

Our 12th edition of the Hotel Chain Development Pipelines in Africa brings news of a continuing increase in the chains' development activity in Africa. The pipeline now sits at 77,896 rooms in 408 hotels, up 3.6 per cent on 2019. Looking back to our first report on Africa's hotel development pipeline in 2009, there were then just under 30,000 rooms, so today we're not far off three times that! The growth of the chains' presence and pipeline in Africa has been an incredibly positive story, and we are proud to be deeply involved with it – in addition to the research work carried out for this report, we have provided professional advice to several of the projects that are included in the data.

However, I am writing this foreword (and you are probably reading it) at a time of unprecedented global upheaval, a complete reset. Our industry – and I mean travel and tourism in the widest sense – has been particularly badly affected by the COVID-19 disease. We in the hotel industry have been completely reset, to what we just don't know yet, but to a state smaller in terms both of supply and demand than we were just a few months ago, that's for certain. There's a new game coming when this is all over, and no one yet has any idea what we will be playing with, nor what the rules will be. That there will be a recovery is certain, and we pray for that to come sooner rather than later, and to be fast, not slow. But speculation has its limits, we don't know what these pipeline figures are going to look like in a year's time, so no speculation there either, instead we will focus on what we discovered in our analysis this year.

As before we have quantified the chains' hotel development activity in Africa at country, regional and city levels, and our detailed analyses provide useful information for investors, governments, hospitality and real estate professionals, students and other interested parties.

This year we have 39 international and regional contributors, reporting their pipeline activity for 107 of their brands for which they have signed deals. Whilst the pipeline numbers are of course hugely important in terms of future income for the chains, of more importance is the realisation of the deals, and we have tracked a record 91 hotels with almost 15,000 rooms that the chains opened in 2019, a massive increase in the actualisation on any previous year, the highest to date being 54 hotels in 2016.

The chains have signed 86 deals with 14,566 rooms since we collected last year's data, down on the 2018 total of 110 deals (18,655 rooms). 2019 was a year of consolidation, with economic problems in Nigeria and South Africa, two of the continent's power houses, mitigating against doing many new deals, compounded by the fact that several cities in Africa are in danger of over-development, also reducing deal activity. And also there was an increased urgency to "get it done", with several long-lived construction sites finally morphing into hotels welcoming guests.

Development activity continues to be mainly in city centres, 303 hotels of the total 408 in the pipeline, that's 74 per cent of the deals and 67 per cent of the rooms – resorts account for almost all of the balance (three are only 12 hotels planned at airports in the whole of Africa), 23 per cent of deals and 30 per cent of rooms, with the average size of a resort project almost 50 per cent higher than a city hotel. There are some very large resort projects out there, as reported here.

Marriott still leads the hotel chain development pipeline in terms of number of rooms and number of hotels, and signed 17 agreements in 11 countries in Africa in 2019. But it seems that Accor is intent on grabbing the headlines every year, at least in this report, and records the largest net increase in pipeline rooms, the most activity in Egypt (the number one country in this survey), the largest hotels (in their Rixos branded-resorts), the most hotels opened......other chains must be wondering what their secret is!

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. We are delighted to have the continuing opportunity to be closely involved in the African hotel success story.

We are extremely grateful to the hotel chains who contributed to our report this year, both those stalwarts who provide their data every year, and those new to the survey in 2020. A full list of the contributors to this report is provided in Appendix 1. My thanks also to our team in Lagos, who have worked on this report during the lockdown.

Should you have any comments and questions on the report, then please do get in touch.

Trevor J Ward

Managing Director, W Hospitality Group, Lagos, Nigeria April 2020

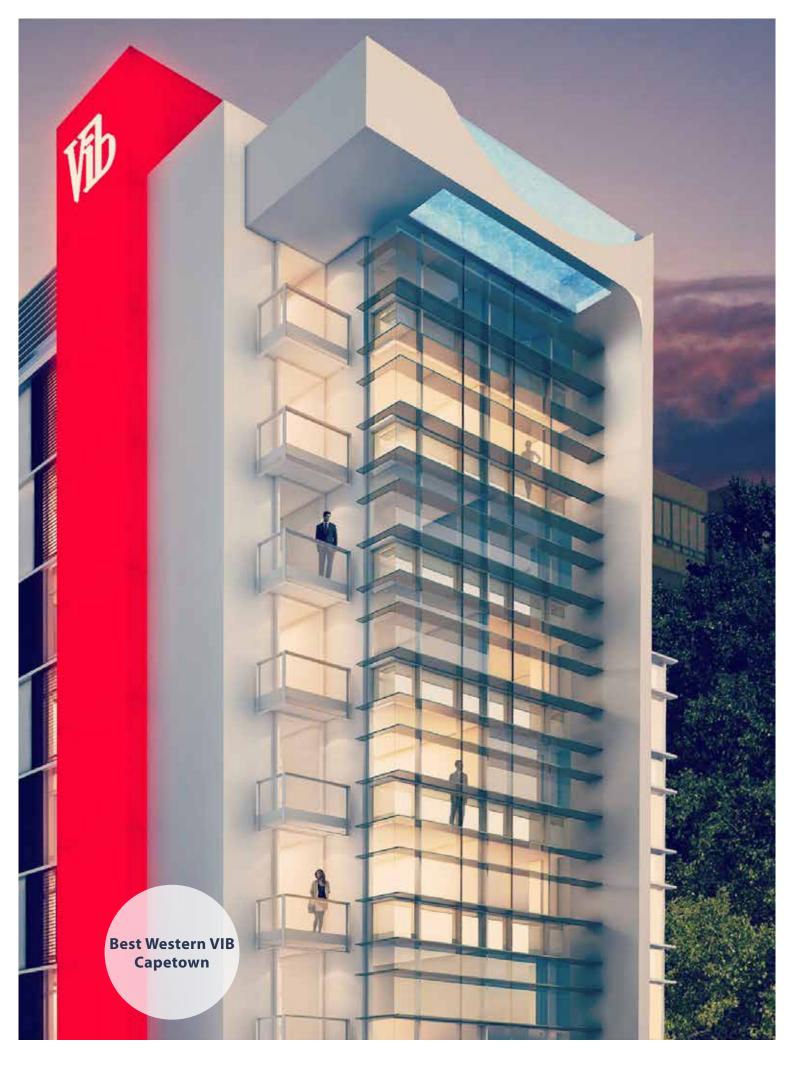


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Methodology

Our report covers the 54 countries in Africa, comprising North Africa (Morocco, Algeria, Tunisia, Libya and Egypt), sub-Saharan Africa and the Indian Ocean islands (Seychelles, Mauritius, Comoros and Madagascar), and provides consistent, reliable and comparable data on the development pipeline activity of the hotel chains who are operating in Africa, and those who are seeking to enter the continent for the first time – although there are fewer and fewer of those, as new chains enter the market.

This report has been compiled from the data on signed deals in early 2020 by 35 regional (African) and international hotel chains. To be included in this report, Africa-based chains need to operate in (or planning on expanding

into) more than one country on the continent, and the international chains in more than one country globally. We do not, therefore, include hotel chains which

35 Chains

are domestic, i.e. operate in only one African 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. Deals at the stage of an MOU, which are "hoped-for" (whether or not they are under construction) are not included.

As in previous years the data have been analysed in several ways, including by region, by country, by city, by hotel chain and by brand. This provides several permutations with which to understand the pipeline

