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HOTEL CHAIN DEVELOPMENT PIPELINES IN AFRICA, 2014

Welcome to the sixth edition of our annual survey of the international hotel chains' development intentions and activities in Africa – the Pipeline Report. Our research tracks hotel development deals in the 54 countries of Africa. There are of course, other deals being discussed besides those listed in our report, which we will include, hopefully, in future surveys; this one includes only those deals that are signed and confirmed – although not necessarily yet actually under construction, as this report shows.

The data in the report has been provided to us by the international and regional (African) hotel chains. To be included, chains need to be operating in more than one country globally or, for the African chains, to be in more than one country on the continent. We do not, therefore, include African chains with operations in only one country.

We are immensely grateful to all of the chains who have contributed to this research since we started in 2009, and to those contributing for the first time. New contributors to our survey this year are Mangalis and Swiss International. Mangalis is an African-owned hospitality company that was launched in 2013, and plans to develop, own and manage hotels throughout the African continent, with their first hotel under construction in Conakry, Guinea. The chain makes a strong debut, with 15 hotels and 2,210 rooms in their pipeline. The Switzerland-based Swiss International is also a strong newcomer, with 10 hotels and almost 700 rooms in their development pipeline.

This year's survey is based on the contributions from 27 hotel chains with 60 brands between them. Of these 27 hotel chains, 24 of them are already operating in Africa, with a total of approximately 84,000 rooms available between them. The pipeline of new deals therefore represents almost 50 per cent of the existing branded supply.

Looking back to 2010 and 2011, the hotel development pipeline in the five countries of North Africa exceeded that in the 48 countries of sub-Saharan Africa by a considerable margin. Then the gap was reduced to almost nil, and in 2014 the now-49 countries of sub-Saharan Africa have a pipeline over 40 per cent greater than North Africa, in double the number of hotels.

Sub-Saharan Africa is really proving to be the hotel growth story of the 21st Century.

Our analysis can only be a snapshot at any one time, and therefore some of the hotels listed may have opened by the time you read this. Please do let us know if you spot any errors or omissions in the data. Any comments on how to improve this survey would be most welcome. And new contributors are always very welcome!

Trevor J Ward
Managing Director

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Lagos, Nigeria
April 2014

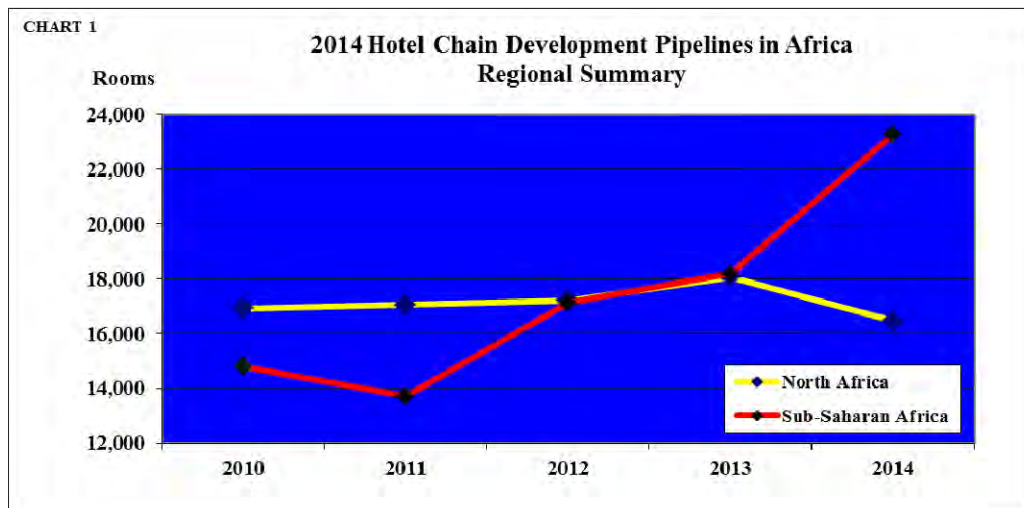
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2014 RESEARCH FINDINGS

The 27 hotel chains that contributed to our survey reported a total of 215 hotels with almost 40,000 rooms in their development pipelines for Africa at the beginning of 2014. The chains that contributed, and their brands, are listed in Appendix 1*. The five-year summary data by region are provided in Table 1 and Chart 1:

	2014		2013		2012		2011		2010	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	73	16,449	73	18,065	77	17,217	75	17,038	72	16,909
Sub-Saharan Africa	142	23,283	115	18,191	100	17,109	76	13,700	77	14,801
TOTAL	215	39,732	188	36,256	208	34,326	151	30,738	149	31,710

*In all tables we have rebased previous years' data to include 2014 contributors only



The pipeline for sub-Saharan Africa (SSA) has mapped a growth trend over the five-year period. This is in contrast to North Africa, which experienced negative growth in 2014. Development plans for North Africa continue to be negatively impacted by the unrest in many markets in the region, particularly Egypt. This has affected investment on existing projects and has severely curtailed the number of new hotel deals. Some large hotel deals, which were previously in the pipeline, have either been suspended or cancelled altogether.

On the other hand, the number of hotel rooms planned for SSA has risen since 2011. For the first time, there is a marked positive difference between the number of hotel rooms planned in SSA and the number in North Africa – in 2013, there was a very negligible difference of less than one percent more – with the SSA pipeline having 41.5 per cent more hotel rooms than in North Africa. The number of hotel deals signed in SSA has also risen sharply, from 77 hotels in 2010 to 142 hotels in 2014. This represents growth of 84 per cent over the five-year period, and a compound annual growth rate of 13 per cent.

