WHY INVESTS IN
IBIS STYLES

Accor Global Development
JUNE 2020
Hello to those who give curiosity a taste,
Those who prefer open spaces and a world embraced,
Those who are never hostile... to style.
Hello to the makers, the thinkers, hello to the dreamers.
Hello to the beauty hunters who see the wonder of design as one of a kind
And always keep an open mind.

Open to Creativity
BRANDS UPSs

THE NEW STAR OF IBIS FAMILY

ibis family powerful footprint of 2,400 hotels globally

550 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

Each hotel has a playful & premium design inspired by a unique theme that is story told across the hotel

550 hotels = 550 themes

71% of customers think the brand is creative
BRANDS UPSs

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
NETWORK AND PIPELINE
Figures as of end of June 2020

556 HOTELS
58,369 ROOMS
51 COUNTRIES IN 2020
175 NEW HOTELS
25,634 MORE ROOMS BY 2025
NETWORK AND PIPELINE

Figures as of end of June 2020

29%
EUROPE
NETWORK
16,655 ROOMS
164 HOTELS
PIPELINE
6,826 ROOMS
49 HOTELS

26%
FRANCE
NETWORK
15,430 ROOMS
213 HOTELS
PIPELINE
2,237 ROOMS
30 HOTELS

11%
AMERICAS
NETWORK
6,590 ROOMS
52 HOTELS
PIPELINE
2,371 ROOMS
18 HOTELS

31%
ASIA – PACIFIC
NETWORK
17,883 ROOMS
119 HOTELS
PIPELINE
10,803 ROOMS
68 HOTELS

3%
AFRICA – MIDDLE EAST
NETWORK
1,811 ROOMS
8 HOTELS
PIPELINE
3,397 ROOMS
10 HOTELS

OPERATING MODE
39% Managed
61% Franchised

ibis Styles Brand Presentation – Brand Status
IBIS STYLES SAO PAULO ANHEMBI, BRAZIL
THEME: HISTORY OF AVIATION
FLAGSHIPS

IBIS STYLES SAO PAULO FARIA LIMA, BRAZIL
THEME: STREET LATIN AMERICA
180 ROOMS
IBIS STYLES GENÈVE CAROUGE, SWITZERLAND
THEME: COMIC BOOKS
119 ROOMS
IBIS STYLES BALI PETITENGET, INDONESIA
THEME: SAFARI
134 ROOMS
IBIS STYLES NEW YORK LAGUARDIA AIRPORT
THEME: NY SUBWAY
98 ROOMS
FLAGSHIPS

IBIS STYLES MEXICO ZONA ROSA, MEXICO
THEME: MEXICAN TOYS
79 ROOMS
IBIS STYLES DRAGON MART DUBAI, UAE
THEME: DESERT OASIS
251 ROOMS
LATEST OPENINGS 2019

IBIS STYLES PARIS ORLY TECH, FRANCE
THEME: UP IN THE AIR
200 ROOMS, NOVEMBER 2019
IBIS STYLES JERUSALEM CITY CENTER, ISRAEL
THEME: BEN YUDA MARKET
110 ROOMS, FEBRUARY 2019

LATEST OPENINGS 2019
IBIS STYLES JAKARTA TANAH ABANG, INDONESIA
THEME: RETRO TEXTILE MARKET
201 ROOMS, APRIL 2019
UPCOMING OPENING

