



2017
Hotel Chain Development Pipelines in Africa



**Front Page:
Radisson Blu
Durban**

Welcome to the 2017 edition of our annual Hotel Chain Development Pipelines in Africa.

This ninth edition of our annual survey has 36 international and regional contributors, reporting pipeline activity of almost 73,000 rooms in 417 hotels, a 13 per cent increase on the 2016 pipeline. Since the beginning of our analysis, the pipeline has grown each year, more than doubling since 2009, when the pipeline was just 30,000 rooms in 144 hotels, and Africa was only just beginning to be the focus of the chains.

2016, during which 86 of these deals were signed, down on the 2015 total of 121, was a challenging year for many countries in Africa, with low prices of oil and other commodities resulting in reduced government spending on infrastructure and other capital projects. Foreign exchange fluctuations also made doing business more difficult, and there was a loss of investor confidence, both domestically and internationally, in countries like Nigeria and Angola, which have single-commodity economies. However, despite this slowdown in some countries others benefited, particularly those who import (cheaper) oil, and there has been increased activity generally in Southern and East Africa.

Pipeline activity was not just in signing agreements – our analysis shows that of the pipeline deals scheduled to open in 2016 (according to the data provided last year), 47 per cent did actually open. Whilst this is, of course, less than what the chains had expected (100 per cent!), it is still a significant increase on 2015, when only 36 per cent of scheduled openings took place.

As well as analysing the data that they contributed, we present in this report insights from some of the hotel chains' development executives, with their reflections on the African market in 2016, the extent to which macro-economic factors have impacted on their development activity, and their outlook for 2017 and beyond.

In last year's report the big news story was AccorHotels' 50-hotel deal in Angola, which shot them to the position of number one developer for the first time, and positioned Angola as the country with the largest pipeline, displacing Nigeria, which had led the field for several years. This year, it will come as no surprise that Marriott is top of the table in terms of number of rooms, after their merger with Starwood last year – Accor continues to lead, just, by the number of hotels in their pipeline.

We are delighted that our annual report on hotel development activity in Africa has become acknowledged as the most authoritative source on the growth of the hotel industry in Africa. And we are equally delighted to be closely involved in this African hotel success story – as well as the research work we undertake, we have provided professional advice on a number of the deals included in this report.

Trevor J Ward

Managing Director

Lagos, Nigeria

April 2017



**Park Inn
by Radisson
Cape Town**



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Methodology

Our report covers the 54 countries in Africa, including North Africa (Morocco, Algeria, Tunisia, Libya and Egypt), sub-Saharan Africa and the Indian Ocean islands, and provides consistent, reliable and comparable data on the development pipeline activity of the hotel chains who are operating in, and those who are seeking to enter for the first time, Africa.

This report has been compiled from the data on signed deals provided to us in early 2017 by regional (African) and international hotel chains in Africa. To be included in this report, Africa-based chains need to operate in more than one country on the continent, and the international chains in more than one country globally. We do not therefore, include African hotel chains which are domestic, i.e. operate in only one country. In addition, the deals need to be legally-binding management, franchise or other agreements (some of the chains are owner-operators) which state the intention of the parties to open a hotel at a date in the future.

The data have been analysed in several ways: by region, by country, by city, by hotel chain and by brand (many of the global chains have multiple brands, the leader being Marriott which, since its merger with Starwood, boasts 30 brands, no fewer than 17 of which have deals in the company's pipeline).

This provides several permutations with which to understand the pipeline activity in Africa. The status of each project has been assessed, differentiating hotels in the pre-planning stage from those that are on-site, in the construction phase, as well as their age – when they were signed.

This year we have 36 contributors, and are pleased to welcome, amongst others, aha Hotels & Lodges for the first time. Based in South Africa, aha has a healthy pipeline in South Africa, and current operations there as well as in Botswana, Zambia and Zimbabwe. Other new contributors include Spain-based Pefaco, with existing hotels in Congo and one under construction in Togo, and India-based Sarovar, which has recently been acquired by Louvre Hotels Group (but is reported separately this year), and has existing hotels in Tanzania, Kenya and South Sudan, and pipeline projects in Kenya, Zambia and Ethiopia.

The Appendices list all the hotel chains and brands that participated in our 2017 survey. As always, we are extremely grateful to the hotel chains who contributed to our report, and would always welcome new contributors, particularly those based in Africa itself.



54
Countries



36
Contributors



**D2 Nairobi
The Rouge Deck**

2017 Research Findings

This year 36 hotel chains contributed to our survey, reporting a pipeline activity of 72,816 rooms in 417 hotels, a 13 per cent increase on 2016.

The data have been analysed initially according to two main regions, North Africa and sub-Saharan Africa (the latter including the Indian Ocean islands). Both regions reported growth in their pipeline activity, as shown in Table 1. The number of pipeline hotels in North Africa increased from 87 in 2016 to 107 in 2017, an increase of 23 per cent, higher than the 10 per cent increase reported in 2016.

The results demonstrate that investor confidence is returning to North Africa, following several years of turmoil and uncertainty in countries such as Libya and Egypt.

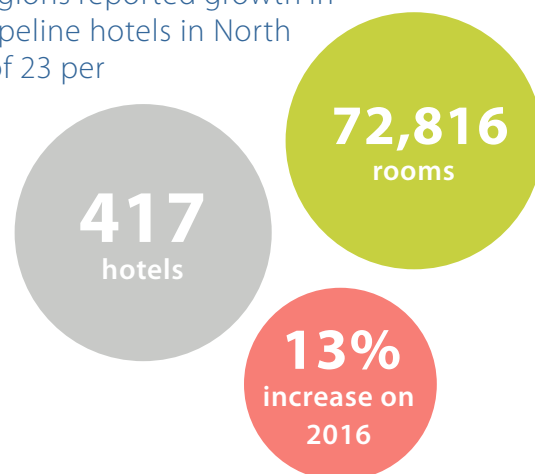


Table 1: Hotel Chain Development Pipelines in Africa 2017
Regional Summary

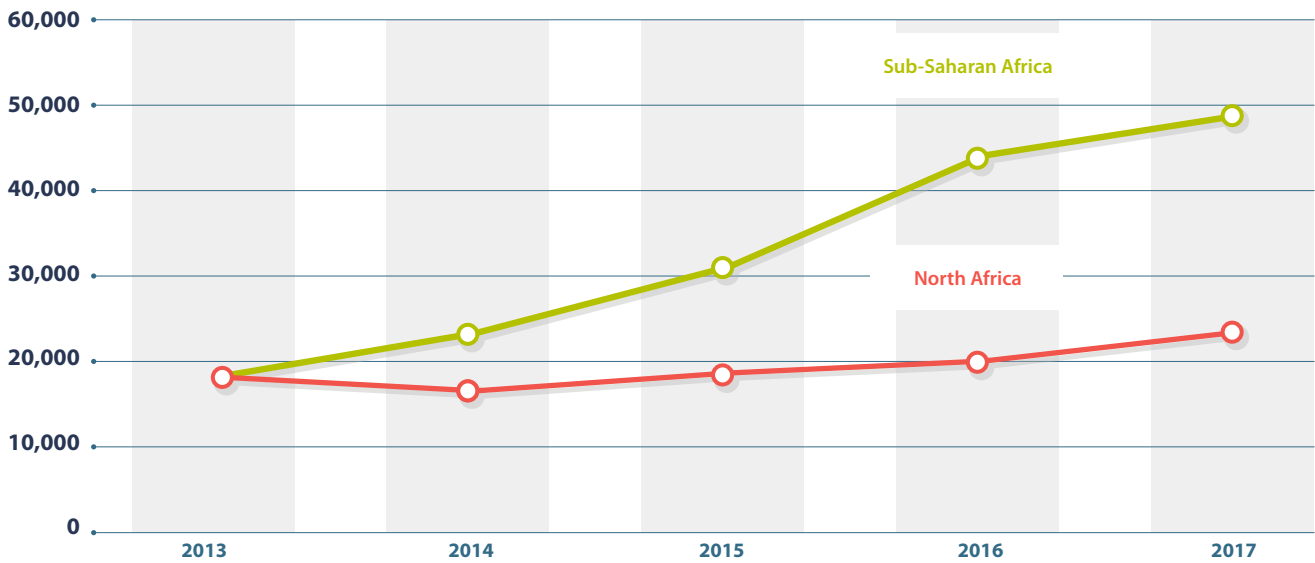
	2013		2014		2015		2016		2017	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	73	18,065	73	16,449	79	18,565	87	19,971	107	23,836
Sub-Saharan Africa	115	18,191	142	23,283	191	31,150	278	44,260	310	48,980
TOTAL	188	36,256	215	39,732	270	49,715	365	64,231	417	72,816

In sub-Saharan Africa, the number of pipeline hotels grew from 278 hotels in 2016 to 310 in 2017, an increase of 12 per cent, but the rate of growth slowing from 46 per cent in 2016. Macro-economic factors such as exchange rate uncertainty, recession and lower prices for commodities depressed several economies in sub-Saharan Africa, with a consequent slow-down in development activity – confidence is a critical factor for new fixed investment.

In terms of room numbers, hotels in the North African pipeline have a higher number of rooms than those in sub-Saharan Africa, with an average of 220 rooms compared to 158 rooms. The average of all pipeline deals remains constant at approximately 175 rooms per hotel.

Chart 1 presents a graphical representation of the change in the number of planned hotels in North Africa and sub-Saharan Africa.

**Chart 1: Hotel Chain Development Pipelines in Africa 2017
Regional Summary**



The total number of rooms in the pipeline in sub-Saharan Africa continues to outstrip those in the more mature North African market, not surprising given the much larger number of countries (49 in sub-Saharan Africa vs. five in North Africa).

The chains have deals signed in 41 countries, as shown in Table 2. As in past years, the main activity is in West Africa, which of the five regions has the highest representation of countries in the pipeline, with deals signed in 13 out of the 16 nations there, and also the highest number of rooms.

**Table 2: Hotel Chain Development Pipelines in Africa 2017
Countries in the Pipeline by Sub-Region**

North -5	Southern and Indian Ocean - 11	West - 13	East -7	Central -5
Algeria Egypt Libya Morocco Tunisia	Angola Botswana Madagascar Mauritius Mozambique Namibia Seychelles South Africa Swaziland Zambia Zimbabwe	Benin Republic Cape Verde Côte d'Ivoire Ghana Guinea Guinea Bissau Mali Mauritania Niger Nigeria Senegal Sierra Leone Togo	Burundi Ethiopia Kenya Rwanda South Sudan Tanzania Uganda	Cameroon Chad Congo DRC Gabon

There are 13 countries in Africa with, currently, no pipeline deals. Of those there are four - Comoros Islands, Eritrea, Liberia and Somalia – which have no hotels in the pipeline, and no existing internationally-branded supply.

