WHY INVEST IN IBIS STYLES
ACCOR GLOBAL DEVELOPMENT
FEBRUARY 2019
Open to creative design

What if a hotel could... Stun you? Inspire you? Make you smile? At ibis Styles, each hotel has its own unique design, theme and personality. Creative and urban, our eclectic hotels offer warm service and stylish comfort. From pillow to pillar, bathroom to bar, every little detail has been thought out to live an experience full of surprises, for young and older kids.

ibis Styles, unique hotels, creative by design.

TRENDY       PLAYFUL       SURPRISED       JOYFUL
## Ibis Styles Top 3 USPs

### The Rising Star of Ibis Family
- Ibis family powerful footprint of 2,200 hotels globally
- 450 Ibis Styles hotels in 10 years and still high speed development
- Strong Ibis brand awareness plus Ibis Styles higher perceived brand premium

### Creative by Design
- 450 hotels + 450 themes
- Each hotel is unique with a playful & premium design inspired by a theme that is story told across the hotel
- 71% of customers think the brand is creative

### Magic Flexibility
- Market driven space programming (room size, no mandatory restaurant nor bar...)
- Soft standards backed up by Ibis family reliable concepts & processes
- Perfect brand for existing hotels conversion

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USPs — WHY INVEST IN Ibis Styles — 3
FLAGSHIPS 2018
Ibis Styles Lausanne Mad House, Switzerland
26 ROOMS
FLAGSHIPS 2018
ibis Styles Paris Boulogne
Marcel Sembat France
48 ROOMS
SHEEPS & MOUNTAINS THEME

FLAGSHIPS 2018
Ibis Styles Tbilisi Center,
Georgia
119 ROOMS

NETWORK & PIPELINE — WHY INVEST IN Ibis Styles — 8
AVIATION THEME

FLAGSHIPS 2018
ibis Styles SP Anhembi, Brasil
187 ROOMS
ibis Styles Den Haag City Centre, Netherland

45 ROOMS
LATEST OPENINGS 2018

Ibis Styles Sallanches Pays Du Mont Blanc, France, 51 Rooms

Ibis Styles Merida Galerias, Mexico, 140 Rooms

Ibis Styles Nairobi Westlands, Kenya, 277 Rooms

Ibis Styles London Gloucester Road, England, 84 Rooms
KEY UPCOMING OPENINGS

EUROPE

ibis styles ØRESTAD, Denmark 170 ROOMS, APRIL 2021
ibis styles MASSY, France 110 ROOMS, JANUARY 2019
ibis styles PARIS AVENUE D’ITALIE MAISON BLANCHE, France 165 ROOMS, JUNE 2019
ibis styles PARIS GARE DE L’EST MAGENTA, France 44 ROOMS, NOVEMBER 2019
ibis styles BEZONS, France 122 ROOMS, SEPTEMBER 2020
ibis styles HAMBURG BARMBEK, Germany 188 ROOMS, APRIL 2020
ibis styles MUNICH AIRPORT, Germany 350 ROOMS, JUNE 2021
ibis styles MUENCHEN PERLACH, Germany 172 ROOMS, NOVEMBER 2021
ibis styles HAMBURG ÜBERSEEQUARTIER, Germany 406 ROOMS, MARCH 2023
ibis styles BUDAPEST PRIELLE, Hungary 104 ROOMS SEPTEMBER 2019
ibis styles ROMA PRINCESS, Italy 288 ROOMS, MARCH 2020
ibis styles WARSZAWA URSUS, Poland 214 ROOMS, OCTOBER 2019
ibis styles BUCHAREST CITY CENTER, Romania 152 ROOMS, MARCH 2020
ibis styles ZURICH CITY CENTER, Switzerland 202 ROOMS, AUGUST 2021
ibis styles ISTANBUL MERTER, Turkey 211 ROOMS, DECEMBER 2020
ibis styles HOUNSLOW, United Kingdom 125 ROOMS, SEPTEMBER 2019

AFRICA – MIDDLE EAST

ibis styles MUSCAT OCEC, Oman 280 ROOMS, JUNE 2021
ibis styles MAKKAH AL NASEEM, Saudi Arabia, 1406 ROOMS, JANUARY 2020
ibis styles RIYADH QURTABA, Saudi Arabia, 325 ROOMS, JANUARY 2021
ibis styles SANDTON, South Africa 290 ROOMS, JANUARY 2021
ibis styles AL GARHOUD, United Arab Emirates 350 ROOMS, JUNE 2020
ibis styles DUBAI SOUK AL KABEER, United Arab Emirates 393 ROOMS, JANUARY 2022