IBIS STYLES MUSCAT OCEC
282 ROOMS, 2022

ibis Styles Brand Presentation – Brand Status
### SECURED PIPELINE OVER 5 YEARS

As of end June 2020

<table>
<thead>
<tr>
<th>EUROPE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ibis Styles ØRESTAD, Denmark</td>
<td>170 ROOMS, JANUARY 2022</td>
</tr>
<tr>
<td>ibis Styles HAMBURG BARMBEK, Germany</td>
<td>188 ROOMS, JUNE 2021</td>
</tr>
<tr>
<td>ibis Styles MUNICH AIRPORT, Germany</td>
<td>350 ROOMS, NOVEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles PARIS GARE DE LYON HELVETIA, France</td>
<td>47 ROOMS, JANUARY 2021</td>
</tr>
<tr>
<td>ibis Styles ROMA PRINCESS, Italy</td>
<td>261 ROOMS, APRIL 2021</td>
</tr>
<tr>
<td>ibis Styles BUDAPEST PRIELLE, Hungary</td>
<td>122 ROOMS, JUNE 2021</td>
</tr>
<tr>
<td>ibis Styles ZURICH CITY CENTER, Switzerland</td>
<td>202 ROOMS, AUGUST 2021</td>
</tr>
<tr>
<td>ibis Styles ISTANBUL MERTER, Turkey</td>
<td>211 ROOMS, SEPTEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles DELFT CENTRE, The Netherlands</td>
<td>82 ROOMS, MARCH 2021</td>
</tr>
<tr>
<td>ibis Styles KOGALYM, Russia</td>
<td>120 ROOMS, DECEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles MADEIRA FUNCHAL, Portugal</td>
<td>78 ROOMS, OCTOBER 2021</td>
</tr>
<tr>
<td>ibis Styles SEVILLA, Spain</td>
<td>218 ROOMS, FEBRUARY 2022</td>
</tr>
<tr>
<td>ibis Styles RIJEKA, Croatia</td>
<td>150 ROOMS, OCTOBER 2022</td>
</tr>
<tr>
<td>ibis Styles SOFIA, Bulgaria</td>
<td>116 ROOMS, SEPTEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles NAMUR, Belgium</td>
<td>98 ROOMS, MARCH 2021</td>
</tr>
<tr>
<td>ibis Styles PARNDORF NEUSIEDLER SEE, Austria</td>
<td>135 ROOMS, JULY 2020</td>
</tr>
<tr>
<td>ibis Styles LONDON SEVEN KINGS, United Kingdom</td>
<td>92 ROOMS, SEPTEMBER 2020</td>
</tr>
<tr>
<td>ibis Styles WARSZAWA WAWER, Poland</td>
<td>120 ROOMS, FEBRUARY 2022</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AMERICAS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ibis Styles SAN ISIDRO BLONDET, Peru</td>
<td>184 ROOMS, FEBRUARY 2021</td>
</tr>
<tr>
<td>ibis Styles COQUIMBO, Chile</td>
<td>85 ROOMS, JANUARY 2025</td>
</tr>
<tr>
<td>ibis Styles GUAYAQUIL, Ecuador</td>
<td>203 ROOMS, FEBRUARY 2022</td>
</tr>
<tr>
<td>ibis Styles SANTO ANGELO, Brazil</td>
<td>144 ROOMS, DECEMBER 2023</td>
</tr>
<tr>
<td>ibis Styles GRAMADO PORTAL, Brazil</td>
<td>148 ROOMS, OCTOBER 2022</td>
</tr>
<tr>
<td>ibis Styles PORTO ALEGRE Moinhos, Brazil</td>
<td>130 ROOMS, JANUARY 2021</td>
</tr>
<tr>
<td>ibis Styles EMBU DAS ARTES, Brazil</td>
<td>108 ROOMS, JANUARY 2025</td>
</tr>
<tr>
<td>ibis Styles FOZ DO IGUACU, Brazil</td>
<td>142 ROOMS, MAY 2021</td>
</tr>
<tr>
<td>ibis Styles SOROCABA, Brazil</td>
<td>110 ROOMS, JULY 2020</td>
</tr>
<tr>
<td>ibis Styles MOGI MIRIM, Brazil</td>
<td>126 ROOMS, AUGUST 2022</td>
</tr>
<tr>
<td>ibis Styles SAN MIGUEL DE ALLENDE, Mexico</td>
<td>120 ROOMS, MARCH 2022</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>AFRICA – MIDDLE EAST</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ibis Styles MAKKAH AL NASEEM, Saudi Arabia</td>
<td>1406 ROOMS, JANUARY 2022</td>
</tr>
<tr>
<td>ibis Styles RIYADH QURTOBA, Saudi Arabia</td>
<td>325 ROOMS, DECEMBER 2022</td>
</tr>
<tr>
<td>ibis Styles DUBAI SOUK AL KABEER, United Arab Emirates</td>
<td>393 ROOMS, JUNE 2022</td>
</tr>
<tr>
<td>ibis Styles DUBAI DEIRA WATERFRONT, United Arab Emirates</td>
<td>143 ROOMS, APRIL 2022</td>
</tr>
<tr>
<td>ibis Styles MUSCAT OCEC, Oman</td>
<td>282 ROOMS, MARCH 2022</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ASIA – PACIFIC</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ibis Styles MANILA MALATE, Philippines</td>
<td>250 ROOMS, DECEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles SHANGHAI HONGQIAO GUBEI HOTEL, China</td>
<td>90 ROOMS, JULY 2020</td>
</tr>
<tr>
<td>ibis Styles BEIJING ZHONGGUANCUN HOTEL, China</td>
<td>153 ROOMS, DECEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles SEPANG KLIA, Kuala Lumpur, Malaysia</td>
<td>338 ROOMS, MARCH 2022</td>
</tr>
<tr>
<td>ibis Styles SYDNEY TOWN HALL, Australia</td>
<td>101 ROOMS, DECEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles PHUKET KAMALA ZENKIRI, Thailand</td>
<td>300 ROOMS, SEPTEMBER 2021</td>
</tr>
<tr>
<td>ibis Styles KOTA BHARU, Malaysia</td>
<td>132 ROOMS, DECEMBER 2020</td>
</tr>
<tr>
<td>ibis Styles NAGOYA, Japan</td>
<td>284 ROOMS, DECEMBER 2020</td>
</tr>
<tr>
<td>ibis Styles BANGKOK SILOM, Thailand</td>
<td>264 ROOMS, DECEMBER 2020</td>
</tr>
<tr>
<td>ibis Styles SINGAPORE ALBERT, Singapore</td>
<td>172 ROOMS, MARCH 2021</td>
</tr>
<tr>
<td>ibis Styles MELBOURNE AIRPORT, Australia</td>
<td>216 ROOMS, JUNE 2022</td>
</tr>
</tbody>
</table>
Our purpose:
Unleash the creativity locked way inside everyone