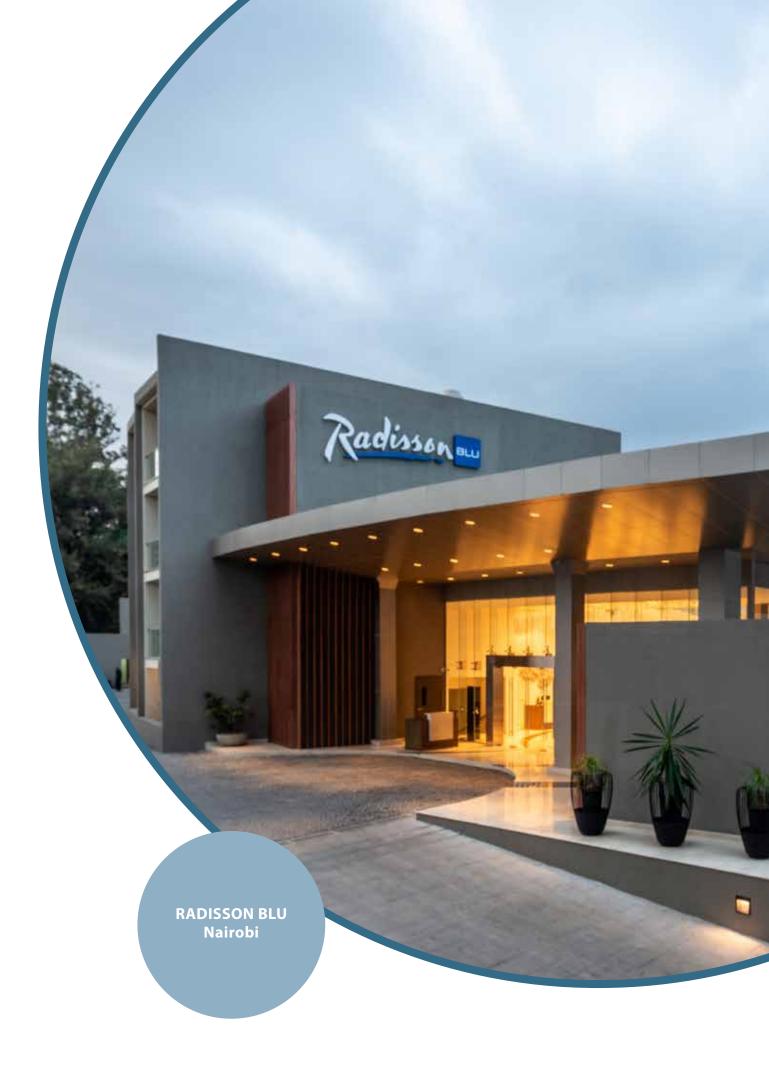
activity in Africa. The status of each project has been assessed, differentiating hotels that are in the preplanning stage (i.e. still on paper) from those that are on-site, in the construction phase.

54 Countries

"In construction" is a phrase that (at least in Africa!) needs some explanation, however – it means that work has started on site, but there are several projects where work has been suspended for some time (in a few cases for several years). Whether or not they will ever materialise is a moot point, but if they remain as deals in the chains' pipelines, then they are included in the analysis.

This year we report on 35 chains' activity. Appendices 1, 3 and 4 list all the hotel chains and their brands that participated in our survey this year, and details of their individual development activity in Africa.

If you would like to participate in our survey, and meet the criteria stated above, then please do get in touch.



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2020 Research Findings

Section 1: Regional Summary

This year's total African hotel chain development activity comes to 408 hotels with 77,896 rooms, up 3.7 per cent on last year.

The data have been analysed initially according to two main regions, i.e. North Africa (we count this as five countries – Morocco, Algeria, Tunisia, Libya and Egypt) and sub-Saharan Africa (49 countries, including the Indian Ocean islands).

Whilst the pipeline in sub-Saharan Africa is up 6.1 per cent on 2019 (measured by rooms, not hotels), in North Africa the total is very slightly down 0.2 per cent.

Table 1: Hotel Chain Development Pipelines in Africa 2020 Regional Summary										
	2016 2017			2018		2019		2020		
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	87	19,971	107	23,836	120	28,643	125	29,294	120	29,250
Sub-Saharan Africa	227	39,416	262	43,113	298	47,679	276	45,861	288	48,646
TOTAL	314	59,387	369	66,949	418	76,322	401	75,155	408	77,896

There has been growth of almost one third (31 per cent) in the total pipeline rooms since 2016, in North Africa the pipeline has grown by 46 per cent and in sub-Saharan Africa by 23 per cent. Africa is growing economically despite the challenging dynamics in most of the countries in the continent. Efforts are however needed from the local authorities and governments to support businesses progress such as the access to finance hurdle and licensing of the hospitality projects.

Hafid Mirabti,
Gulf Region Director,
Business Development at The Ascott Limited.

Chart 1: Hotel Chain Development Pipelines in Africa 2020 Regional Summary



The dip in pipeline rooms in 2019 was due to the chains cleaning their data, and we calculated that some 12,000 rooms were removed from their listings last year - deals that were there in 2018, but were no longer in the 2019 data, and which had not opened in the interim. This was due to their lack of confidence that the hotels would ever open under their flags, and a desire not to inflate their figures.

Taking those into account (i.e. deducting them from the 2018 data), there was a net increase in the total pipeline rooms of 17 per cent in 2019. There has been no such "cleaning" this year, and it is therefore evident that the rate of growth in the pipelines has slowed considerably.

The chains have deals signed in 37 countries in Africa as shown in Table 2 and on the map. West Africa and the Southern & Indian Ocean sub-regions both have 11 countries with pipeline development activity. Central Africa continues to lag, with deals in only three of the eight countries in the sub-region having any deal activity

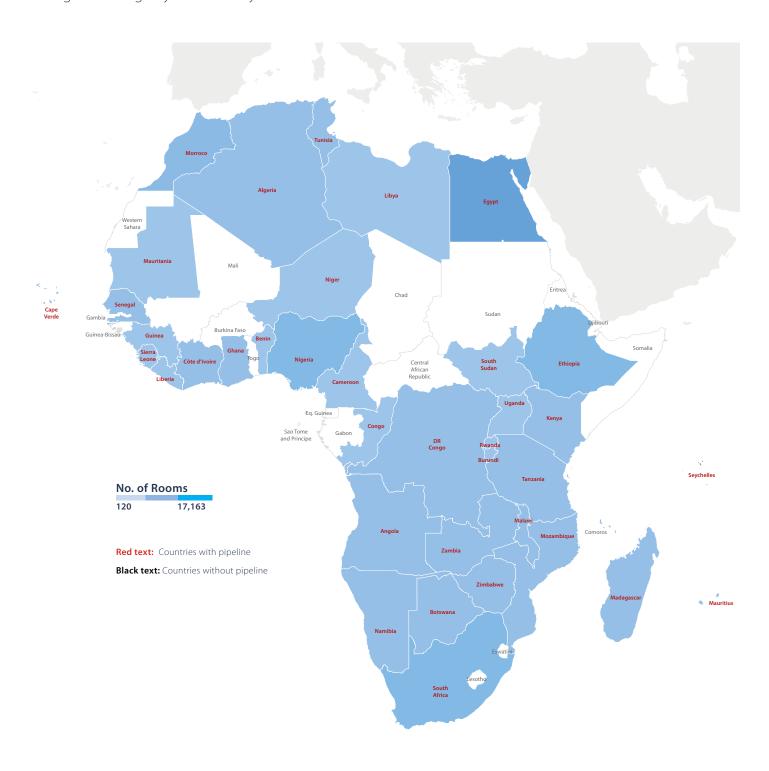


Table 2: Hotel Chain Development Pipelines in Africa 2020 Countries in the Pipeline by Sub-Region								
North	Southern and Indian Ocean	West	East	Central				
Algeria	Angola	Benin Republic	Burundi	Cameroon				
Egypt	Botswana	Cape Verde	Ethiopia	Congo				
Libya	Madagascar	Côte d'Ivoire	Kenya	DR Congo				
Morocco	Malawi	Ghana	Rwanda					
Tunisia	Mauritius	Guinea	South Sudan					
	Mozambique	Liberia	Tanzania					
	Namibia	Mauritania	Uganda					
	Seychelles	Niger						
	South Africa	Nigeria						
	Zambia	Senegal						
	Zimbabwe	Sierra Leone						

Sub-Saharan Africa has the main pipeline activity with 48,646 rooms (62.4 per cent of the Africa total), a large proportion in West Africa with 22,633 rooms, of which 7,809 are in Nigeria, and in East Africa with about 13,850 pipeline rooms (6,356 in Ethiopia and 3,588 in Kenya).

There are 17 countries in Africa with no reported chain pipeline hotels.

Table 3: Hotel Chain Development Pipelines in Africa 2020 Countries with no Chain Pipeline							
Southern and Indian Ocean	West	East	Central				
Comoros Islands	Burkina Faso	Djibouti	Chad				
Eswatini	Guinea Bissau	Eritrea	Central African Republic				
Lesotho	Mali	Somalia	Gabon				
	The Gambia	Sudan	Equatorial Guinea				
	Togo		São Tomé and Principe				

Chart 2 provides our analysis of the distribution of pipeline rooms in sub-Saharan Africa. West Africa is, as ever, the largest region, with 47 per cent of the pipeline.

Chart 2: Hotel Chain Development Pipelines in Africa 2020 Sub-Saharan Africa Sub-Regional Breakdown (Rooms)

South Africa 2,276

East Africa 13,837

Central Africa 2,276

West Africa 22,633

Hotel Chain Development Pipelines in Africa 2020

Table 4 shows the top 10 countries by number of rooms in the pipeline. Together, they account for 69 per cent of the total hotels in the survey, and 75 per cent of the rooms.