* As in previous years, we were unable to gather information from most of the South Africa-based chains, who did not respond or would not provide data. It has, however, been noticeable in past years' surveys that, when they did contribute, their pipelines were very small, certainly in comparison to their dominant market position in their home market, eclipsed by the international players, and therefore their absence doesn't affect the overall picture.

Although all these reported hotel deals have been signed by the hotel chains, it is important to note that this does not always mean that the hotels are actively being built, or even on site, and we cannot always be certain these hotel deals will actually open by the indicated completion date (or at all!). Such is typical of the difficult business environments that the hotel chains encounter in Africa, where projects generally tend to have much longer development programmes than is initially planned.

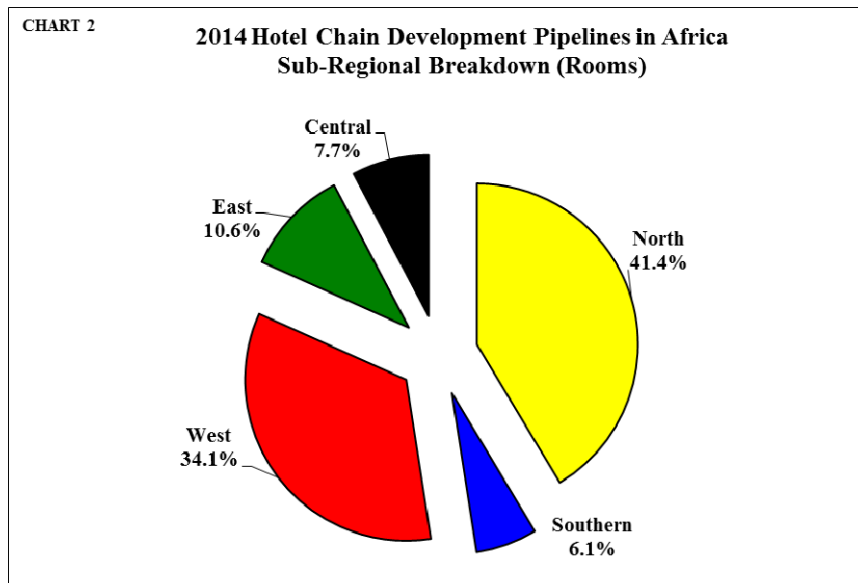
The 2014 survey reports on pipeline data for 38 countries, seven more countries than were featured in the 2013 data. Countries included in 2014, which were not in the 2013 survey, are Cameroon, Congo, DRC, Equatorial Guinea, Liberia, Niger, South Sudan, Togo and Zambia. Three of these – DRC, Liberia and South Sudan – do not currently have any existing branded hotel supply. The countries in each sub-region with pipeline deals are listed in Table 2:

TABLE 2 2014 Hotel Chain Development Pipelines in Africa Countries in the Pipeline by Sub-Region				
North	South	West	East	Central
Algeria	Angola	Benin	Burundi	Cameroun
Egypt	Mauritius	Republic	Ethiopia	Chad
Libya	Mozambique	Burkina Faso	Kenya	Congo
Morocco	South Africa	Cape Verde	Rwanda	DRC
Tunisia	Zambia	Cote d'Ivoire	South Sudan	Equatorial
		Ghana	Sudan	Guinea
		Guinea	Tanzania	Gabon
		Republic		Uganda
		Liberia		
		Mali		
		Mauritania		
		Niger		
		Nigeria		
		Senegal		
		Sierra Leone		
		Togo		

South Sudan makes its debut in the pipeline data with two hotels totalling 435 rooms between them, including one by Sheraton, both planned for 2017 openings. Liberia also has a planned hotel for the first time, a 120-room Seen hotel, to be developed in Monrovia by Mangalis, who are also planning to develop two hotels in Congo, which has not seen any pipeline action in the past three years. Equatorial Guinea and the DRC have also not seen any pipeline action in the past three years, but this has changed with a planned Noom hotel in Kinshasa (DRC) and two Kempinski hotels, in Oyala (Equatorial Guinea) and Kinshasa.

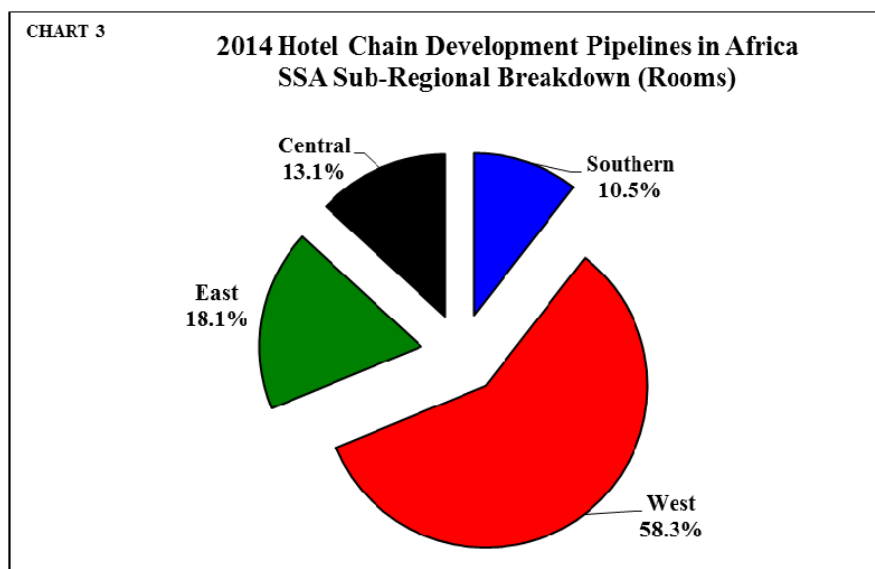
There are 10 African countries which have no existing branded supply; however, this list of “hotel deserts” is shrinking fast, as seven of them – Burundi, DRC, Liberia, Mauritania, Niger, Sierra Leone and South Sudan – now have hotels in the 2014 development pipeline. Burundi, DRC, Mauritania and Sierra Leone all have hotels that are scheduled to open in 2014. The lack of activity in the other three countries – Comoros, Eritrea and Somalia – is, to some, not surprising.

