Hello to those who say hello rather than goodbye,
Those who keep an open mind
and trust what their eyes might find,
Hello to those who love an unexpected encounter,
Those who see nothing strange in being a stranger.
Hello to you, to her, to him
who love when life and fun just happen
And always keep their heart and their eyes wide open.
The leading economy brand in the world

- ibis family powerful footprint more than 2,500 hotels globally
  - One of the largest brand network:
    1,260 ibis hotels opened
    140 in development
  - The highest brand awareness of its category:
    > 60% in 14 feeder markets
The best design & product of its category

• Standardization but flexibility with 3 new design concepts (social hub + room)

• Product & service offers above segment standards, at an economic price (24/7 breakfast and F&B offer, Sweet Bed concept, Mission 15’...)

• Unique & powerful music program (partnerships with famous Music Labels & Festivals)
A great business model

- Efficient concept + surface optimization drive predictable development cost
- Best asset in class to generate highest occupancy and GOP margins in the industry
- Economy segment is the least volatile in case of economic downturns
Competition matrix

Source: BEAM 2019, survey carried out on representative population of travellers.
A GLOBAL FOOTPRINT OF OVER 1,400 HOTELS OPEN AND IN THE PIPELINE

2% network + pipeline
North, Central America & Caribbean
20 hotels 2,686 rooms

24% network + pipeline
Northern Europe
283 hotels 39,921 rooms

24% network + pipeline
Southern Europe
453 hotels 41,717 rooms

16% network + pipeline
South America
160 hotels 23,761 rooms

9% network + pipeline
India, Middle East & Africa
80 hotels 14,468 rooms

16% network + pipeline
Greater China
201 hotels 22,432 rooms

7% network + pipeline
South East Asia
43 hotels 10,088 rooms

2% network + pipeline
Pacific
19 hotels 3,354 rooms

All figures as of end December 2021
Breakdown network + pipeline by region is calculated by number of rooms
ibis Paris Bercy Village 12ème, France | 195 Rooms
ibis São Paulo Expo Barra Funda, Brazil | 286 Rooms
ibis Hong Kong Central & Sheung Wan, Hong Kong | 550 Rooms
ibis Vikhroli Mumbai, India | 249 Rooms | Opened in October 2021
ibis Yogyakarta International Airport Kulonprogo, Indonesia | 224 Rooms | Opening in December 2022
ibis Bogota Calle 80, Colombia | 103 Rooms | Opening in March 2023
Vision
Music is a powerful force that connects people, ideas and culture

Purpose
To unite all people through the power of music

Activation
ibis MUSIC, We are open: Promote musical discovery & inspire unexpected connections worldwide

ibis MUSIC Global Tour
An international community of artists discovered by ibis, playing live gigs in our hotels and/or on our Social Channels, and taking us on a worldwide phygital tour.

ibis MUSIC in-hotel
Physical in-hotel markers and events: curated Spotify playlists, music corners with instruments available to play and regular live music events hosted in our hotels.

ibis MUSIC at festivals
A presence in major festivals around the world to reinforce the brand perception of a vibrant and open brand.
ibis embodies forward-looking modern design: both trendsetting and comfortable, with a real feeling of home away from home. Each ibis hotel has its own character to create vibrant and fulfilling guest experiences.
With the removal of reception desks, Welcome-in avoids the uninviting feeling of a «check-point» when guests and locals enter the lobby. Now, they receive a warm, personalized and seamless welcome in a home feeling and vibrant space.
ibis offers a collection of 3 design concepts to bring flexibility and create casual and vibrant social spaces:

- Agora by Innocad
- Plaza by FGMF
- Square by Soda
THE BEDROOM COLLECTION

COMFORTABLE AND ADAPTABLE

- First economy brand with a bed concept designed from start to finish, SweetBed™ by ibis
- Extra Comfortable rooms
- Agora by Innocad: evolving and personalized ambiance
- Plaza by FGMF: stylish shelving and adaptable spaces for 2 to 6 pax
- Square by Soda: relaxing, warm and cozy atmosphere
GREAT BAR AROUND
SIGNATURE DRINK

CASUAL AND VIBRANT

The bar is the focal point of the social experience at the hotel. It is where our guests can socialize and feel entertained.

To that end, the great bar at ibis focuses on a signature drink: beer, wine, cocktail...
People : ibis Heartists

HEARTIST® is a motivating and engaging program that aims to unlock the openness and initiative in all our employees.

It stems from a very concrete drive to transform the company.

What does it mean to be an Heartist® at ibis?
• Be an expert of my brand
• Make our guest feel free and entertained
• Share the brand passion for music
Strong presence and engagement on social media

Global Instagram account
INSTAGRAM.COM/IBISHOTELS  
+94K followers

Global TikTok account
TIKTOK.COM/@IBISHOTELS  
+32K followers  
(Since Jan 2022)

Global Facebook page
FACEBOOK.COM/IBIS  
+1.9M followers

1 Global Profile on Spotify
IBIS MUSIC ON SPOTIFY  
+3K followers

1 World-class YouTube channel
YOUTUBE.COM/IBIS  
+38K followers
ibis.com

14M users
78M PAGE VIEWS
in 13 LANGUAGES

4%
CONVERSION RATE

2019 figures
ibis Awards

BRAND AWARDS

• **GOLD** – Sound Design: Grand prix Stratégies du Design 2020
• **GOLD** – Brand Language: Grand prix Stratégies du Design 2020
• **GOLD** – Best Music Sponsorship: European Sponsorship Award 2020
• **SILVER** – Best International campaign: Grand Prix du Brand Content 2020
• **BRONZE** – Best Media Strategy: Grand Prix des Stratégies Media 2021

