

Hotel Chain Development Pipelines in Africa 2015





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Hotel Chain Development Pipelines in Africa 2015



Welcome to the 7th edition of our annual survey of the international hotel chains' development intentions and activities in Africa. We are pleased that this survey has received increasing attention from investors, hospitality and real estate professionals, and other parties interested in the Africa growth story, including the hotel chains themselves, and has become acknowledged as an authoritative source on the African hotel industry.

The data in the report is 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 hugely 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. We have a total of 37 contributors this year, almost double the 19 chains that contributed when we first produced the survey in 2009. New hotel chains included this year include Mandarin, CityBlue, Frasers and Banyan Tree, bringing the number of brands reporting data to a massive 80.

The headlines this year are that the total pipeline is almost 50,000 rooms, with sub-Saharan Africa exceeding North Africa by almost 70 per cent – it is only two years ago that the number of rooms in the North African pipeline was the same as that in sub-Saharan Africa.

Hotel development on the continent is rarely easy (what is?!), but the recognition that there are opportunities which can, and must, be exploited is firmly rooted. Several of the international hotel chains have established development offices in Africa, the newest being Hyatt in Nairobi.

As another benchmark of interest, there is an increasing number of hotel investment conferences on the continent, and of these the African Hotel Investment Forum (AHIF), held last year in Addis Ababa, is best-known for attracting the big international players, as well as leaders from across the continent. In 2014 it was attended by over 500 delegates from 47 countries (with half of all African countries having some representation), and it was sponsored by over 35 companies – the international hotel brands, the leading advisory firms, governments, developers and banks. We and our sister company, Hotel Partners Africa, are proud to have been a sponsor from the event's inception.

Africa is really proving to be the growth story of the 21st Century.

Trevor J Ward
Managing Director

Lagos, Nigeria
April 2015



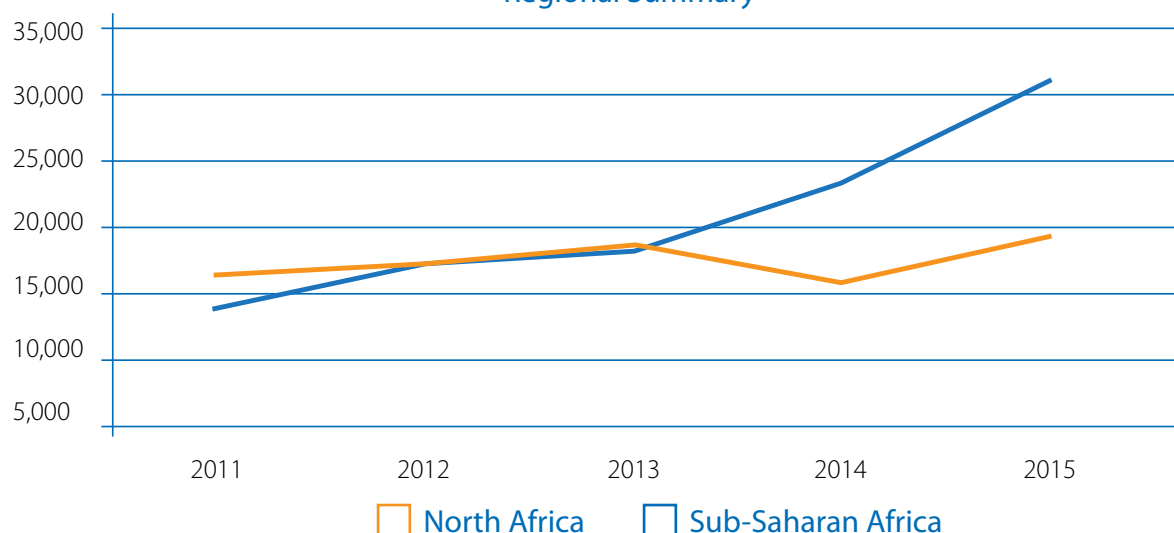
2015 Research Findings

Our 2015 survey achieved an 80 per cent response rate, with 37 of the 46 chains whom we approached in January either contributing their pipeline, or reporting no pipeline activity.

The 33 contributing chains reported a total of 270 hotels and almost 50,000 rooms in their combined pipeline. We list all the contributing chains and their brands in Appendix 1.

Table 1: 2015 Hotel Chain Development Pipelines in Africa Regional Summary										
	2011		2012		2013		2014		2015	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	75	17,038	77	17,217	73	18,065	73	16,449	79	18,565
Sub-Saharan Africa	76	13,700	100	17,109	115	18,191	142	23,283	191	31,150
Total	151	30,738	177	34,326	188	36,256	215	39,732	270	49,715

Chart 1: 2015 Hotel Chain Development Pipelines in Africa
Regional Summary



The pipeline for sub-Saharan Africa (SSA) continues to grow much faster than the North African region. The SSA region, of course has far more markets than North Africa, 49 countries vs five. Many of the SSA markets have historically been underserved with branded hotels and are now playing catch up – Mauritania, for example, with no existing branded supply, now has three branded hotels in the development pipeline.

Growth in the pipeline in North Africa has slowed considerably, impacted by unrest and political conflict in the region. Egypt, which has traditionally been a major growth market, lost some projects off its pipeline due to delays and the cancelling of some deals in 2014. Libya, a country which many groups were focusing on just two years ago, has seen no new activity in terms of hotel development deals, for obvious reasons.

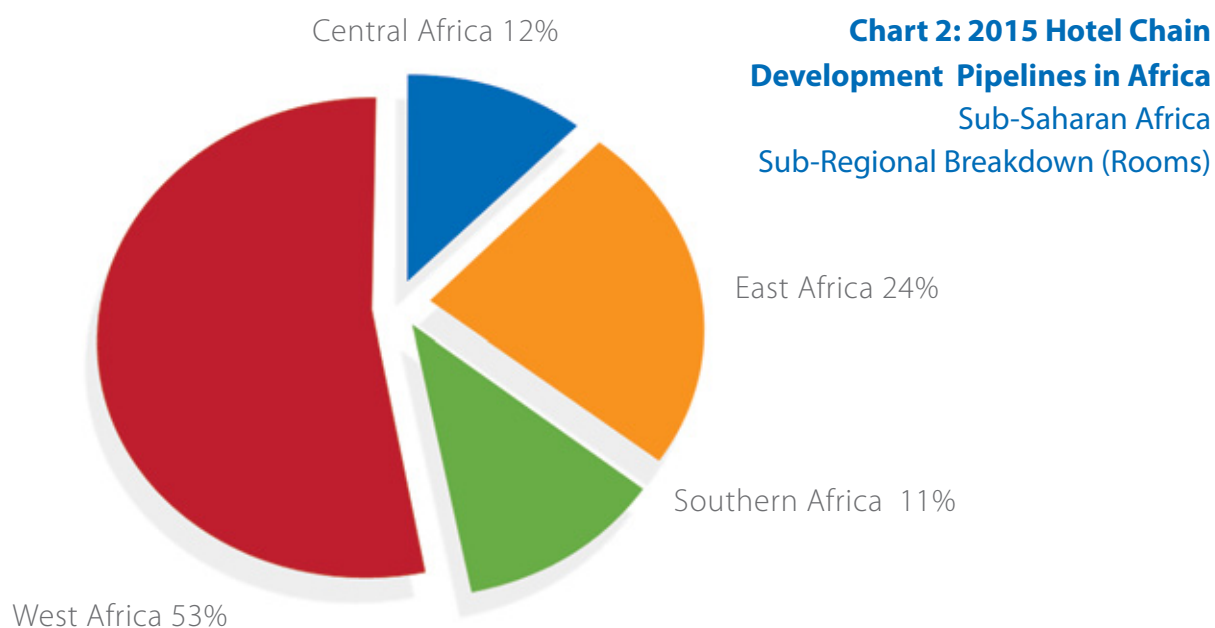
The countries included in each sub-region are listed in Table 2 :