2019  A global social media contest through photographs of playful design, inspired by @DrCuerda and @Anniset

2020  A global social media contest of twisted daily objects in partnership with Designer Jaime Hayon
THE THEME

TO EXPRESS THE BRAND PASSION FOR CREATIVE DESIGN EACH IBIS STYLES HAS A UNIQUE AND INSPIRED THEME.
SOCIAL HUBS

DISCOVER THE THEMES

Each ibis Styles has a unique and inspired theme, highlighted in the design of the social hub, and present all along the customer journey, from the design to signage, all the way to the dress code.
PERFECT PHOTOSPOT

A perfect photo spot encourages guests to take creative pictures highlighting the theme of the hotel and to share them on social media.

BERLAGE ARCHITECTE THEME
Ibis Styles Den Haag, Netherlands
BEDROOMS

UNIQUE THEMED DESIGN, 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
CREATIVE F&B

An F&B offer that triggers creativity thanks to trendy DIY elements
GUEST JOURNEY & EXPERIENCE – KEY STANDARDS AT A GLANCE

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.
THE FAMILY OFFER

FAMILIES ARE VIPS AT IBIS STYLES

BOOKING
Regular promotional offers

CHECK-IN
Welcome gift + VIP welcome

STAY
Kids’ corners + baby equipment + board games

ROOM
Family rooms + TV channels

F&B
Kids’ menu + special place mats + free breakfast for children under 16

ACTIVITIES
Special activities during holidays
HEARTIST® is a motivating and engaging program that aims to unlock the creativity and initiative in all our employees. It stems from a very concrete drive to transform the company.

What does it mean to be an ibis Styles Heartist®?

• Be an expert of my brand
• Make our guest feel surprised and joyful
• Share the brand passion for creative design
• Bring the theme of the hotel to life
IBIS STYLES VISUAL IDENTITY
A playful, creative and unconventional brand territory

Playful and creative colors

A genuine stand-out personality

Eclectic and unique design
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 culture
- An invitation to come and live the ibis experience

ibis Styles Brand Presentation – Brand Communication
SOCIAL MEDIA AMPLIFICATION

2019:
ibis Styles By Us campaign
+ 60M impressions in 14 countries
3K contest entries

2020:
a greater ambition for social media strategy

1 global Instagram account
INSTAGRAM.COM/IBISSTYLES
Regional Facebook pages
FACEBOOK.COM/IBIS
1 world-class YouTube channel
YOUTUBE.COM/IBIS

ibis Styles creative design activation
IBIS.COM

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

4% conversion rate

2019 figures
IBIS STYLES 2019 AWARDS

BRAND AWARDS

➢ Best Midscale/Economy Hotel Brand – British Travel Awards 2019

➢ Best international Brand – Spain

HOTELS AWARDS

➢ Highly Commended Small and Successful Award – ibis Styles Mount Isa – Northern Outback Business Awards

➢ Standard Accommodation – ibis Styles Hobart – Tasmanian Tourism Awards
WE MEASURE SUCCESS THROUGH THE EVOLUTION OF:

**BRAND AWARENESS**
23%
ibis Styles has a growing brand awareness in most of its markets in line with network development

*Our objective is to be the best-known design-hotel brand in the economy segment: +3 to 5% awareness.*

Source: BEAM

---

**BRAND PERCEPTION**
22%
Of people claim they “strongly” love ibis Styles.
ibis Styles is highly rated as modern, design and trendy and better room comfort than competitors.