**Table 3: Hotel Chain Development Pipelines in Africa 2017
Countries with no Pipeline, by Sub-Region**

Southern and Indian Ocean - 3	West - 3	East - 4	Central - 3
Comoros Islands Lesotho Malawi	Burkina Faso Liberia The Gambia	Djibouti Eritrea Somalia Sudan	Central African Republic Equatorial Guinea São Tomé and Príncipe

Chart 2 provides our analysis of the distribution of pipeline rooms in sub-Saharan Africa. West Africa is the largest region, with 42 per cent of the pipeline (rooms), a similar proportion to 2016's 45 per cent. East Africa also reports a similar proportion of rooms to 2016 with 23 per cent compared to 24 per cent last year. Central Africa has the same proportion as 2016, with just a 5 per cent share, whilst Southern Africa reports a slight increase on last year, with a 30 per cent share of the pipeline, compared to 26 per cent in 2016.

**Chart 2: Hotel Chain Development Pipelines in Africa 2016
Sub-Saharan Africa Sub-Regional Breakdown (Rooms)**

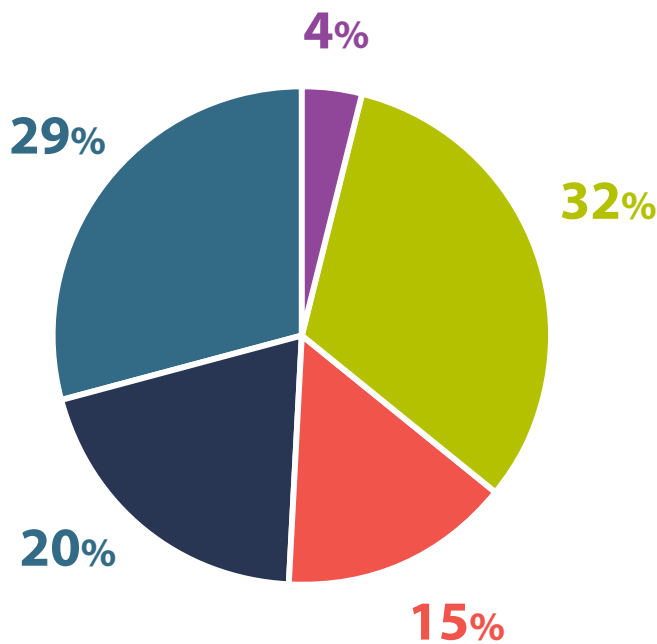


Table 4 lists the top 10 countries by number of hotels in the pipeline, together with the total number of planned rooms, and the average sizes of the hotels. As in 2016, and for several past years, Nigeria has the most rooms in the pipeline. Around 40 per cent of the deals in Nigeria were signed between 2009 and 2014, but a significant proportion has still not progressed to on-site construction. Angola remains in the top 10 due to the 2015 AccorHotels deal there with AAA Activos LDA.

South Africa, Tunisia and Ethiopia displaced Algeria from its top five position: two of the planned hotels opened in Algeria in 2016, the 180-room Marriott Constantine and the 201-room Sheraton Annaba.

Approximately 50 per cent of the deals in South Africa were signed between 2015 and 2017, after something of a drought following the surge in supply for the 2010 FIFA World Cup. The number of pipeline rooms in South Africa more than doubled (a 117 per cent increase), from 2,058 rooms in 11 hotels in 2016 to 4,484 rooms in 33 hotels in the 2017 pipeline.

The top 10 still contains four of the five North African countries, with several deals signed in 2016, including 12 in Egypt.

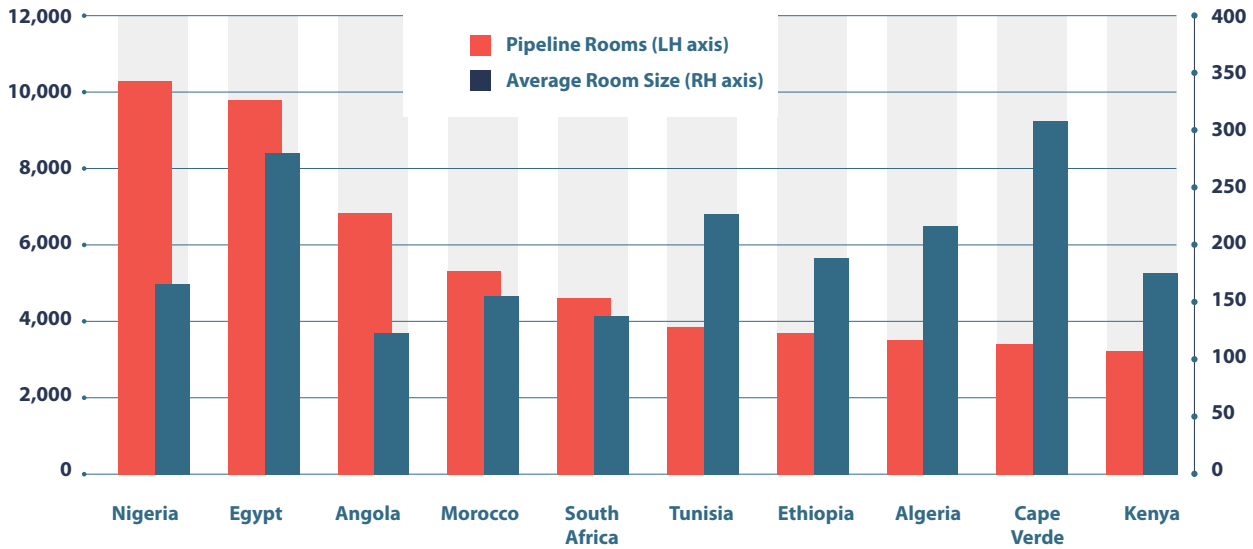
**Table 4: Hotel Chain Development Pipelines in Africa 2017
Top 10 Countries by Number of Rooms**

		Hotels	Rooms	Average Size
1	Nigeria	61	10,313	169
2	Egypt	35	9,851	281
3	Angola	54	6,939	129
4	Morocco	34	5,271	155
5	South Africa	33	4,484	136
6	Tunisia	17	3,852	227
7	Ethiopia	20	3,819	191
8	Algeria	17	3,771	222
9	Cape Verde	11	3,478	316
10	Kenya	19	3,453	182

Cape Verde recorded the highest growth in the number of pipeline rooms, over 300 per cent on 2016, albeit from a low base, and with 3,478 rooms in 11 hotels is in the top 10 countries for the first time. Meliá have 1,697 pipeline rooms in five hotels in Cape Verde, whilst Hilton, Deutsche Hospitality and Carlson Rezidor also have signed deals on the islands. In terms of average rooms per hotel, Cape Verde has the largest hotels in the top 10, with an average of 316 rooms per property, more than double the average in Angola, Morocco and South Africa.

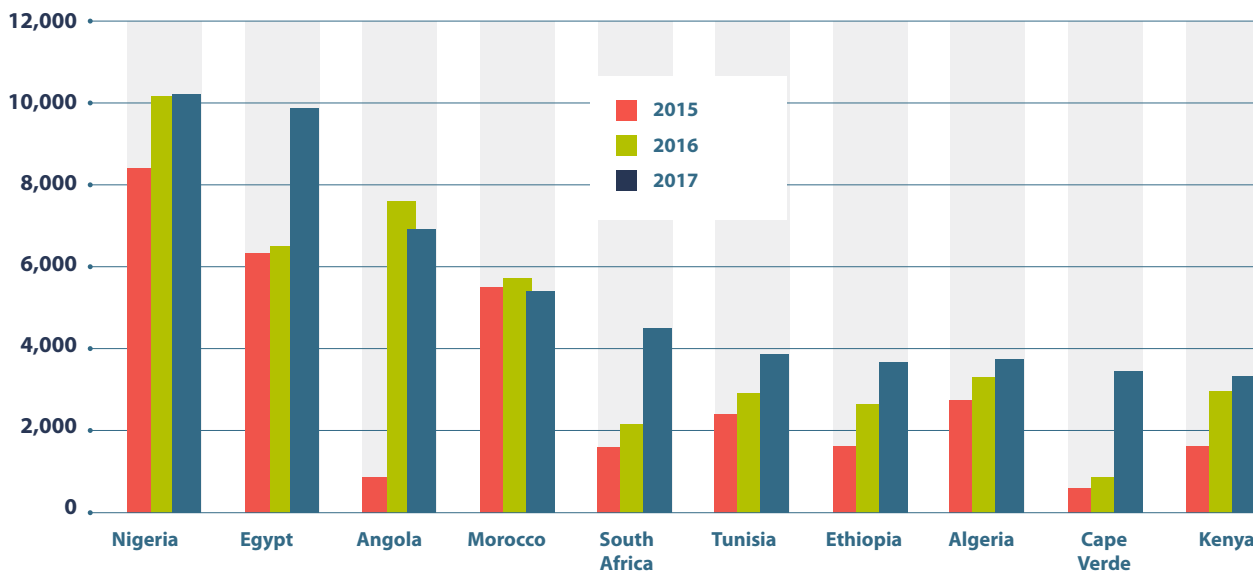
Chart 3 provides a graphical representation of the top 10 countries by number of planned rooms and average size, and highlights the larger average size of hotels in Cape Verde and Egypt, the majority of which are vacation resorts.

**Chart 3: Hotel Chain Development Pipelines in Africa 2017
Top 10 Countries by Number of Planned Rooms and Average Size**



In Chart 4 we track the development activity in the top 10 countries to show the growth in each nation since 2015. With the exception of Angola and Morocco, all had an increase in the number of rooms in the pipeline in 2017 compared to 2016. The number of planned rooms in Angola decreased from 7,560 rooms in 56 hotels in 2016 to 6,939 rooms in 54 hotels, due in part to the 2016 opening of three of AccorHotels' 50-hotel deal.