Four chains – Taj, Steigenberger, Shaza and Serena – reported no new activity in Africa currently. For the purposes of our survey, North Africa comprises Morocco, Algeria, Tunisia, Libya and Egypt. Table 2 lists 40 countries of the 54 in Africa. The remaining 14 countries, listed in Appendix 2 have no hotels currently in the development pipeline

Table 2: 2015 Hotel Chain Development Pipelines in Africa
Countries in the Pipeline by Sub-Region

North	South	West	East	Central
Algeria Egypt Libya Morocco Tunisia	Angola Madagascar Mauritius Mozambique Namibia Seychelles South Africa Zambia	Benin Republic Cape Verde Cote d'Ivoire Ghana Guinea Republic Mali Mauritania Niger Nigeria Sao Tome & Principe Senegal Sierra Leone Togo	Burundi Ethiopia Kenya Rwanda South Sudan Sudan Tanzania Uganda	Cameroun Chad Congo DRC Equatorial Guinea Gabon

Chart 2 shows the sub-regional breakdown of hotel rooms in the pipeline in sub-Saharan Africa:



As a sub-region, West Africa has by far the largest number of rooms in the pipeline, more than double East Africa. Not only does West Africa have deals in the largest number of countries (13), but it also has Nigeria, officially recognized as the largest economy on the continent in 2014 after it rebased its GDP figures, with the largest population, and the largest number of urban conurbations in one country, with the exception of South Africa.

As in previous years, Southern Africa continues to lag behind, with fewer rooms in the regional development pipeline this year than in Central Africa, and with the highest number of countries with no

activity at all – five, namely Botswana, Lesotho, Malawi, Swaziland and Zimbabwe.

It is important to distinguish between deals which are still in the planning stage, and those which are becoming reality, with construction started. We have therefore analysed the pipeline deals regarding whether or not they are on site.

Table 3 shows the proportion of the deals (rooms) which are under construction – sub-Saharan Africa has more signed deals on site than North Africa. In 2014, North Africa had 78 per cent of its signed deals on site, compared to 55 per cent in SSA.

Table 3: 2015 Hotel Chain Development Pipelines in Africa				
SSA vs. North Africa by Pipeline Status				
	Hotels		Rooms	
	Total	Total	Onsite Construction	
Sub-Saharan Africa	191	31,150	17,070	55%
North Africa	79	18,565	14,428	78%

Moving from the regional analysis to individual countries, Nigeria has by far the most rooms in the chains' development pipelines, over 8,500 rooms in 51 planned

new hotels. That is more than the entire pipeline in Central Africa and East Africa combined! Table 4 shows the top ten countries by number of rooms:

Table 4: 2015 Hotel Chain Development Pipelines in Africa				
Top 10 Countries by Number of Rooms				
		Hotels	Rooms	Average Size
1	Nigeria	51	8,563	168
2	Egypt	18	6,440	358
3	Morocco	31	5,474	177
4	Algeria	13	2,749	211
5	Tunisia	12	2,444	204
6	South Africa	13	1,662	128
7	Kenya	8	1,510	189
8	Libya	5	1,458	292
9	Ghana	8	1,399	175
10	Uganda	9	1,397	155

Nigeria, Egypt and Morocco have occupied the top three slots since 2011. It is noticeable that whilst Nigeria has 33 per cent more rooms than second-placed Egypt, the average size of each planned hotel in the former is less than half that in the latter. New hotel deals in North Africa generally, and particularly

in Egypt, are of a much larger size.

Appendix 2 details the number of hotels and rooms by country, and Chart 3 shows the top 10 countries by the number of planned rooms, and the average size of hotel graphically:

Chart 3: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Countries by Number of Planned Rooms & Average Size

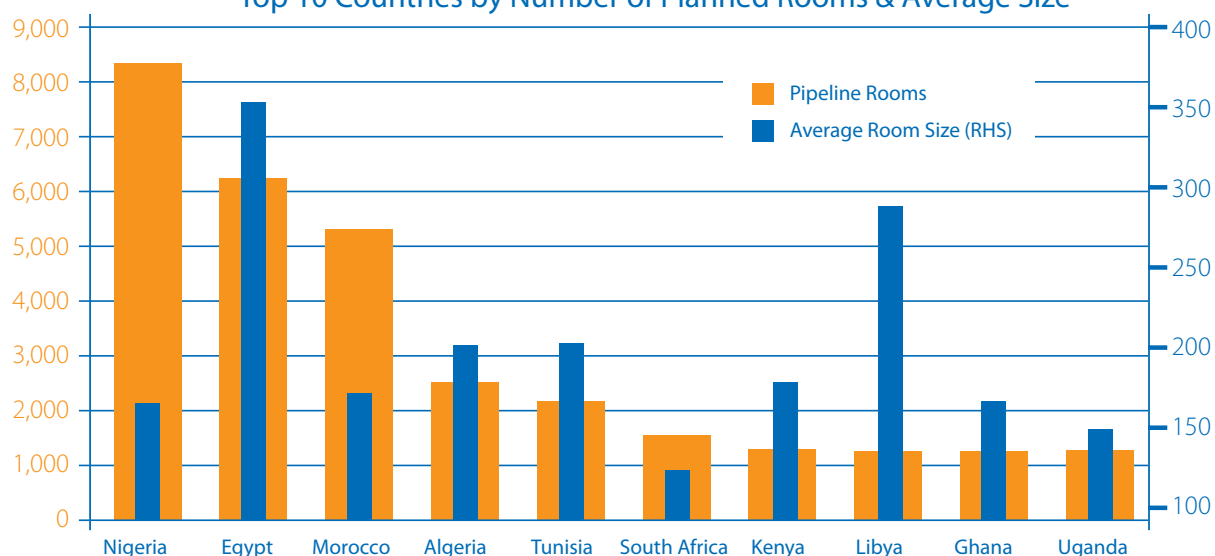
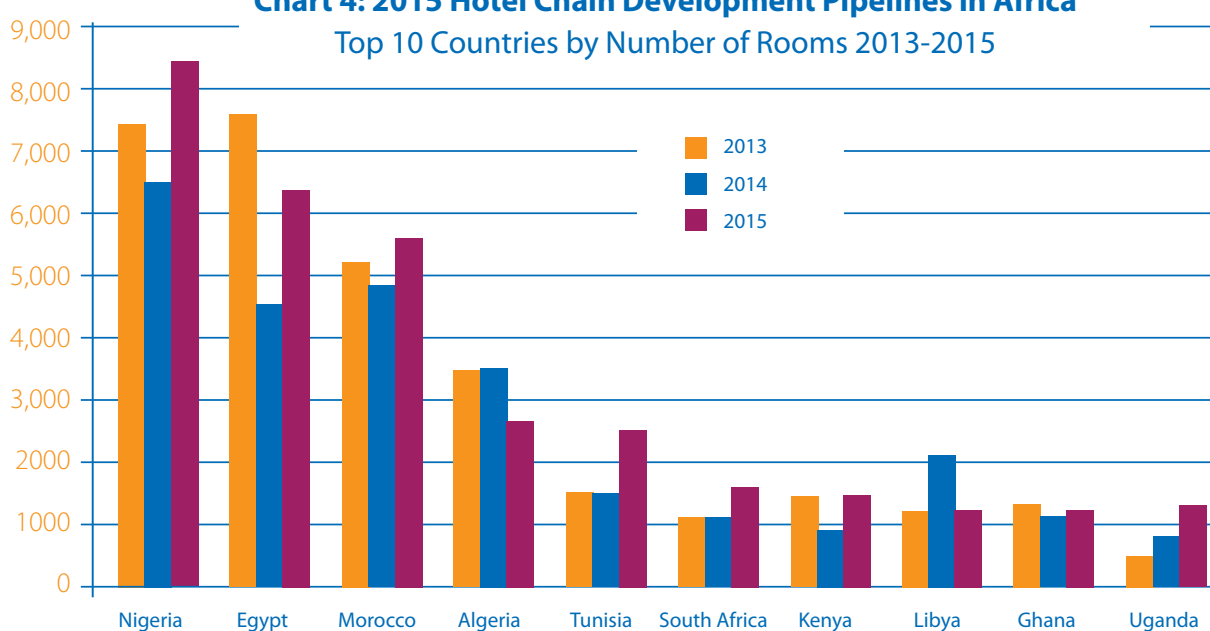