We further break down the regions to show the distribution of the development pipeline by sub-region. Chart 2 shows the sub-regional breakdown of hotel rooms in the pipeline:



North Africa, with only five countries, has the largest proportion of new rooms in the pipeline, at 41.4 per cent, whilst West Africa has the largest number of countries (14).

When recalculated for SSA only, the distribution of the development shows that West Africa does indeed have the largest concentration of new rooms in the region, by far, dominated by Nigeria. Chart 3 shows the distribution of new rooms in SSA.



Of note is the comparative lack of activity in southern Africa in terms of new hotel deals. The five countries in the Southern African pipeline are shown in Table 2 above. Of the total 16 hotels and 2,443 rooms in the Southern African pipeline, South Africa is the most active, representing more than half of the pipeline for the region, with nine hotels and 1,293 rooms. There are eight Southern African countries with no pipeline data recorded - Botswana, Lesotho, Madagascar, Malawi, Namibia, Seychelles, Swaziland, and Zimbabwe.

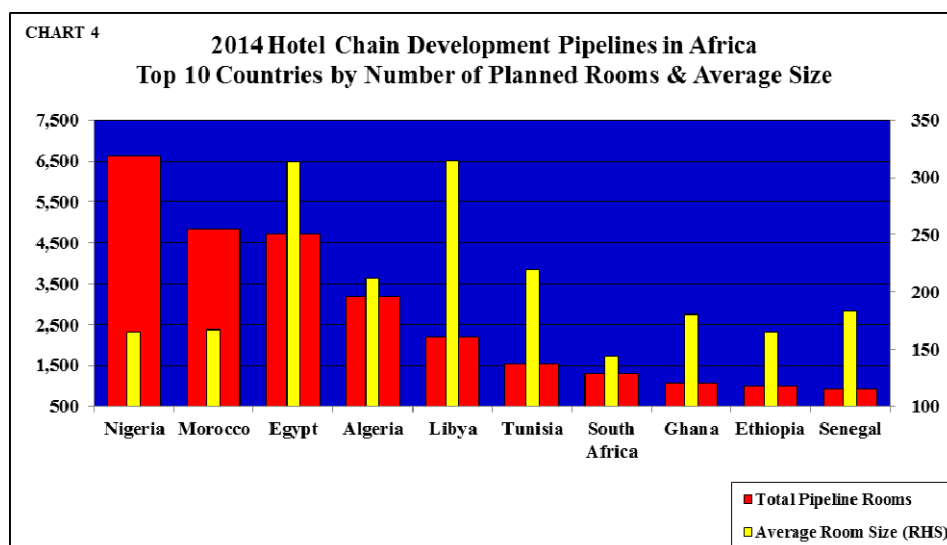
We have analysed the deals by region as to whether or not construction work has started on site. Table 3 details the pipeline status:

TABLE 3 2014 Hotel Chain Development Pipelines in Africa SSA vs. North Africa by Pipeline Status				
	Hotels	Rooms		
	Total	Total	Onsite Construction	
North Africa	73	16,449	12,381	75%
Sub-Saharan Africa	142	23,283	13,018	56%

North Africa has 75 per cent of its signed deals under construction, whilst SSA only has 56 per cent. And note that “under construction” means that work has at some time started, but is not necessarily active currently – we know of several hotels in Nigeria and Ghana in that category, where work has been suspended for some time, in a few cases for several years.

We further analyse this data by country. Table 4 and Chart 4 show the top ten countries by number of rooms as well as the average size of hotel in the development pipeline:

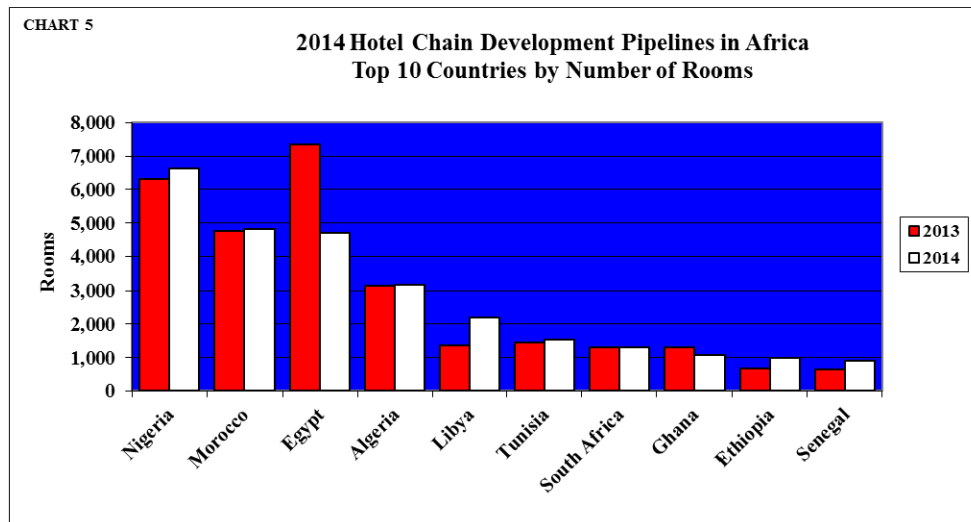
TABLE 4 2014 Hotel Chain Development Pipelines in Africa Top 10 Countries by Number of Rooms				
		Hotels	Rooms	Average Size
1	Nigeria	40	6,614	165
2	Morocco	29	4,828	166
3	Egypt	15	4,703	314
4	Algeria	15	3,172	211
5	Libya	7	2,205	315
6	Tunisia	7	1,541	220
7	South Africa	9	1,293	144
8	Ghana	6	1,080	180
9	Ethiopia	6	990	165
10	Senegal	5	914	183



