



Why invest *ibis* 2025

GLOBAL DEVELOPMENT
PREMIUM, MIDSCALE & ECONOMY DIVISION

WELCOME TO IBIS

Because right next door and all over the world there is always an ibis hotel to welcome you.



WHY IBIS?

Smart Business Model

Join the segment's best-known & trusted brand.

Benefit from

- Proven strong RGI performance
- Predictable development & operating costs resulting in highest GOP margins.

Loved by guests around the world

A global footprint of nearly **1,400 hotels**, offering vibrant, social places open to all

And **leading experience vs competitors** in design, comfort, food & beverage & entertainment.

Powerful Distribution Eco-system

Leverage Accor's sales, marketing, distribution & loyalty platform from day 1

Connecting you with valuable global business & directly contributing **79% of your room revenue.**

Smart Business Model

Chapter

01



*Topline
Investment
EBITDA*

TOPLINE

Highest awareness of its category

BRAND AWARENESS

65%

Vs. Holiday Inn Express - 42%
Premier Inn - 29%
Kyriad - 15%

**Brand awareness index
vs competition: 218**

Worldwide, ibis is the undisputed leader of economy brands (95% in France, nearly 80% in the UK, Germany and Brazil and over 70% in Indonesia, Spain and Australia)

BRAND MARGIN

€13

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




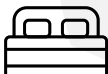


TOPLINE

With a global footprint of nearly 1,400 hotels open and in the pipeline



16%

Americas

	185	45
	26,955	5,142



54%

Europe & North Africa

	715	35
	79,782	3,840



9%

MEAPAC



	126	17
	25,594	3,168

21%

China & Others

	225	40
	23,556	3,802

ibis

	NETWORK	PIPELINE
	1,251	137
	155,887	15,952

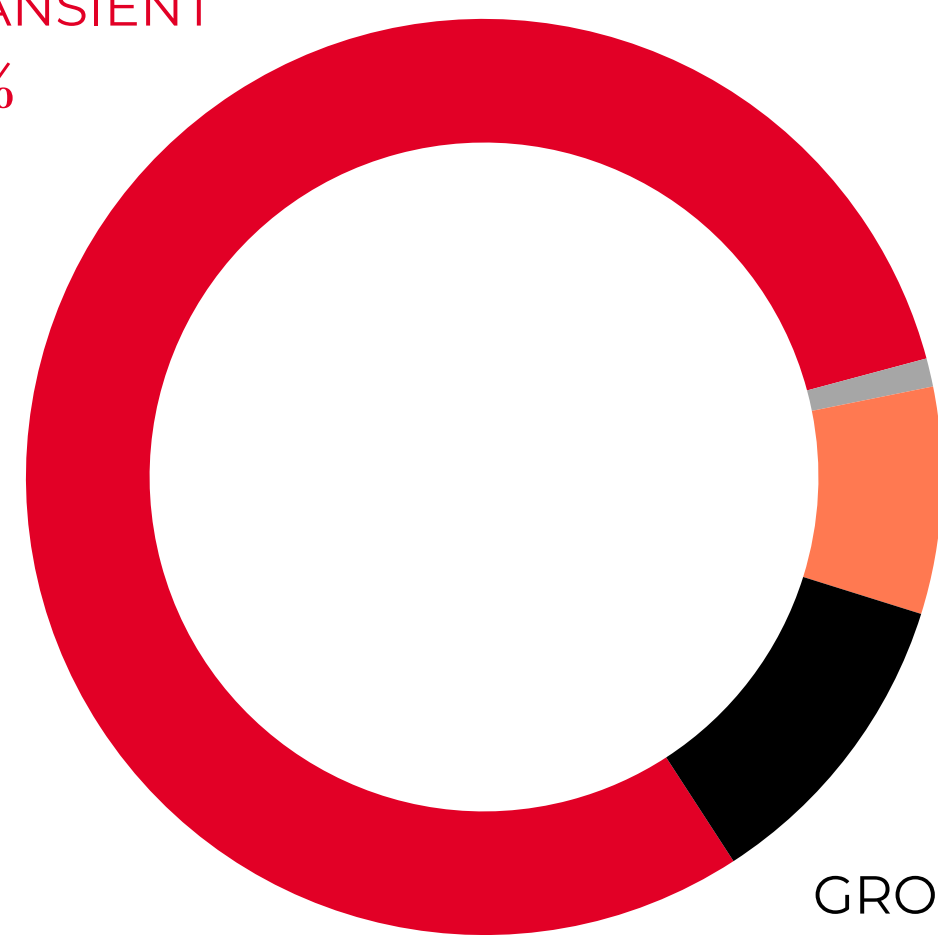
All figures as of end December 2024
Breakdown network + pipeline by region is calculated by number of rooms

TOPLINE

Resulting in **79%** of
revenue generated by
transient individuals

BOOKING REVENUE IBIS NETWORK
FULL YEAR 2024

TRANSIENT
79%



CONTRACT
3%

OTHER
3%

GROUPS
15%



INVESTMENT

Predict your development costs with efficient design concepts

Choose from 3 adaptable design concepts, creating casual and vibrant social spaces.

Accor Design & Technical Services experts are fully mobile to support implementation & surface optimisation.