	Table 4: Hotel Chain Development Pipelines in Africa 2020 Top 10 Countries by Number of Rooms							
		Hotels	Rooms	Average Size				
1	Egypt	54	17,163	318				
2	Nigeria	48	7,809	163				
3	Ethiopia	35	6,356	182				
4	Morocco	35	5,530	158				
5	Cape Verde	18	5,307	295				
6	South Africa	26	4,092	157				
7	Kenya	23	3,588	156				
8	Algeria	16	3,383	211				
9	Senegal	14	2,490	178				
10	Tunisia	12	2,348	196				

Egypt has by far the largest number of rooms in the pipeline, well over double the number in second-place Nigeria. Accor continue to be extremely busy in North Africa – of the total of 4,227 rooms that were signed in Egypt in 2019, an amazing 78 per cent (3,278 rooms) were signed by Accor. They have now 20 deals with 8,774 hotels in Egypt, more than half the total.

The pipeline in Nigeria has decreased by 2 per cent on last year, with signings running at only 8 deals with 1,071 rooms in 2019. Four of these were by newcomer Continent, and two by Hyatt, who also signed deals in Uganda and Kenya last

Ethiopia, in third place (it has swapped places with Morocco), has seen a slight increase in pipeline deals, up from 6,184 rooms in 2019, signed both by international chains such as Accor and

Hilton, as well as regional chains such as Latitude.

We have signed on two deals, in Addis Ababa and Mauritius, and the target is to get these across the starting line in H1 2020. With the 2019 opening of Latitude Zero in Kampala taking the group's number of offerings to three, we are now at an inflection point in terms of pipeline and funding

Executive Director at The Latitude Hotels Group.

Hilton, Marriott and Radisson signed one hotel apiece in Ethiopia in 2019, in Addis Ababa, Mekelle and Bahir Dar respectively. Of the total 35 hotels in the Ethiopia pipeline, the majority (26 hotels and 4,865 rooms, 77 per cent of the total) are in Addis Ababa and join a multitude of half-built unbranded hotels, leading to fears of oversupply - if they all go ahead, which is doubtful.

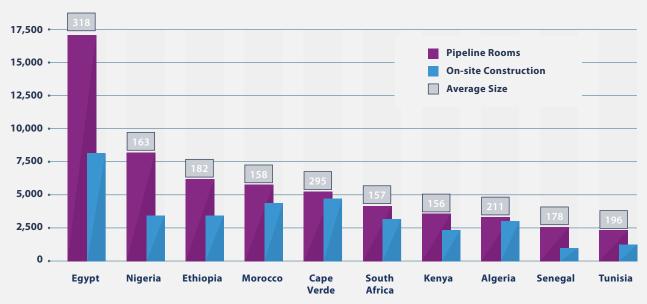
Four of the five North African countries are in the top 10 by number of planned rooms (as in 2019), with Morocco, in fourth place, recording a decrease of 14 per cent on 2019, partly because of openings (Accor opened three hotels there last year); seven deals with 777 rooms were signed in 2019, of which over half were in Rabat. It will come as no surprise that there are no new deals being signed in Libya; the pipeline today stands at three hotels with 826 rooms, all old deals, whilst 10 years ago, when things were going much better for the country, the pipeline was almost 2,900 rooms in nine hotels.

4 of 5

are in the top 10 by

Chart 3 shows the top 10 countries by number of planned rooms and their average size. Cape Verde and Egypt have hotels which on average are much larger, 294 rooms and 317 rooms respectively, the majority being seaside vacation resorts.

Chart 3: Hotel Chain Development Pipelines in Africa 2020 Top 10 Countries by Number of Planned Rooms and Average Size



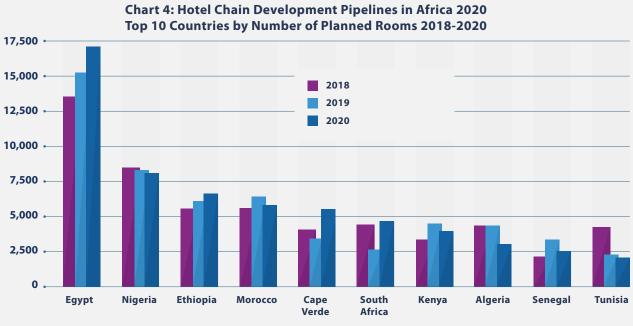
Of the 10 largest hotels in the pipeline, all but four (two in Cape Verde, one Algeria and one in Tanzania) are in Egypt, in Sharm El-Sheikh, Hurghada and Fokah. The average size of the top 10 hotels is 752 rooms, and the largest, the Rixos Makadi Bay (Hurghada), has a massive 1,636 rooms.

Chart 4 tracks the development activity in the top 10 countries since 2018. Egypt, Cape Verde and South Africa have experienced appreciable increases in the number of pipeline rooms, whilst other countries, such as Morocco, Kenya and Algeria have a slight decrease, due in part to completed projects in both countries.

We are in discussions for new projects in Africa and our focus is to strengthen our footprint within key destinations, at the moment we are negotiating on projects in Tanzania and Ethiopia.

Dana Al-Atiyat,

Development Manager - Middle East at Dusit International.



Appendix 2 provides country by country information on the chains' development activity.

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



Hotel Development Analyst, Louvre Hotels Group.

Chart 5: Hotel Chain Development Pipelines in Africa 2020 Top 10 Cities by Number of Planned Rooms

Cairo 19.22% 6,257 rooms	Lagos 11.34% 3,690 rooms	Algiers 7.86% 2,559 rooms	Abuja 7.10% 2,310 rooms	
	Nairobi 10.13% 3,298 rooms	Sharm El Sheikh 7.09%	Abidjan 6.77% 2,203 rooms	
Addis Ababa 14.94% 4,865 rooms	Hurghada	2,308 rooms		
	9.81% 3,194 rooms	Dakar 5.74% 1,869 rooms		

2020 is off to a good start since the British travel ban was lifted, in January 2020 Sharm el Sheikh started receiving charter flights from England and we believe that the Russian charters will be back as well.

Clara Muller,

Senior Expert Business Development at Deutsche Hospitality.

Cairo and Addis Ababa have by far the largest pipelines, followed by Lagos and Nairobi. Hurghada and Sharm El Sheikh, long-established resorts in Egypt, are new entrants to the top 10.

The charts overleaf show the evolution of new supply entering these markets, as anticipated by the chains.

Chart 6: Hotel Chain Development Pipelines in Africa 2020 Top 10 Cities - Anticipated Additions to Supply (Rooms)



We have expressed concern before regarding the (high) volume of new supply coming into some of these markets, with Addis Ababa and Nairobi singled out. Whilst Others such as Cairo and Abidjan look slightly alarming, it is going to be a fact in the "new norm" of post COVID-19 that all markets globally will be oversupplied, if by that we mean there is insufficient demand to go around.

Having said that, we see development activity slowing down considerably for a while, because of the supply-demand scenario, and also because of greater scarcity of funding. More hotels are likely to be pushed out into the "to be confirmed" (TBC) opening date category.





Section 2: Hotel Chains and Their Brands

In this section we present our analysis of the activity of the individual hotel chains and their brands – differentiating between the companies and their flags. Table 5 shows the top 10 brands by number of planned hotels and by number of rooms.

	Table 5: Hotel Chain Development Pipelines in Africa 2020 Top 10 Brands by Number of Planned Hotels and Rooms									
Rank by Hotels				Rank by Ro	Change on 2019	Average Size				
		Hotels	Rooms		Brand	Hotels	Rooms		Rooms	
1	Hilton	24	5,446	1	Hilton	24	5,446	-16.0%	227	
2	Radisson Blu	18	3,831	2	Marriott	17	3,836	20.8%	226	
3	Marriott	17	3,836	3	Radisson Blu	18	3,831	-30.8%	213	
4	Protea	13	2,307	4	Mövenpick	11	2,804	-7.5%	255	
5=	Hilton Garden Inn	12	1,986	5	Fairmont	8	2,729	0.8%	341	
5=	Novotel	12	2,195	6	Rixos	3	2,548	-	849	
7	Mövenpick	11	2,804	7	Protea	13	2,307	49.6%	177	
8=	DoubleTree by Hilton	10	1,846	8	Novotel	12	2,195	63.7%	183	
8=	Four Points by Sheraton	10	1,946	9	Barceló	5	2,039	-	408	
8=	Mantis	10	411	10	Hilton Garden Inn	12	1,986	-20.1%	166	

As last year, Hilton tops the list of brands ranked by number of rooms (this is only hotels branded as Hilton, and doesn't include other brands in the Hilton chain such as Hilton Garden Inn, which is shown separately).

Radisson Blu and Hilton have competed for the top slot for years, but Hilton wins again in 2020, not only with "bigger boxes" but is also pulling ahead in the number of deals. Marriott (the brand) has fewer hotels in the pipeline, but with its plethora of brands Marriott the company is on top (see Table 6).

Rixos (an Accor brand) has by far the largest hotels, with an average of 849 rooms, followed by Barceló, a new entrant to the top 10 (and to this survey), with an average of 408 rooms and by Fairmont at 341 rooms.