Nigeria ranks highest both in terms of the number of hotels and the number of hotel rooms in the pipeline. Its pipeline is almost 40 per cent larger than the second-ranked country, Morocco. Both Libya and Egypt have much larger hotels in the pipeline, close to double those in Nigeria and

Morocco. Of the five North African countries, Libya is the top performer in terms of growth, despite the ongoing unrest there, adding three hotels to its 2014 pipeline, an addition of 869 rooms, up 62 per cent on 2013.

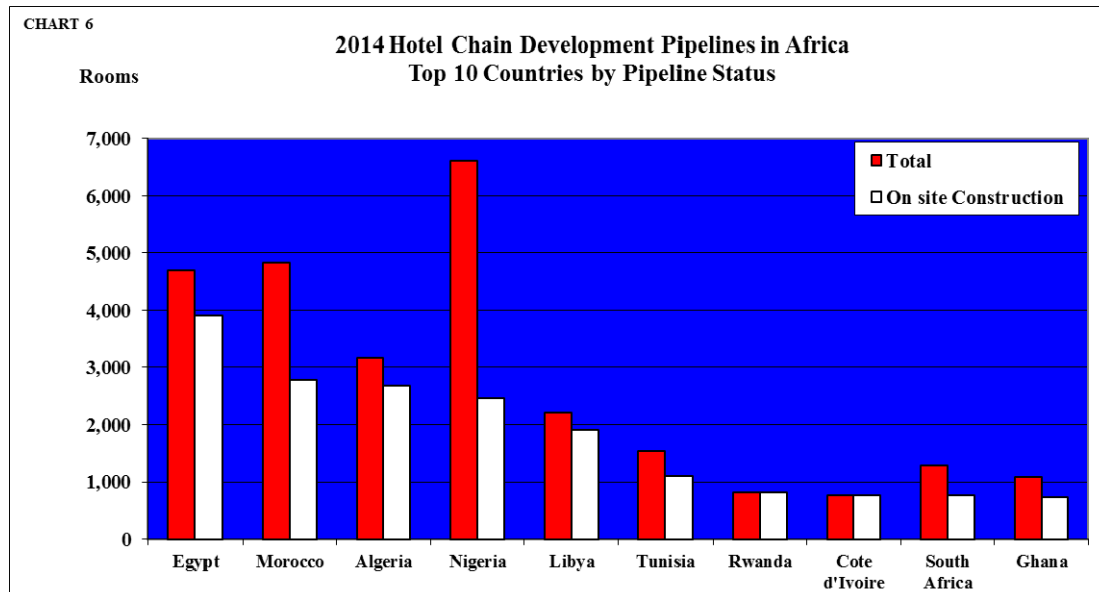
Chart 5 shows the growth of the pipeline for the top 10 countries by number of planned rooms between 2013 and 2014:



The data for Egypt show a sharp drop in its pipeline. This is partly attributable to the opening of two Hilton projects (730 rooms) in 2013, plus a 703-room Steigenberger and a 418-room Mövenpick that were listed in the 2013 pipeline and have not been replaced by new deals.

Table 5 shows the top 10 countries ranked by the number of rooms on site:

TABLE 5 2014 Hotel Chain Development Pipelines in Africa Top 10 Countries by Pipeline Status						
Rank	Country	Hotels	Rooms			Rank – All Deals
			Total	On site Construction		
1	Egypt	15	4,703	3,913	83%	3↑
2	Morocco	29	4,828	2,778	58%	2↔
3	Algeria	15	3,172	2,680	84%	4↑
4	Nigeria	40	6,614	2,467	37%	1↓
5	Libya	7	2,205	1,905	86%	5↔
6	Tunisia	7	1,541	1,105	72%	6↔
7	Rwanda	4	819	819	100%	-↑
8	Cote d'Ivoire	4	772	772	100%	-↑
9	South Africa	9	1,293	763	59%	7↓
10	Ghana	6	1,080	732	68%	8↓



Nigeria loses its first position in the previous ranking by number of planned rooms and moves to fourth place – with only 37 per cent of signed rooms under construction, Nigeria has the least percentage of new rooms on site of any of the top 10. This reflects both the pace of the growth in the pipeline, as well as the slow pace of getting projects started in that country. Currently, 62 per cent of the hotel rooms reported to open in 2015 are not yet on site (and thus highly unlikely to meet that schedule) and only one of the projects planned to open in subsequent years (the 150-room Marriott Lagos) is actively on site.

Ethiopia and Senegal lose their positions in the top 10 to Cote d'Ivoire and Rwanda, who have more projects actively on site than the former two.