CHOOSE FROM

1. AGORA BY INNOCAD
 2. PLAZA BY FGMF
 3. SQUARE BY SODA
- OR BESPOKE CONCEPTS

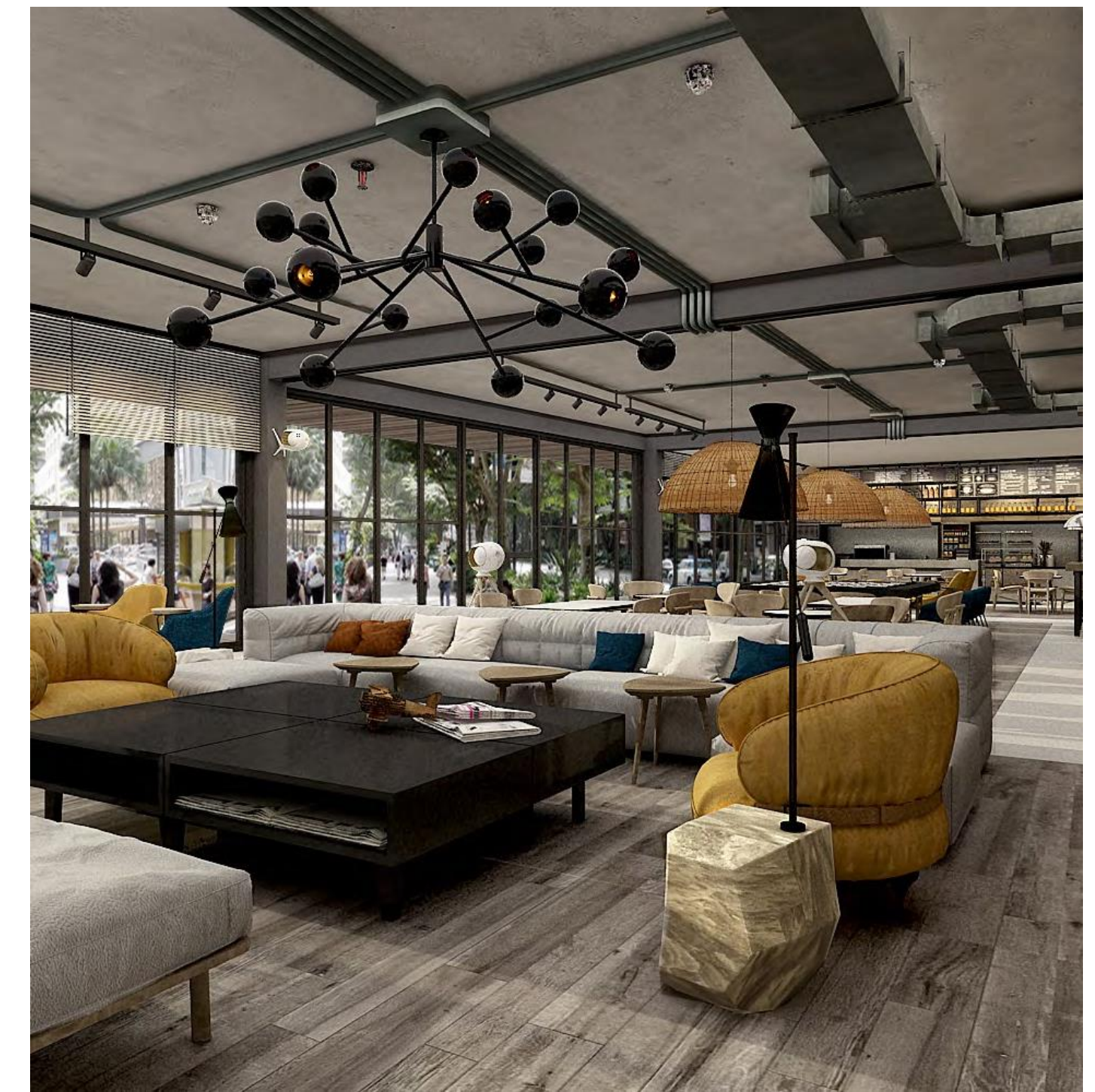


2. PLAZA

1. AGORA



3. SQUARE



Loved by guests

Chapter

02

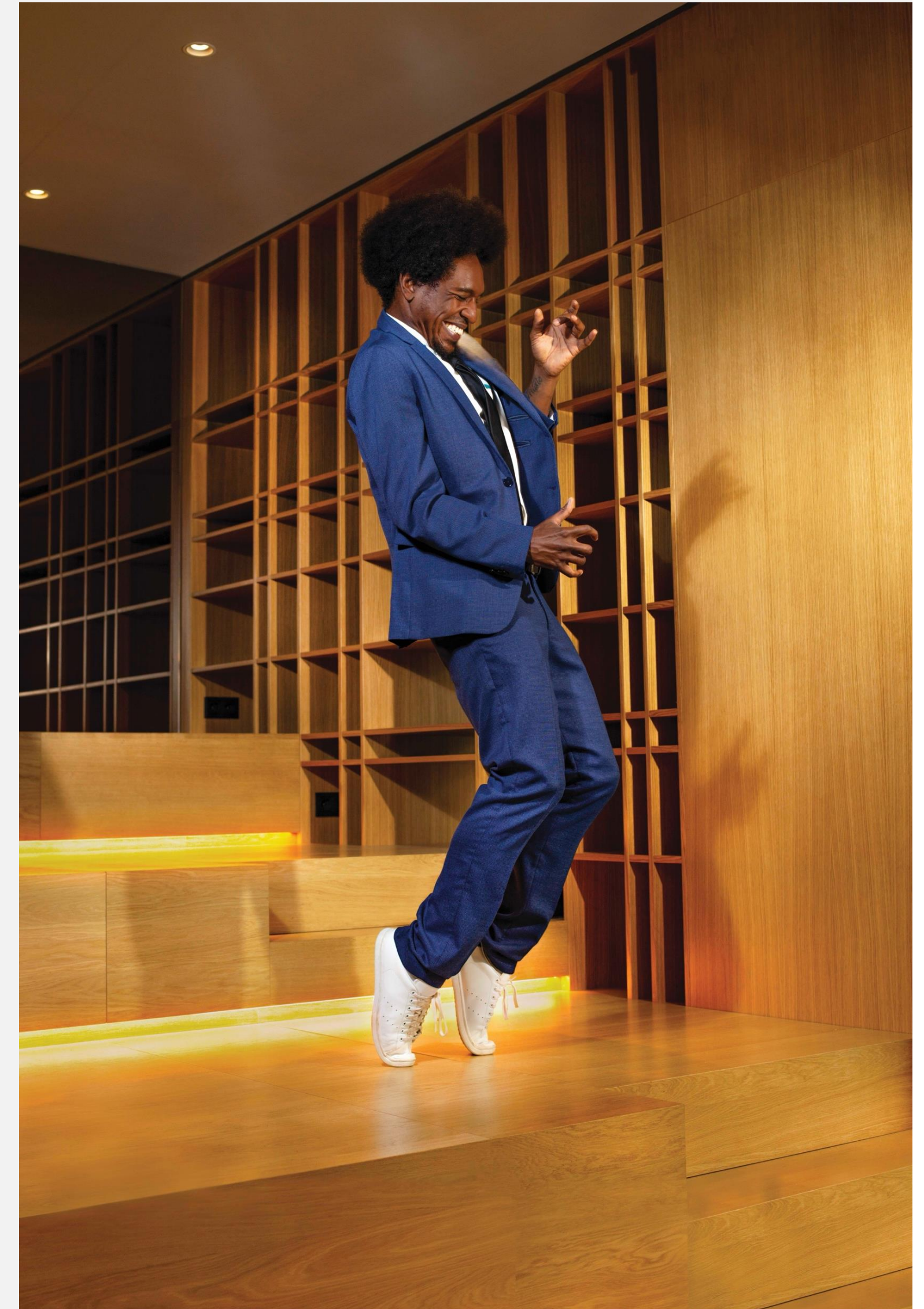


Brand positioning
Brand Movie
TOP 3 USPs

BRAND POSITIONING

ibis hotels are
vibrant social places

FRIENDLY OUTGOING
OPEN TO ALL



TOP 3 USPs

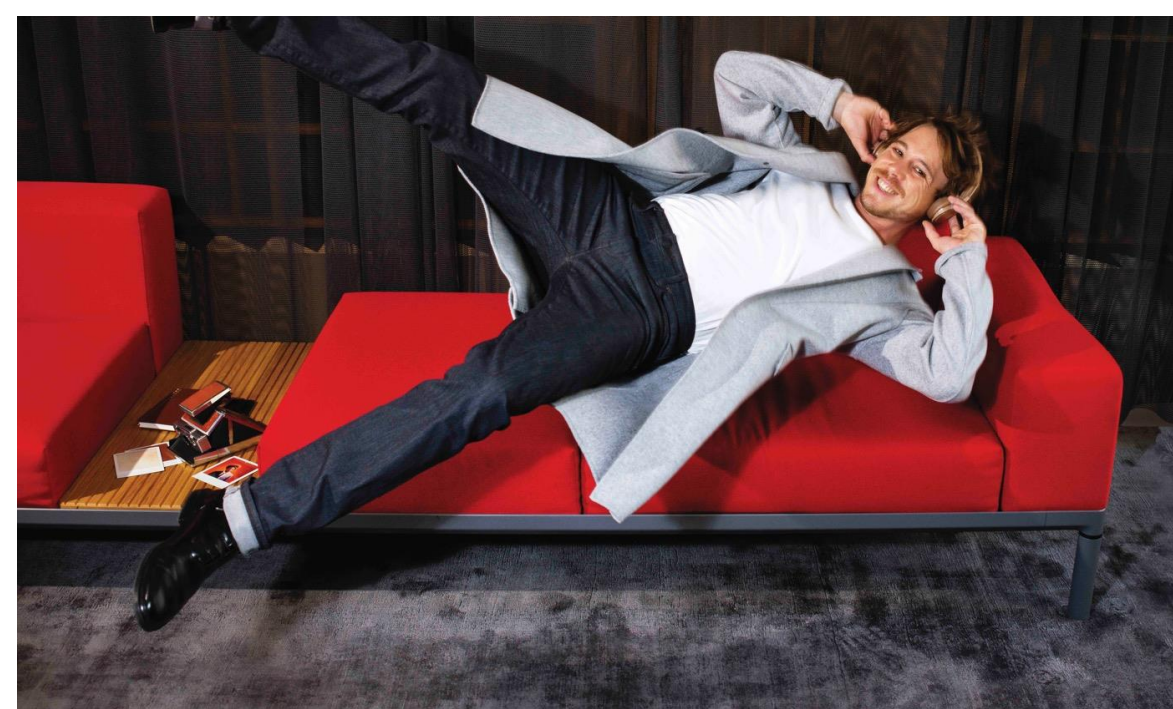
Our promise to guests all over the world



1 ibis embodies
forward-looking
trendy design



2 ibis is the trustworthy
choice for all travellers
around the world



3 Eat, work &
play in a vibrant
atmosphere



USP #1



With a real feeling of home away from home, each ibis hotel has its own character to attract customers and create the preference among the crowd.