ASIA – PACIFIC

ibis styles BANGKOK RATCHADA, Thailand 266 ROOMS, MARCH 2019
ibis styles MANILA MALATE, Philippines 250 ROOMS, DECEMBER 2021
ibis styles MANILA ARANETA CENTER, Philippines 320 ROOMS, JUNE 2020
ibis styles JAKARTA TANAH ABANG, Indonesia 156 ROOMS, JANUARY 2019
ibis styles JAKARTA SIMATUPANG, Indonesia 142 ROOMS, DECEMBER 2019
ibis styles SHANGHAI ZHANGJIANG, China 102 ROOMS, FEBRUARY 2019
ibis styles GUANGZHOU OUZHUANG METRO STATION, China 215 ROOMS, JUNE 2019
ibis styles SHANGHAI CAOHEJING, China 95 ROOMS, NOVEMBER 2019
ibis styles GUANGZHOU PANYU SHIQIAO, China 163 ROOMS, DECEMBER 2020
ibis styles GUANGZHOU RAILWAY STATION, China 110 ROOMS, DECEMBER 2020
ibis styles SHANGHAI QINGPU SPORTS CENTER, China 68 ROOMS, DECEMBER 2020
ibis styles SYDNEY TOWN HALL, Australia 101 ROOMS, JANUARY 2021
ibis styles SYDNEY AIRPORT, Australia 251 ROOMS, DECEMBER 2020
ibis styles MELBOURNE AIRPORT, Australia 216 ROOMS, DECEMBER 2020

AMERICAS

ibis styles LIBERTY BUENOS AIRES, Argentina 86 ROOMS, NOVEMBER 2019
ibis styles IBIS STYLES SAO PAULO DOWNTOWN, Brazil 198 ROOMS, APRIL 2020
ibis styles SP PARAISO, Brazil 264 ROOMS, MARCH 2020
ibis styles BENAVIDES, Perou 90 ROOMS, MARCH 2020
ibis styles LIMA SAN ISIDRO INGEVEC, Perou 184 ROOMS, SEPTEMBER 2020

Secured Pipeline from end 2018
UPCOMING OPENING

Muscat OCEC
280 Keys
(Opening 2021)
DESIGN PHILOSOPHY

OUR BRAND POSITIONING IS EXPRESSED THROUGH CREATIVE DESIGN.

Each property is a unique project with trendy and playful design inspired by a theme. The chosen theme can be linked to the hotel’s location and always springs from the brand’s innate creativity.

This eclectic design is arranged to help guests discover the chosen theme, from cycling to cinema to beer, and bring them a surprising and joyful journey throughout their stay.
BRAND PROGRAM

IBIS STYLES
BY US

DEMOCRATIZING DESIGN
Everyone has innate creative potential locked away inside them, that’s why across the next two years, we will invite our community to become the next wave of co-creators.

We will celebrate our shared creativity through a series of in-hotel events, digital activations and iconic partnership

2019 We will organise a global social media contest to inspire photography of playful design, moderated by a selection of famous photographers.

2020 We will launch a limited edition of a revisited iconic item, inspired by our aspirational community and created in collaboration with a famous fashion/lifestyle brand, that consumers can purchase online.
WELCOME - IN

REVOLUTIONARY DESK-FREE MOBILE CHECK-IN
SOCIAL HUBS

DISCOVER THE THEMES

Each ibis Styles hotel has its own personality and tells its story.

Inventive & ACE social spaces
IBIS STYLES SP, Faria Lima, Brazil

STREET-ART THEME

Ibíis Styles London Southwark, United Kingdom

THEATER THEME

Ibíis Styles Laval Centre Gare, France

HORSE THEME

BARS

INVENTIVE & ACE

Ibíis Styles London Southwark, United Kingdom
BREAKFASTS

ALL-YOU-CAN-EAT BUFFET
ibis Styles Paris Gare de l'Est TGV, France

RESTAURANTS
SIMPLE AND SURPRISING OFFER

TROPICAL-FEEL THEME

MEDITERRANEAN THEME

COUNTRY-HOUSE THEME

ibis Styles Barcelona City Bogatell, Spain

ibis Styles Bali Petitenget, Indonesia

Ibiza Styles Paris Gare de l'Est TGV, France
BEDROOMS

FAMILY-FRIENDLY, COMFORTABLE AND CREATIVE

Sweet Bed™ by ibis Styles
TOP QUALITY

2 large microfiber pillows – 80x50 cm

White, light duvet soft and enveloping 220x240 cm

Tucked under the topper

The ibis topper: 7 cm of added comfort for unrivaled support and comfort

Multi-zone, multi-density mattress

White 3D material

Flexible, multiply-wood slats

Box spring, with supports

White 3D material

Choice of colors for the feet
To know more about the content of the AccorHotels story: Heartiststory.com
ibis FAMILY
NEW COMMUNICATION PLATFORM
WE ARE OPEN

Increase **brand awareness**
(esp. for 18-35 generation)

**Improve emotional perception** by
establishing ibis on a **lifestyle territory**

Ladder up from product comfort promise
**To an inspirational value**

Claim the value of **OPENNESS** for ibis, a brand
that welcomes everyone everywhere

*Assets to be delivered in March 2019*
SOCIAL MEDIA

The reach platform

The brand image lever

33K subscribers on global channel
23M video views

The showcase of our hotels and destinations

24K followers on global account
85M impressions

IBIS.COM

13 languages
31 contribution zones
92M€ revenue generated
4,4% conversion rate.