**Chart 4: Hotel Chain Development Pipelines in Africa 2017
Top 10 Countries by Number of Rooms 2015-2017**

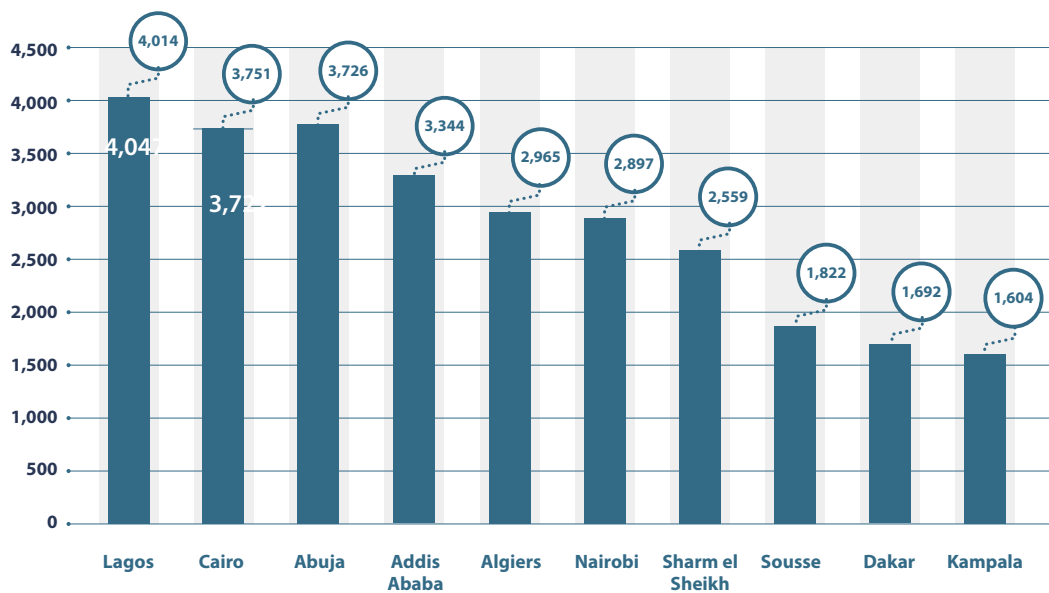


In Morocco, the number of planned rooms decreased to 5,271 rooms in 34 hotels from 2016 (5,681 rooms in 33 hotels), with the opening of the 503-room Mövenpick Hotel Mansour Eddahbi Marrakech contributing to this slight decline.

The significant increase in South Africa's 2017 pipeline is clear.

We present the top 10 cities in Africa by number of planned rooms in Chart 5.

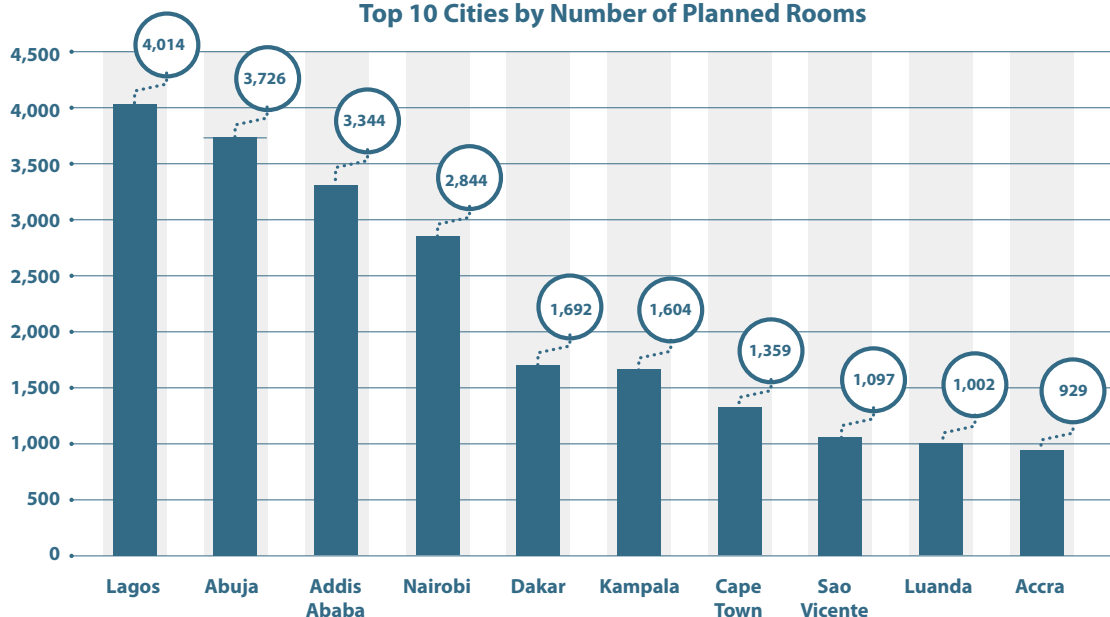
**Chart 5: Hotel Chain Development Pipelines in Africa 2017
Top 10 Cities by Number of Planned Rooms**



Lagos continues to lead the top 10 with over 4,000 planned rooms in branded hotels and with, according to our estimates, around another 1,000 rooms in unbranded properties. Cairo has the second highest number of planned rooms, rising from sixth place in 2016 and displacing Abuja into third place. Sousse and Kampala are two new entrants into this year's top 10 cities, whilst Sharm el Sheikh moves from third place to seventh place, as only one new deal was signed there in 2016.

Looking only at sub-Saharan Africa, Lagos and Abuja, the commercial and political capitals of Nigeria respectively, remain once again as the top two cities with the highest number of planned rooms. Addis Ababa is in third place, with several new signings there recently, including multiple deals by Wyndham and AccorHotels, amongst others. Kampala also has increased interest, and has moved up two places, from eighth in 2016 to sixth in 2017. Cape Town, Sao Vicente (Cape Verde) and Dar es Salaam are new cities in the top 10 in 2017.

**Chart 6: Hotel Chain Development Pipelines in Sub-Saharan Africa 2017
Top 10 Cities by Number of Planned Rooms**





D2
Nairobi

“2016 was a transitional year for organic growth in the hospitality industry” according to Philippe Baretaud, Senior Vice President Development Africa & India Ocean, AccorHotels.

Philippe explained that this was because of a slowdown of development in markets such as Morocco and Nigeria, although there were some positives as AccorHotels was able to sign 13 new deals, and opened three hotels in Angola in 2016 – the first international brand to operate there for several years.

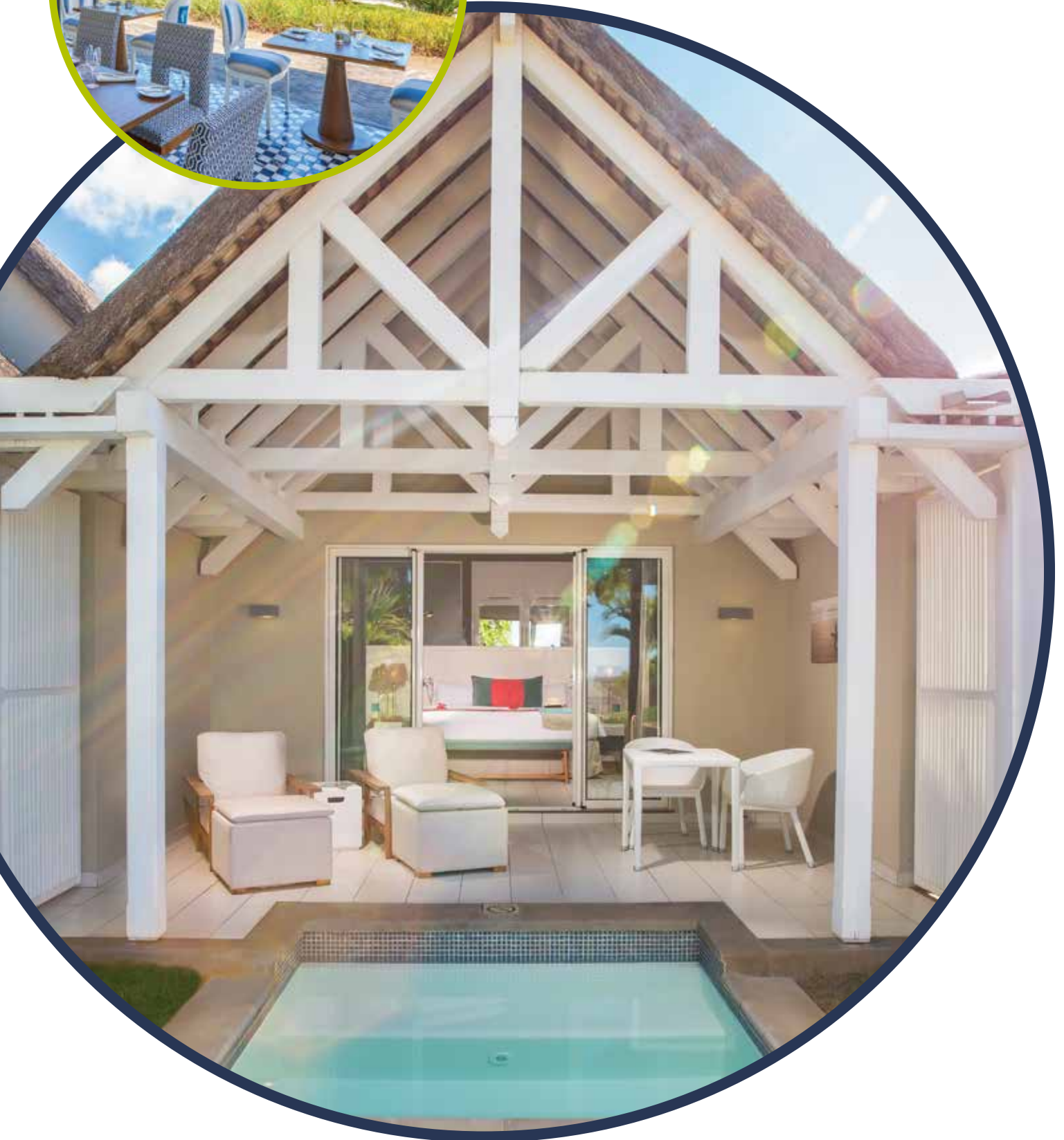
For Andrew McLachlan Senior Vice President, Carlzon Rezidor Hotel Group, *“The highlights in 2016 were the signing of two luxury hotel properties under a new brand, Quorvus Collection, and entering countries new to us such as Cape Verde, Zimbabwe and Uganda) growing our presence in Africa to 16,500 rooms in 29 countries.”* Carlson Rezidor opened a new hotel in Africa every 60 days and, according to Andrew, are on track to reach their objective of having more than 23,000 hotel rooms in Africa by the end of 2020.