*Our objective is to continue reinforcing our creative-design positioning.*

Source: BEAM

---

**BRAND MARGIN**
€12
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 maintain this price premium.*

Source: BEAM

---

**REPUTATION PERFORMANCE SCORE**
83.45
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

*Our objective is to reach 84.6 pts in 2020*

Source: TrustYou
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.”
REPUTATION PERFORMANCE SCORE
Figures as of end 2019

IBIS STYLES AVERAGE RPS
83.45%

NORTH & CENTRAL AMERICAS
81%

EUROPE
83%

SOUTH AMERICAS
85%

AFRICA – MIDDLE EAST
85%

ASIA-PACIFIC
85%
ACCOR DISTRIBUTION SOLUTION*

Figures as of end 2019

ACCOR OFFERS > 110 GLOBAL DISTRIBUTION CHANNELS AT BEST MARKET CONDITIONS

*All Accor brands excluding recently integrated:
Delano, SLS, The House of Originals, Mondrian, Hyde, greet, Mantis, Tribe
IBIS STYLES DISTRIBUTION PERFORMANCE POWERED BY ACCOR

Figures as of end 2019 – Room revenue based

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

ACCOR WEB WEBSITES, MOBILE SITES & APP

77%
OF IBIS STYLES ROOM REVENUE COMES THROUGH ACCOR CENTRAL RESERVATION SYSTEM

WEB PARTNERS (OTAs)

23%
HOTEL PMS

36% DIRECT SALES

GDS/IDS

38% INDIRECT SALES

35%

6%

FOCUS WEB
(ACCOR WEB + WEB PARTNER)

56%

4,8M ROOM NIGHTS
€430M ROOM REVENUE
NEW BOOKING ENGINE & APP

Figures as of end 2019

1 MULTIBRAND PORTAL
ALL.ACCOR.COM

- 326M Website + App visits
- 2200 Destinations
- 18 Languages

1 LIFESTYLE COMPANION APP

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

18 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

Figures as of end 2019

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

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

Central Europe 6%
North & Central America, Caribbean 11%
Northern Europe 12%
France 12%
AS PAC 31%
Other Europe, Middle-East & Africa 20%
Europe, Central 31%
All Other 40%
North 40%
Central America, Caribbean 11%
South America 8%
North & Central America, Caribbean 11%
Other Europe, Middle-East & Africa 20%

ibis Styles Brand Presentation – Brand Performance
APPENDIX
COMPETITION

Figures as of end 2019

ibis Styles Brand Presentation – Brand Performance
DEVELOPMENT CRITERIA - Programming

Figures as of end 2019

AAA ULTRA CITY CENTER LOCATION, HISTORIC CONVERSION

RECOMMENDED NUMBER OF ROOMS
- >80 keys (Franchise)
- >125 keys (Management)

ROOM AVERAGE SIZE
13 - 24 sqm

TGFA / ROOM
-15%/-20% of worldwide

FOOD & BEVERAGE
1 Restaurant*, shared with breakfast room
1 Bar*

WELL-BEING
Fitness center*
Swimming pool (nice to have)

MEETINGS
Meeting rooms*
Web Corner
Kids Area

WORLDWIDE

PRIME LOCATIONS
SECONDARY LOCATIONS
AIRPORTS

INTERNATIONAL CAPITALS
KEY CITIES & RESORTS

MAJOR DOMESTIC DESTINATIONS

OTHER CITIES & ATTRACTIVE TOURISTIC DESTINATIONS

On Market Demand

* On Market Demand
DESIGN & TECHNICAL SERVICES - Guidelines

IBIS STYLES DESIGN BRIEF
Can be used before HCSA is signed

IBIS STYLES STYLE BOOK
Can be used before HCSA is signed

IBIS STYLES CONSTRUCTION & RENOVATION STANDARDS
Can be used after HCSA is signed
THANK YOU