#1 in Facilities

Sentiment Score* at 79.30
vs. competitors between 74.81 and 74.85**

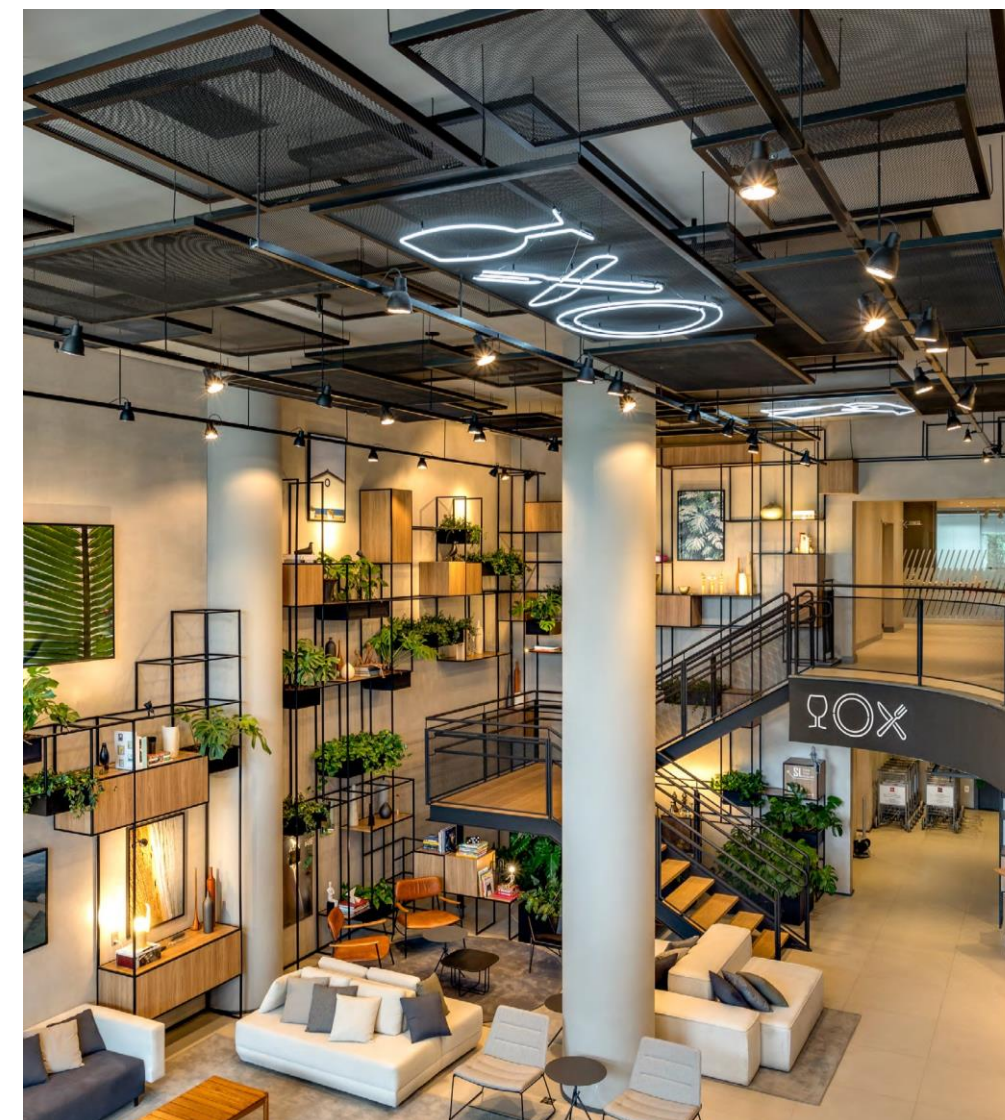
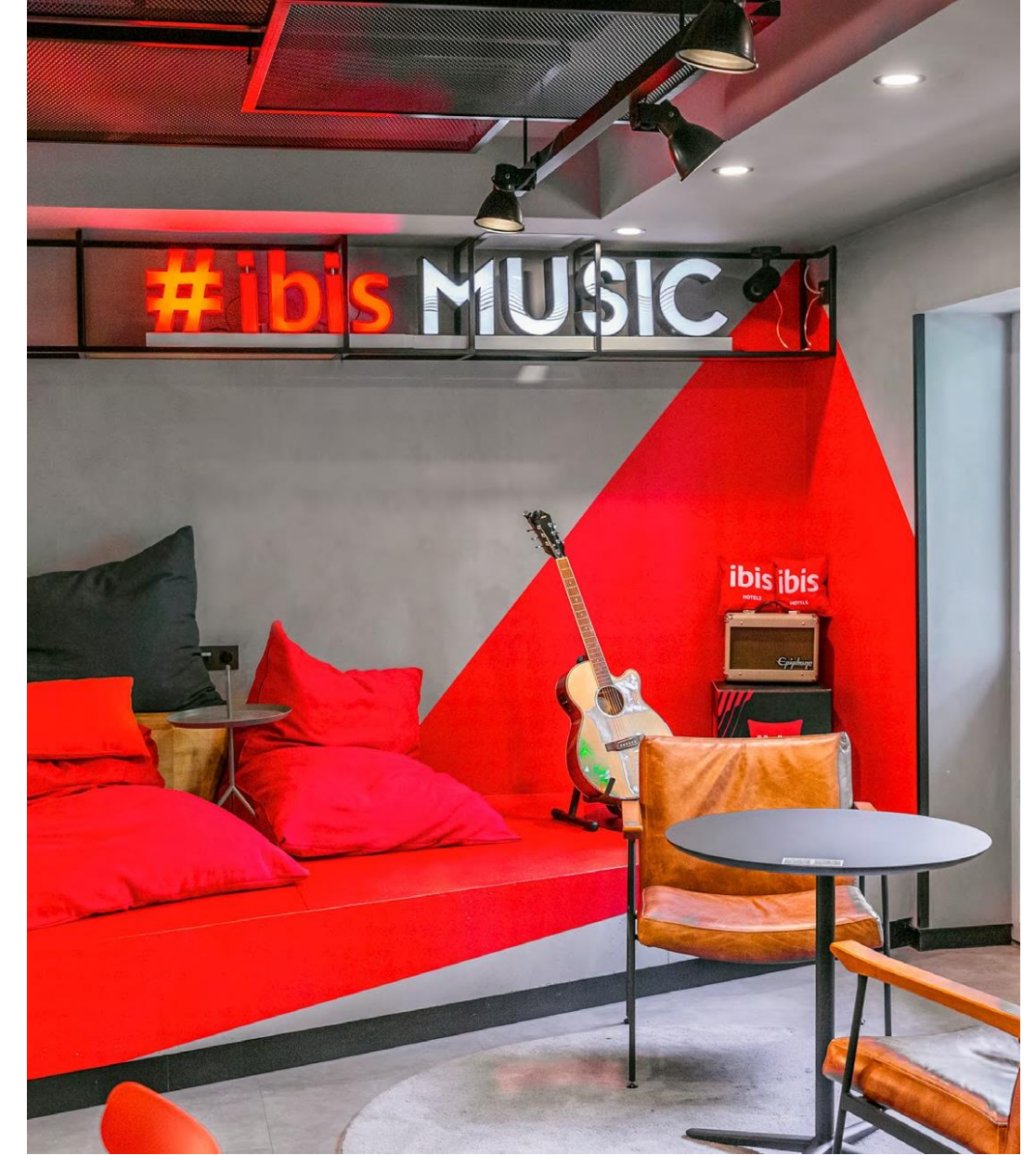
* Sentiment Score

**Competitors include: Holiday Inn Express and Premier Inn

Source: Trust You 2024



Why invest - ibis





USP #2

ibis is the
trustworthy choice



for all travelers
around the world

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

#1 in Breakfast

Sentiment Score* at 82.70
vs. competitors between 80.02 and 81.00**

* Sentiment Score

**Competitors include: Campanile, Holiday Inn Express and Premier Inn

Source: Trust You 2024

Warm and personal service

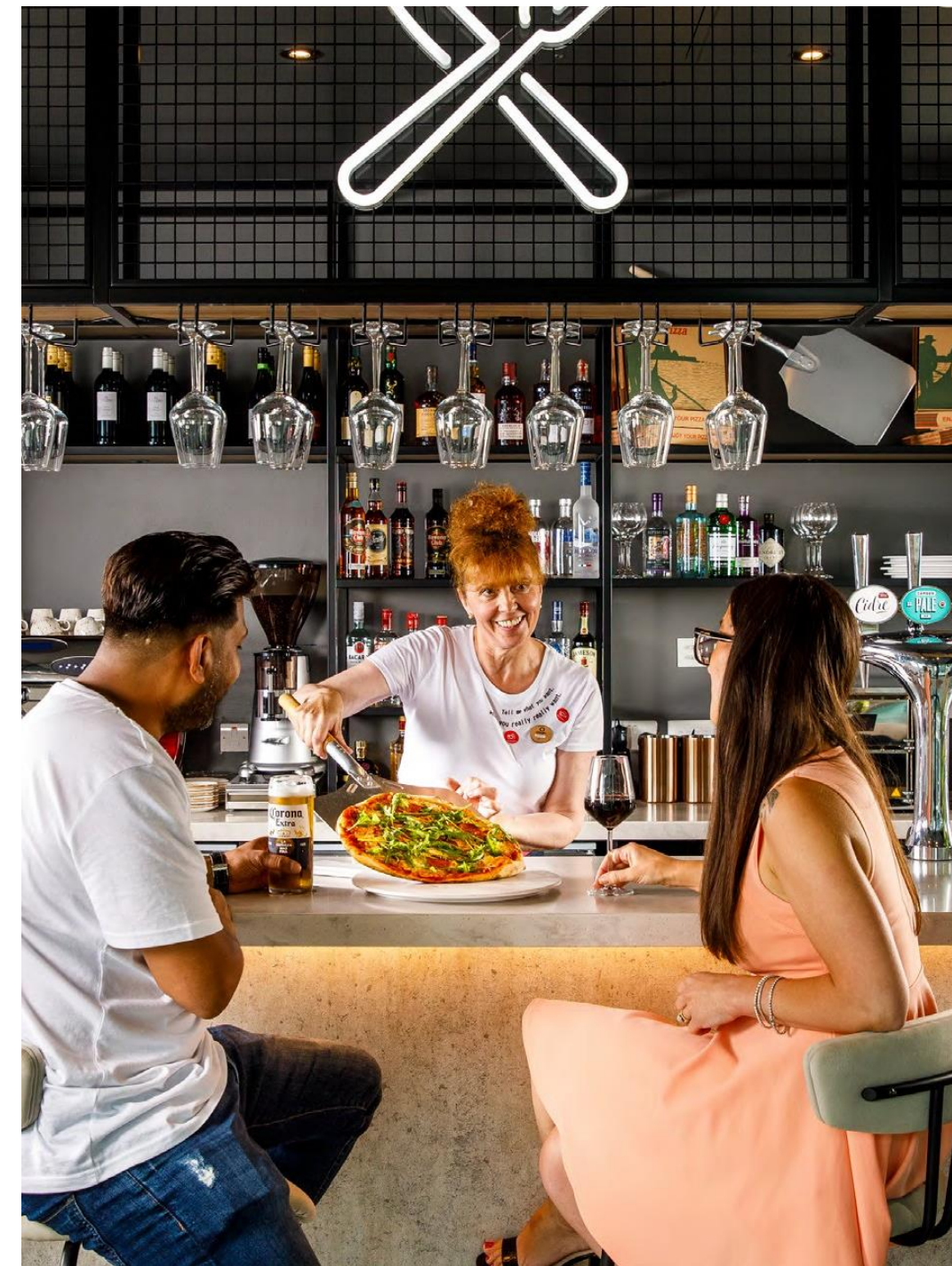
The ibis service culture is all about making our guests feel like home. With the removal of reception desks, Mobile Welcome provides guests and locals with a warm, personalised and seamless welcome.

Comfortable & adaptable guest room

Rooms within each concept are also flexible: they come in different sizes to accommodate solo guests, couples, families or groups of six, in standard, premium and duplex versions. First and only in the economy segment to develop its own concept of bedding – Sweet bed™ by ibis.