Chart 4 shows the growth of the pipeline for the top 10 countries by number of

planned rooms between 2013 and 2015:

Chart 4: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Countries by Number of Rooms 2013-2015





In 2015, all the countries in the top 10 (with the exception of Algeria and Libya) saw an increase in their pipeline from the previous year. Kenya and Uganda saw the largest increases in their pipeline, at over 100 per cent and 90 per cent respectively, albeit from a much smaller base than the four leading nations. Despite the continued difficulties that the country has faced, Egypt recorded a substantial

37 per cent increase in its pipeline, indicative of returning confidence.

Egypt also has the highest “performing” pipeline in Africa, with almost 5,500 rooms under construction, compared to “only” 3,400 in Nigeria. Table 5 analyses the top 10 countries with the highest number of hotel rooms by pipeline status.

Table 5: 2015 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	18	6,440	5,480	85%	2 ↑
2	Morocco	31	5,474	3,795	69%	3 ↑↕
3	Nigeria	51	8,563	3,369	39%	1 ↓
4	Algeria	13	2,749	2,494	91%	4 ↔
5	Tunisia	12	2,444	1,501	61%	5 ↔
6	South Africa	13	1,662	1,196	72%	6 ↔
7	Libya	5	1,458	1,158	79%	8 ↑
8	Ethiopia	8	1,326	1,117	84%	- ↑
9	Kenya	8	1,510	1,050	70%	7 ↓
10	Rwanda	7	1,351	953	71%	- ↑

Please note the arrows in the 'Rank - all deals' column denote a change in the countries' ranking compared to the ranking by all pipeline rooms

There is, of course, more than one way of looking at the pipeline status. Whilst the North African countries have what could be regarded as a “mature” pipeline, with more than 50 per cent of the rooms under construction, this also means that there will be fewer new openings in the future, as deals which are soon coming on stream are not being replaced by new ones.

Alternatively, one could surmise that the North African pipeline, and that in Ethiopia, Kenya and Rwanda, is more “real”, better able to be realised than deals in Nigeria, where below 40 per cent of pipeline rooms are on site (and a

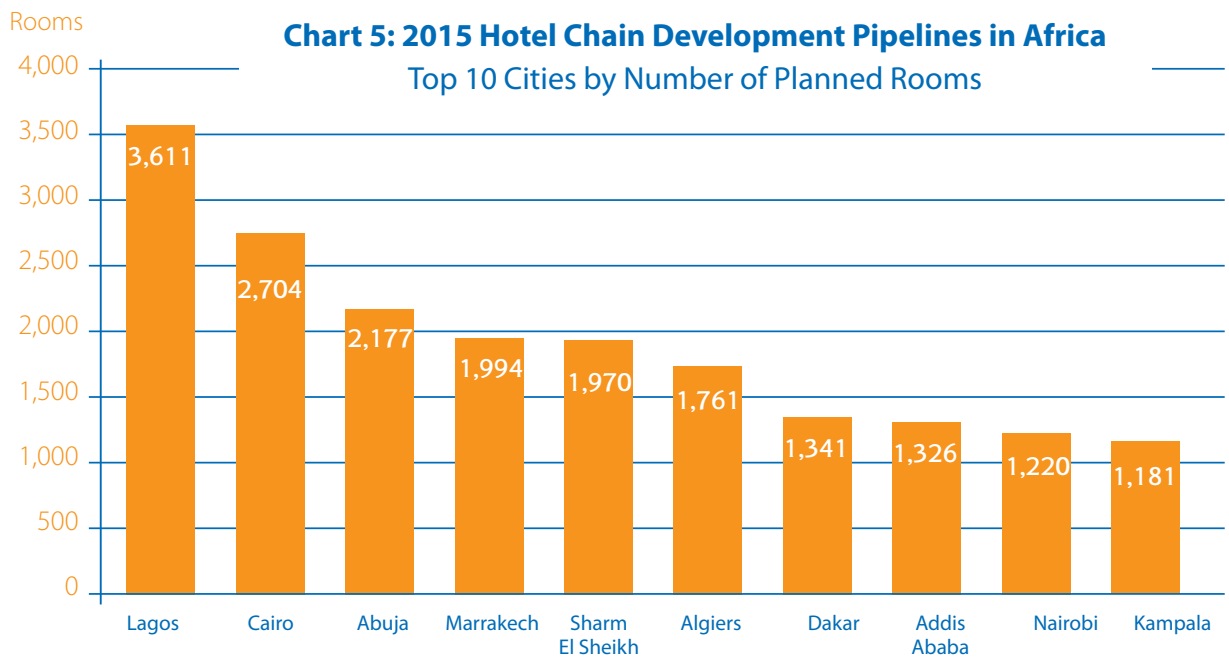
proportion of those which have gone to site have stalled, with the likelihood of completion very questionable).

Or, and perhaps the best approach, is wait and see what happens!