The opportunity for hotel development and investment in Africa remains strong as the market is significantly under-supplied with quality branded hotel accommodation. The level of expertise in delivering hotel projects in Africa continues to improve and with increasing economic and political stability Africa is getting better as a place to do business.

Mike Collini,Former Vice President Development,
Sub-Saharan Africa, Hilton.

Chart 7: Hotel Chain Development Pipelines in Africa 2020
Top 10 Brands by Number of Planned Rooms, Average Size and Status



Accor has four brands in the top 10, whilst Hilton and Marriot have two each. The only brand with all of its planned hotels (big ones, three hotels with 2,548 rooms!) under construction is Accor's Rixos, but whose Mövenpick and Fairmont brands have the lowest proportion on site, because many of their signings are quite recent. Marriott and Radisson Blu both have smaller pipelines but more rooms on site than Hilton.

The previous analysis is by individual brands (see also Appendix 3). Several of the chains have more than one brand which they are seeking to expand or establish in Africa – Marriott have signed deals for 18 different brands (out of the total of 30 in their portfolio), and Accor for 15 (total 39).

Table 6 shows the top 10 chains by number of planned rooms in Africa.

	Table 6: Hotel Chain Development Pipelines in Africa 2020 Top 10 Chains by Number of Planned Rooms							
		Hotels	Rooms	Change on 2019	Average Size			
1	Marriott International	90	17,902	5.9%	199			
2	Accor	74	16,868	24.6%	228			
3	Hilton Hotels & Resorts	53	10,093	-10.0%	190			
4	Radisson Hotel Group	38	7,385	-17.7%	194			
5	InterContinental Hotel Group	13	2,642	38.8%	203			
6	Barceló Hotels & Resorts	8	2,488	-	311			
7	Meliá Hotels & Resorts	6	1,954	-15.7%	326			
8	Hyatt International	11	1,859	23.4%	169			
9	Mangalis Hotel Group	13	1,522	-14.5%	117			
10	Deutsche Hospitality	4	1,503	32.0%	376			

Marriott, the world's largest hotel chain, has the largest pipeline in Africa, 22 per cent more hotels and 6 per cent more rooms than second-placed Accor.

Of the top 10 six chains - Marriott, Accor, Hilton, Radisson, Hyatt and Mangalis - have development offices in Africa, recognising that they need to be on the ground to deliver deals – and their presence is clearly doing that. The top four chains account for fully 67 per cent of the pipeline rooms!

Spain-based Barceló is new to the top 10 and signed eight deals in 2018.

Whilst IHG and Deutsche Hospitality have both experienced high percentage increases in their pipelines, Accor once again is first past the post, with a net increase of 3,325 rooms, and 24 deals signed in 2019. Hilton and Radisson signed around 1,900 and 1,350 rooms respectively last year, but saw a net reduction in their pipelines, due to hotels opening. Like Accor, Marriott managed a net increase, signing 2,350 rooms in 2019.

Mangalis is the only African chain in the top 10. Launched in 2011, they now have four hotels operating, and a pipeline of 13 hotels, all but one in Francophone West and Central Africa.

Chart 8 on the opposite page shows the status of the chains' pipelines.

2019 was another record year of organic rooms signing for Marriott International worldwide and the momentum continued in Africa.
We signed 17 agreements in 11 countries in Africa in 2019.

Karim Cheltout, Regional Vice President Development -

Africa at Marriott International.

There were more opportunities, at least in the markets we work in, mainly Northern Africa & Cape Verde) Better than previous years since we achieved a significant presence and our brand is better known. Also, recovery of safety conditions has pushed to go back to countries such as Tunisia.

Marisa Fronterra,

Development Manager Mediterranean Area, Barceló Hotel Group.

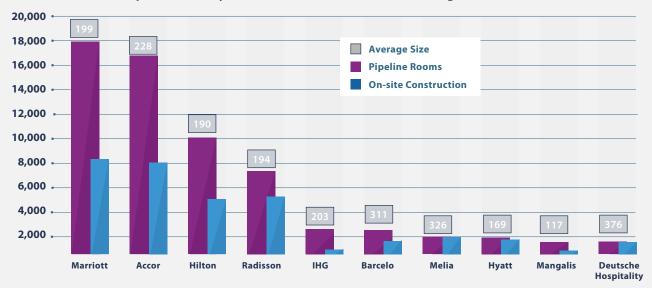
A small amelioration in 2019, interest for hotel development opportunities is growing.

Charlotte Specht,

Group Business Development Director,
Mangalis.



Chart 8: Hotel Chain Development Pipelines in Africa 2020 Top 10 Chains by Number of Planned Rooms & Average Size

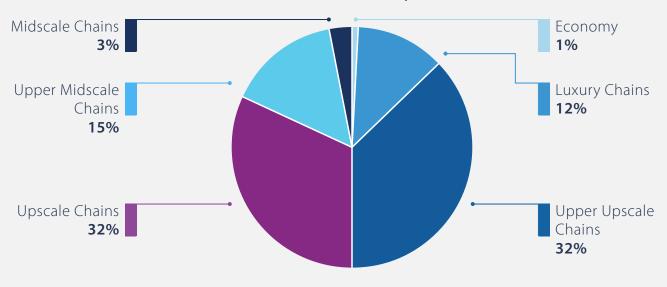


Further detail regarding each hotel chain is provided in Appendix 4.

Table 7 and Chart 9 analyse the total pipeline by STR's chain scales.

Table7: Hotel Chain Development Pipelines in Africa 2020 Chain Scale Analysis							
	Hotels	Rooms		Brands per scale	Average Size (rooms)		
Economy	4	409	0.5%	1	102		
Midscale	17	2,059	2.6%	8	121		
Upper Midscale	71	11,520	14.8%	22	162		
Upscale	136	24,712	31.7%	35	182		
Upper Upscale	128	29,681	38.1%	30	232		
Luxury	52	9,515	12.2%	21	183		
TOTAL	408	77,896	100.0%	117	191		

Chart 9: Hotel Chain Development Pipelines in Africa 2020 Chain Scale Analysis



Almost 70 per cent of the pipeline is in the Upscale and Upper Upscale chain scales, with only 4 per cent in Economy and Midscale, down on last year's 6.7 per cent. We remain convinced of the opportunities for the expansion of economy and midscale brands, positioned to cater for the rising volume of intra-Africa travel, as well as to growing numbers of domestic travellers.

The challenges can be the cost of land, and the requirement of the chains to quickly achieve a sufficient number of hotels and rooms to make it worth their while, because the hotels tend to be smaller. To date, we have not come across investors willing or able to successfully undertake the roll-out programmes of branded budget hotels on a scale that the chains require.

Africa certainly offers many opportunities, particularly in the mid-scale to upscale segments. Hard to see whether it is getting better – certainly more markets are maturing as many of the big brands open hotels in the region

Paul Pisani

Senior Vice President Hotel Development at Corinthia Hotels.

Table 8 shows the number of hotels that the hotel chains opened in 2019, ranked by number of rooms.

Table 8: Hotel Chain Development Pipelines in Africa 2020 Hotels Opened in 2019						
	Hotels	Rooms				
Accor	18	3,412				
Hilton	7	1,645				
Marriott International	7	1,491				
Rotana Hotels & Resorts	3	896				
Onomo Hotels	6	868				
Radisson Hotel Group	4	577				
Deutsche Hospitality	2	439				
Wyndham Hotels and Resorts	2	382				
Meliá Hotels & Resorts	2	363				
Hyatt International	1	326				
Best Western Hotels & Resorts	4	309				
Swiss International	4	296				
CityBlue	2	272				
Ascott	1	220				
Pefaco Hotels	1	186				
City Lodge Hotel Group	1	158				
Mangalis Hotel Group	1	141				
aha Hotels and Lodges	2	88				
Continent Worldwide	2	74				
Latitude	1	47				
InterContinental Hotels Group	1	42				
Kerzner International	1	25				
TOTAL	73	12,257				

Accor (yes, Accor again!) opened the most hotels, 18 properties, followed by Hilton with seven. Last year's pipeline totalled 75,155 rooms at the beginning of 2019, so in simple terms the total openings represent around 15 per cent of the total, "simple" because some of the hotels opened may not have been in the pipeline at the beginning of last year.

Our analysis of the types of agreement signed by the hotel chains (see Chart 10) shows that most are still management contracts, with no increase in the number of franchise agreements. But there are franchise agreements, about 10 per cent of the total, and we are seeing more interest in this type of deal from owners, and a growing willingness on the part of the chains to offer them, especially with an increase in the presence of third party, "white label" management companies such as Aleph. The industry is maturing and the brands have greater confidence in partnering with indigenous managers and management companies.

Hotel owners in Africa are becoming more sophisticated and are being advised by world class consultants and accompanied by experienced third party operators (in the case of franchise)

Karim Cheltout

Regional Vice President Development
- Africa at Marriott International.