For Hilton, 2016 was also a year of growth according to Daniel Ford, Director of Communications: *“Last year, we opened the Hilton Garden Inn Tangier City Centre and announced key new signings including the Hilton Garden Inn Accra Liberation Road – our first hotel to be constructed under the modular build method - The Legend Lagos Airport, a Curio Collection by Hilton, and the Hilton Nairobi Upper Hill, which will be housed in Africa’s tallest building.”*

“Over the past years, we have witnessed a lot of activity in Morocco where, with our wide portfolio of urban and resort brands we see strong potential across key cities, including Casablanca, Marrakesh and Tangier.” Benjamin Oppl, Development Director Middle East and North Africa, Meliã Hotels International shared with us.

He explained that this was due to the relatively stable Moroccan economy together with supply and demand dynamics which support further growth in the hotel industry there. Benjamin also shared some of Meliã’s future hotel development activity - *“We currently have one operational Sol hotel in Tagazhout, we will open two Meliã hotels in Saidia this year and another in 2018. In addition, we are close to finalising several other deals in Morocco.”*

Radisson Blu
Mauritius



Development Activity and Owners

Insights from the hotel chains on the impact of macro-economic activity on potential hotel owners and hotel development activity in Africa.

AccorHotels' Philippe Baretaud explained that *"AccorHotels has an exposure to both luxury and lifestyle through its new brands associated or acquired in 2016, including Raffles, Fairmont, Swissotel, Banyan Tree, Rixos, 25 Hours and JO&JOE."* He further explained that *"this exposure presents significant opportunities for owners and investors in Africa who are interested in the spectrum of branding opportunities provided by AccorHotels."*

Siegfried Nierhaus, Managing Director, Deutsche Hospitality shared the importance of diversification, and the role of hotel chains in providing such diversification: *"Investors are looking to diversify their portfolios of brands and investments. A new brand brings their own customers and helps greatly in developing a destination, and creating more business and potential investment to a country."*

Further, he explained that the Steigenberger brand was receiving very positive feedback from potential partners in Africa due to the values Deutsche Hospitality stands for: *"quality, consistency and commitment"*.

Hilton's Daniel Ford explained that: *"As Africa's economies grow, so does the scale of innovation in our industry, and we are constantly looking at new solutions for guests and investors alike. Fast-paced development is now a reality with mid-scale Hilton Garden Inn offering a modular room-build solution, enabling the pre-manufacture, shipping and construction onsite of prebuilt guest rooms and corridors."*

Daniel confirmed that Hilton have recently opened a dedicated development office in Morocco to support the North Africa market, as a commitment to working with developers to support guests' needs, and the strong demand for Hilton's brands in Africa. Hilton expect to see *"continued strong growth in key strategic markets across the continent"*.

Meliã's Benjamin Oppl observed that *"Our development activity is targeted to select areas, and with current owners (Morocco and Tanzania); macro-factors have not significantly affected development decisions at this time. That said, any development activity requires for the product/location/ownership balance to be right, for there to be an established business case, and where we feel that we can add value as an operator."*

**Kempinski
Hotel Gold Coast
Accra**



Following on from our analysis of the continent-wide and regional hotel development activity in Africa, we present the results of the development activity of the hotel chains and brands in this section. Table 5 shows the top 10 brands by number of planned hotels and by number of rooms (Appendix 1 has the detail of all contributors).

**Table 5: Hotel Chain Development Pipelines in Africa 2017
Top 10 Brands by Number of Planned Hotels and Rooms**

Rank by Hotels				Rank by Rooms			Change on 2016	Average Size (Rooms)
	Brand	Hotels	Rooms		Brand	Rooms		
1	ibis Styles	26	3,642	1	Hilton	5,697	17%	228
2	Radisson Blu	24	5,373	2	Radisson Blu	5,373	-6%	224
3	Grand Mercure	23	2,350	3	ibis Styles	3,642	-5%	140
4	Hilton	21	5,697	4	Marriott	3,005	3%	200
5	Marriott	15	3,005	5	Meliã Hotels & Resorts	2,437	214%	271
6=	Hilton Garden Inn	13	2,147	6	Grand Mercure	2,350	5%	102
6=	Mantis	13	537	7	Four Points by Sheraton	2,189	22%	182
8=	Park Inn by Radisson	12	1,701	8	Hilton Garden Inn	2,147	-16%	165
8=	Four Points by Sheraton	12	2,189	9	JW Marriott	1,877	40%	313
10	Meliã Hotels & Resorts	9	2,437	10	Fairmont	1,788	27%	255

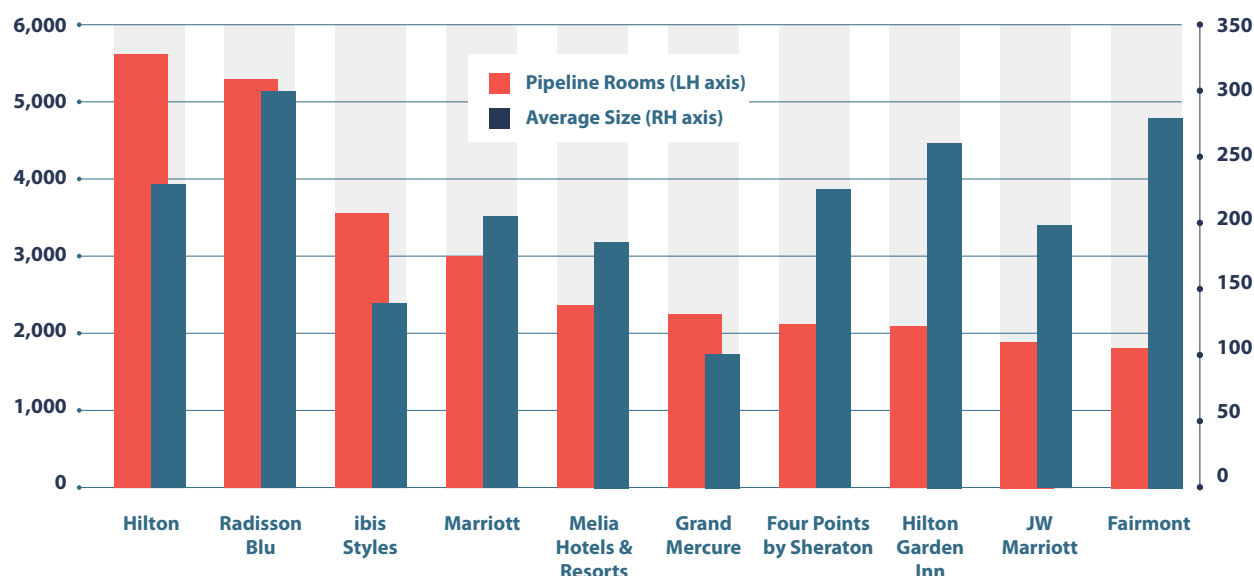
In the ranking by number of hotels, AccorHotels has two brands in the top five positions - ibis Styles and Grand Mercure, both pipelines primarily in Angola. ibis Styles and Radisson Blu remain in first and second place respectively, and Hilton and Marriott retain their positions in the fourth and fifth places. New entrants into the top 10 (by number of hotels) are Mantis, Park Inn by Radisson and Meliã.

When ranked by the number of rooms in their pipelines, Hilton, Radisson Blu, ibis Styles and Marriott remain in the top four places. The Hilton brand displaces Radisson Blu from the top slot this year (they have been competing for that cherished position for several years!) with a 17 per cent increase in the number of planned rooms, from 4,851 rooms in 2016 to 5,697 rooms in 2017. Radisson Blu continue to have a large pipeline (and this is only one of the brands that Carlson Rezidor are developing in Africa), but experienced a slight decrease this year, because they are opening their pipeline hotels – seven hotels with 1,686 rooms opened in 2016.

Meliã, Grand Mercure and JW Marriott are new entrants in the top 10 brands. Meliã has the highest percentage increase (from a low base) with a 214 per cent increase on 2016. This is followed by JW Marriott who report a 40 per cent increase in the number of planned rooms compared to 2016. Fairmont has increased their pipeline by 27 per cent, from 1,412 rooms in 2016 to 1,788 planned rooms in 2017.

JW Marriott has the largest hotels, with an average of 313 rooms, followed by Meliã with 271 rooms, and Fairmont with 255 rooms. Hilton hotels have an average 228 rooms, a decrease in average hotel size of 303 rooms in 2016.

Chart 7: Hotel Chain Development Pipelines in Africa 2017
Top 10 Brands by Number of Planned Rooms & Average Size



The analysis in the previous chart and table is by individual brands. Several of the chains have more than one brand which they are seeking to expand or establish in Africa. We present the top 10 chains by number of planned hotels in Table 6.

Table 6: Hotel Chain Development Pipelines in Africa 2017
Top 10 Chains by Number of Planned Hotels

Rank by Hotels				
		Hotels	Rooms	Average Size
1	AccorHotels	84	13,286	158
2	Marriott International	83	16,393	198
3	Hilton	41	9,098	222
4	Carlson Rezidor Hotel Group	39	7,862	202
5	Best Western Hotels & Resorts	18	1,652	92
6=	Louvre Hotels Group	13	1,325	102
6=	Mantis Collection	13	537	41
8	CityBlue Hotels	11	803	73
9	Mangalis Hotel Group	10	1,349	135
10	Meliá Hotels International	9	2,437	271

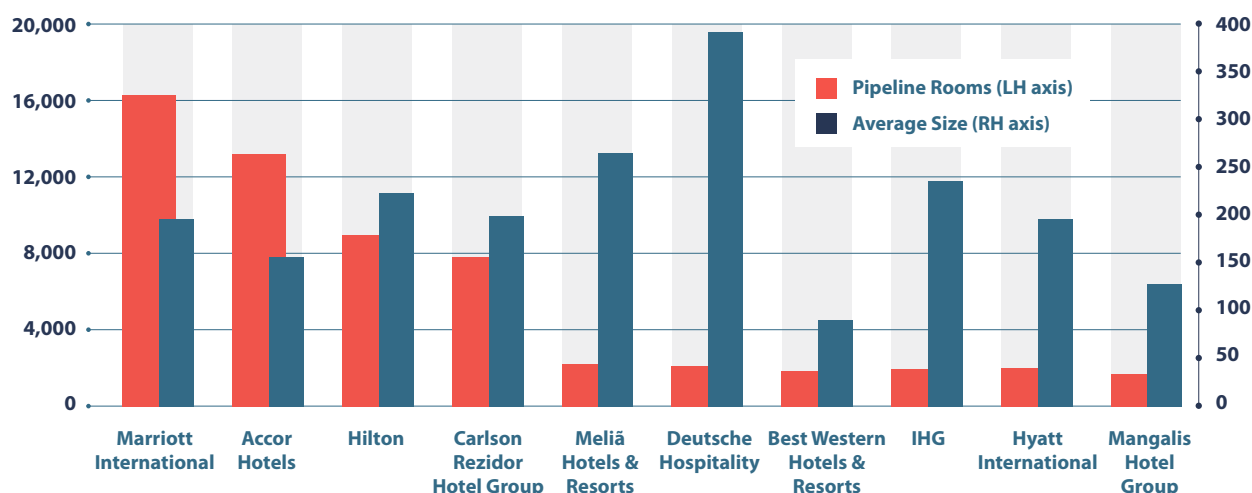
AccorHotels continues to lead the ranking of the chains by number of planned hotels, due primarily to their Angola deal. Marriott, Hilton and Carlson Rezidor remain in the top five. Best Western has moved from 9th position in 2016, with 13 planned hotels, to 18 planned hotels in 2017. Louvre and Mantis tie at sixth position in terms of number of rooms, but “fall out” of the ranking by number of rooms, as does CityBlue, due to their relatively small average size of property (see Table 7).