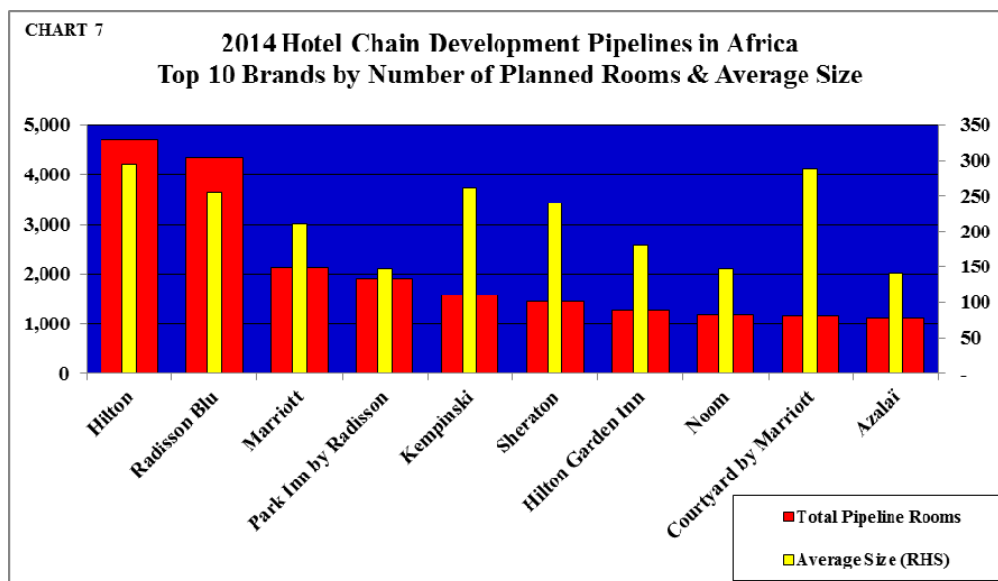
The renewed interest in Cote d'Ivoire in recent years is as a result of the return to political stability, after many years of civil war, which is encouraging economic growth in the country. The progressive policies adopted by the current government administration will help this West African nation back on the path to being a major economic force in the region. The planned return of the African Development Bank to Abidjan from its temporary base in Tunis will also boost the demand for hotel accommodation in the city.

All the planned projects for Cote d'Ivoire and Rwanda are on site and are planned for opening between 2014 and 2015.

We now analyse the pipeline data according to the hotel brands. The top 10 brands by number of hotels and rooms in their pipelines are shown in Table 6 and Chart 7. Radisson Blu and its sister brand, Park Inn by Radisson, occupy the first and third positions on the list, respectively in terms of the number of rooms in the pipeline. The rankings of the two brands, which are operated by Carlson Rezidor, slip to the second and fourth positions, when considering the actual number of rooms planned, overtaken by Hilton and Marriott, with larger hotels.

TABLE 6
2014 Hotel Chain Development Pipelines in Africa
Top 10 Brands by Number of Planned Hotels and Rooms

Rank by Hotels			Rank by Rooms		Change on 2013	Average Size Rooms	
	Brand	Units		Brand			Rooms
1	Radisson Blu	17	1	Hilton	4,723	-12.5%	295
2	Hilton	16	2	Radisson Blu	4,336	3.5%	255
3	Park Inn by Radisson	13	3	Marriott	2,116	19.8%	212
4	Marriott	10	4	Park Inn by Radisson	1,912	14.1%	147
5	Noom	8	5	Kempinski	1,567	5.8%	261
6	Azalai	8	6	Sheraton	1,437	238.9%	240
7=	Hilton Garden Inn	7	7	Hilton Garden Inn	1,264	185.3%	181
7=	Seen	7	8	Noom	1,180	-	148
8=	Kempinski	6	9	Courtyard by Marriott	1,154	28.5%	289
8=	Sheraton	6	10	Azalai	1,129	150.9%	141

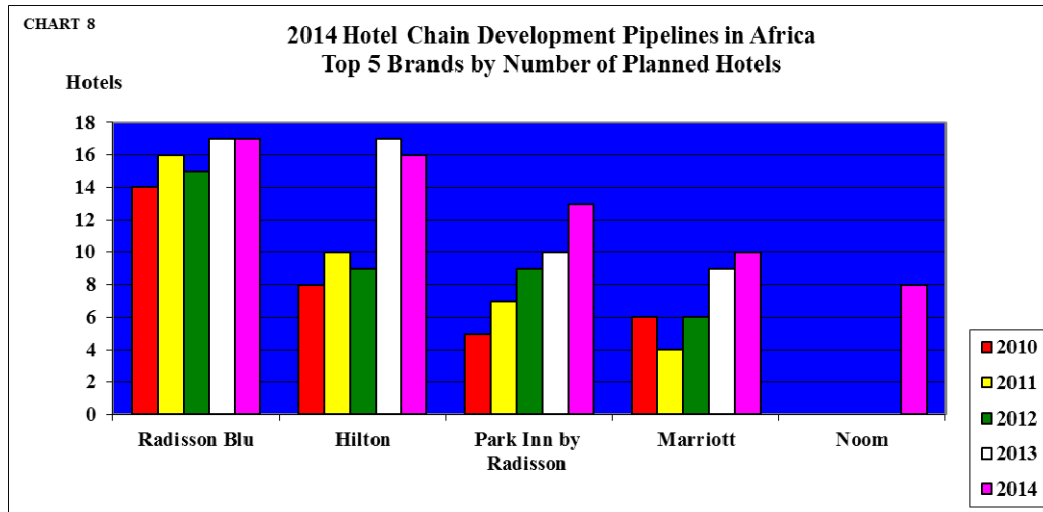


The Hilton, Courtyard by Marriott, Radisson Blu, Kempinski and Sheraton brands all have a far larger average size of hotel than the others in the top ten.

The Hilton brand occupies first position in terms of the total number of rooms planned, and its sister brand, Hilton Garden Inn, also features for the first time in the top 10 rankings, as the chain begins to sign deals for that brand, with seven deals throughout the continent, including three in Nigeria. The Hilton brand has the largest average room size in the top 10 list, whilst Hilton Garden Inn also has a relatively high average of 181 rooms, compared to other upper midscale brands such as Park Inn by Radisson (average 147 rooms).