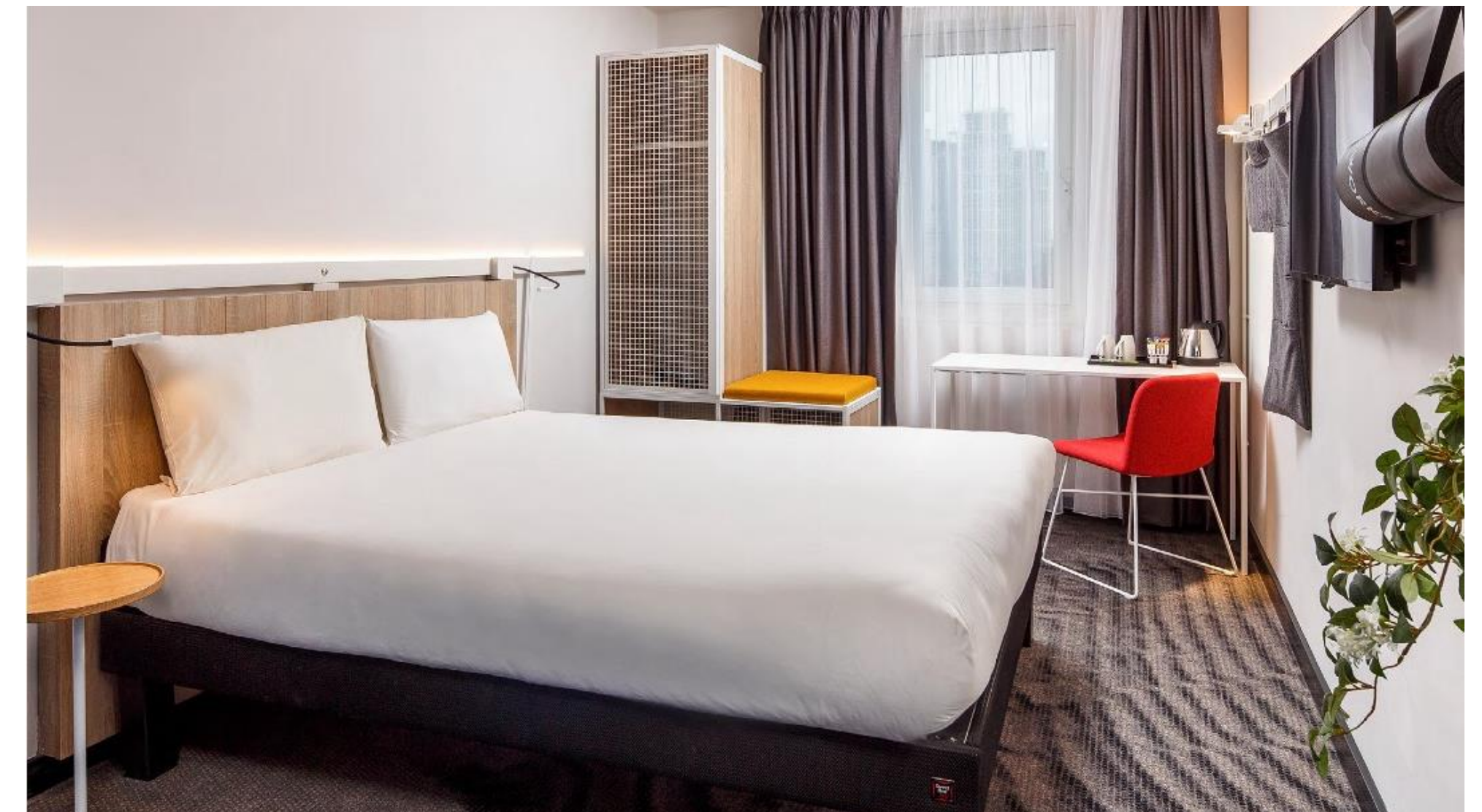
Casual and vibrant F&B

ibis offers 24/7 food & beverage solutions at an economic price, above segment standards. The bar is the focal point of the social experience at the hotel, where our guests can socialise and feel entertained.



Best loved breakfast

All you can eat buffet (6:30am to 10am) with unique signature treats & 24h take-away breakfast bag.





USP #3



Off-the-shelf F&B concepts
Co-working solutions
Entertainment through music.

#1 in Ambience

Sentiment Score* at 85.89
vs. competitors between 65.83 and 81.07**

* Sentiment Score

**Competitors include: Campanile, Holiday Inn Express and Premier Inn
Source: Trust You 2024

Off-the-shelf F&B concepts

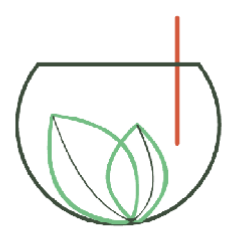
ibis offers off-the-shelf F&B concepts to plug in hotels, attracting both locals and guests in a casual and vibrant atmosphere.



AMY'S SPOT



AIRBERT'S PLACE



lily's garden

Co-working solutions

With our co-working brand "Wojo" or a bespoke concept, social hub space is optimised during the day, attracting neighbors or travelers.

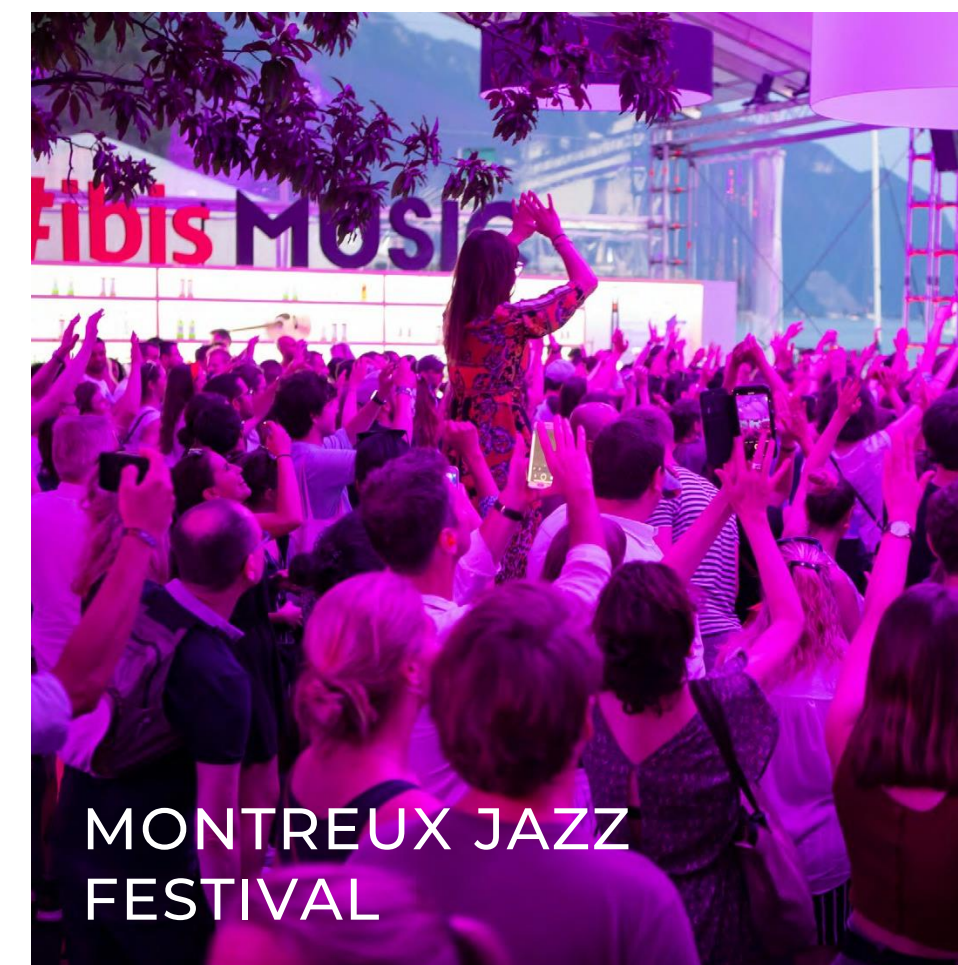




Music in-bar animations

Easy-to-implement animations around music attract locals and guests to gather in our great bars

- in-hotel collateral with Spotify playlists
- Plug & Play corner with some musical instruments for guests to play and organisation of music classes
- Music games, quiz night, blind test...
- In-hotel small and intimate gigs are greatly appreciated by our guests and can be organised from time to time



Presence in music festivals

In-hotel animations amplified with a strong presence at festivals – sharing ibis hospitality outside hotels.





TOP 3 USPS

Guest journey & experience

KEY STANDARDS AT A GLANCE

Arrival & departure	Social hub	Guest room	F&B
Staff dress code Mobile welcome	High-end sound system & Brand Compliant playlist played 24/7 Plus & Play corner with music instruments Music in-bar animations	Sweet Bed™ by ibis Branded amenities	Breakfast buffet 24/7 F&B offer Great Bar around a signature drink

Distribution ecosystem

Chapter

03

*Accor Sales,
Distribution & Loyalty
ibis digital scale*



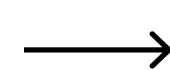


Connect your hotel with Accor 360° solutions from day 1

SALES

Largest global sales office

450+ sales professionals across 34 countries,
covering 80% of the globe



Large B2B clients portfolio

15K regional & strategic accounts, generating
45% topline of Accor global network