**Table 7: Hotel Chain Development Pipelines in Africa 2017
Top 10 Chains by Number of Planned Rooms**

Rank by Rooms		Change on 2016	Average Size (Rooms)
1	Marriott International	21.9%	198
2	AccorHotels	51.1%	158
3	Hilton	7.0%	222
4	Carlson Rezidor Hotel Group	7.1%	202
5	Meliã Hotels International	213.6%	271
6	Deutsche Hospitality	158.6%	390
7	Best Western Hotels & Resorts	26.0%	92
8	InterContinental Hotel Group	56.3%	233
9	Hyatt International	47.4%	196
10	Mangalis Hotel Group	-42.1%	135

In Chart 8, Marriott has moved up from third place in 2016 to first place in 2017, with the number of planned rooms rising 21.9 per cent from 13,448 rooms in 2016 (combining Marriott's 7,683 rooms and Starwood's 5,765 rooms) to 16,393 rooms in 2017.

**Chart 8: Hotel Chain Development Pipelines in Africa 2017
Top 10 Chains by Number of Planned Rooms & Average Size**



Deutsche Hospitality (formerly Steigenberger Group) has the largest hotels, with an average size of 390 rooms per hotel. The chain has grown its pipeline 158.6 per cent to 2,340 planned hotel rooms, with the entire pipeline (two hotels in each of Cape Verde, Egypt and Tunisia) signed in 2016/17.

For Mangalis, the contraction of their pipeline of planned hotel rooms, down from 17 hotels with 2,329 rooms in 2016 is because they opened three hotels in 2016 and early 2017, in Dakar, Abidjan and Conakry. In addition, they have "cleaned" their pipeline to remove deals that were not progressing for them, in order to focus on those that they can push to fruition.

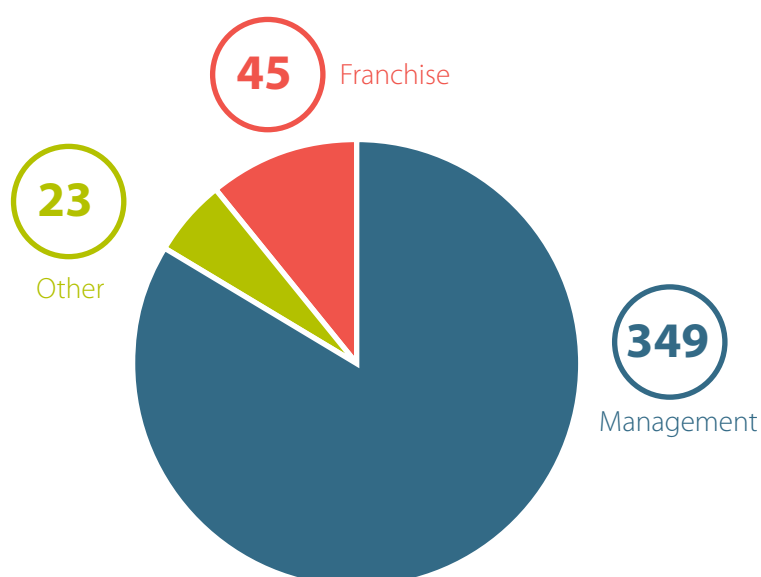
Table 8 details the number of rooms and hotels opened in 2016 by the hotel chains.

Table 8: Hotel Chain Development Pipelines in Africa 2017 Hotel Openings 2016		
	Hotels	Rooms
AccorHotels	13	1,638
Azalaï Hotel Group	1	200
Banyan Tree Hotels	1	91
Best Western Hotels & Resorts	4	355
Carlson Rezidor Hotel Group	7	1,686
CityBlue Hotels	1	65
Hilton	1	320
Louvre Hotels Group	10	1,048
Mangalis Hotel Group	3	425
Marriott International	9	1,816
Meliã Hotels International	1	87
Minor Hotel Group	1	23
Mövenpick Hotels & Resorts	1	501
Swiss International Hotels and Resorts	1	150
Tune Hotels	1	280
Wyndham Hotel Group	1	136
TOTAL	56	8,821

AccorHotels opened the most hotels, 13 properties, followed by Louvre with 10. Hilton signed nine deals in 2016 and opened one hotel - the 320-room Hilton Garden Inn Tanger City Centre, Morocco. Carlson Rezidor opened 1,686 rooms in seven hotels last year; 11 new deals with 2,073 rooms were signed in 2016.

Our analysis of the type of agreement signed by the hotel chains (see Chart 9) shows that most are signing management contracts, with very few franchise agreements.

**Chart 9: Hotel Chain Development Pipelines in Africa 2017
Sub-Saharan Africa Sub-Regional Breakdown (Rooms)**



Best Western's entire pipeline is for licence agreements (the chain does not manage hotels), whilst chains signing franchise agreements include Hilton, Louvre and Marriott. At less than 6 per cent of total rooms, franchises are not yet in favour in Africa – excluding Best Western, whose business model is licence agreements, only 21 hotels in the pipeline are for franchises, and of those only two were signed in 2016/17.

The 'Other' category includes joint ventures between hotel chains and hotel owners, and owner-operators such as Azalaï, Onomo and City Lodge, as well as a (very) small number of leases.

Our analysis of the chains' pipelines versus their existing presence on the continent, shown in Table 9, reveals that Marriott has the highest absolute pipeline, due in part to its acquisition of Starwood in 2016, but also because of its creation of a development team dedicated to Africa, based in Cape Town. Their pipeline will, as at the time of writing, slightly more than double its presence on the continent. Mangalis has the highest pipeline as a percentage of its existing portfolio, with 1,349 planned rooms compared to its existing 425 rooms. Meliã has the second highest percentage; the 2,437 rooms in its pipeline represent 124.7 per cent of its existing 1,954 rooms.

Table 9: Hotel Chain Development Pipelines in Africa 2017
Top 10 Chains: Pipeline vs Existing Hotels in Africa

		Pipeline		Existing*		Pipeline vs Existing (Rooms)
		Hotels	Rooms	Hotels	Rooms	
1	Marriott International	83	16,393	125	15,907	103.1%
2	AccorHotels	84	13,286	110	19,595	67.8%
3	Hilton	41	9,098	38	10,925	83.3%
4	Carlson Rezidor Hotel Group	39	7,862	37	8,383	93.8%
5	Meliã Hotels International	9	2,437	8	1,954	124.7%
6	Deutsche Hospitality	6	2,340	10	2,730	85.7%
7	Best Western Hotels & Resorts	18	1,652	26	2,310	71.5%
8	IHG	7	1,632	25	6,445	25.3%
9	Hyatt International	8	1,564	6	1,330	117.6%
10	Mangalis Hotel Group	10	1,349	3	425	317.4%
	TOTAL	305	57,613	388	70,004	82.3%

*as of March 2017

Radisson
Blu Nairobi



On the experience of 2017 so far, and the outlook for the rest of the year, our contributors shared with us their insights - they are, on the whole, optimistic.

"It looks to be a dynamic year for AccorHotels. In 2017, pipeline deals for 517 rooms in 3 hotels have been signed in triple A locations in Addis Ababa under Mercure, ibis and ibis Styles. Together, this provides a great multi-segment presence which provides operational and marketing strength in Addis Ababa" Philippe Baretaud.

He continued *"In sub-Saharan Africa, we are looking at a 400+-room Novotel/ibis combination hotel in Nairobi, and the opening of the 315-room Pullman hotel in Westlands (also in Nairobi), by the end of the year or early 2018."*

Andrew McLachlan shared that *"In 2017 we will continue to grow and expect to accelerate our openings, by opening a new hotel every 50 days. The first Radisson Red, our new upscale lifestyle select brand, is to be opened in Cape Town in 2017, and this will add positively to our future pipeline, as investors and guests can experience the brand first-hand. We are experiencing a lot of interest in Radisson Red. Park Inn by Radisson and Radisson Blu remain our core brands and we will continue to grow them across Africa."*

"We are at the beginning of our expansion in Africa and are carefully selecting the destinations, the projects and our partners. Entering a new continent and destination requires information and extensive research. We intend to enter the market with our Steigenberger, Jaz in the City and Intercity Hotel brands" said Siegfried Nierhaus.

Continuing in a similar vein, Daniel Ford told us that *"Hilton continues to see strong growth and great opportunity in Africa. Across the continent, we have almost 40 operating hotels and a development pipeline of more than double that number, so we expect to be operating some 80 hotels in Africa in the next 3-5 years or so, as more than half of Hilton's African pipeline is currently under construction."*

For Meliã, the focus is mainly on Cape Verde. Benjamin Oppl shared that: *"Most of our current and short-term hotel room supply in Africa will be in the Cape Verde islands, where we have four hotels in operation and another five in the pipeline (to open by 2020). Spain is a strong market for Cape Verde, a market in which we have unrivalled sales and marketing strength. In addition to our Meliã resort in Zanzibar, we are currently developing a Meliã safari lodge with the same owner in the Serengeti."* Benjamin also shared that other markets of interest to the chain are Mauritius, Seychelles and Algeria.