Mangalis, a new entrant to the survey and to the African market, features its two core brands on the top 10 rankings by the number of hotels planned - the Noom brand is ranked fifth with eight hotels planned, whilst the Seen brand ties in seventh position with Hilton Garden Inn, with seven hotels planned. The Noom brand also ranks eighth in the top 10 list of rooms planned, at 1,180 rooms.

Chart 8 shows the evolution of the number of rooms in the development pipelines of the top five brands ranked by hotels, from 2010 to 2014.



Radisson Blu opened two hotels that were listed on its 2013 pipeline – a 154-room hotel in Mozambique and a 274-room hotel in Tunisia.

We have analysed the deals as to whether or not they are on site, which changes the rankings:

TABLE 7
2014 Hotel Chain Development Pipelines in Africa
Top 10 Brands by Pipeline Status

Rank	Brands	Hotels	Rooms			Rank – All Deals
			Total	Onsite Construction		
1	Hilton	16	4,723	3,063	64.9%	1↔
2	Radisson Blu	17	4,336	2,903	67.0%	2↔
3	Kempinski	6	1,567	1,317	84.0%	5↑
4	Marriott	10	2,116	1,210	57.2%	3↓
5	Noom	8	1,180	1,180	100.0%	8↑
6	Park Inn by Radisson	13	1,912	975	51.0%	4↓
7	Mövenpick	4	945	945	100.0%	-↑
8	Best Western Plus	6	748	748	100.0%	-↑
9	Golden Tulip	6	734	734	100.0%	-↑
10	Sheraton	6	1,437	731	50.9%	6↓

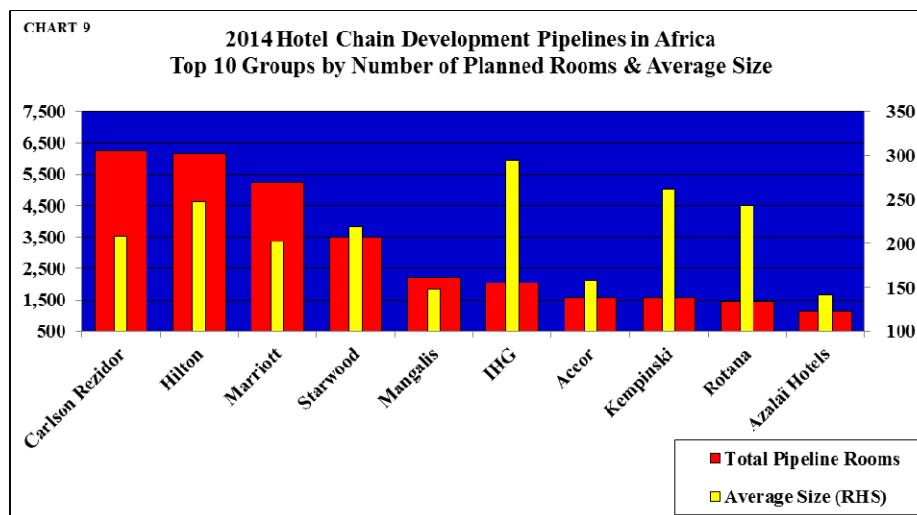
Hilton and Radisson Blu retain their first and second position in the rankings, but Marriott drops one place, relinquishing third position to Kempinski who have 84 per cent of their rooms actively on site, compared to Marriott's 57.2 per cent. Of Kempinski's six hotels, four are scheduled to open in 2014. Noom, Mövenpick, Best Western Plus and Golden Tulip report that all of their hotels in the pipeline are on site. All of the Best Western Plus and Mövenpick projects are scheduled for 2014 openings, as are all but one of the Golden Tulip projects.

Our analysis thus far has concentrated on the hotel *brands*. Many of the hotel chains have multiple brands in their development pipeline. Table 8 and Chart 9 show the development pipelines by hotel chain.

TABLE 8
2014 Hotel Chain Development Pipelines in Africa
Top 10 Chains by Number of Planned Hotels and Rooms

Rank by Hotels			Rank by Rooms				
						Change on 2013	Average Size
1	Carlson Rezidor	30	1	Carlson Rezidor	6,248	5%	208
2	Marriott	26	2	Hilton	6,165	-1%	247
3	Hilton Worldwide	25	3	Marriott	5,243	34%	202
4	Starwood	16	4	Starwood	3,499	39%	219
5	Mangalis	15	5	Mangalis	2,210		147
6	Best Western	10	6	IHG*	2,055	-15%	294
6=	Accor	10	7	Accor	1,587	0%	159
6=	Swiss International	10	8	Kempinski	1,567	6%	261
9	Louvre Hotels	9	9	Rotana	1,455	7%	243
10	Azalai	8	10	Azalai	1,129	151%	141

* based on data provided by IHG in September 2013, which has not been updated



The Carlson Rezidor, Hilton Worldwide and Marriott International[†] chains maintain the first three positions on both the top 10 rankings by number of hotels planned and by the number of rooms. Of the three leading chains, Marriott had the largest percentage increase on its 2013 pipeline, up 34 per cent year-on-year. The chain added a project in Libya to its 2014 pipeline, increasing the total number of countries in which it plans to open hotels to 11. It also added additional projects to its pipeline in Morocco, Nigeria and Tunisia. Starwood had the largest percentage increase of the international chains in the top 10, up 39 per cent year-on-year, with developments planned in eight countries, four more countries than in 2013. Of its 16 projects, four hotels are in each of Egypt (814 rooms in total) and Nigeria (874 rooms). Azalai has plans to become a more dominant regional player, increasing its development pipeline with five more hotels and 679 more rooms compared to 2013.

Table 9 shows the deals signed by the top 10 chains ranked by the number of rooms on site.

