

A mixture of our brand identity and of the local environment.

Social Media Goal: To show the JO&JOE experience and the communities surrounding it.

FACEBOOK

INSTAGRAM

EAT. SURF. DRINK. SLEEP. REPEAT!

PR & INFLUENCE

Extra care given to our relationships with the press and influencers.
AWARDS

TOP COM
GRAND PRIX

LE GRAND PRIX
STRATÉGIES
DU DESIGN
WITH WCIE
GOLD: Brand creation
category
GOLD: General design
category

LE GRAND PRIX
STRATÉGIE
DU DIGITAL
STORE / RETAIL
dispositifs
Drive to store
GOLD BETC DIGITAL for
JO&JOE

CRISTAL
FESTIVAL
WITH WCIE

FIRST PRICE AT PRIX
COMMUNICATION
& ENTREPRISE UJEF
WITH WCIE

LABEL
WITH WCIE
Design Observer
Category

RED DOT
WITH WCIE
Brand Identity Category

DATA DRIVEN
CAMPAIGN
SILVER
BETC DIGITAL
for JO&JOE

GRAND PRIX Design category
Logotype (Branding)
WITH WCIE
« Launching of Jo&Joe »

GOLD: Brand creation
category

GOLD BETC DIGITAL for
JO&JOE

BRONZE Design /
Consumer’s Brand Identity
category for the launching
of JO&JOE
JO&JOE | A NEW DISTRIBUTION SOLUTION

NEW TYPE OF CUSTOMERS / NEW TARGETS / NEW PMS / NEW TOOLS

CLASSIC OTAs
Booking.com, agoda, Expedia

CLASSIC TRADE SHOWS
imex, Fitur

CLASSIC TRAVEL ASSOCIATIONS
GBTA, ETOA

CLASSIC TOUR OPERATORS
TUI, Kuoni, Q Travel

« YOUTH TRAVEL » TRADE SHOWS
Stay WYSE Amsterdam, SYTA Annual Conference, ISIC Event Thessaloniki 2019

« YOUTH TRAVEL » ASSOCIATIONS
Wyse Travel Confederation, NAFSA

« YOUTH TRAVEL » TRAVEL ASSOCIATIONS
Topdeck, Contiki, EF

++ ACCOR >110 GLOBAL DISTRIBUTION PARTNERSHIPS
SPLIT OF HOTELS REVENUE PER DISTRIBUTION CHANNELS

- **Direct Channel**: 20%
- **Web Direct Sales**: 20%
- **Walk In - Direct hotel**: 12%
- **AH.com**: 1%
- **Dorms.com**: 1%
- **Expedia**: 5%
- **Airbnb**: 9%
- **Direct JO&JOE**: 20%
- **Booking.com**: 23%
- **Hostelworld.com**: 29%

OVERALL STRONG
DIRECT CHANNEL

WEB DIRECT SALES

*SPLIT BASED ON JO&JOE PARIS GENTILLY IN 2019*
JO&JOE | ACCOR’S DISTRIBUTION SOLUTION

ACCOR OFFERS >110 GLOBAL DISTRIBUTION PARTNERSHIPS AT BEST MARKET CONDITIONS

Source: CRS by end of 2019
NEW BOOKING ENGINE & APP

JO&JOE’s DISTRIBUTION

- 300M Website + App visits
- 2,200 Destinations
- 18 Languages

1 MULTIBRAND PORTAL

1 LIFESTYLE COMPANION APP

18 BRAND.COM WEBSITES

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

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

Plugged to ALL.ACCOR.COM

- 2.7M Fairmont website visits per month

Official figures as of end of 2019
NEW LOYALTY PROGRAM

THE ONLY LIFESTYLE LOYALTY PROGRAM

NEW LIMITLESS EXPERIENCES AND EXTENDED OPPORTUNITIES TO EARN & REDEEM POINTS ON ACCOMODATION ONLY

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

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

Official figures as of end of 2019
# JO&JOE DEVELOPMENT KEY CRITERIA - PROGRAMMING

<table>
<thead>
<tr>
<th>HOTEL</th>
<th>WORLDWIDE</th>
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<tr>
<td>AAA ultra city center location, historic conversion</td>
<td>300 to 600 beds</td>
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<tr>
<td>TGFA PER BED</td>
<td>9 – 10 sqm/bed</td>
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<tr>
<th>FOOD &amp; BEVERAGE</th>
<th>High volume Bar in indoor &amp; outdoor premises</th>
<th>Happy house featuring snacking area for guest use</th>
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<tr>
<th>MEETINGS &amp; OTHERS</th>
<th>Flexible space among public spaces</th>
<th>Shared room to be converted into ad hoc meeting spaces</th>
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<tr>
<th>PRIME LOCATIONS</th>
<th>SECONDARY LOCATIONS</th>
<th>AIRPORTS SUBURBS</th>
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<tbody>
<tr>
<td>INTERNATIONAL CAPITALS</td>
<td>KEY CITIES &amp; RESORTS</td>
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<tr>
<td>MAJOR DOMESTIC DESTINATIONS</td>
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<tr>
<td>OTHER CITIES &amp; ATTRACTIVE TOURISTIC DESTINATIONS</td>
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(1) Based on market demand
JO&JOE BRAND BOOK
Can be used before HCSA is signed

JO&JOE DESIGN BRIEF
Can be used before HCSA is signed

JO&JOE STYLE BOOK
Can be used before HCSA is signed

JO&JOE CONSTRUCTION & RENOVATION STANDARDS
Can be used after HCSA is signed

JO&JOE PRODUCT GUIDELINES
Can be used after HCSA is signed

JO&JOE F&B&E BOOK; F&B MANIFESTO
Can be used after HCSA is signed
THANK YOU