Status of Hotel Development Activity

In this section we present the status of the chains' hotel development activity in Africa. Table 10 shows the different status of development activity between North Africa and sub-Saharan Africa – the former continues to report a higher proportion of hotels actually under construction (as opposed to still being in planning). Deals in North Africa tend to be “older” than those in sub-Saharan Africa (i.e. they were signed some years back), plus there are a number of renovations/re-brandings in the pipeline in North Africa.

**Table 10: Hotel Chain Development Pipelines in Africa 2017
SSA vs. North Africa by Pipeline Status**

	Hotels	Rooms		
	Total	Total	Onsite Construction	
Sub-Saharan Africa	310	48,980	24,877	50%
North Africa	107	23,836	17,901	75%
TOTAL	417	72,816	42,778	59%

Table 11 provides an analysis of the top 10 countries with the highest number of hotel rooms according to their pipeline status. The table also presents the change in ranking from all deals – Egypt, for example, was in second place to Nigeria in terms of total number of rooms, but when ranked by the total number of rooms actually under construction (75 per cent of the total pipeline there), it moves to first place, changing places with Nigeria (with only 42 per cent “on site”). Egypt is in first place with the highest number of hotel rooms in the on-site construction phase.

**Table 11: Hotel Chain Development Pipelines in Africa 2017
Top 10 Countries by Pipeline Status**

			Rooms			Rank – All Deals
			Total	Onsite Construction		
1	Egypt	35	9,851	7,355	75%	2 ↑
2	Nigeria	61	10,313	4,296	42%	1 ↓
3	Morocco	34	5,271	3,660	69%	4 ↑
4	Tunisia	17	3,852	3,204	83%	6 ↑
5	Kenya	19	3,453	3,073	89%	10 ↑
6	Angola	54	6,939	3,060	44%	7 ↑
7	Ethiopia	20	3,819	2,782	73%	8 ↑
8	Algeria	17	3,771	2,717	72%	3 ↓
9	Cape Verde	11	3,478	1,337	38%	9 ↔
10	South Africa	33	4,484	1,263	28%	5 ↓

In sub-Saharan Africa, Kenya has the highest proportion of its pipeline rooms under construction, at 89 per cent. Of the total, only two hotels are outside of Nairobi, and of those in the capital city, all but one of the 16 hotels are under construction – a total of almost 3,100 rooms entering the market between 2017 and 2020. Kenya has jumped from sixth place to fifth, with seven deals signed in 2016/17. As an important regional and African city, it continues to be the focus of the international chains, with more deals in the offing.

Table 12 presents our analysis of the brands according to pipeline status. ibis Styles is in first position, having the highest number of rooms actually under construction. The Marriott brand has moved from fifth place in 2016 to fourth place this year. As well as ibis Styles, AccorHotels has three of its brands in the top 10, i.e. ibis Styles, Novotel and Swissôtel, all of which have 100 per cent of their pipeline hotels under construction. Swissôtel's four hotels with 1,187 rooms are all in Egypt and are scheduled to open between 2019 and 2024.

**Table 12: Hotel Chain Development Pipelines in Africa 2017
Top 10 Brands by Pipeline Status**

		Hotels	Rooms			Rank – All Deals
			Total	Onsite Construction		
1	ibis Styles	26	3,642	3,642	100%	3↑
2	Radisson Blu	24	5,373	3,341	62%	2 ↔
3	Hilton	21	5,697	3,106	55%	1 ↓
4	Marriott	15	3,005	1,985	66%	4 ↔
5	Meliá Hotels & Resorts	9	2,437	1,837	75%	5 ↔
6	Hilton Garden Inn	13	2,147	1,619	75%	8 ↑
7	Park Inn by Radisson	12	1,701	1,397	82%	- ↑
8	JW Marriott	6	1,877	1,270	68%	9 ↑
9	Novotel	6	1,245	1,245	100%	- ↑
10	Swissôtel	4	1,187	1,187	100%	- ↑

As for the chains' pipelines (as opposed to their individual brands), Table 13 shows the top 10 positions by status:

**Table 13: Hotel Chain Development Pipelines in Africa 2017
Top 10 Chains by Pipeline Status**

		Hotels	Rooms			Rank - All deals
			Total	Onsite Construction		
1	Marriott International	83	16,393	7,844	48%	1 ↔
2	AccorHotels	84	13,286	7,630	57%	2 ↔
3	Hilton	41	9,098	5,767	63%	3 ↔
4	Carlson Rezidor Hotel Group	39	7,862	5,526	70%	4 ↔
5	Meliá Hotels International	9	2,437	1,837	75%	5 ↔
6	Deutsche Hospitality	6	2,340	1,640	70%	6 ↔
7	Best Western Hotels & Resorts	18	1,652	1,507	91%	7 ↔
8	Louvre Hotels Group	13	1,325	1,325	100%	- ↑
9	IHG	7	1,632	989	61%	8 ↓
10	Mangalis Hotel Group	10	1,349	829	61%	10 ↔

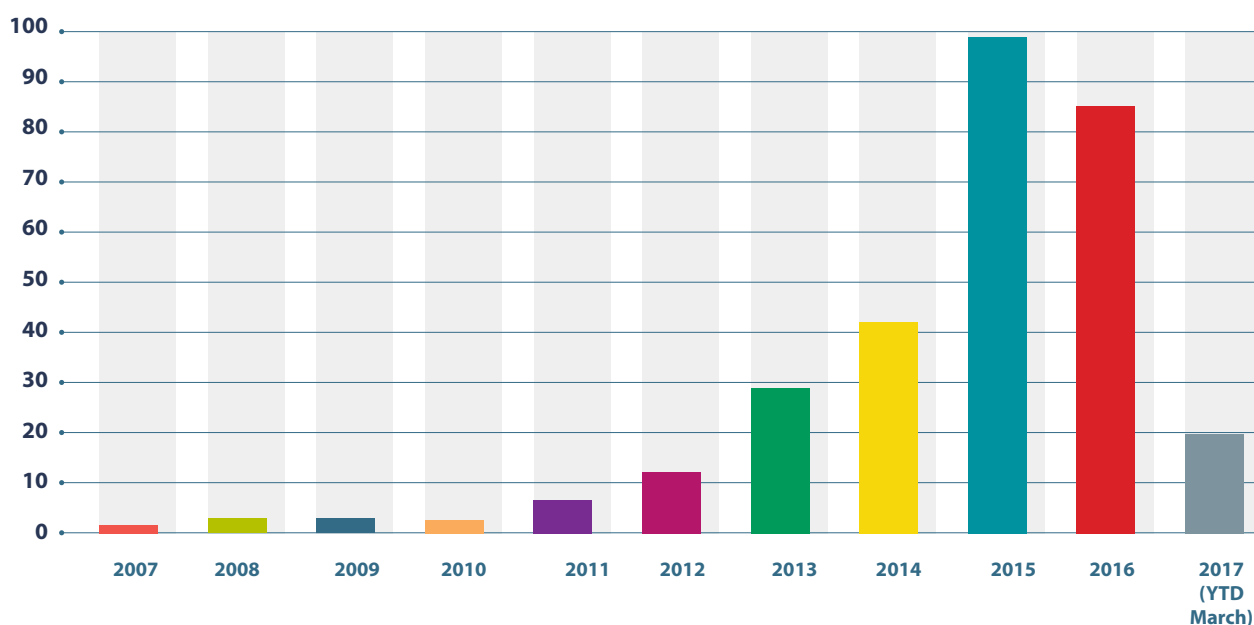
Marriott, AccorHotels, Hilton and Carlson Rezidor Group retain their position as the top four hotel chains by pipeline status. Louvre has all of its planned hotels on-site, all expected to open by 2020.

In Table 14 we present when the deals in the chains' pipelines were signed. 86 new deals were signed in 2016, down from the 121 signed in 2015 (the table shows only the 99 hotels that are still in the pipeline in 2017, the balance having opened or deleted from the pipeline for non-performance). At the time of writing, 20 deals have been signed in 2017 so far. The "tail" of deals, those that were signed more than four years ago, and perhaps should be open by now, is 28 hotels, which is far fewer than the 37 reported in last year's report; this is due less to openings than to the chains "cleaning" their pipelines.

Table 14: Hotel Chain Development Pipelines in Africa 2017
Years the Deals Were Signed – Number of Hotels

Year Signed	Number of Hotels
2007	1
2008	3
2009	3
2010	2
2011	7
2012	12
2013	29
2014	43
2015	99
2016	86
2017 (YTD March)	20

Chart 10: Hotel Chain Development Pipelines in Africa 2017
Years the Deals were Signed - Number of Hotels



Scheduled Vs Actual Openings 2014-2016

We have analysed the data provided by the chains to look at new hotels that were scheduled to open in 2014, 2015, and 2016, and have compared those expectations with what actually happened – did a hotel scheduled to open in 2014, 2015 or 2016 actually open? Appendix 5 has the detail of each chain’s scheduled openings and those that actually opened.

**Table 15: Hotel Chain Development Pipelines in Africa 2017
2014-2016 Scheduled vs. Actual Hotel Openings**

	Scheduled	Actual	Actualization
2014	73	19	26%
2015	75	27	36%
2016	119	56	47%
TOTAL	267	102	38%

In 2014, three chains, Dusit, Four Seasons and Minor Hotel Group opened all of their scheduled pipeline hotels, with Minor Hotel signing and opening an additional hotel the same year.

Four chains - Four Seasons, Hilton, Hyatt International and IHG - opened all of their scheduled 2015 pipeline hotels that year, whilst Azalaï , Banyan Tree, Mangalis, Marriott, Meliã and Rotana opened all of their scheduled hotels in 2016, with Marriott signing and opening two additional hotels in the same year. Overall, the chains are achieving a growth in actualisation, up from 26 per cent in 2014, to 47 per cent in 2016.