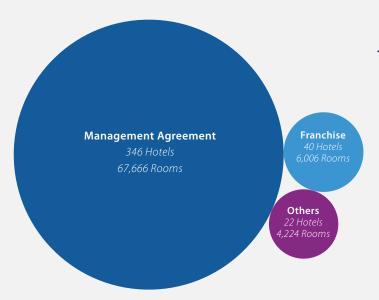


Chart 10: Hotel Chain Development
Pipelines in Africa 2020
Type of Agreement - Number of Deals Signed

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

An analysis of the chains' pipelines versus their current presence on the continent (Table 9) shows that whilst Accor is lagging slightly behind Marriott, Hilton and Radisson in growth on existing, they do have the largest footprint already – after all, they did start operating on the continent a long time ago! Should all the pipeline rooms materialise (a scenario as near to impossible as you can get) and all of the existing rooms stay within the chains' brands, then Accor and Marriott will pretty much be level pegging in Africa.

2019 was a record year for Accor in Africa with the signing of 25 hotel management agreements and a great momentum for brands such as Novotel and Mantis

Alexis Janoray former Head of Development Africa, Accor.

	Table 9: Hotel Chain Development Pipelines in Africa 2020 Top 10 Chains: Pipeline vs Existing Hotels in Africa								
		Pipe	eline	Exis	sting	Pipeline			
Rank	Company	Hotels	Rooms	Hotels	Rooms	vs Existing (Rooms)			
1	Marriott International	90	17,902	139	24,567	73%			
2	Accor	74	16,868	155	25,688	66%			
3	Hilton Hotels & Resorts	53	10,093	48	13,344	76%			
4	Radisson Hotel Group	38	7,385	41	8,254	89%			
5	InterContinental Hotels Group	13	2,642	27	6,329	42%			
6	Barceló Hotels & Resorts	8	2,488	14	3,203	78%			
7	Meliá Hotels & Resorts	6	1,954	12	3,084	63%			
8	Hyatt International	11	1,859	8	1,838	101%			
9	Mangalis Hotel Group	13	1,522	4	572	266%			
10	Deutsche Hospitality	4	1,503	15	4,888	31%			
TOTAL		310	64,216	463	91,767	70%			



Section 3: Status of Hotel Development Activity

As well as looking at the overall quantum of the countries' and chains' pipelines, in this section we present the status of their hotel development activity in Africa. Table 10 details the status of the deals in North Africa and sub-Saharan Africa, regarding whether construction has started. Just over half of rooms in the African pipeline are currently under construction.

Table 10: Hotel Chain Development Pipelines in Africa 2020 Sub-Saharan Africa vs. North Africa by Pipeline Status					
	Hotels Rooms				
	Total	Total Onsite Construction			
North Africa	120	29,250	16,771	57.3%	
Sub-Saharan Africa	288	48,646	27,432	56.4%	
TOTAL	408	77,896	44,203	56.7%	

Table 11 shows the pipeline status of the top 10 countries. Unlike in 2017, when Egypt had 75 per cent of its pipeline rooms under construction, that figure has now dropped to 47 per cent, because of the large number of deals that were signed there in 2018 and 2019. Morocco and Algeria have 77 per cent and 80 per cent respectively under construction, with Cape Verde at 83 per cent and South Africa at 78 per cent, all with much greater progress than Nigeria at 40 per cent.

We have signed new deals in Morocco and find [doing business on the continent] neither better nor worse than previous years

João Raposo
Pestana Hotel Group

Table 11: Hotel Chain Development Pipelines in Africa 2020 **Top 10 Countries by Pipeline Status Rooms** Rank **Countries** Hotels **Onsite Construction Total** 17,163 7,977 46.5% 1 Egypt 54 2 **Cape Verde** 18 5,307 4,388 82.7% 3 Morocco 35 5,530 4,273 77.3% 4 **Ethiopia** 35 6,356 3,276 51.5% **South Africa** 5 26 4,092 3,202 78.3% Nigeria 6 48 7,809 3,196 40.9% 7 **Algeria** 16 3,383 2,699 79.8% 8 Kenya 23 3,588 2,328 64.9% 9 Ghana 12 72.5% 2,131 1,544 12 10 **Tunisia** 2,348 1,152 49.1%

Table 12 looks at the brands according to pipeline status. Radisson Blu now takes top spot, having a slightly higher number of rooms and proportion of its pipeline actually under construction than Marriott.

	Table 12: Hotel Chain Development Pipelines in Africa 2020 Top 10 Brands by Pipeline Status					
Doule		Hotels	Rooms			
Rank			Total Pipeline	Onsite Co	nstruction	
1	Radisson Blu	18	3,831	2,919	76%	
2	Marriott	17	3,836	2,747	71%	
3	Rixos	3	2,548	2,548	100%	
4	Hilton	24	5,446	2,263	41%	
5	Meliá Hotels & Resorts	6	1,954	1,954	100%	
6	Hilton Garden Inn	12	1,986	1,311	66%	
7	Steigenberger Hotels & Resorts	3	1,253	1,253	100%	
8	Pullman	5	1,230	1,230	100%	
9	Barceló	5	2,039	1,213	59%	
10	DoubleTree by Hilton	10	1,846	1,166	63%	

As a company, Hilton has three brands in the top 10, their core brand Hilton as well as DoubleTree by Hilton and Hilton Garden Inn. Meliá and Steigenberger, as well as Accor's Rixos and Pullman, have all their new hotels under construction.

Getting to the onsite construction phase means that the deals are in a more advanced stage than those which are "on paper", and are more likely to represent hotels that will actually open – but note that starting construction does not necessarily mean that they ever will happen, the likelihood varying considerably from country to country.

Table 13 shows the status of the chains' pipelines.

	Table 13: Hotel Chain Development Pipelines in Africa 2020 Top 10 Chains by Pipeline Status					
				Rooms Total Onsite Construction		
Rank	Company	Hotels	Total			
1	Marriott International	90	17,902	8,324	46.5%	
2	Accor	74	16,868	7,820	46.4%	
3	Radisson Hotel Group	38	7,386	5,521	74.8%	
4	Hilton	53	10,093	5,278	52.3%	
5	Meliá Hotels & Resorts	6	1,954	1,954	100.0%	
6	Hyatt International	11	1,859	1,713	92.1%	
7	Barcelo	8	2,488	1,662	66.8%	
8	Deutsche Hospitality	4	1,503	1,503	100.0%	
9	InterContinental Hotel Group	13	2,642	1,041	39.4%	
10	Swiss-Belhotel	5	966	966	100.0%	

Marriott are back of top, but because 41 per cent of their deals are fairly new, having been signed between 2017 and 2019, and therefore it is not unexpected that less than 50 per cent of their pipeline rooms are under construction. Melia and Deutsche Hospitality have all their pipeline rooms onsite.

Radisson Bluis in first place amongst the brands, with the largest number of rooms under construction, and the parent company Radisson Hotels Group is in third place in the chains' top ten.

In Table 14 we detail when the deals in the chains' pipelines were signed; 83 were signed in 2019 – actually a few more were signed that year, and opened soon thereafter, such as the 147-room Residence Inn Algiers. The table shows only the hotels that are still in the pipeline as of the beginning of 2020, the balance having opened or been deleted from the pipeline. At the time of the collection of the data (Q1, 2020), three more deals have already been signed this year.

In general, Africa is getting much better as governments are trying to help the investors and attract new investors in all countries all over Africa as it is the only continent with developing countries and a lot of areas for growth.

Clara Muller

Senior Expert Business Development at Deutsche Hospitality

We have established a clear strategy
for the continent around two
priorities – first, on focus countries,
namely Morocco, Egypt, South Africa
and Nigeria; and second, on creating
scale with a cluster approach. Our
development strategy is interlinked
with our ability to create further
synergies and operational efficiencies
as we deliver critical mass

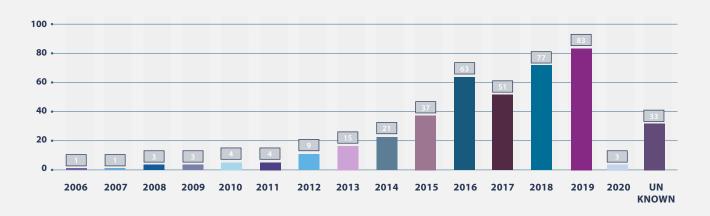
and scale across key cities in the region

Ramsay Rankoussi,

Vice President, Development, Middle East, Turkey and Africa at the Radisson Hotel *Group*.