DISTRIBUTION & DIGITAL MARKETING

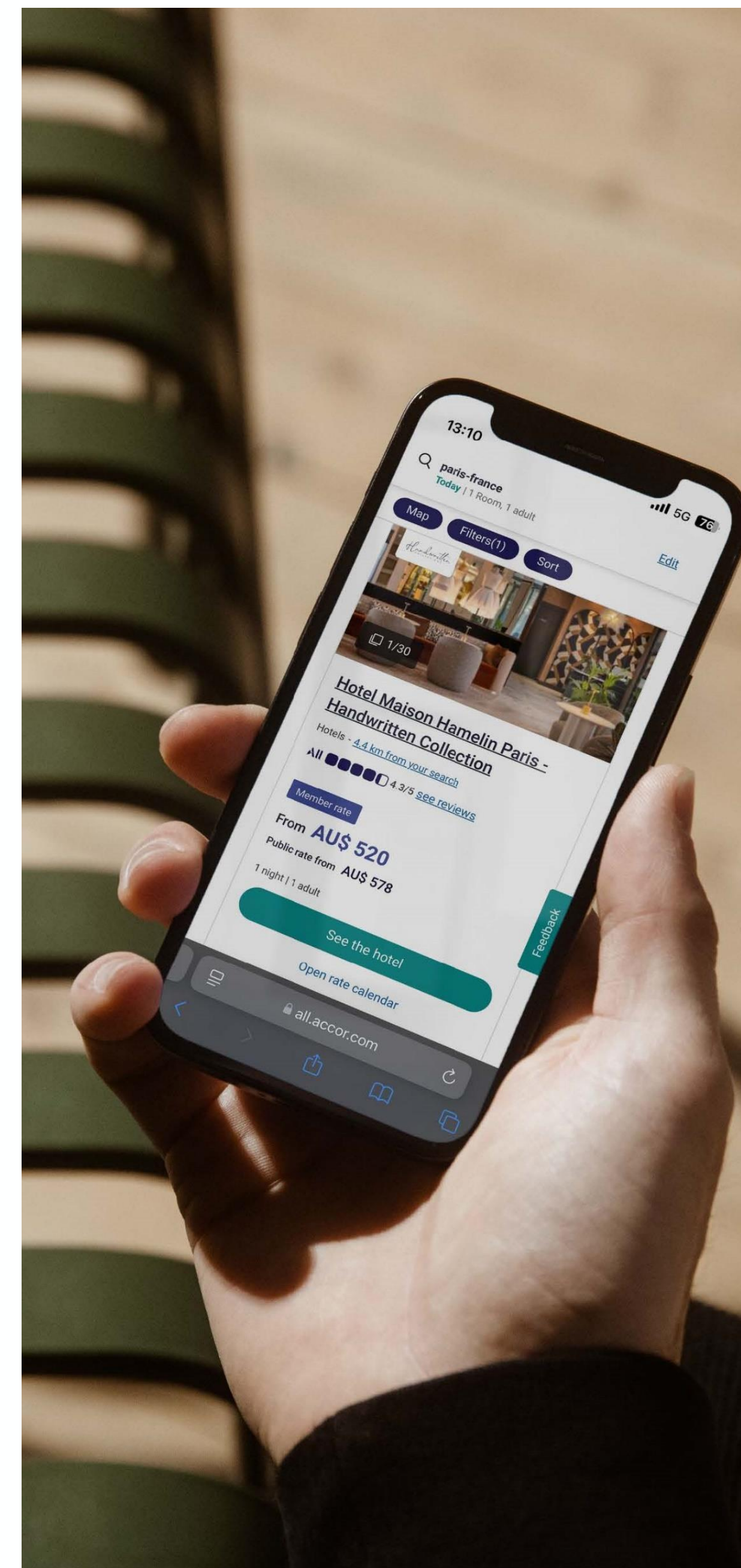
Robust and powerful distribution system

110 countries, 140+ global & local connectivity
partners and All.com available in 19 languages



Secured hotel business & cost control

2/3 of web direct revenue generated by
owned channels





LOYALTY

Widest & most diversified international network

100M members worldwide and
100+ global & local partnerships

Strong return on investment

3.3x higher incremental net revenue
than loyalty cost to hotels

REVENUE MANAGEMENT

100+ local certified experts

Managing performance and optimisation
of revenue and profitability

Powerful data-driven RMS

Resulting in +1 to +5% RevPAR



IBIS DIGITAL SCALE

Boost direct sales with ibis digital scale

IBIS.COM

6.2M
Sessions

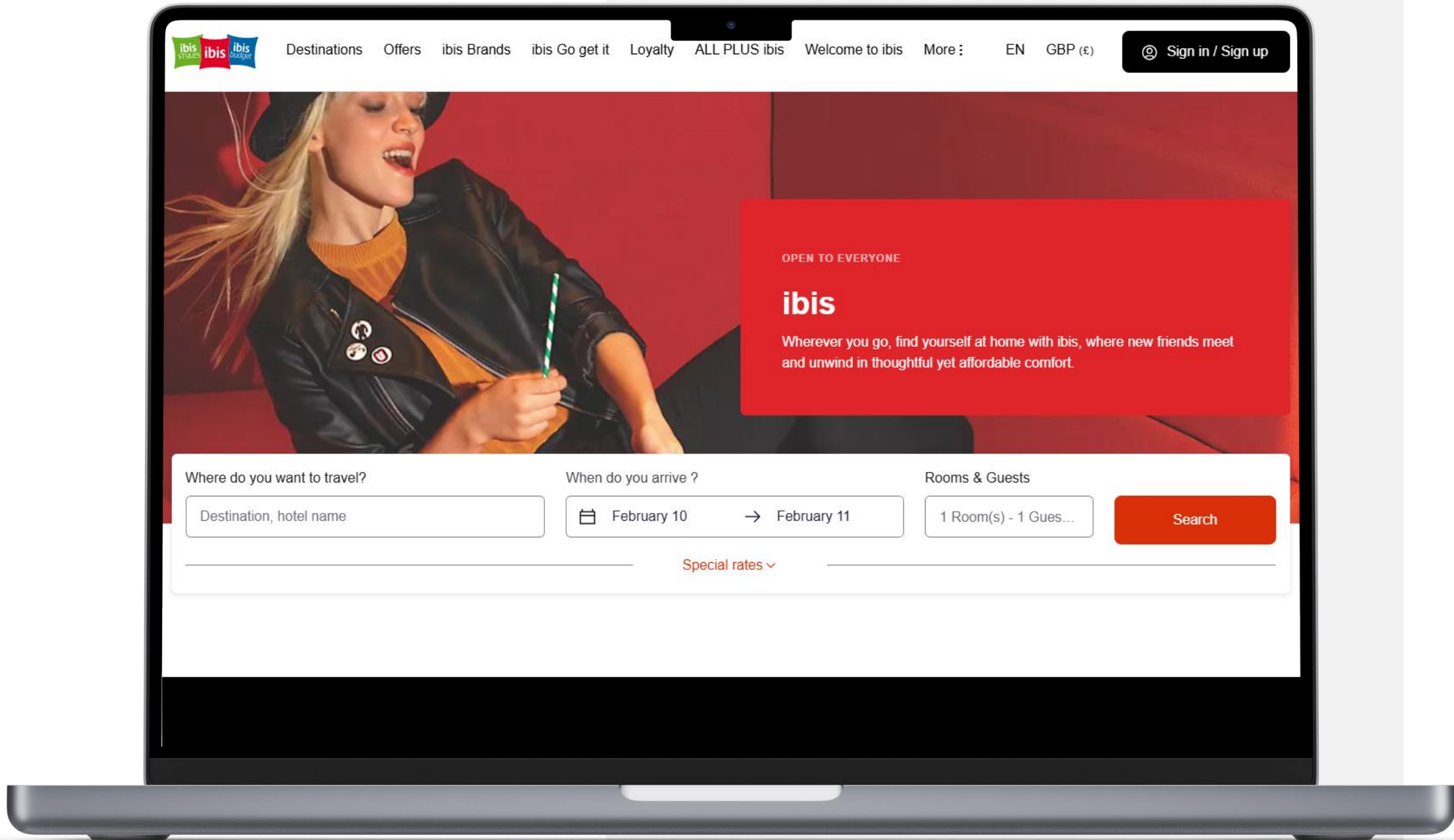
15
Languages

4.50%
Conversion rate
Well above hotel industry conversion rate average of 2.2%)


All data FY 2024

CRM

6.5M
Contacts in CRM ibis family database in 2024



SOCIAL MEDIA AMPLIFICATION

 +171k
Followers

 +273k
Followers

 +23k
Followers

 +40k
Followers
(Global ibis channel)

 +1.9M
Followers
(Global ibis account)

 +76k
Followers
(Global ibis account)

Development Criteria

Chapter

04



IBIS TASHKENT LUMIERE
UZBEKISTAN – OPENING 2026

*Hotels
Leisure & Resorts
Combos*



HOTELS

Hotels Development Criteria

ibis hotels fit equally new builds and conversions projects.

	EUROPE ⁽¹⁾	WW
NUMBER OF KEYS	80+	100+
ROOM SIZE	14-18 SQM	16-24 SQM
TGFA	25-40 SQM	30-45 SQM

(1) Incl. AAA ultra city center + historic conversion WW

MUST-HAVES

- Lobby bar
- Buffet breakfast
- Work in the lobby
- Music corner

NICE-TO-HAVES

- Restaurant
- Coworking dedicated area
- Meeting room
- Fitness
- Swimming Pool
- Laundry room
- Car park
- Family Rooms



LEISURE & RESORTS

Leisure & Resorts Development Criteria

ibis also answers the growing leisure demand with affordable and comfortable resorts, welcoming everyone looking for a casual gateway.

	EUROPE ⁽¹⁾	WW
NUMBER OF KEYS	80+	100+
ROOM SIZE	15-20 SQM	18-25 SQM
TGFA	35-50 SQM	40-55 SQM

(1) Incl. AAA ultra city center + historic conversion WW

MUST-HAVES

- Lobby bar
- Buffet breakfast
- Kids Corner
- Outside Space
- Entertainment Facilities
- Car Park

NICE-TO-HAVES

- Laundry room
- Fitness
- Restaurant
- Swimming Pool
- Work in the Lobby
- Meeting Room



COMBO NOVOTEL / IBIS ALMATY JETISU
KAZAKHSTAN

COMBOS

Combos development

Strong ROI for projects
combining ibis hotel with:

- EXTENDED STAY EX. 
- 2 STARS HOTELS EX. 
- 4 STARS HOTELS EX. 