WORLDWIDE CAMPAIGNS

#JustForFriends
At *ibis*, you just enjoy your holiday (and your friends).
+ 35M reach
+ 46M impressions
+ 85K engagements
+ 9M views

#ibisTravelQuest
A treasure hunt in the pursuit of each brand’s passion!

+ 6,216 followers (+35,7%)
+ 15,1M reach
+ 26,5M impressions (without influencers)
+ 17,887 engagement
+ 6,202 participations (without influencers)
WE MEASURE SUCCESS THROUGH THE EVOLUTION OF:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Objective</th>
<th>Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand awareness</td>
<td>21% Our objective is to be the best-known design-hotel brand in the economy segment: +3 to 5% awareness.</td>
<td>BEAM by end of 2018</td>
</tr>
<tr>
<td>Brand perception</td>
<td>ibis Styles is highly rated as modern, creative and trendy with positive staff and better room comfort than competitors.</td>
<td>BEAM by end of 2017</td>
</tr>
<tr>
<td>Brand margin</td>
<td>12.7€ Our objective is to maintain this price premium.</td>
<td>BEAM by end of 2018</td>
</tr>
<tr>
<td>Reputation</td>
<td>81.7% Very good Our objective is to reach 82.32 pts in 2018.</td>
<td>TrustYou by end of 2018</td>
</tr>
</tbody>
</table>

PERFORMANCE — WHY INVEST IN ibis Styles — 26
 BRAND AWARENESS (%) 

BEAM Figures as of end 2018.

PERFORMANCE — WHY INVEST IN ibis Styles — 27
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 2018.
ACCOR DISTRIBUTION SOLUTION

ACCOR OFFERS > 110 GLOBAL DISTRIBUTION CHANNELS AT BEST MARKET CONDITIONS

* Figures as of end 2018
ibis Styles DISTRIBUTION PERFORMANCE
POWERED BY ACCOR

FOCUS WEB
IBIS.COM + ACCORHOTELS.COM + MOBILE WEBSITES + PARTNER WEBSITES
52% ibis styles room revenue
€414 M Ibis Styles room revenue

Figures as of end 2018
REPUTATION PERFORMANCE SCORE

NORTH & CENTRAL AMERICAS
82%

EUROPE
82%

SOUTH AMERICAS
85%

AFRICA – MIDDLE EAST
81%

ASIA-PACIFIC
84%

Official figures, December 2018

ibis styles
AVERAGE RPS
82.57%
LE CLUB ACCORHOTELS

ACCOR OWNS THE MOST INTERNATIONAL & FAST GROWING LOYALTY PROGRAM

Loyalty members - Worldwide
- Le Club AccorHotels
- FRS loyalty program
- Huazhu loyalty program

Guests’ origin - Worldwide

A Worldwide program:
- 20 brands
- 3,500 hotels in 100 countries
- Free enrollment
- 100% Web based program
- More than 27,7k new members every day
- Le Club AccorHotels represents 34.6% of all roomnights
- Partnerships with large Airlines loyalty program: Skyteam, One World, Star Alliance...

>53 MILLION MEMBERS WORLDWIDE

LE CLUB ACCORHOTELS REPRESENTS 34.6%
OF ALL ROOMNIGHTS

LCAH by end of 2018

PERFORMANCE — WHY INVEST IN ibis Styles — 32
# DEVELOPMENT CRITERIA ibis styles

## PROGRAMMING & DEVELOPMENT RECOMMENDATION

<table>
<thead>
<tr>
<th>RECOMMENDED NUMBER OF ROOMS</th>
<th>AAA ultra city center location, historic conversion</th>
<th>WORLDWIDE</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;80 keys (Franchise)</td>
<td>100 keys and +</td>
<td></td>
</tr>
<tr>
<td>&gt;125 keys (Management)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13 - 24 sqm</td>
<td>20 – 24 sqm</td>
<td></td>
</tr>
<tr>
<td>-15%/-20% of worldwide</td>
<td>40 – 50 sqm</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FOOD &amp; BEVERAGE</th>
<th>1 Restaurant*, shared with breakfast room</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 Bar*</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WELL-BEING</th>
<th>Fitness center*</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Swimming pool (nice to have)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>MEETINGS</th>
<th>Meeting rooms*</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Web Corner</td>
</tr>
<tr>
<td></td>
<td>Kids Area</td>
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</table>

* On Market Demand

<table>
<thead>
<tr>
<th>PRIME LOCATIONS</th>
<th>SECONDARY LOCATIONS</th>
<th>AIRPORTS SUBURBS</th>
</tr>
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<tbody>
<tr>
<td>INTERNATIONAL CAPITALS</td>
<td>KEY CITIES &amp; RESORTS</td>
<td></td>
</tr>
<tr>
<td>MAJOR DOMESTIC DESTINATIONS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OTHER CITIES &amp; ATTRACTIVE TOURISTIC DESTINATIONS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* On Market Demand
Thank You