Note the two additions to the top ten when considering pipeline status, i.e. Ethiopia and Rwanda. Both countries have a relatively small pipeline, and therefore didn't make the top ten before, but enter the rankings because they have a high proportion of their pipeline rooms under construction, in their capitals Addis Ababa and Kigali respectively. New internationally-branded hotels opening

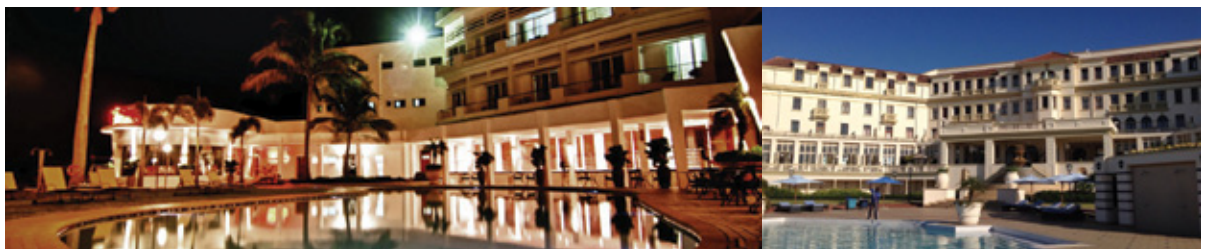
there are due to enhance the offer in each city considerably.

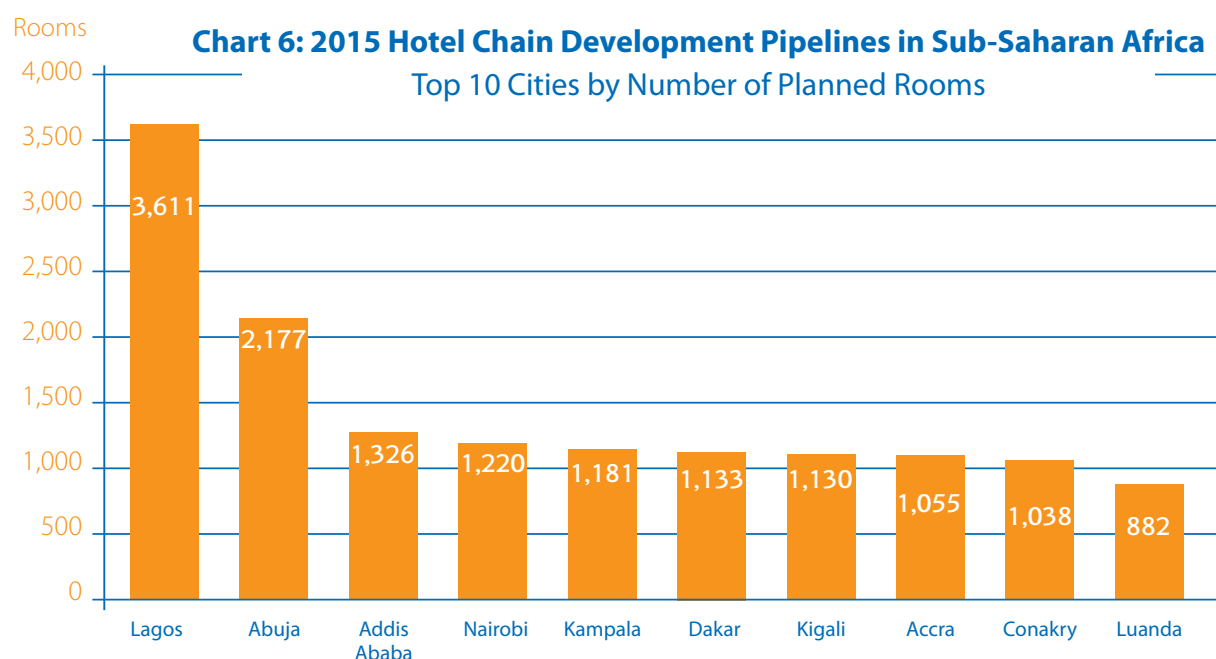
Given how diverse Africa is, and the size of many of the nations there, we believe it is increasingly relevant to look at cities as well as countries. Charts 5 and 6 show the top ten cities for pipeline deals, in Africa as a whole and in sub-Saharan Africa.



Egypt has two of the largest destinations for new hotel deals, Cairo and Sharm el Sheikh. Lagos and Abuja, the commercial and political capital respectively of Nigeria, are both in the top three cities. However, of the 11 hotel deals signed in Abuja, only two, the Fraser Suites and the Hilton Garden Inn, are actively under construction.

Excluding North Africa from the analysis brings into the top ten some relatively small markets such as Kigali and Conakry, where there must be some concern regarding oversupply – if all the hotel deals that are planned go ahead. Nigeria continues to dominate – 40 per cent of rooms in the top ten are in Lagos and Abuja.





Having looked at where it is happening, or due to happen, we then look at who is making the running. The top 10 brands by number of hotels and rooms in their pipelines are shown in Table 6 and Chart 7, and data on all brands is included as Appendix 3.

Carlson Rezidor's Radisson Blu brand continues to occupy first position in terms of the number of hotels and rooms in its development pipeline. Its sister brand, Park Inn by Radisson, is also in the top 10, whilst the Hilton brand and its

"little brother", Hilton Garden Inn, occupy second and fifth positions respectively. Marriott and Starwood each have two brands in the top ten, with Starwood achieving particularly strong growth for both brands, Sheraton and Four Points. Kempinski has been signing the biggest deals, with an average 324 rooms per hotel, double that of Park Inn, and of all the chains in the survey has the largest hotel project in sub-Saharan Africa, the 451-room Grand Hotel Oyala Kempinski in Equatorial Guinea's future new capital, Oyala.

Table 6: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Brands by Number of Planned Hotels and Rooms

Rank by Hotels			Rank by Rooms			Change on 2014	Average Size
	Brand	Units		Brand	Rooms		Rooms
1	Radisson Blu	22	1	Radisson Blu	5,372	23.9%	244
2	Hilton	16	2	Hilton	4,965	5.1%	310
3	Marriott	11	3	Marriott	2,316	9.5%	211
4	Park Inn by Radisson	10	4	Sheraton	1,862	29.6%	233
5=	Hilton Garden Inn	9	5	Hilton Garden Inn	1,682	33.1%	187
5=	Noom	9	6	Kempinski	1,618	3.3%	324
7	Sheraton	8	7	Park Inn by Radisson	1,581	-17.3%	158
8=	Four Points by Sheraton	7	8	Noom	1,332	12.9%	148
8=	Golden Tulip	7	9	Four Points by Sheraton	1,250	37.5%	179
8=	Mantis	7	10	Courtyard by Marriott	1,154	0.0%	289

Please note the = sign in the Rank column denotes that the brands are of equal rank

The far larger average size of new hotels signed by Hilton, Kempinski and Marriott (Courtyard) is clear from Chart 7. Hilton's

and Courtyard's largest deals are mostly in North Africa:

Chart 7: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Countries by Number of Planned Rooms & Average Size