[†] This survey was conducted before Marriott completed its purchase of South Africa-based Protea. Any Protea development deals are excluded from this survey.

TABLE 9 2014 Hotel Chain Development Pipelines in Africa Top 10 Chains by Pipeline Status						
Rank	Company	Hotels	Rooms			Rank – All Deals
			Total	Onsite Construction		
1	Hilton	25	6,165	3,962	64%	2↑
2	Carlson Rezidor	30	6,248	3,878	62%	1↓
3	Marriott	26	5,243	3,225	62%	3↔
4	Starwood	16	3,499	1,858	53%	4↔
5	Mangalis	15	2,210	1,560	71%	5↔
6	Kempinski	6	1,567	1,317	84%	8↑
7	IHG	7	2,055	1,170	57%	6↓
8	Louvre Hotels	9	1,128	1,128	100%	-↑
9	Best Western	10	1,033	968	94%	-↑
10	Mövenpick	4	945	945	100%	-↑

Mangalis, the newcomer, is placed in the top 10 rankings. Of its 15 Noom and Seen hotels and 2,210 hotel rooms in the pipeline, 11 are reported to be on site and scheduled to open between 2014 and 2016. Louvre Hotels Group, which has three hotel brands in its development pipeline for Africa – Royal Tulip, Golden Tulip and Tulip Inn - reports that all of its projects are on site and that all but one are scheduled to open in 2014.

New countries, new brands, and a clear focus on sub-Saharan Africa. Those are the main stories in the 2014 hotel chain development pipeline report. More hotel chains are opening development offices in Africa, or in some cases in the Middle East focused on Africa, and generally growing their resource base, in order to take advantage of the strong economies on the continent and the hotel deals that arise as a result. Africa has never been an easy place to do business, and is likely to remain more challenging than Europe, or even China. But most of the continent is so lacking in quality hotel rooms, not just in the capitals but also in the secondary cities, that it is our belief that the pipelines in sub-Saharan Africa will continue to grow, and that even more international players will enter the market.

The flip-side of the sub-Saharan Africa story is that less than 60 per cent of the rooms in the pipeline are under construction, compared to 75 per cent in North Africa. Is that because they are new deals, and will be on-site soon? Or are they more projects suffering from the inevitable delays? Time will tell.


The big story next year will be “what did Marriott do?” After their acquisition of Protea’s operating assets, they are now the largest hotel chain on the African continent. Will the other global players leave that unchallenged?

Notes on the Sample:

We sent questionnaires to 41 international and regional hotel chains. 27 submitted data, five chains provided a zero-deal return, and three chains declined to participate this year (although they had participated in the past). We polled only those international chains with a known interest in being in Africa, or Africa-based chains with operations and/or deals outside their home country. This report summarises the results of our analysis. Detailed information on all the deals signed by the chains are provided only to the contributors.





APPENDICES

 W HOSPITALITY GROUP	PARTICIPATING CHAINS	BRANDS
	Accor	Ibis Ibis Budget Novotel Pullman Sofitel
	Azalai Hotels	Azalai
	Best Western International	Best Western Best Western Plus Best Western Premier
	Carlson Rezidor	Park Inn by Radisson Radisson Blu
	City Lodge	City Lodge Road Lodge
	Corinthia Hotels	Corinthia
	Dusit International	dusitD2
	Fairmont Raffles Hotels International	Fairmont
	Four Seasons Hotels and Resorts	Four Seasons
	Hilton Worldwide	DoubleTree by Hilton Hilton Hilton Garden Inn
	Hyatt International	Hyatt Hyatt Place Hyatt Regency Park Hyatt
	InterContinental Hotels Group	Crowne Plaza Holiday Inn InterContinental Jumeirah
	Jumeirah Group	Jumeirah
	Kempinski	Kempinski
	Louvre Hotels Group	Golden Tulip Royal Tulip Tulip Inn
	Mangalis	Noom Seen
	Mantis Collection	Mantis
	Marriott International	Courtyard by Marriott JW Marriott Marriott Executive Apartments (MEA) Residence Inn by Marriott Ritz Carlton
	Milennium & Copthorne	Grand Millenium
	Minor Hotels Group	Elewana
	Mövenpick Hotels & Resorts	Mövenpick
	Onomo International	Onomo
	Pestana Hotels and Resorts	Pestana
	Rotana	Arjaan Hotel Apartments by Rotana Rayhaan Hotel & Resorts by Rotana Rotana
	Starwood Hotels and Resorts	Four Points by Sheraton Le Meridien Sheraton St. Regis W Westin
	Swiss International	Royal Swiss Swiss International Swiss Spirit Inns & Suites
	Wyndham Hotel Group	Ramada Ramada Encore