Table 14: Hotel Chain Development Pipelines in Africa 2020 Years the Deals Were Signed – Number of Hotels					
2006 1					
2007	1				
2008	3				
2009	3				
2010	4				
2011	4				
2012	9				
2013	15				
2014	21				
2015	37				
2016	63				
2017	51				
2018	77				
2019	83				
2020 (YTD March)	3				
Not Stated	33				

Chart 11: Hotel Chain Development Pipelines in Africa 2020 Years the Deals were Signed - Number of Hotels



One really has to question whether those projects that were signed so many years ago are ever going to be realised and generate income for the owners and the chains. Fully 61 are more than five years old, some have been lying around for 10 years and more – and of the oldest eight hotels, seven of them are (we are told), "under construction"!

We have further analysed the data to quantify the hotels that were scheduled to open over the last four years (according to the data provided by the chains at the beginning of each year), and have compared those expectations with what actually happened. Appendix 5 has the detail of each chain's scheduled openings and those that actually opened.

Table 15: Hotel Chain Development Pipelines in Africa 2020 2015-2019 Scheduled vs. Actual Hotel Openings					
	Scheduled	Actual	Actualisation		
2015	69	27	36%		
2016	110	54	49%		
2017	95	51	54%		
2018	115	46	39%		
2019	91	68	75%		
TOTAL	480	246	51%		

After a worrying drop in the metric in 2018 the actualisation rate soared to 75 per cent last year, with a record 68 openings.

Table 16 shows the anticipated opening years of the pipeline hotels, as per the chains' expectations.

Table 16: Hotel Chain Development Pipelines in Africa 2020 Anticipated Opening Years of Pipeline Deals				
	Hotels	Rooms	Cumulative New Rooms Open	
2020	90	16,952	16,952	
2021	90	15,366	32,318	
2022	89	18,195	50,513	
2023	46	9,969	60,482	
2024	19	3,636	64,118	
2025 and later*	74	13,778	77,896	

Of the total 77,896 rooms in the pipeline, almost 17,000 rooms (about 22 per cent) are expected by the chains to open in 2020, and a further 15,366 in 2021 (coincidentally 90 hotels each year). There has been quite a big increase in the number of deals for which the chains don't know when they will open, telling us either "to be confirmed" or "2030" (we take the latter to mean TBC as well!). Last year the TBC figure was 36 deals with 6,600 rooms, increased in 2020 to 53 deals with 9,900 rooms, that's almost 13 per cent of the total that appear to be wholly uncertain as to realisation.

We signed 3 hotels in 2019 but one we didn't move forward with was in Juba, South Sudan due to security concerns at this time. We signed one hotel in Cape Town and one in Nairobi in 2019. In the past year we have expanded our operations in Africa to make it easier for us to do business and deliver services to our properties on the continent. We currently have 3 staff based in Johannesburg, 2 revenue managers and 2 sales managers.

Neville Graham,

Managing Director, International Member
Services at BWH Hotel Group.

Chart 12: Hotel Chain Development Pipelines in Africa 2020 Anticipated Additions to Supply (Rooms)



Table 17 shows the number of rooms that are scheduled to open and those actually onsite, by year. About 90 per cent of the rooms planned for 2021 (and all of those due to open in 2020) are already onsite.

Table 17: Hotel Chain Development Pipelines in Africa 2020 Anticipated Opening Years of Pipeline Deals – Total and Onsite				
	Rooms	Onsite Construction		
2020	16,952	16,952	100%	
2021	15,366	13,662	89%	
2022	18,195	6,938	38%	
2023	9,969	3,605	36%	
2024	3,636	361	10%	
2025 and later	13,850	2,685	19%	
TOTAL	77,896	44,203	57%	

Demonstrating the reality that many things in Africa, including (especially?) hotel development and construction, can be kinda slow, almost 2,700 of the rooms scheduled to open in 2025 or later (about 20 per cent) are already under construction – that's 5 and more years away!

Chart 13: Hotel Chain Development Pipelines in Africa 2020 Anticipated Opening Years of Pipeline Deals which are Onsite

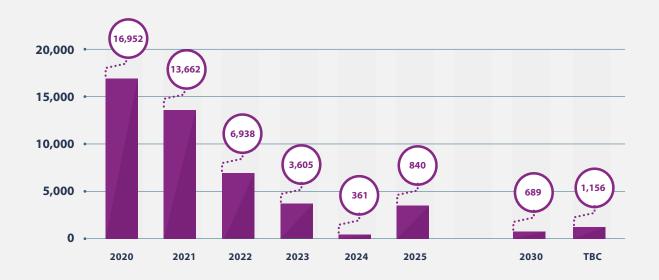


Table 18: Hotel Chain Development Pipelines in Africa 2020 Top 10 Chains Opening Hotels in 2020				
Rank		Hotels	Rooms	
1	Accor	15	3,690	
2	Marriott International	12	2,417	
3	Bon Hotels	8	650	
4	Radisson Hotel Group	7	989	
5	Swiss-Belhotel	5	966	
6	Deutsche Hospitality	4	1,503	
7	Hilton Hotels & Resorts	4	702	
8	Louvre Hotels Group	4	589	
9	Wyndham Hotels and Resorts	4	719	
10	Meliá Hotels International	3	1,354	

There is, it seems, no stopping those two! Accor and Marriott continue to top the league, and account for no less than 36 per cent of the total rooms slated to open in 2020. Both Deutsche and Meliá have an appreciable number, with "big boxes on the beach".

Outside of the top 10 Mangalis look forward to opening another hotel in Abidjan, and Hyatt have a project scheduled to open in Taghazout in Morocco.

2019 was a good year for Hyatt in Africa. In line with our strategy of expanding our presence in gateway markets across Africa, we signed projects in key markets of Nairobi and Kampala in East Africa as well as Abuja and Lagos in West Africa

Tejas Shah Regional Vice President Development, Sub-Saharan Africa at Hyatt.

Concluding Remarks

Each year, we take a "snapshot" of the hotel chains' development activity in Africa. Normally we write positively about what we expect will happen in the coming 12 months and beyond in terms of development activity, and talk about job creation, the amount of FDI involved in our industry, and all the benefits that accrue from our industry.

Normally?

In our living memories there has been nothing like 2020, and it will go down in history as being completely and utterly abnormal, a year to be

Africa continues to offer fantastic growth opportunities but it remains challenging to develop and open hotels in the envisaged timeframe; that is why Accor partnered with Kasada to provide the right solutions to the challenges identified to its development on the continent

Alexis Janoray,

former Head of Development Africa – Accor.

studied and analysed for several generations. We are one of the hardest-hit sectors of the economy, particularly as we depend on travel, and the lockdowns have stopped domestic and international movements almost completely. Some hotels, restaurants, tour operators, even airlines maybe won't survive, so when the recovery comes, we will be a smaller industry than before, when in many countries we were on a roll. Demand will also be down, with lower spend on business travel, including attendance at conferences, and it will take a while before vacation travellers are willing to drop their newly-acquired habit of social distancing and sit on a plane for hours to get to the beach.

How do we see this impacting on hotel development in Africa? A slowdown, obviously, with those hotels under construction (57 per cent of the pipeline rooms) delayed because construction sites are closed in the lockdown, and finance will be scarcer. The chains' development executives quoted in this report are unable to travel around, sniffing out and doing deals, because they and their potential owners are in lockdown, and the airlines are grounded (there's a benefit there, we all have much-reduced carbon footprints, but that's cold comfort).

But we will be back. We wish all our contributors, our readers, the industry and the world's entire population a safe outcome to this crisis, and look forward to reporting some positive news on the African hotel industry next year.

To conclude, the final words go to two of our contributors, Rotana and Urban. Neither mention COVID-19 because their comments were provided before the outbreak was fully upon us, but the words ring true today.