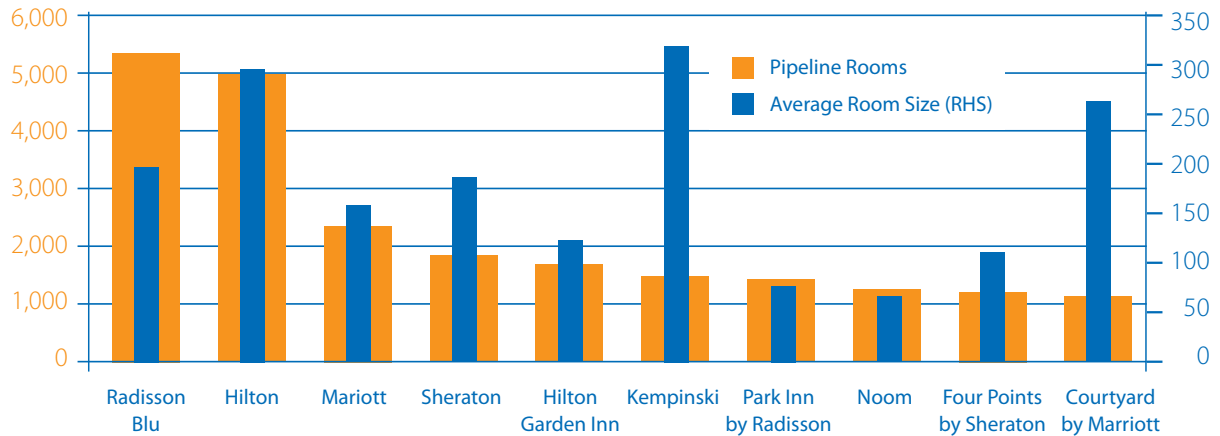
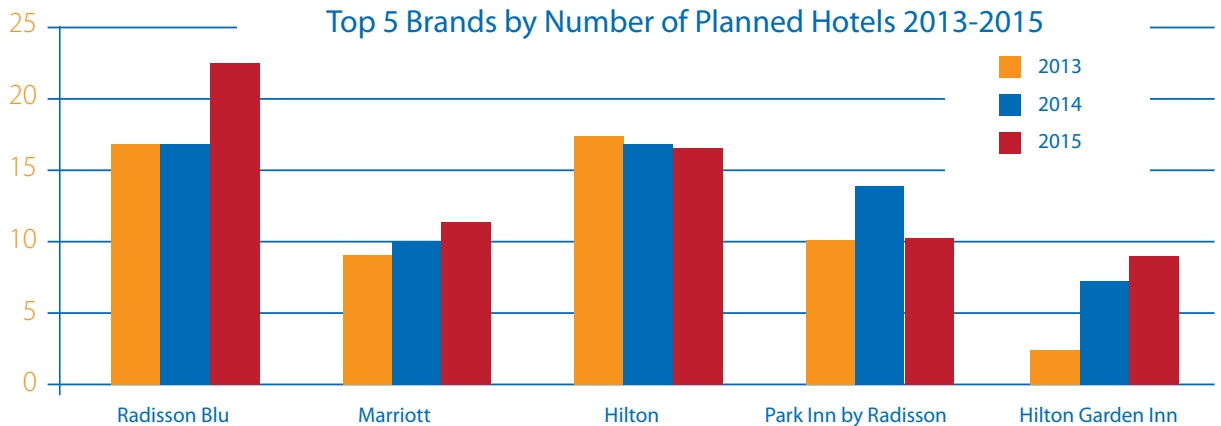


Chart 8 shows the evolution of the number of rooms in the top five brands'

development pipelines from 2013 to 2015.

Chart 8: 2015 Hotel Chain Development Pipelines in Africa
Top 5 Brands by Number of Planned Hotels 2013-2015



Although from a small basis, Hilton Garden Inn has seen the largest absolute growth, from two hotels in 2013 to nine hotels in 2015. In our opinion this highlights two trends in African hotel development, first that the main opportunities lie in the midscale segment, and second that such hotels are "easier" to develop.

Hilton have launched a modular build solution for upcoming Garden Inn projects in Africa, in conjunction with CIMC Modular Building Systems - modular guest rooms and hallways are built in the factory, ensuring guarantees of cost and quality, as well as enabling faster development.

Sorting the deals to analyse whether or not they are on site changes the

brands' rankings slightly.

Table 7: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Brands by Pipeline Status

Rank	Brand	Hotels	Rooms			Rank - all deals
			Total	On site construction		
1	Radisson Blu	22	5,372	4,061	75.6%	1 ↔
2	Hilton	16	4,965	3,305	66.6%	2 ↔
3	Sheraton	8	1,862	1,219	65.5%	4 ↑
4	Marriott	11	2,316	1,210	52.2%	3 ↓
5	Park Inn by Radisson	10	1,581	1,189	75.2%	7 ↑
6	Hilton Garden Inn	9	1,682	1,108	65.9%	5 ↓
7	Mövenpick	4	1,001	1,001	100.0%	- ↑
8	Kempinski	5	1,618	968	59.8%	6 ↓
9	Noom	8	1,332	846	63.5%	8 ↓
10	Pullman	3	844	844	100.0%	- ↑

Please note the arrows in the 'Rank - all deals' column denote a change in the brands' ranking compared to the ranking by all pipeline rooms

The Radisson Blu and Hilton brands remain in the top two positions - both have long-established development offices on the continent, and have been actively signing deals with investors considered capable of making it happen. Marriott drops one place in the rankings, relinquishing its third position to Sheraton.

Mövenpick's four hotel deals (all located in North Africa – Egypt, Morocco and Tunisia), are under construction and scheduled to open in 2016 and 2017. Pullman's signed deals, in Nairobi, Kinshasa and Addis Ababa, are also all on site, and are scheduled to open fully by 2017 (the Grand Hotel in Kinshasa opened partially earlier this year).

As noted earlier, some of the chains, notably Hilton, Carlson Rezidor and Marriott, have more than one brand in the pipeline. Marriott leads in presenting a multi-brand offer, with 10 brands available to developers, including four brands included for the first time since its acquisition of Protea last year. This multi-brand approach has become more commonplace as Africa's markets continue to develop and become mature enough for multiple brands, catering to markets across a broad spectrum. Having led their market entry with their flagship brands, typically at the upscale level, several of the chains are now introducing their midscale and budget brands.