ibis Network

Chapter

05

*Urban,
Leisure & Resorts
Airport,
MICE
Combos*

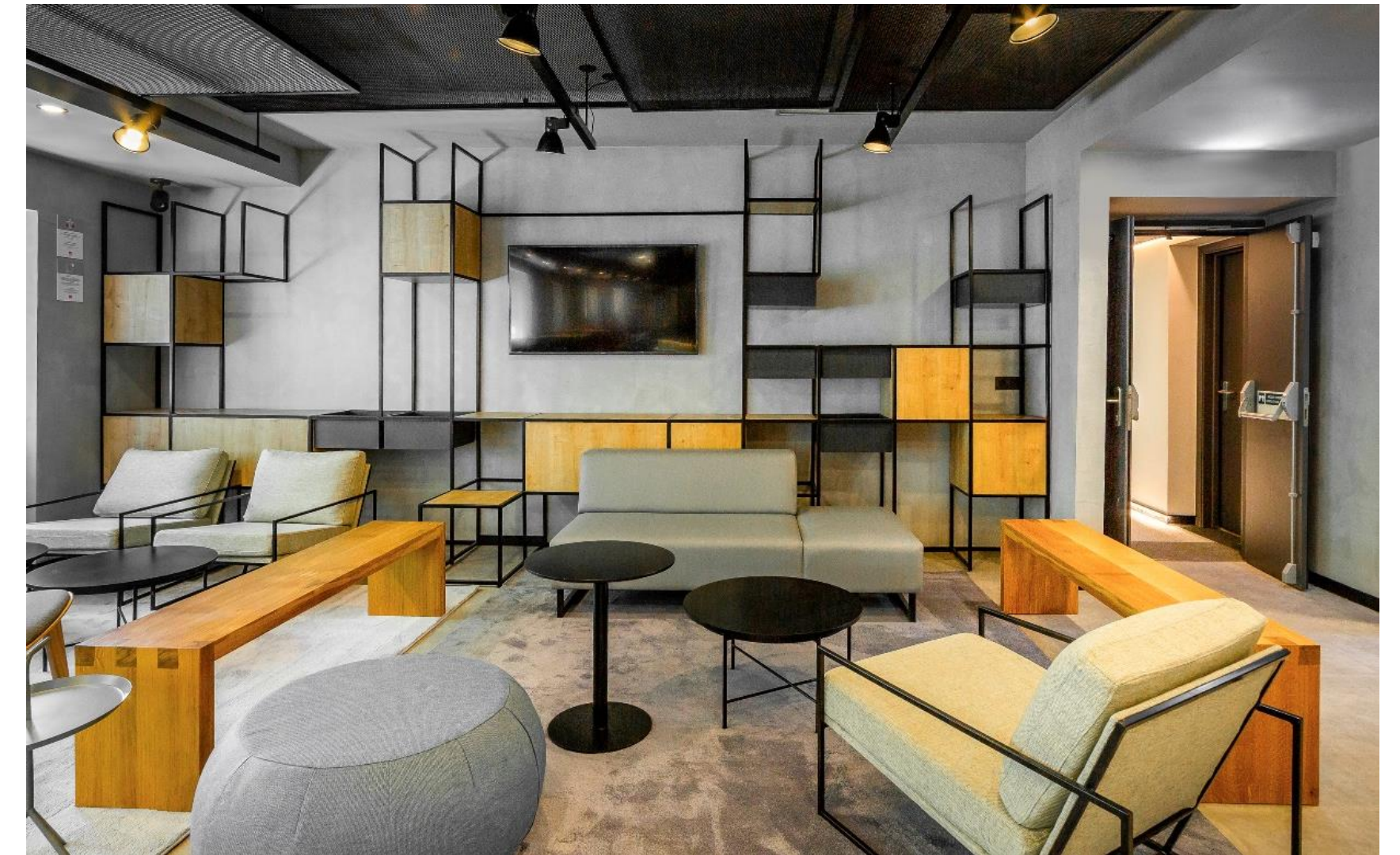


IBIS BANGKOK SUKHUMVIT 24
THAILAND

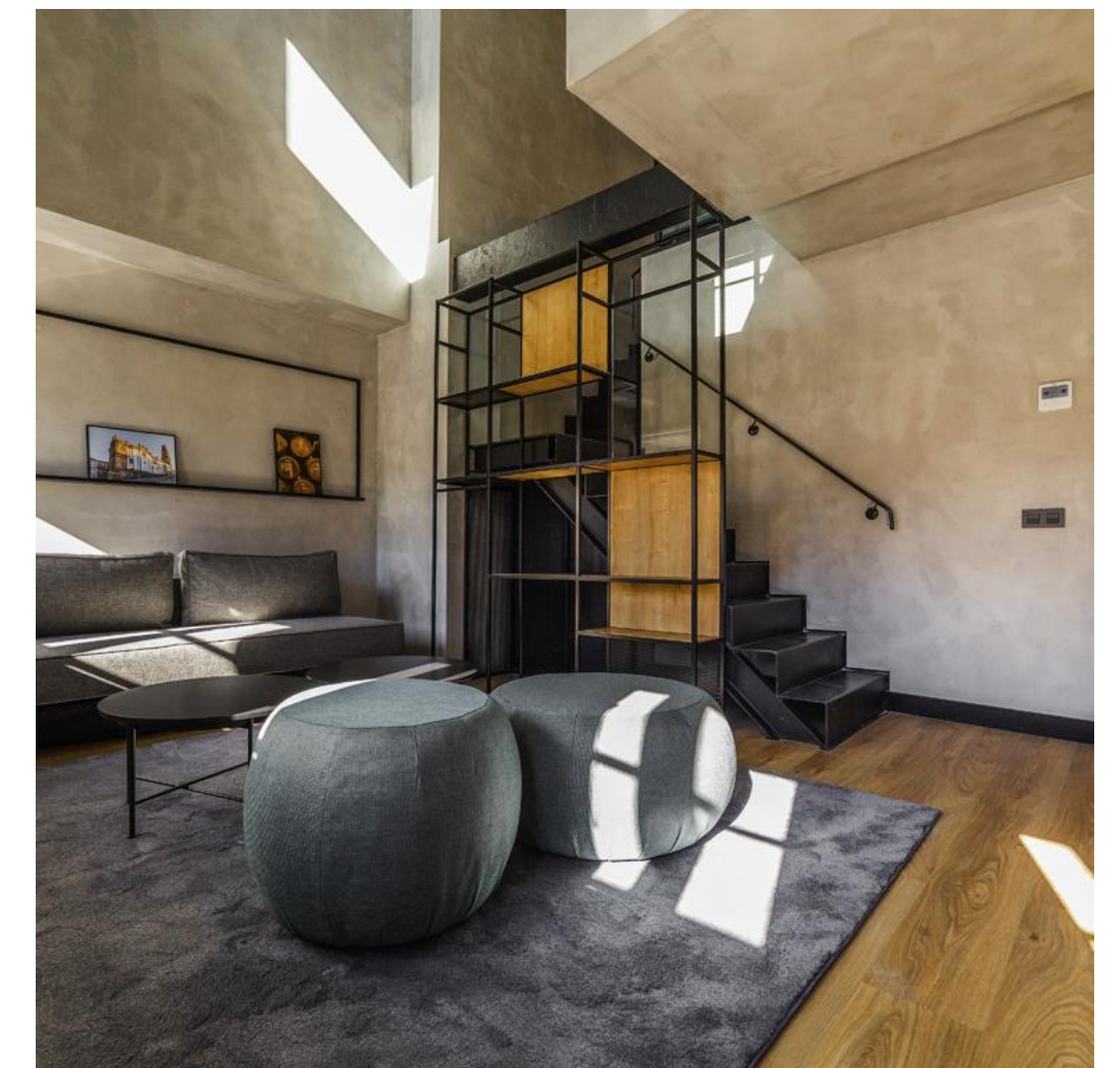


URBAN

ibis Porto Centro Mercado do Bolhao, *Portugal*



 89 rooms

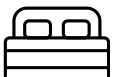


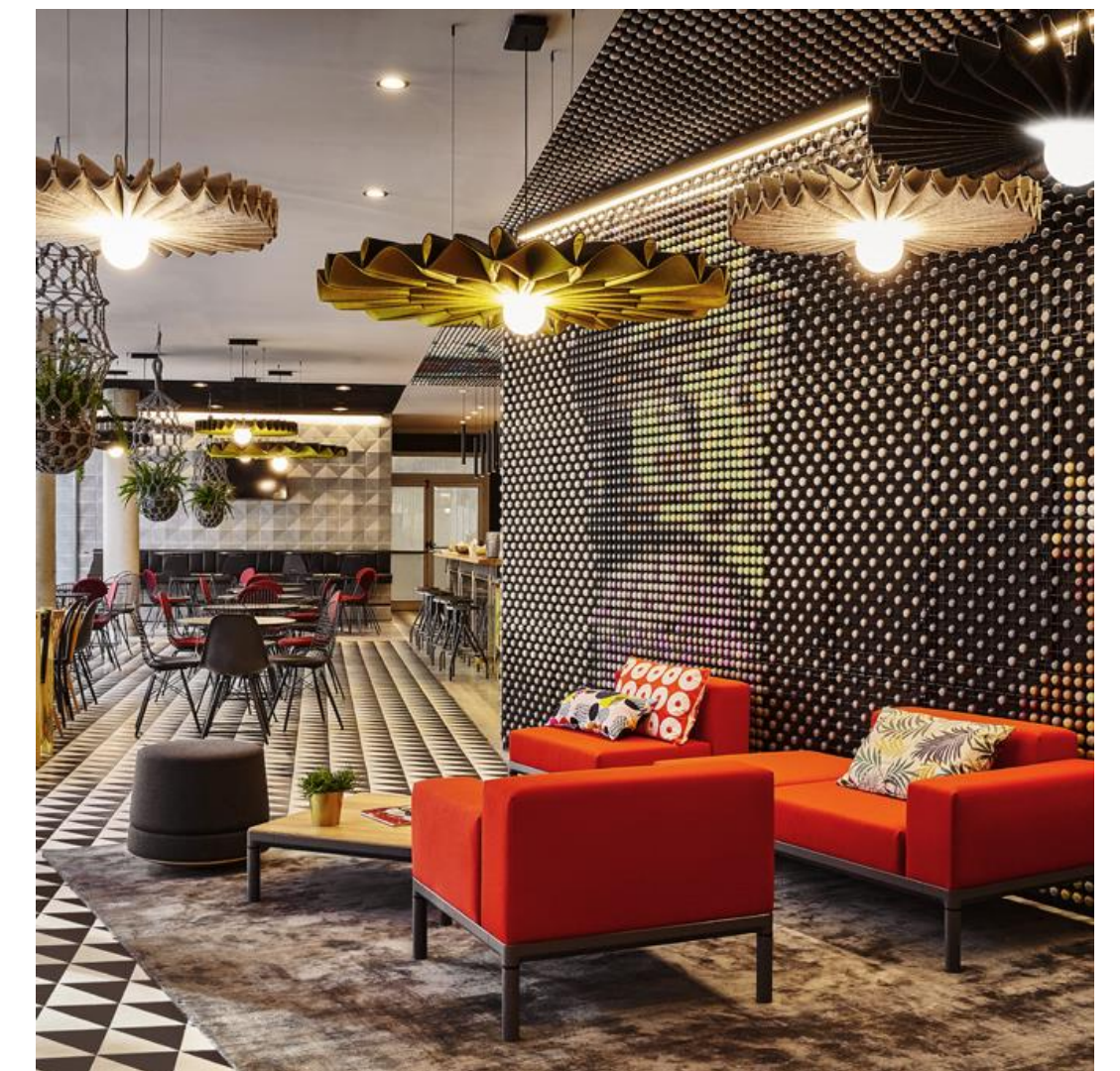


URBAN

ibis Barcelona Plaza Glories 22, *Spain*



 147 rooms





Why invest - ibis

URBAN

ibis Lyon Sud Oullins , *France*



 123 rooms



URBAN

ibis Béthune Centre Gare, *France*



 78 rooms





Why invest - ibis

URBAN

ibis London Sutton Point Hotel, UK



 99 rooms



Why invest - ibis

URBAN



ibis Bucharest Politechnica, *Romania*



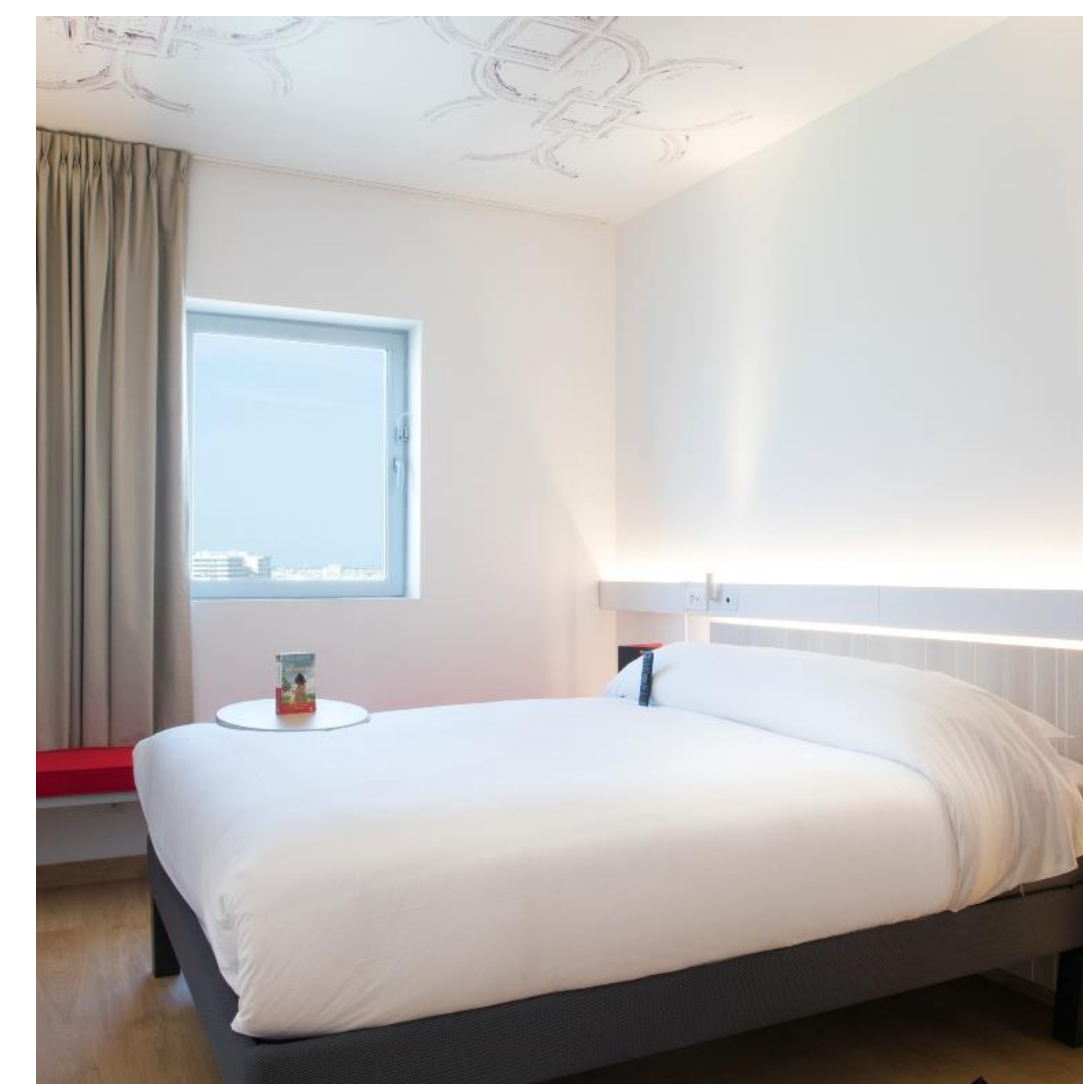


URBAN

ibis Casablanca Abdlemoumen, *Morocco*



 157 rooms





Why invest - ibis

URBAN

ibis São Paulo Expo Barra Funda, *Brazil*



 286 rooms



Why invest - ibis

URBAN



 120 rooms

ibis Santa Cruz de la Sierra, *Bolivia*