Africa remains a priority in our development strategy. Travel and tourism industry has significant potential in Africa, notably due to its richness in natural resources and its growing population and in particularly its middle class population

Farhan Shubailat

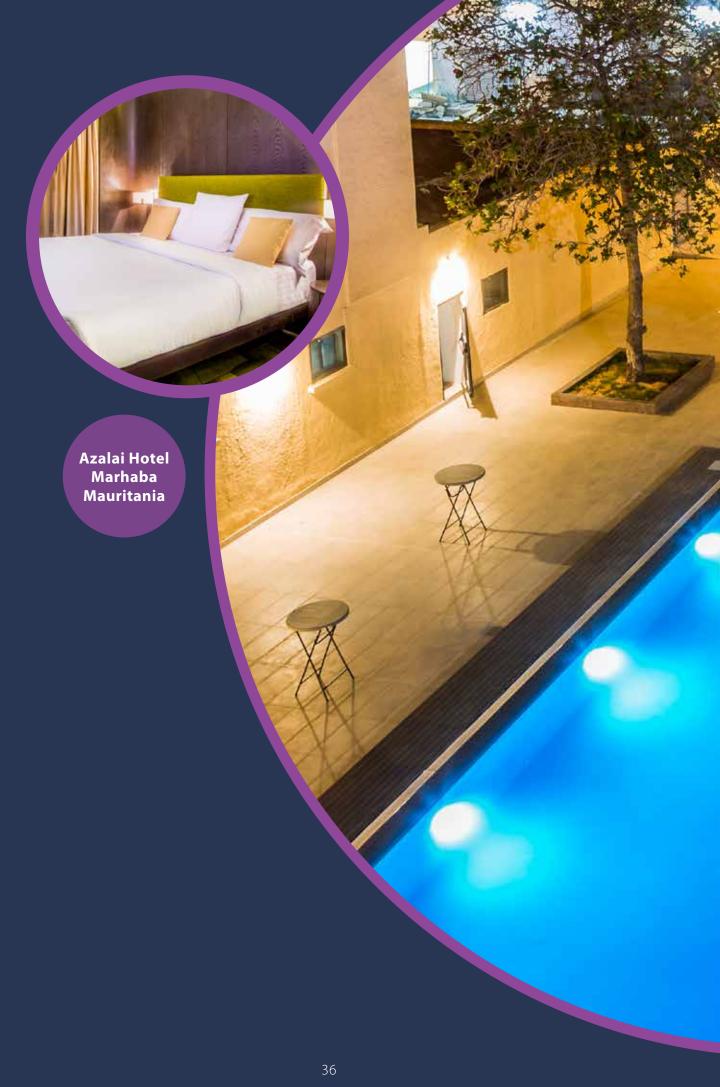
Director of Research and Development, Rotana Hotel Management Corporation.

On one hand, certain markets are really under stress because of structural things like power and regulatory uncertainty. On the other hand, what doesn't break you makes you stronger. As a brand, we're developing a pretty strong back.

We remind ourselves that if it was easy, everyone would be here

Christopher Jannou

Managing Partner, The Urban Hotel Group. Sub-Saharan Africa at Hyatt.





Appendices

APPENDIX 1 Hotel Chain Development Pipelines in Africa 2020 Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Bra	ands						
	Aparthotel Adagio	Mövenpick						
	Fairmont	Novotel						
	Grand Mercure	Pullman						
Accor	ibis	Raffles						
Accor	ibis Styles	Rixos						
	Mantis	Sofitel						
	Mercure	Swissôtel						
	M-Gallery	M-Gallery						
Banyan Tree Hotels & Resorts	•	an Tree						
Barceló Hotels & Resorts	Barceló Occidental	Royal Hideaway						
	Occidental							
	Best Western	Executive Residency						
Best Western Hotels & Resorts	Best Western Plus	by Best Western						
	Best Western Premier	Vib						
Bon Hotels	Bon	Hotels						
CityBlue Hotels	CityBlue	Urban by CityBlue						
City Lodge Hotel Group	City Lodge	Courtyard						
Club Med	Cluk	o Med						
Continent Worldwide	Con	tinent						
Corinthia Hotels International	Cor	inthia						
Deutsche Hospitality	Jaz at the Beach	Steigenberger Hotels & Resorts						
Dusit International	Dusi	t Thani						
Four Seasons Hotels & Resorts	Four Seasons H	otels and Resorts						
Groupe Azalaï	Az	zalaï						
	Canopy	Hampton by Hilton						
Hilton	Curio Collection by Hilton	Hilton						
	DoubleTree by Hilton	Hilton Garden Inn						
I hvett lutermeticuel	Hyatt Centric	Hyatt Regency						
Hyatt International	Hyatt House Hyatt Place	Park Hyatt						
	·	InterContinental						
InterContinental Hotels Group	Crowne Plaza	Staybridge Suites						
•	Holiday Inn	VOCO						
Kempinski Hotels	Kempinski							
Kerzner International	One	&Only						
Louvre Hotels Group	Golden Tulip	Royal Tulip Sarovar						
Mangalis Hotel Group	Noom	Yaas						
arigans rioter Group	Seen	Tuus						

APPENDIX 1 Hotel Chain Development Pipelines in Africa 2020 Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Brands					
	AC Hotels	Marriott Executive Apartments				
	Aloft Hotels	Protea Hotels				
	Autograph	Renaissance				
	Courtyard by Marriott	Residence Inn by Marriott				
Marriott International	Element by Westin	Ritz-Carlton				
	Four Points by Sheraton	Sheraton				
	JW Marriott	St. Regis				
	Le Méridien	W Hotels				
	Marriott	Westin				
Meliã Hotels International	Meliá H	otels & Resorts				
Minor Hotel Group	Anantara	AVANI				
Onomo Hotels	Onomo					
Pestana Hotels & Resorts	Pestana CR7 Lifestyle Hotels	Pestana Hotels				
	Park Inn by Radisson	Radisson Blu				
Radisson Hotel Group	Radisson	Radisson Collection				
	Nadisson	Radisson Red				
Rotana Hotels & Resorts	Arjaan Hotel Apartments by	Centro Hotels by Rotana Rotana				
Notalia flotels & Resolts	Rotana	Hotels and Resorts				
Serena Hotels & Resorts	Ser	ena Hotels				
Six Senses Hotels Resorts Spas	S	ix Senses				
Swiss-Belhotel International	Swi	ss-Belhotel				
The Accept	Ascott	C				
The Ascott	Citadines	Somerset				
The Latitude Hotels Group		Latitude				
Tsogo Sun	Southern Sun					
Urban Hotels	The Urban					
Wyndham Hotels and Resorts	Ramada Encore	Tryp by Wyndham				
wynanam noters and resorts	Ramada Plaza	Wyndham				

^{*}Note: these are the brands for which the chains have signed deals. Some have many more brands than are listed here, but no deals in Africa for those brands.

APPENDIX 2 Hotel Chain Development Pipelines in Africa 2020 Hotels and Rooms by Country

noteis allu not	, , , , , , , , , , , , , , , , , , ,	,		
	Total by	Country	Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Algeria	16	3,383	20%	80%
Angola	3	785	52%	48%
Benin	5	768	26%	74%
Botswana	2	360	100%	0%
Burundi	1	120	0%	100%
Cameroon	5	757	43%	57%
Cape Verde	18	5,307	17%	83%
Congo	2	321	0%	100%
Côte D'Ivoire	15	2,343	63%	37%
Dr Congo	9	1,198	34%	66%
Egypt	54	17,163	54%	46%
Ethiopia	36	6,428	49%	51%
Ghana	12	2,131	28%	72%
Guinea	2	300	0%	100%
Kenya	23	3,588	35%	65%
Liberia	2	299	64%	36%
Libya	3	826	19%	81%
Madagascar	6	651	32%	68%
Malawi	2	324	56%	44%
Mauritania	1	200	100%	0%
Mauritius	7	862	100%	0%
Morocco	35	5,530	23%	77%
Mozambique	7	804	61%	39%
Namibia	1	174	0%	100%
Niger	3	680	100%	0%
Nigeria	50	8,115	60%	40%

APPENDIX 2 Hotel Chain Development Pipelines in Africa 2020 Hotels and Rooms by Country Pre-Construction (Planning) Rooms on Site (Construction) **Total by Country** Hotels Rooms 673 Rwanda 7 62% 38% Senegal 14 59% 41% 2,490 Seychelles 1 295 0% 100% Sierra Leone 2 306 0% 100% **South Africa** 26 4,092 22% 78% **South Sudan** 2 393 60% 40%

6

12

9

11

408

1,130

2,348

1,577

1,308

77,896

61%

51%

30%

44%

43%

39%

49%

70%

56%

57%

Tanzania

Tunisia

Uganda

TOTAL

Zimbabwe

APPENDIX 3 Hotel Chain Development Pipelines in Africa 2020 **Hotels and Rooms by Brand** Pre-Construction **Rooms on Site** (Construction) **Total by Brand Hotels Rooms AC Hotels** 385 100% 0% aloft Hotels 300 50% 50% **Anantara** 2 305 50% 50% **Aparthotel Adagio** 3 335 67% 33% **Arjaan Hotel Apartments by Rotana** 1 100 100% 0% **Ascott** 1 100 100% 0% **Autograph** 1 54 0% 100% **AVANI** 3 498 78% 22% Azalaï 4 747 49% 51% **Banyan Tree** 2 19% 81% 81 59% **Barcelo** 5 2,039 41% **Best Western** 4 400 65% 36% **Best Western Plus** 4 355 20% 80% **Best Western Premier** 2 225 29% 71% **Bon Hotels** 8 650 0% 100% Canopy 1 150 0% 100% **Centro Hotels by Rotana** 2 512 100% 0% **Citadines** 1 120 0% 100% **City Lodge** 1 148 0% 100% **Club Med** 3 790 48% 52% Continent 4 473 69% 31% Corinthia 300 100% 1 0% Courtyard 1 168 0% 100% **Courtyard by Marriott** 3 875 43% 57% **Crowne Plaza** 2 398 55% 45% **Curio Collection by Hilton** 3 230 0% 100% **DoubleTree by Hilton** 10 1,846 37% 63% 1 **Dusit Princess** 100 0% 100% **Dusit Thani** 2 725 100% 0% **Element by Westin** 2 77% 449 23%