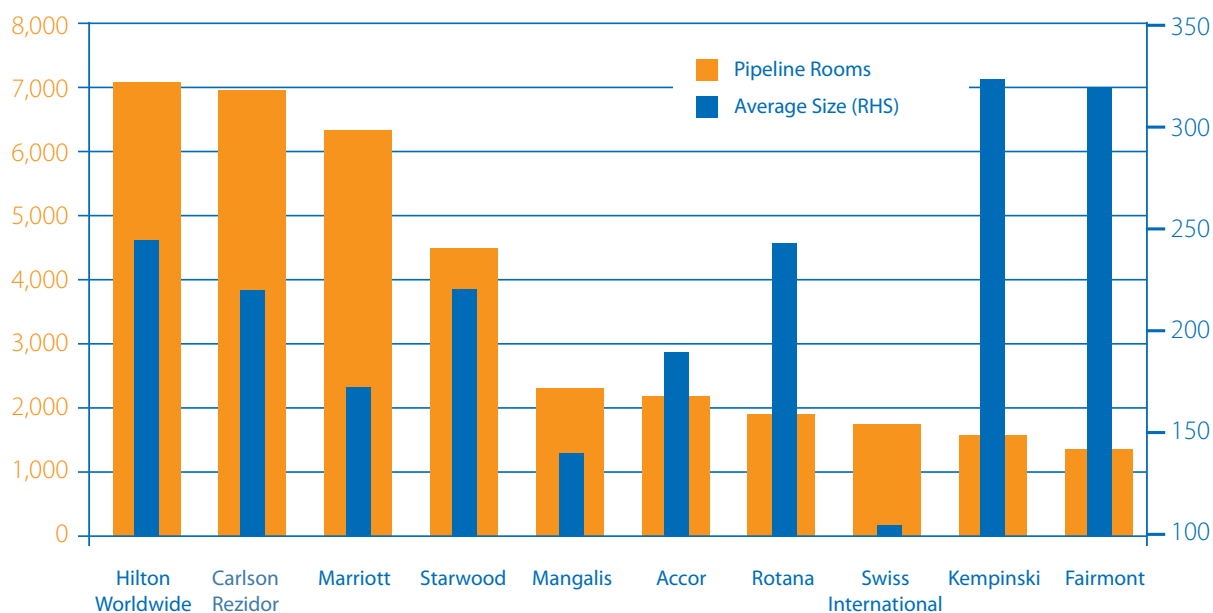
We have therefore analysed the pipeline data on the basis of what the hotel chains are doing across all their brands -Table 8

and Chart 9 show the results, with detail for all the chains included in Appendix 4:

Table 8: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Chains by Number of Planned Hotels and Rooms

Rank by Hotel			Rank by Rooms				
						Change on 2013	Average Size
1	Marriott	36	1	Hilton Worldwide	7,250	18%	250
2	Carlson Rezidor	32	2	Carlson Rezidor	6,953	11%	217
3	Hilton Worldwide	29	3	Marriott	6,412	22%	178
4	Starwood	21	4	Starwood	4,623	32%	220
5	Mangalis	17	5	Mangalis	2,329	5%	137
6	Swiss International	16	6	Accor	2,273	43%	189
7=	Accor	12	7	Rotana	1,955	34%	244
7=	Best Western	12	8	Swiss International	1,738	150%	109
9	Rotana	8	9	Kempinski	1,618	3%	324
10	Louvre Hotels Group	7	10	Fairmont Raffles	1,277	366%	319

Chart 9: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Groups by Number of Planned Rooms & Average size



Although in third place by number of hotels, Hilton Worldwide takes top slot in terms of the number of rooms in their pipeline, with 4 per cent more rooms than Carlson Rezidor, and 13 per cent more than Marriott, due to the larger average size of deal. Hilton are focusing primarily on three brands – their core Hilton, DoubleTree by Hilton, and Hilton Garden Inn.

Best Western has 12 new hotels in their pipeline, but the average size of hotel is

lower, at 93 rooms, and therefore drops out of the top ten when the pipeline is analysed by number of rooms. Both Kempinski and Fairmont focus on large, luxury hotels (Kempinski with their single brand, and Fairmont developing Raffles, Fairmont and Swissotel) and have the largest average number of rooms in the survey.

Table 9 analyses the signed deals by pipeline status for the chains.

Table 9: 2015 Hotel Chain Development Pipelines in Africa						
Top 10 Chains by Pipeline Status						
Rank	Company	Hotels	Rooms			Rank - all deals
			Total	On site construction		
1	Carlson Rezidor	32	6,953	5,250	76%	2 ↑
2	Hilton Worldwide	29	7,250	4,730	65%	1 ↓
3	Marriott	36	6,412	3,555	55%	3 ↔
4	Starwood	21	4,623	3,016	65%	4 ↔
5	Accor	12	2,273	2,018	89%	6 ↑
6	Mangalis	17	2,329	1,204	52%	5 ↓
7	Best Western	12	1,115	1,050	94%	- ↑
8	Mövenpick	4	1,001	1,001	100%	- ↑
9	Kempinski	5	1,618	968	60%	9 ↔
10	IHG	5	1,195	895	75%	- ↑

Please note the arrows in the 'Rank - all deals' column denote a change in the brands' ranking compared to the ranking by all pipeline rooms



Carlson Rezidor has more rooms actually under construction than Hilton Worldwide, and therefore takes the top slot again. Best Western re-enters the top ten, with 94 per cent of its pipeline rooms on site. For some of these chains their pipeline represents

their first entry to the African market, with no existing presence on the continent:

Table 10: 2015 Hotel Chain Development Pipelines in Africa
Chains with no Existing Hotels in Africa

Company	Pipeline	
	Hotels	Rooms
Mangalis	17	2,329
Jumeirah	2	548
Millennium & Copthorne	1	250
Frasers	1	126
Mandarin Oriental	1	61

Mangalis is a new chain, launched in 2013, with its first hotel openings expected in 2015, in Conakry and Dakar.

It is of note that Mangalis is achieving its very rapid growth by adopting an “asset-heavy” strategy, funding the development of nearly all of its hotels. This is in contrast with virtually every

other chain in the survey, who are “asset-light”, seeking management agreements or, exceptionally, franchises and leases.

The top 10 chains whose pipeline represents the largest proportion of their existing hotels presence on the continent are shown in Table 11:

Table 11: 2015 Hotel Chain Development Pipelines in Africa
Top 10 Chains by Pipeline and % of Existing Hotels in Africa

Rank	Company	Existing		Pipeline		Pipeline % of Existing	
		Hotels	Rooms	Total	Rooms	Hotels	Rooms
1	Swiss International	6	547	16	1,738	267%	318%
2	Rotana	2	759	8	1,955	400%	258%
3	City Blue	4	69	2	135	50%	196%
4	Onomo	3	343	4	525	133%	153%
5	Mantis Collection	23	284	7	430	30%	151%
6	Groupe Azalai	7	700	6	949	86%	136%
7	Carlson Rezidor	25	5,763	32	6,953	128%	121%
8	Wyndham	5	820	6	931	120%	114%
9	Hyatt	4	1,111	7	1,121	175%	101%
10	Kempinski	9	1,656	5	1,618	56%	98%

Hyatt and Kempinski are set to double their African presence through new deals signed, but in percentage terms it is the smaller chains (in terms of African presence) including those focusing purely on Africa, such as City Blue, Onomo and Azalai, that have the highest percentage increase. Rotana, the Abu-Dhabi based chain, are making rapid inroads into the continent,