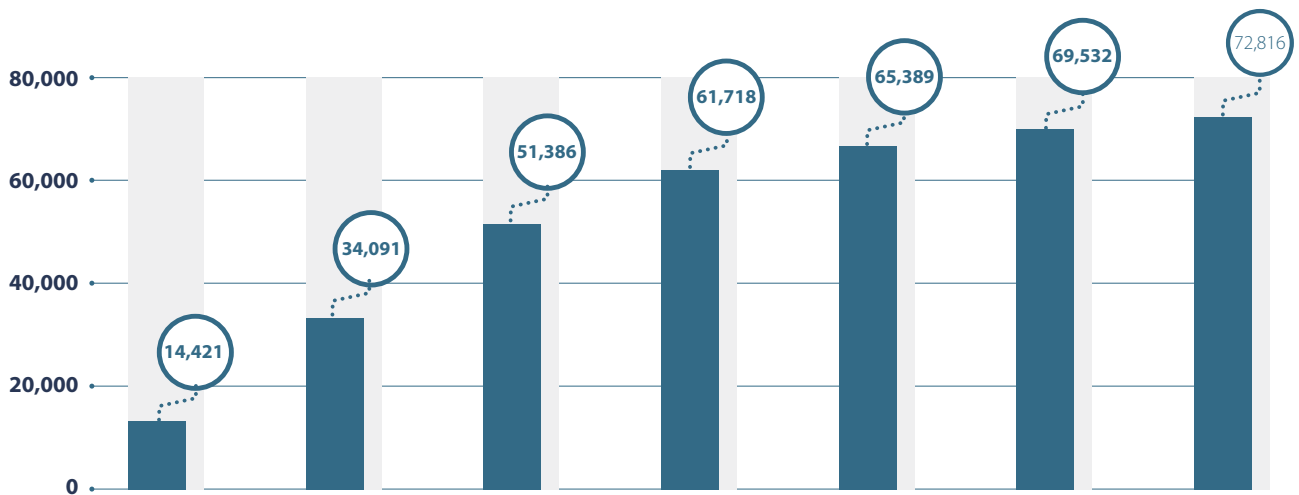
AccorHotels signed 21 hotel deals with 3,615 rooms in 2016, increasing their pipeline by over 50 per cent. Of these, around 2,000 new rooms are in Egypt. Mangalis opened 425 rooms in three hotels in 2016, in Abidjan, Conakry and Dakar. The group has 10 hotels scheduled to open between 2017 and 2019; their planned openings in 2017 are in Cotonou (120 rooms), Lagos (50 rooms) and Pointe Noire (140 rooms), and represent the first “from scratch” hotel group in Africa, with its own brands, for many years.

We present in Table 16 the anticipated opening years of the hotels in the chains’ pipelines, as per their expectations – it is clear from Appendix 5 that, sometimes, their expectations are over-optimistic, hotels can take a long time to develop in Africa! The projections are based on the hotel deals signed by the chains at the time of this survey (Q1, 2017), and no doubt more deals will be added to these totals.

**Table 16: Hotel Chain Development Pipelines in Africa 2017
Anticipated Opening Years of Pipeline Deals**

	Hotels	Rooms	Cumulative New Rooms Open
2017	100	14,421	14,421
2018	117	19,670	34,091
2019	87	17,295	51,386
2020	55	10,332	61,718
2021	20	3,671	65,389
2022	23	4,143	69,532
2024 and ongoing	15	3,284	72,816

**Chart 11: Hotel Chain Development Pipelines in Africa 2017
Anticipated Addition to Supply (Rooms, Cumulative)**



The analysis in the previous pages is a snapshot of the international and regional hotel chains' pipelines in Africa, and their expectations for the future of their brands. More and more chains are establishing development offices on the continent – Wyndham have established an office in Lagos, whilst Hilton now have a presence in Casablanca, and are looking to establish more regional offices, and Marriott has consolidated its African presence in Cape Town after the Starwood merger.

If those involved – the investors, the chains, the consultants and the lenders – can get these and more deals to fruition, the pipeline of the future, as shown in Table 15, will result in much-needed expansion of Africa's hotel industry, on a continent that is still woefully under-provided. There remain, more so in some countries than others, severe challenges to completing hotel developments in Africa, due mostly to a lack of long-term, affordable finance, but also to bureaucratic challenges and other hurdles.

Several countries in Africa have had severe economic problems in the past couple of years, and inevitably further problems will be experienced in the years to come. But there are signs that we are turning the corner in 2017, and whilst growth is more muted, there is an acceptance of the "new normal", with lower-valued currencies, less government income, but a desire to move forward again. It is encouraging to see that the realisation of the hotel deals that we are reporting is increasing – from only 26 per cent of deals opening on schedule in 2014 to 47 per cent in 2016.

The world in 2017 is a very different place to when we started this survey in 2009. But Africa is still rising, at least as far as the development activities of the hotel chains is concerned.



**Kempinski
Villa Rosa**

Bench Events Acknowledgement

We are grateful to Bench Events for the support it provides each year to this publication, including the opportunity to present the results at the Africa Hotel Investment Forum (AHIF), the leading African hotel investment conference, now in its seventh year.

Bench Events deliver the world's most respected events in hotel and restaurant investment across Europe, the Middle East, Asia, South America, the Caribbean and Africa. Its events are considered to be the definitive meeting places for the hotel and restaurant investment community to learn, network and, most importantly, to do deals – the deals featured in this report.

In our experience, AHIF is attended by the highest calibre international hotel investors of any conference in Africa. It connects business leaders from the international and regional markets, driving investment into tourism projects, infrastructure and hotel development across the continent.

AHIF 2017 will be held in Kigali, Rwanda, at the Radisson Blu & Kigali Convention Centre, from 11-12 October.

Visit <http://www.africa-conference.com/> for more details of the event, and to register as a delegate.



**Radisson Blu
Nairobi**

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2017
Contributors to the Survey – Hotel Chains and Brands

	Brands	
AccorHotels	Adagio Fairmont Grand Mercure ibis ibis Styles Managed by Accor	Mercure Novotel Pullman Raffles Sofitel Swissôtel
aha Hotels & Lodges	aha	
Azalaï Hotel Group	Azalaï	
Banyan Tree Hotels & Resorts	Banyan Tree	
Best Western Hotels & Resorts	Best Western Best Western Plus Best Western Premier Vib	Best Western Premier Collection Executive Residency by Best Western
Carlson Rezidor Hotel Group	Park Inn by Radisson Quorvus Collection	Radisson Blu Radisson Red
CityBlue Hotels	c3 CityBlue Hotels & Suites	Urban by CityBlue
City Lodge Hotel Group	City Lodge	Town Lodge
Club Med	Club Med	
Corinthia Hotels International	Corinthia	
Deutsche Hospitality	JAZ at the Beach	Steigenberger Hotels & Resorts
Dusit International	Dusit Thani	
Emaar Hospitality Group*	The Address	
Four Seasons Hotels & Resorts	Four Seasons Hotels and Resorts	
Frasers Hospitality*	Fraser Suites	
Hilton	Curio Collection by Hilton DoubleTree by Hilton	Hilton Hilton Garden Inn
Hyatt International	Hyatt Centric Hyatt House	Hyatt Regency Park Hyatt
InterContinental Hotels Group	Crowne Plaza Holiday Inn	InterContinental
Jumeirah Group*	Jumeirah	
Kempinski Hotels	Kempinski	

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2017
Contributors to the Survey – Hotel Chains and Brands

	Brands	
Louvre Hotels Group	Campanile Golden Tulip Kyriad	Première Classe Royal Tulip Tulip Inn
Mangalis Hotel Group*	Noom Seen	Yaas
Mantis Collection	Mantis	
Marriott International	AC Hotels Aloft Hotels Autograph Courtyard by Marriott Element Four Points JW Marriott Marriott Marriott Executive Apart- ments	Meridien Protea Hotel Residence Inn by Marriott Ritz-Carlton Sheraton St. Regis W Westin
Meliä Hotels International	Meliä Hotels & Resorts	
Millennium Hotels & Resorts *	Grand Millennium	
Minor Hotel Group	Anantara	
Mövenpick Hotels & Resorts	Mövenpick	
Onomo Hotels	Onomo	
Pefaco Hotels	Pefaco	
Rotana Hotel Management Corporation	Arjaan Hotel Apartments by Rotana Centro Hotels by Rotana	Rotana Hotels and Resorts Rayhaan Hotels and Resorts by Rotana
Sarovar Hotels	Sarovar Premiere	
Swiss International Hotels and Resorts	Swiss International	Swiss Spirit
Oberoi Hotels & Resorts	The Oberoi	
Wyndham Hotel Group	Days Hotel & Suites Ramada Encore Tryp by Wyndham	Wyndham Wyndham Garden

Note: the brands listed are only those for which deals have been signed in Africa

* Chains currently with no existing hotels in Africa

APPENDIX 2
Hotel Chain Development Pipelines in Africa 2017
Hotels and Rooms by Country

	Total by Country		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Algeria	17	3,771	28%	72%
Angola	54	6,939	61%	39%
Benin Republic	4	607	33%	67%
Botswana	3	507	39%	61%
Burundi	1	120	0%	100%
Cameroon	6	873	75%	25%
Cape Verde	11	3,478	62%	38%
Chad	1	175	0%	100%
Congo, Rep. of	5	630	30%	70%
Côte d'Ivoire	2	419	38%	62%
DRC	2	263	60%	40%
Egypt	35	9,851	25%	75%
Ethiopia	20	3,819	27%	73%
Gabon	5	610	100%	0%
Ghana	7	1,259	17%	83%
Guinea	3	584	73%	27%
Guinea Bissau	1	208	100%	0%
Kenya	19	3,400	11%	89%
Libya	4	1,091	12%	88%
Madagascar	2	366	43%	57%
Mali	2	340	59%	41%
Mauritania	2	380	0%	100%
Mauritius	5	775	79%	21%
Morocco	34	5,271	31%	69%
Mozambique	2	208	100%	0%
Namibia	2	321	0%	100%
Niger	2	300	53%	47%
Nigeria	61	10,313	58%	42%

APPENDIX 2
Hotel Chain Development Pipelines in Africa 2017
Hotels and Rooms by Country