Why invest - ibis

URBAN



 288 rooms

ibis Jeddah City Center, *Saudi Arabia*





Why invest - ibis

URBAN

ibis Osaka Umeda, *Japan*



 181 rooms



Why invest - ibis

URBAN



 162 rooms

ibis Samarinda, *Indonesia*



URBAN

ibis Nanjing Confucius Temple, *China*



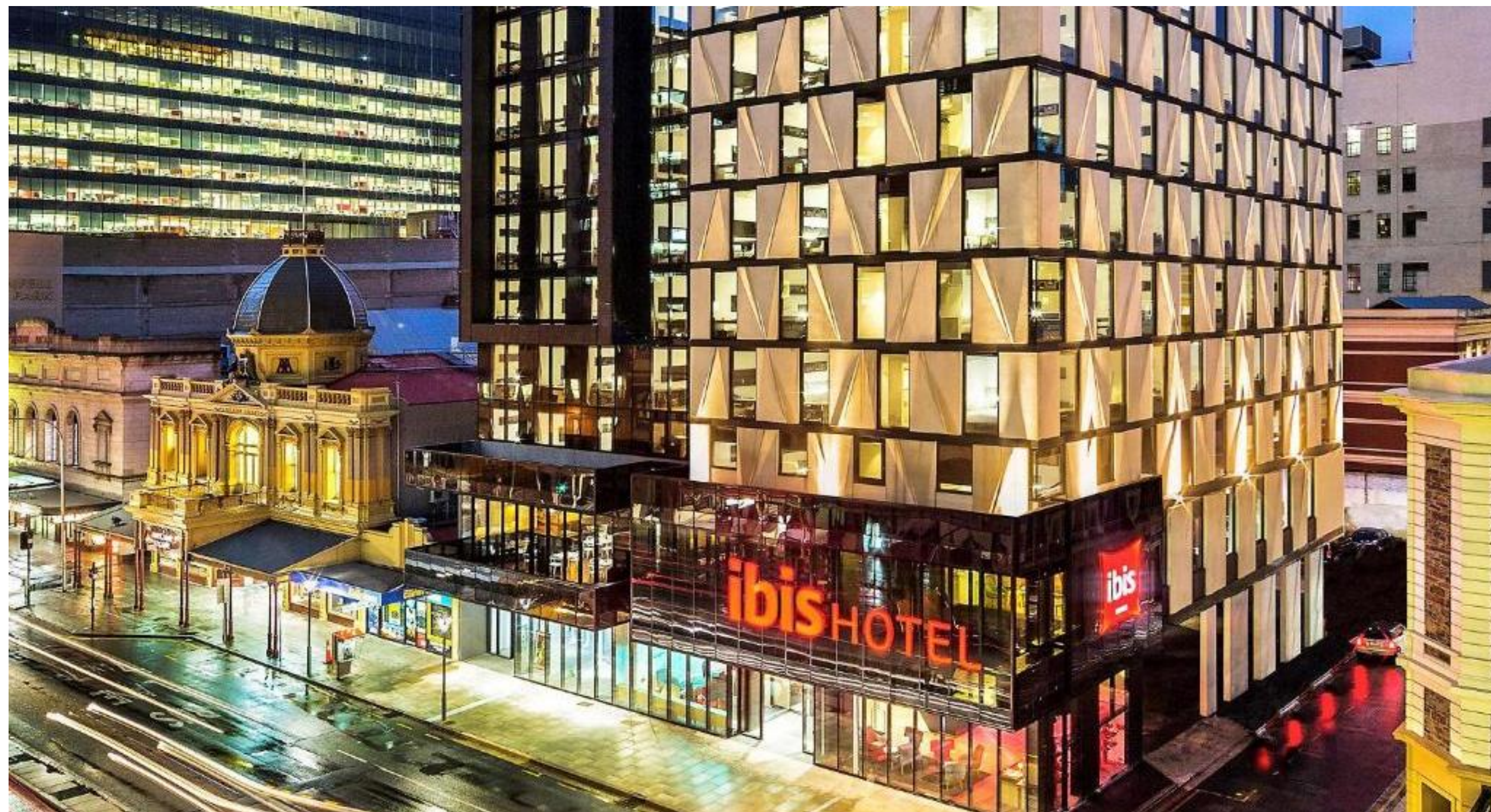
 288 rooms



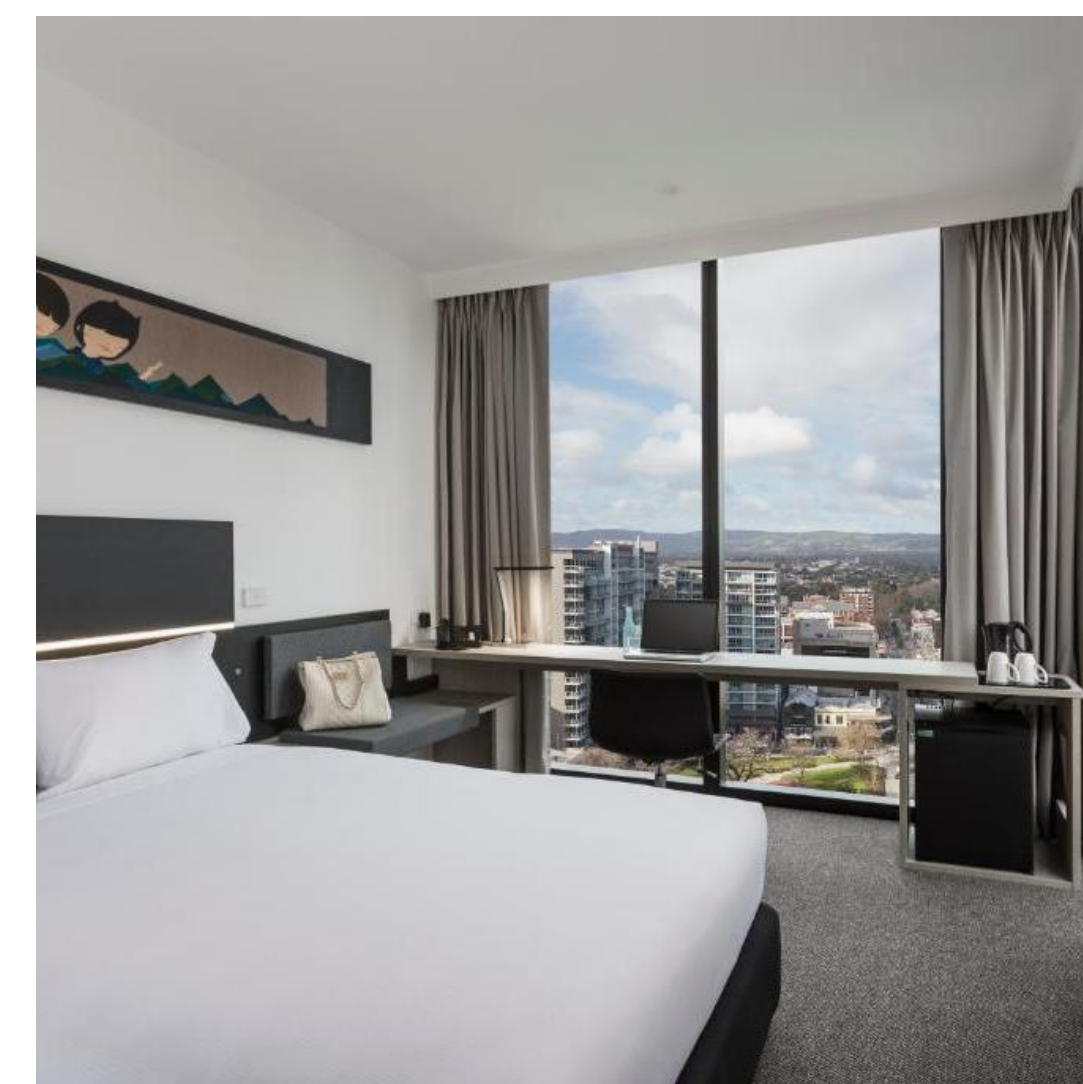


URBAN

ibis Adelaide, *Australia*



 311 rooms





LEISURE & RESORTS



 209 rooms

ibis Samui Bophut, *Thailand*





LEISURE & RESORTS



 91 rooms

ibis Thalassa Le Touquet, *France*





AIRPORT

55+ airport hotels

20+ COUNTRIES



ibis Istanbul Airport, *Turkey* | 132 rooms



ibis Paris CDG Airport, *France* | 772 rooms



ibis London Heathrow Airport, *United Kingdom* | 356 rooms

ibis Barcelona Aeropuerto Viladecans, *Spain* | 101 rooms





AIRPORT

55+ airport hotels

20+ COUNTRIES



ibis Yogyakarta International Airport Kulonprogo, *Indonesia* | 224 rooms