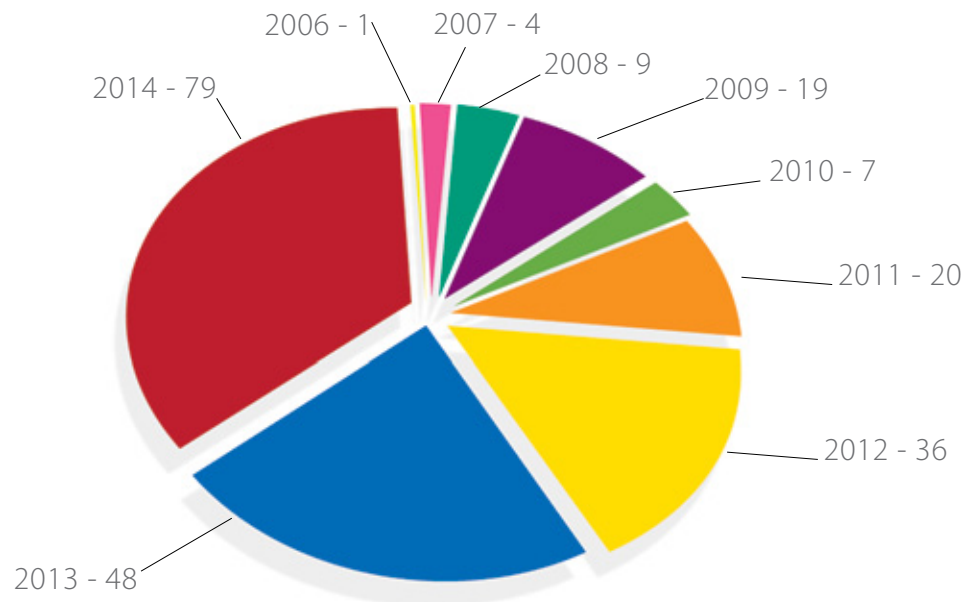
with eight new hotels in the pipeline, as is Swiss International, with 16 new franchise deals, of which more than half are in Nigeria.

For the first time in this year's survey, we have analysed the deal-signing activity

by year, as shown in Chart 10:

Chart 10: 2015 Hotel Chain Development Pipelines in Africa

Years the deals were signed - number of hotels



A record 79 deals were signed in 2014. Some of the deals signed in previous years have, of course, become reality, and are operational. What is of concern (particularly to the hotel chains!), is the number of deals that are still on the books after several years.

Between 2006 and 2011, no fewer than 60 deals with 13,500 rooms, over 25 per cent of the total, were signed, and really should

have opened by now, but for many reasons (most often a lack of finance) are still just paperwork or, in some cases, unfinished monuments to unfulfilled promise.

But most importantly, looking very positive is the pipeline of the future, as shown in Table 12:

Table 12: 2015 Hotel Chain Development Pipelines in Africa Anticipated Opening Years of Pipeline Deals			
	Pipeline	Rooms	Cumulative New Rooms Open
2015	75	10,599	-
2016	80	14,073	24,672
2017	55	10,988	35,660
2018	39	8,671	44,331
2019	11	2,685	47,016
2020	4	1,157	48,173
Not Known	6	1,542	49,715

That's over 35,000 new rooms in 210 new hotels in the next three years, with a certainty that there will be more than that, in deals yet to be done.

Africa is really proving to be the growth story of the 21st Century!



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Appendices



Appendix 1

2015 Hotel Chain Development Pipelines in Africa, Contributors to the Survey - Hotel Chains & Brands

Hotel Chains	Brands		
Accor	Ibis Pullman	Mercure Sofitel	Novotel
African Sun	Stand Alone		
Banyan Tree	Banyan Tree		
Best Western	Best Western	Best Western Plus	Best Western Premier
Carlson Rezidor	Park Inn by Radisson	Radisson Blu	
CityBlue	CityBlue	Express by CityBlue	
City Lodge	City Lodge	Road Lodge	
Corinthia	Corinthia		
Dusit International	Dusit Thani		
Four Seasons	Four Seasons		
Fraser Hospitality	Fraser Suites		
FRHI Hotels & Resorts	Fairmont	Raffles	Swissotel
Groupe Azalai	Azalai		
Hilton Worldwide	DoubleTree by Hilton	Hilton	Hilton Garden Inn
Hyatt	Hyatt Park Hyatt	Hyatt Place	Hyatt Regency
IHG	Crowne Plaza	Holiday Inn	InterContinental
Jumeirah Group	Jumeirah		
Kempinski	Kempinski		
Louvre Hotels Group	Golden Tulip		

Appendix 1 contd.

2015 Hotel Chain Development Pipelines in Africa, Contributors to the Survey - Hotel Chains & Brands

Hotel Chains	Brands		
Mandarin Oriental	Mandarin Oriental		
Mangalis	Noom	Seen	Yaas
Mantis Collection	Mantis		
Marriott	African Pride Marriott Protea Residence Inn by Marriott	Courtyard by Marriott Marriott Executive Apartments Protea Fire&Ice! Ritz Carlton	JW Marriott
Meliá Hotels International	Meliá		
Millennium & Copthorne	Grand Millennium		
Minor Hotel Group	Anantara	Avani	Per Aquum
Mövenpick	Mövenpick		
Onomo Hotels	Onomo		
Pestana Hotels & Resorts	Pestana		
Rotana Hotels & Resorts	Arjaan Hotel Apartments Rotana	Centro	Rayhaan
Serena	No pipeline		
Shaza	No pipeline		
Starwood	Four Points by Sheraton St. Regis	Le Meridien W	Sheraton Westin
Steigenberger	No pipeline		
Swiss International	Edges by Swiss International Swiss Spirit	Royal Swiss	Swiss International
Taj	No pipeline		
Wyndham	Ramada Wyndham	Ramada Encore	Ramada Plaza

Appendix 2

2015 Hotel Chain Development Pipelines in Africa, Hotels and Rooms by Country

	Total Per Country		Pre-Construction (Planning)	Rooms on Site (Construction)
Country	Hotels	Rooms		
Algeria	13	2,749	9%	91%
Angola	4	882	89%	11%
Benin Republic	4	643	32%	68%
Burundi	1	120	-	100%
Cameroon	2	263	100%	-
Cape Verde	2	441	46%	54%
Chad	2	370	-	100%
Congo, Republic of	2	290	52%	48%
Cote d'Ivoire	4	860	-	100%
DRC	5	748	34%	66%
Egypt	18	6,440	15%	85%
Equatorial Guinea	2	551	18%	82%
Ethiopia	8	1,326	16%	84%
Gabon	3	610	48%	52%
Ghana	8	1,399	49%	51%
Guinea	5	1,038	55%	45%
Kenya	8	1,510	30%	70%
Libya	5	1,458	21%	79%
Madagascar	2	378	100%	-
Mali	2	214	47%	53%
Mauritania	3	587	43%	57%
Mauritius	3	382	58%	42%
Morocco	31	5,474	31%	69%
Mozambique	2	210	-	100%
Namibia	1	180	100%	-
Niger	2	290	52%	48%
Nigeria	51	8,563	61%	39%
Rwanda	7	1,351	29%	71%
Sao Tome & Principe	1	40	100%	-
Senegal	10	1,341	45%	55%
Seychelles	1	124	-	100%
Sierra Leone	3	445	73%	27%
South Africa	13	1,662	28%	72%

Appendix 2 contd.