HOTEL AWARDS

• **ibis Kolkata Rajarhat** – Budget / Economy Hotel of the Year - HICSA 2021
• **ibis Moscow Paveletskaya** - Best 3* Hotel in Moscow - Putevodnaya Zvezda Award
• **ibis Moscow Centre Bakhrushina** - Best 3* Hotel in Moscow - Russian Hospitality Awards 2020
• **ibis Hong Kong Central & Sheung Wan** - Caring Company Award - The Hong Kong Council of Social Service (HKCSS)
• **44 ibis hotels worldwide won a TripAdvisor “Travelers Choice Award” 2021**
We measure success through the evolution of:

<table>
<thead>
<tr>
<th>BRAND AWARENESS</th>
<th>BRAND PERCEPTION</th>
<th>BRAND MARGIN</th>
<th>REPUTATION PERFORMANCE SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>65%</strong> Worldwide, ibis is the undisputed leader of economy brands (nearly 90% in France, over 80% in the UK and Germany and over 70% in Brazil, Indonesia and Australia).</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>20%</strong> Of people claim they “strongly” love ibis. ibis is associated with modernity and comfort by regular guests. ibis caring staff is recognized as brand strength.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>11€</strong> Brand Margin® measures the financial premium which the brand name adds to the intrinsic value of the same hotel stay with an unbranded alternative.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>80,7 pts</strong> The Reputation Performance Score measures the overall hotel online reputation based on several sources: Guest Satisfaction Survey (GSS &amp; 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%.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: BEAM 2019

Our objective by 2024 is to increase brand awareness by 1 pt amongst 18-35 audience.

Our objective is to build more emotional positioning and improve the perception of being a modern brand.

Our objective is to maintain price premium.

Our objective is to increase RPS by 0.4pts in 2022.

Source: TrustYou 2021
Central Brand Delivery: CBD (%)

Central Brand Delivery measures the business in room nights brought by Accor to the hotel through the 3 main group levers: Distribution (through Central Reservation System - CRS), Loyalty & Sales. A 70% CBD means that 70% of the room nights of a hotel are driven by Accor & Brand Sales, Distribution (all channels powered by the CRS) & Loyalty ecosystem.

Official figures, end of 2019

<table>
<thead>
<tr>
<th>Distribution</th>
<th>Loyalty &amp; Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL.ACCOR.COM, BRANDS.COM, VOICE</td>
<td>21%</td>
</tr>
<tr>
<td>B2B GLOBAL SALES (incl. GDS)</td>
<td>16%</td>
</tr>
<tr>
<td>OTA</td>
<td>26%</td>
</tr>
<tr>
<td>LOYALTY DIRECT HOTEL</td>
<td>8%</td>
</tr>
</tbody>
</table>

71,1%

16M ROOM NIGHTS
€1,285M ROOM REVENUE

FOCUS WEB
(ACCOR WEB + WEB PARTNER)
Direct bookings: Accor Digital Platform

Official figures, end of 2019

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

**NEW in 2020:**
- **All Safe label visibility** on digital experience to reassure guests during the pandemic
- Launch of **Apartment & Villas** website dedicated to Branded Residences and Extended Stay hotels

- **> 50%** Mobile and App visits
- **1** Download every minute
- **> 4,3/5** app ratings
  - iOS: 4,5/5 & Android: 4,3/5

- plugged to **ALL.COM**

1 **MULTIBRAND PORTAL**
ALL.COM

1 **LIFESTYLE COMPANION APP**
ACCOR ALL

18 **BRAND.COM WEBSITES**

Official figures as of end 2019
Direct Bookings : Accor Loyalty Program
Official figures, end of 2019

**THE ONLY LIFESTYLE LOYALTY PROGRAM**

NEW LIFESTYLE & AUGMENTED HOSPITALITY FRAMEWORK
OFFERING EXTENDED OPPORTUNITIES TO EARN & REDEEM POINTS

NEW BENEFITS
- 38 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**

- **73M** Loyalty members worldwide
- **37%** Loyalty contribution rate in RN
- **x 3,6** Members stay twice more than non-members

**THE MOST GLOBAL LOYALTY PROGRAM**

- **>250M** Loyalty members worldwide
- **North & Central America, Caribbean 11%**
- **Southern Europe 22%**
- **Middle-East & Africa 5%**
- **Asia - Pacific 32%**

Official figures as of end 2019
## Development Criteria – Programming

Official figures, end of 2019

<table>
<thead>
<tr>
<th>AAA ULTRA CITY CENTER LOCATION, HISTORIC CONVERSION</th>
<th>WORLDWIDE</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECOMMENDED NUMBER OF ROOMS</td>
<td>100 keys and +</td>
</tr>
<tr>
<td>ROOM AVERAGE SIZE</td>
<td>16.4 – 17.4 sqm</td>
</tr>
<tr>
<td>TGFA / ROOM</td>
<td>30 - 36 sqm</td>
</tr>
</tbody>
</table>

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

**FOOD & BEVERAGE**
- 1 restaurant\(^{(1)}\), shared with breakfast room
- 1 bar

**WELL-BEING**
- No fitness center
- No swimming pool
- No spa

**MEETINGS**
- Meeting rooms\(^{(1)}\)
Merci

For more information, please connect to the internal Accor platform.
These files are for internal use only. Do not distribute or reproduce.