ibis Mumbai Airport, *India* | 169 rooms

ibis Sydney Airport, *Australia* | 200 rooms





MICE

MICE flagships



ibis Paris 17 Clichy-Batignolles *France*
1,074 sqm total meeting space



ibis London Earls Court *United Kingdom*
1,700 sqm total meeting space



ibis Jakarta Harmoni *Indonesia*
516 sqm total meeting space

COMBO

Combination projects



ibis & Adagio Aparthotel
London Sutton Point, *United Kingdom*
99 rooms + 59 apartments



ibis & *ibis budget*, Porto Exponor
Portugal (Opening 2027)
99 rooms + 102 rooms



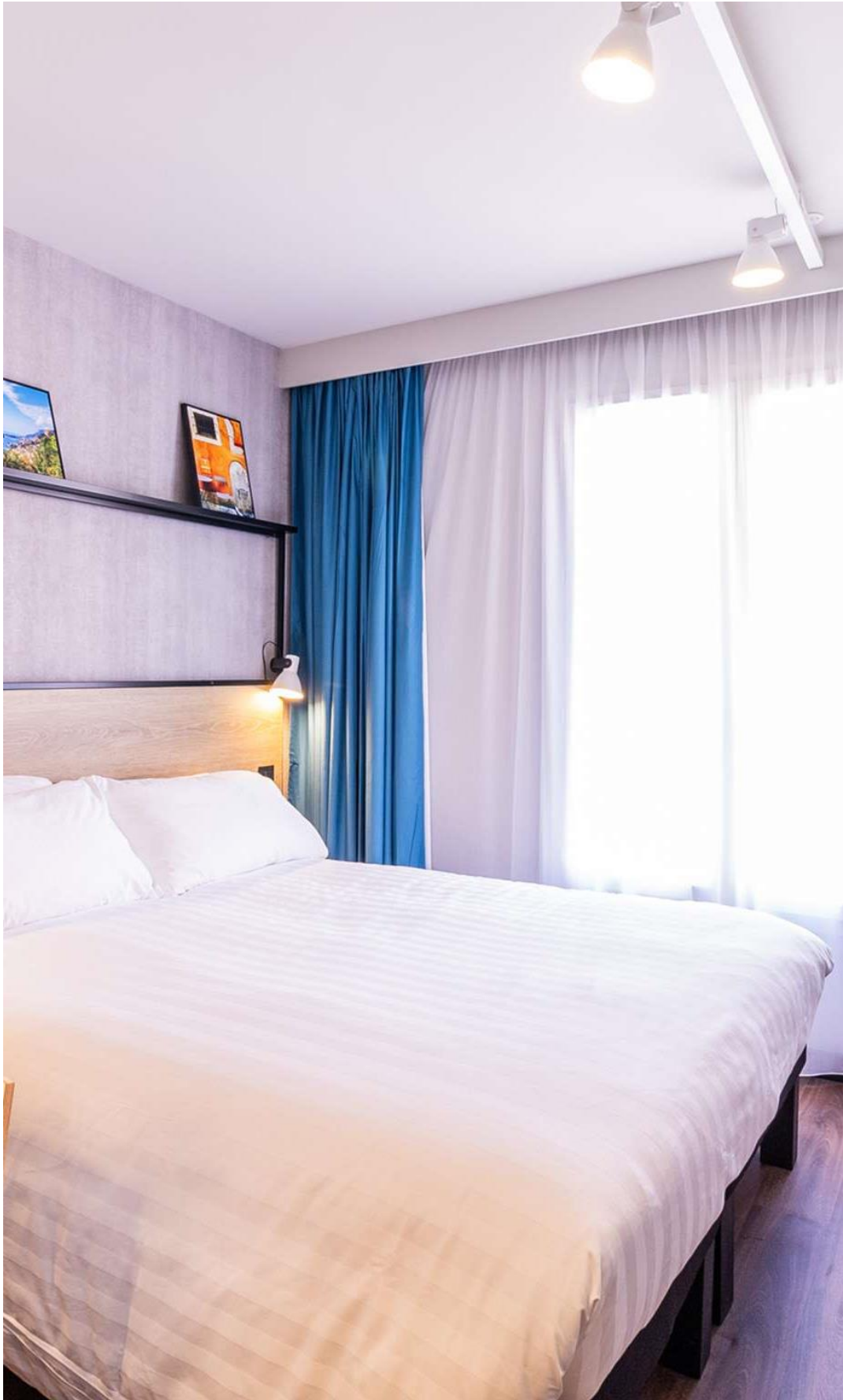
ibis & Novotel Melbourne Central
Australia
259 rooms + 213 rooms



ibis & *ibis budget* Paris Saint-
Quentin-en-Yvelines, *France*
92 rooms + 88 rooms

LEISURE & RESORTS

ibis Roquebrune Cap Martin Menton, *France*



 69 rooms



LEISURE & RESORTS

ibis Lavras, *Brazil*



 110 rooms





Why invest - ibis

URBAN



 126 rooms

ibis Istanbul Sisli, *Turkey*





Thank

you