	Total by country		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Rwanda	4	544	36%	64%
Senegal	14	2,164	44%	56%
Seychelles	1	40	0%	100%
Sierra Leone	3	432	26%	74%
South Africa	33	4,484	72%	28%
South Sudan	2	393	60%	40%
Swaziland	1	123	0%	100%
Tanzania	9	1,142	21%	79%
Togo	2	306	39%	61%
Tunisia	17	3,852	17%	83%
Uganda	12	1,751	48%	52%
Zambia	5	366	16%	84%
Zimbabwe	2	341	72%	28%
TOTAL	417	72,816	41%	59%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2017
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
AC Hotels	1	189	100%	0%
Adagio	1	80	100%	0%
aha	6	1,062	100%	0%
Aloft Hotels	1	150	100%	0%
Anantara	4	583	17%	83%
Arjaan Hotel Apartments by Rotana	1	140	100%	0%
Autograph	1	54	0%	100%
Azalai	5	862	77%	23%
Banyan Tree	1	60	100%	0%
Best Western	5	492	0%	100%
Best Western Plus	9	842	0%	100%
Best Western Premier	1	65	100%	0%
Best Western Premier Collection	1	83	0%	100%
c3	2	113	0%	100%
Campanile	1	189	0%	100%
Centro Hotels by Rotana	2	512	100%	0%
City Lodge	3	467	32%	68%
CityBlue Hotel & Suites	5	416	60%	40%
Club Med	2	472	0%	100%
Corinthia	2	490	39%	61%
Courtyard by Marriott	4	1,059	35%	65%
Crowne Plaza	1	200	0%	100%
Curio Collection by Hilton	1	104	0%	100%
Days Hotel & Suites	1	85	0%	100%
DoubleTree by Hilton	6	1,150	18%	82%
Dusit Thani	2	507	0%	100%
Element	2	449	77%	23%
Executive Residency by Best Western	1	90	0%	100%
Fairmont	7	1,788	70%	30%
Four Points by Sheraton	12	2,189	70%	30%
Four Seasons Hotels and Resorts	3	436	44%	56%
Fraser Suites	2	216	42%	58%
Golden Tulip	6	474	0%	100%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2017
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Grand Mercure	23	2,350	60%	40%
Grand Millennium	1	255	100%	0%
Hilton	21	5,697	45%	55%
Hilton Garden Inn	13	2,147	25%	75%
Holiday Inn	3	588	0%	100%
Hyatt Centric	1	149	0%	100%
Hyatt House	1	180	100%	0%
Hyatt Regency	5	1,054	69%	31%
ibis	5	675	18%	82%
ibis Styles	26	3,642	64%	36%
InterContinental	3	844	76%	24%
Jaz at the Beach	2	820	30%	70%
Jumeirah	1	155	100%	0%
JW Marriott	6	1,877	32%	68%
Kempinski	2	580	69%	31%
Kyriad	1	98	0%	100%
Managed by Accor	2	179	0%	100%
Mantis	13	537	41%	59%
Marriott	15	3,005	34%	66%
Marriott Executive Apartments	5	890	61%	39%
Meliã Hotels & Resorts	9	2,437	25%	75%
Mercure	5	626	37%	63%
Méridien	1	368	0%	100%
Mövenpick	6	1,211	43%	57%
Noom	6	960	31%	69%
Novotel	6	1,245	0%	100%
Onomo	8	1,062	60%	40%
Park Hyatt	1	181	0%	100%
Park Inn by Radisson	12	1,701	18%	82%
Pefaco Hotels	1	186	0%	100%
Première Classe	1	124	0%	100%
Protea Hotel	8	1,063	43%	57%
Pullman	2	670	0%	100%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2017
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Quorvus Collection	2	536	0%	100%
Radisson Blu	24	5,373	38%	62%
Radisson Red	1	252	0%	100%
Raffles	1	243	0%	100%
Ramada Encore	1	84	0%	100%
Rayhaan Hotels and Resorts by Rotana	1	180	0%	100%
Residence Inn by Marriott	4	651	77%	23%
Ritz-Carlton	7	921	41%	59%
Rotana Hotels and Resorts by Rotana	1	256	0%	100%
Royal Tulip	3	333	0%	100%
Sarovar Premiere	3	183	0%	100%
Seen	3	290	41%	59%
Sheraton	8	1,713	59%	41%
Sofitel	2	601	40%	60%
St. Regis	4	749	50%	50%
Steigenberger Hotels & Resorts	4	1,520	30%	70%
Swiss International Hotels & Resorts	4	679	31%	69%
Swiss Spirit Hotels and Suites	1	60	0%	100%
Swissôtel	4	1,187	0%	100%
The Address	5	699	67%	33%
The Oberoi	1	84	0%	100%
The Premiere	1	144	0%	100%
Town Lodge	1	147	0%	100%
Tryp by Wyndham	1	120	100%	0%
Tulip Inn	1	107	0%	100%
Urban by CityBlue	4	274	66%	34%
Vib	1	80	100%	0%
W	3	678	100%	0%
Westin	1	388	100%	0%
Wyndham	2	451	64%	36%
Wyndham Garden	1	110	0%	100%
Yaas	1	99	100%	0%
TOTAL	417	72,816	43%	57%

APPENDIX 4
Hotel Chain Development Pipelines in Africa 2017
Hotels and Rooms by Chain

	Total by Chain			Pre-Construction (Planning)	Rooms on Site (Construction)
	Countries	Hotels	Rooms		
AccorHotels	11	84	13,286	43%	57%
aha Hotels & Lodges	1	6	1,062	100%	0%
Azalai Hotel Group	5	5	862	77%	23%
Banyan Tree Hotels & Resorts	1	1	60	100%	0%
Best Western Hotels & Resorts	6	18	1,652	9%	91%
Carlson Rezidor Hotel Group	20	39	7,862	30%	70%
CityBlue Hotels	7	11	803	54%	46%
City Lodge Hotel Group	4	4	614	24%	76%
Club Med	1	2	472	0%	100%
Corinthia Hotels International	2	2	490	39%	61%
Deutsche Hospitality	3	6	2,340	30%	70%
Dusit International	2	2	507	0%	100%
Emaar Hospitality Group*	2	5	699	67%	33%
Four Seasons Hotels & Resorts	3	3	436	44%	56%
Frasers Hospitality	2	2	216	42%	58%
Hilton	18	41	9,098	37%	63%
Hyatt International	7	8	1,564	58%	42%
InterContinental Hotels Group	5	7	1,632	39%	61%
Jumeirah Group	1	1	155	100%	0%
Kempinski Hotels	2	2	580	69%	31%
Louvre Hotels Group	7	13	1,325	0%	100%
Mangalis Hotel Group	8	10	1,349	39%	61%
Mantis Collection	3	13	537	41%	59%
Marriott International	22	83	16,393	52%	48%
Meliã Hotels International	3	9	2,437	25%	75%
Millennium Hotels & Resorts *	1	1	255	100%	0%
Minor Hotel Group	4	4	583	24%	76%
Mövenpick Hotels & Resorts	6	6	1,211	46%	54%
Onomo Hotels	8	8	1,062	60%	40%
Pefaco Hotels	1	1	186	0%	100%
Rotana Hotel Management Corporation	5	5	1,088	60%	40%

APPENDIX 4
Hotel Chain Development Pipelines in Africa 2017
Hotels and Rooms by Chain

	Total by Chain			Pre-Construction (Planning)	Rooms on Site (Construction)
	Countries	Hotels	Rooms		
Meliä Hotels International	3	3	327	0%	100%
Swiss International Hotels and Resorts	3	5	739	28%	72%
Oberoi Hotels & Resorts	1	1	84	0%	100%
Wyndham Hotel Group	4	6	850	48%	52%
TOTAL	41	417	72,816	43%	57%

APPENDIX 5
Hotel Chain Development Pipelines in Africa 2017
2014-2016 Scheduled vs. Actual Hotel Openings

		2014			2015			2016		
		Hotels		Actual vs Scheduled	Hotels		Actual vs Scheduled	Hotels		Actual vs Scheduled
		Scheduled	Actual		Scheduled	Actual		Scheduled	Actual	
1	AccorHotels	5	1	20%	6	1	17%	21	13	62%
2	Azalaï Hotels	1	-	0%	2	1	50%	1	1	100%
3	Banyan Tree	-	-	-	1	-	0%-	1	1	100%
4	Best Western Hotels & Resorts	8	2	25%	7	3	43%	8	4	50%
5	Carlson Rezidor	14	2	14%	9	5	56%	14	5	36%
6	CityBlue Hotels	-	-	-	-	-	-	6	1	17%
7	City Lodge	2	-	0%	2	-	0%	-	-	-
8	Deutsche Hospitality	-	-	-	-	-	-	2	-	0%
9	Dusit	1	1	100%	-	-	-	-	-	-
10	Emaar Hospitality	-	-	-	-	-	-	1	-	0%
11	Four Seasons	1	1	100%	1	1	100%	-	-	-
12	Frasers Hospitality	-	-	-	-	-	-	1	-	0%
13	Hilton	3	1	33%	2	2	100%	3	1	33%
14	Hyatt International	-	-	-	2	2	100%	-	-	-
15	IHG	1	-	0%	1	1	100%	-	-	-
16	Kempinski	5	1	20%	3	2	67%	-	-	-
17	Louvre Hotels Group	8	4	50%	3	2	67%	16	10	63%
18	Mangalis Hotel Group	1	-	0%	2	-	0%	3	3	100%
19	Mantis Collection	1	-	0%	4	1	25%	3	-	-
20	Marriott	1	-	0%	7	-	0%	7	9	129%
21	Meliã Hotels International	-	-	-	-	-	-	1	1	100%
22	Minor Hotel Group	1	2	200%	3	2	67%	5	1	20%
23	Mövenpick	4	2	50%	-	-	-	2	1	50%
24	Onomo Hotels	2	-	0%	2	1	50%	2	-	0%
25	Rotana Hotels & Resorts	-	-	-	1	-	0%	1	1	100%
26	Starwood	1	-	0%	3	-	0%	6	-	0%
27	Swiss International Hotels	10	1	10%	6	1	17%	10	1	10%
28	Wyndham Hotel Group	3	1	33%	5	2	40%	3	1	33%
	TOTAL	73	19	26%	75	27	36%	119	56	47%

Notes: Chains achieving more than 100 per cent actualisation would have signed deals and opened the hotels in the same year
Starwood is shown separately from Marriott as it reported separately

About Us

At W Hospitality Group we specialise in the provision of advisory services to the hotel, tourism, real estate and leisure industries, providing a full range of services to our clients who have investments in the sector, or who are looking to enter them through development, acquisition or other means.

In sub-Saharan Africa we are regarded as the market leader due to the market and financial expertise of our staff (all of whom have worked in the industries they now consult to), our worldwide knowledge, and our commitment to our clients.

Our team has experience of more than 90 countries worldwide, including 39 in Africa, both developed and developing, and at all market levels, from deluxe hotels to roadside lodges and inns, exclusive health clubs and country clubs to public recreation facilities, and from the master planning of thousand hectare sites to the best use of city blocks.



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