2014 HOTEL CHAIN DEVELOPMENT PIPELINES IN AFRICA

APPENDIX 2

	TOTAL PER COUNTRY		PRE-CONSTRUCTION (PLANNING)	ROOMS ON SITE (CONSTRUCTION)
	COUNTRY	Hotels		
Algeria	15	3,172	16%	84%
Angola	3	780	65%	35%
Benin Republic	4	645	31%	69%
Burkina Faso	1	170	0%	100%
Burundi	1	120	0%	100%
Cameroon	2	260	0%	100%
Cape Verde	1	288	100%	0%
Chad	1	195	0%	100%
Congo	2	280	0%	100%
Cote d'Ivoire	4	772	0%	100%
Democratic Rep. of Congo	2	377	0%	100%
Egypt	15	4,703	17%	83%
Equatorial Guinea	1	451	0%	100%
Ethiopia	6	990	53%	47%
Gabon	4	760	38%	62%
Ghana	6	1,080	32%	68%
Guinea	4	832	48%	52%
Kenya	5	704	24%	76%
Liberia	1	120	100%	0%
Libya	7	2,205	14%	86%
Mali	2	205	49%	51%
Mauritania	3	589	76%	24%
Mauritius	1	126	100%	0%
Morocco	29	4,828	42%	58%
Mozambique	2	96	100%	0%
Niger	2	260	46%	54%
Nigeria	40	6,614	63%	37%
Rwanda	4	819	0%	100%
Senegal	7	1,066	45%	55%
Sierra Leone	5	653	49%	51%
South Africa	9	1,293	41%	59%
South Sudan	2	435	46%	54%
Sudan	1	200	0%	100%
Tanzania	10	945	26%	74%
Togo	2	274	55%	45%
Tunisia	7	1,541	28%	72%
Uganda	3	736	60%	40%
Zambia	1	148	0%	100%
TOTAL	215	39,732	36%	64%

	TOTAL			PRE-CONSTRUCTION (PLANNING)	ROOMS ON SITE (CONSTRUCTION)
	GROUP	Countries	Hotels		
Accor	4	10	1,587	43%	57%
Azalai Hotels	8	8	1,129	57%	43%
Best Western International	5	10	1,033	6%	94%
Carlson Rezidor	16	30	6,248	38%	62%
City Lodge	1	2	240	0%	100%
Corinthia Hotels	2	2	490	39%	61%
Dusit International	1	1	101	0%	100%
Fairmont Raffles Hotels International	1	1	274	100%	0%
Four Seasons Hotels and Resorts	4	6	720	31%	69%
Hilton Worldwide	13	25	6,165	36%	64%
Hyatt International	3	6	923	58%	42%
InterContinental Hotels Group	5	7	2,055	43%	57%
Jumeirah Group	1	2	486	100%	0%
Kempinski	6	6	1,567	16%	84%
Louvre Hotels Group	7	9	1,128	0%	100%
Mangalis	12	15	2,210	29%	71%
Mantis Collection	1	2	138	0%	100%
Marriott International	11	26	5,243	38%	62%
Millennium & Copthorne	1	1	250	100%	0%
Minor Hotels Group	1	1	16	0%	100%
Mövenpick Hotels & Resorts	3	4	945	0%	100%
Onomo International	3	3	349	34%	66%
Pestana Hotels and Resorts	2	3	369	26%	74%
Rotana	6	6	1,455	52%	48%
Starwood Hotels and Resorts	8	16	3,499	47%	53%
Swiss International	3	10	696	0%	100%
Wyndham Hotel Group	2	3	416	0%	100%
TOTAL		215	39,732	36%	64%

2014 HOTEL CHAIN DEVELOPMENT PIPELINES IN AFRICA APPENDIX 4

 W HOSPITALITY GROUP	TOTAL		PRE-CONSTRUCTION (PLANNING)	ROOMS ON SITE (CONSTRUCTION)
	Hotels	Rooms		
Arjaan Hotel Apartments by Rotana	2	500	60%	40%
Azalai	8	1,129	57%	43%
Best Western	2	194	0%	100%
Best Western Plus	6	748	0%	100%
Best Western Premier	2	91	71%	29%
City Lodge	1	150	0%	100%
Corinthia	2	490	39%	61%
Courtyard by Marriott	4	1,154	40%	60%
Crowne Plaza	1	275	0%	100%
DoubleTree by Hilton	2	178	0%	100%
dusitD2	1	101	0%	100%
Elewana	1	16	0%	100%
Fairmont	1	274	100%	0%
Four Points by Sheraton	5	909	59%	41%
Four Seasons	6	720	31%	69%
Golden Tulip	6	734	0%	100%
Grand Millennium	1	250	100%	0%
Hilton	16	4,723	35%	65%
Hilton Garden Inn	7	1,264	43%	57%
Holiday Inn	3	842	64%	36%
Hyatt	1	140	0%	100%
Hyatt Place	1	190	100%	0%
Hyatt Regency	2	347	100%	0%
Ibis Budget	2	176	0%	100%
Ibis	2	248	0%	100%
InterContinental	3	938	37%	63%
Jumeirah and Jumeirah Living	2	486	100%	0%
JW Marriott	2	677	45%	55%
Kempinski	6	1,567	16%	84%
Le Meridien	1	339	0%	100%
Mantis	2	138	0%	100%
Marriott	10	2,116	43%	57%
MEA	4	594	24%	76%
Mövenpick	4	945	0%	100%
Noom	8	1,180	0%	100%
Novotel	4	752	49%	51%
Onomo	3	349	34%	66%
Park Hyatt	2	246	0%	100%
Park Inn by Radisson	13	1,912	49%	51%
Pestana	3	369	26%	74%
Pullman	1	316	100%	0%
Radisson Blu	17	4,336	33%	67%
Ramada	2	300	0%	100%
Ramada Encore	1	116	0%	100%
Rayhaan Hotels and Resorts by Rotana	1	250	100%	0%
Residence Inn by Marriott	1	147	0%	100%
Ritz Carlton	5	555	37%	63%
Road Lodge	1	90	0%	100%
Rotana	3	705	28%	72%
Royal Swiss	2	225	0%	100%
Royal Tulip	1	220	0%	100%
Seen	7	1,030	63%	37%
Sheraton	6	1,437	49%	51%
Sofitel	1	95	0%	100%
St. Regis	1	292	0%	100%
Swiss International	4	297	0%	100%
Swiss Spirit Inns & Suites	4	174	0%	100%
Tulip Inn	2	174	0%	100%
W	2	400	100%	0%
Westin	1	122	0%	100%
TOTAL	215	39,732	36%	64%