2015 Hotel Chain Development Pipelines in Africa, Hotels and Rooms by Country

	Total Per Country		Pre-Construction (Planning)	Rooms on Site (Construction)
Country	Hotels	Rooms		
South Sudan	2	358	56%	44%
Sudan	2	435	54%	46%
Tanzania	10	1,043	38%	62%
Togo	4	697	36%	64%
Tunisia	12	2,444	39%	61%
Uganda	9	1,397	39%	61%
Zambia	3	402	-	100%
TOTAL	270	49,715	37%	63%

Appendix 2 contd.

2015 Hotel Chain Development Pipelines in Africa, Countries with no Pipeline, by Sub-Region

South	West	East	Central
Botswana	Burkina Faso	Comoros Island	CAR
Lesotho	Gambia	Djibouti	
Malawi	Guinea Bissau	Eritrea	
Swaziland	Liberia	Somalia	
Zimbabwe			





Appendix 3

2015 Hotel Chain Development Pipelines in Africa, Hotels and Rooms by Brand

	Total Per Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
Brand	Hotels	Rooms		
African Pride	1	155	-	100%
Anantara	4	506	-	100%
Arjaan Hotel Apartments by Rotana	3	600	50%	50%
AVANI	1	124	-	100%
Azalai	6	949	64%	36%
Banyan Tree	1	92	-	100%
Best Western	3	244	-	100%
Best Western Plus	6	605	-	100%
Best Western Premier	3	266	24%	76%
Centro Hotels by Rotana	1	350	100%	-
City Lodge	3	467	68%	32%
Cityblue	1	35	-	100%
Corinthia	2	490	39%	61%
Courtyard by Marriott	4	1,154	40%	60%
Crowne Plaza	1	200	-	100%
Doubletree by Hilton	3	413	23%	77%
Dusit Thani	1	307	100%	-
Edges by Swiss International	2	88	-	100%
Express by Cityblue	1	100	100%	-
Fairmont	2	677	32%	68%
Four Points by Sheraton	7	1,250	41%	59%
Four Seasons	5	606	37%	63%
Frasers Suites	1	126	-	100%
Golden Tulip	7	967	37%	63%
Grand Millennium	1	250	100%	-
Hilton	16	4,965	33%	67%
Hilton Garden Inn	9	1,682	34%	66%
Holiday Inn	2	451	67%	33%
Hyatt	2	338	59%	41%
Hyatt Place	1	190	-	100%
Hyatt Regency	2	347	100%	
Ibis	2	218	-	100%
InterContinental	2	544	-	100%
Jumeirah	2	548B	100%	
JW Marriott	1	307	100%	
Kempinski	5	1,618	40%	60%
Le Meridien	1	319	-	100%
Mandarin Oriental	1	61	-	100%
Mantis	7	430	54%	46%
Marriott	11	2,316	48%	52%
Marriott Executive Apartments	5	794	43%	57%

Appendix 3 contd.

2015 Hotel Chain Development Pipelines in Africa, Hotels and Rooms by Brand

	Total Per Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
Brand	Hotels	Rooms		
Melia	3	690	-	100%
Mercure	1	158	-	100%
Mövenpick	4	1,001	-	100%
No Brand	1	200	-	100%
Noom	9	1,332	36%	64%
Novotel	4	749	34%	66%
Onomo	4	525	54%	46%
Park Hyatt	2	246	-	100%
Park Inn by Radisson	10	1,581	25%	75%
Per Aquum	1	49	-	100%
Pestana	1	275	100%	-
Protea	4	439	46%	54%
Protea Fire&Ice!	1	178	-	100%
Protea Select	1	132	-	100%
Pullman	3	844	-	100%
Radisson Blu	22	5,372	24%	76%
Raffles	1	200	100%	-
Ramada	3	361	-	100%
Ramada Encore	1	116	-	100%
Ramada Plaza	1	164	-	100%
Rayhaan Hotels & Resorts by Rotana	1	250	100%	-
Residence Inn by Marriott	2	297	51%	49%
Ritz Carlton	6	640	45%	55%
Road Lodge	1	90	-	100%
Rotana Hotels & Resorts	3	755	26%	74%
Royal Swiss	3	310	27%	73%
Seen	5	709	62%	38%
Sheraton	8	1,862	35%	65%
Sofitel	1	104	-	100%
St. Regis	1	372	-	100%
Stand Alone (African Sun)	2	237	-	100%
Swiss International Hotels & Resorts	6	894	83%	17%
Swiss Spirit Hotels & Suites	5	446	56%	44%
Swissotel	1	400	-	100%
Unknown (Hilton Worldwide)	1	190	100%	-
W	2	448	100%	-
Westin	2	372	-	100%
Wyndham Hotels & Resorts	1	290	100%	-
Yaas	3	288	69%	31%
TOTAL	270	49,715	37%	63%



Appendix 4

2015 Hotel Chain Development Pipelines in Africa, Hotels and Rooms by Group

Group	Total Per Group			Pre-Construction (Planning)	Rooms on Site (Construction)
	Countries	Hotels	Rooms		
Accor	6	12	2,273	11%	89%
African Sun	2	2	237	-	100%
Banyan Tree	1	1	92	-	100%
Best Western	6	12	1,115	6%	94%
Carlson Rezidor	20	32	6,953	24%	76%
City Blue	2	2	135	74%	26%
City Lodge	3	4	557	57%	43%
Corinthia	2	2	490	39%	61%
Dusit	1	1	307	100%	-
Four Seasons	3	5	606	37%	63%
Frasers	1	1	126	-	100%
Fairmont	2	4	1,277	33%	67%
Groupe Azalai	6	6	949	64%	36%
Hilton Worldwide	15	29	7,250	35%	65%
Hyatt	4	7	1,121	49%	51%
IHG	5	5	1,195	25%	75%
Jumeirah	1	2	548	100%	-
Kempinski	5	5	1,618	40%	60%
Louvre Hotels Group	7	7	967	37%	63%
Mandarin Oriental	1	1	61	-	100%
Mangalis	11	17	2,329	48%	52%
Mantis Collection	4	7	430	54%	46%
Marriott	12	36	6,412	45%	55%
Melia Hotels International	1	3	690	-	100%
Millennium & Copthorne	1	1	250	100%	-
Minor Hotel Group	6	6	679	-	100%
Mövenpick	3	4	1,001	-	100%
Onomo	4	4	525	54%	46%
Pestana	1	1	275	100%	-
Rotana	8	8	1,955	56%	44%
Starwood	11	21	4,623	35%	65%
Swiss International	5	16	1,738	62%	38%
Wyndham	4	6	931	31%	69%
TOTAL	270	49,715	37%	63%	



W HOSPITALITY GROUP

Plot 10, Babatunde Crescent, off Oniru Market Road,
Lekki Phase 1, Lagos, Nigeria

info@w-hospitalitygroup.com

www.w-hospitalitygroup.com

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