1

10

90

2,729

1,946

100%

83%

73%

0%

17%

27%

Executive Residency by Best Western

Four Points by Sheraton

Fairmont

APPENDIX 3 Hotel Chain Development Pipelines in Africa 2020 Hotels and Rooms by Brand

	Ta Rooms by Brank			
		Total by Brand Hotels Rooms		Rooms on Site (Construction)
Francisco de la contraction de			Pre-Construction (Planning)	CF0/
Four Seasons Hotels and Resorts	2 4	353	35%	65%
Golden Tulip Grand Mercure		592	0%	100%
	1	105	100%	0%
Hampton by Hilton	3	435	64%	36%
Hilton	24	5,446	58%	42%
Hilton Garden Inn	12	1,986	34%	66%
Holiday Inn	4	555	36%	64%
Hyatt Centric	2	312	0%	100%
Hyatt House	1	60	0%	100%
Hyatt Place	2	353	0%	100%
Hyatt Regency	5	953	15%	85%
ibis	1	176	0%	100%
ibis Styles	4	679	78%	22%
InterContinental	4	1,178	68%	32%
Jaz at the Beach	1	250	0%	100%
JW Marriott	5	1,433	49%	51%
Kempinski	1	180	0%	100%
Latitude	2	158	100%	0%
Le Méridien	2	352	55%	45%
Mantis	10	411	43%	57%
Marriott	17	3,836	28%	72%
Marriott Executive Apartments	5	781	44%	56%
Meliá Hotels & Resorts	6	1,954	0%	100%
Mercure	5	744	42%	58%
M-Gallery	3	426	0%	100%
Mövenpick	11	2,804	85%	15%
Noom	6	861	35%	65%
Novotel	12	2,195	50%	50%

APPENDIX 3 Hotel Chain Development Pipelines in Africa 2020 Hotels and Rooms by Brand **Pre-Construction** Rooms on Site (Construction) (Planning) **Total by Brand** Hotels Rooms **Occidental** 369 100% 0% Onomo 3 388 100% 0% **Park Hyatt** 1 181 0% 100% Park Inn by Radisson 572 58% 42% **Pestana CR7 Lifestyle Hotels** 1 174 0% 100% **Pestana Hotels** 3 364 0% 100% **Protea Hotels** 2,307 49% 13 51% Pullman 5 1,230 0% 100% Radisson 10 1,461 31% 69% Radisson Blu 18 3,381 24% 76% **Radisson Collection** 4 0% 1,134 100% **Radisson Red** 2 57% 387 43% Raffles 1 343 0% 100%

1

1

1

84

177

216

0%

0%

100%

100%

100%

0%

Ramada Encore

Ramada Plaza

Renaissance

APPENDIX 3 Hotel Chain Development Pipelines in Africa 2020 Hotels and Rooms by Brand

		y Brand	Pre-Construction (Planning)	Rooms on Site (Construction)	
Buttle and a Marchine	Hotels	Rooms	_	200/	
Residence Inn by Marriott	7	997	70%	30% 100%	
Residences by CityBlue Ritz-Carlton		249			
	6	855	40%	60%	
Rixos		2,548	0%	100%	
Rotana Hotels and Resorts	3	550	100%	0%	
Royal Hideaway	1	80	0%	100%	
Royal Tulip	2	260	0%	100%	
Sarovar	1	80	0%	100%	
Seen	3	252	58%	42%	
Serena Hotels	1 7	100	0%	100%	
Sheraton	7	1,518	85%	15%	
Six Senses	3	74	100%	0%	
Sofitel	1	182	0%	100%	
Somerset	2	314	48%	52%	
Southern Sun	1	115	0%	100%	
St. Regis	4	680	18%	82%	
Staybridge Suites	1	150	100%	0%	
Steigenberger Hotels & Resorts	3	1,253	0%	100%	
Swiss-Belhotel	5	966	0%	100%	
Swissôtel	6	1,961	100%	0%	
The Urban	7	780	63%	37%	
Tryp by Wyndham	1	120	0%	100%	
Urban by CityBlue	1	65	0%	100%	
Vib	1	80	0%	100%	
voco	2	361	64%	36%	
W Hotels	2	530	66%	34%	
Westin	1	388	100%	0%	
Wyndham	2	458	0%	100%	
Wyndham Garden	1	112	100%	0%	
Yaas	4	409	82%	18%	
TOTAL	408	77,896	43%	57%	

APPENDIX 4 Hotel Chain Development Pipelines in Africa 2020 Hotels and Rooms by Group

			Total B	y Group			Pre- construction (planning)	Rooms on site (construction)		
	2019				2020				Change on 2019	
Group	Countries	Hotels	2018 Rooms	Countries	Hotels	Rooms			Change	% Change
Accor	16	57	13,543	18	74	16,868	54%	47%	3,325	25%
Banyan Tree Hotels & Resorts	1	1	66	2	2	81	18%	82%	15	23%
Barceló Hotels & Resorts	-	-	-	3	8	2,488	33%	67%	-	-
Best Western Hotels & Resorts	6	18	1,613	6	12	1,150	42%	58%	-463	-29%
Bon Hotels	-	-	-	2	8	650	0%	100%	-	-
City Lodge Hotel Group	2	3	474	2	2	316	0%	100%	-158	-33%
CityBlue Hotels	3	4	602	2	2	314	0%	100%	-288	-48%
Club Med	2	3	790	2	3	790	42%	58%	0	0%
Continent Worldwide	1	2	74	1	4	473	30%	70%	399	539%
Corinthia Hotels International	1	1	300	1	1	300	0%	100%	0	0%
Deutsche Hospitality	2	4	1,139	2	4	1,503	0%	100%	364	32%
Dusit International	2	2	725	3	3	825	88%	12%	100	14%
Four Seasons Hotels & Resorts	2	2	336	2	2	353	35%	65%	17	5%
Groupe Azalaï	4	4	747	4	4	747	49%	51%	0	0%
Hilton Hotels & Resorts	22	55	11,209	10	53	10,093	48%	52%	-1,116	-10%
Hyatt International	6	8	1,507	7	11	1,859	8%	92%	352	23%
InterContinental Hotels Group	4	10	1,904	6	13	2,642	60%	40%	738	39%
Kempinski Hotels	1	1	180	1	1	180	-	100%	0	0%
Louvre Hotels Group	5	7	916	6	7	932	-	100%	16	2%
Louvre Hotels Group	8	16	2,414	5	7	916	40%	60%%	-1,498	-62.1%

APPENDIX 4 Hotel Chain Development Pipelines in Africa 2020 Hotels and Rooms by Group, 2018 and 2019 Data

			Total B	y Group			Pre- construction (planning)	Rooms on site (construction)			
	2019				2020					Change on 2019	
Group	Countries	Hotels	2018 Rooms	Countries	Hotels	Rooms			Change	% Change	
Mangalis Hotel Group	8	15	1,781	7	13	1,522	51%	49%	-259	-15%	
Marriott International	24	81	16,905	13	90	17,902	53%	47%	997	6%	
Meliá Hotels International	3	8	2,317	2	6	1,954	0%	100%	-363	-16%	
Minor Hotel Group	5	8	999	5	5	803	68%	32%	-196	-20%	
Onomo Hotels	5	8	1,103	3	3	388	-	100%	-715	-65%	
Pestana Hotels & Resorts	2	3	408	2	4	538	-	100%	130	32%	
Radisson Hotel Group	23	47	8,974	19	38	7,385	25%	75%	-1,589	-18%	
Rotana Hotels & Resorts	7	9	2,058	5	6	1,162	100%	0%	-896	-44%	
Serena Hotels & Resorts	1	1	100	1	1	100	0%	100%	0	0%	
Six Senses Hotels Resorts Spas	1	2	64	1	3	74	100%	0%	10	16%	
Swiss-Belhotel International	-	-	-	2	5	966	0%	100%	-	-	
The Ascott	2	2	370	3	4	534	47%	53%	164	44%	
The Latitude Hotels Group	2	2	139	2	2	158	100%	0%	19	14%	
Tsogo Sun	-	-	-	1	1	115	0%	100%	-	-	
Urban Hotels	3	6	514	5	7	780	63%	37%	266	52%	
Wyndham Hotels and Resorts	6	8	1,324	4	6	951	12%	88%	-373	-28%	
TOTAL		382	73,181		408	77,896			4,715		

About Us

At W Hospitality Group we specialise in the hotel, tourism and leisure industries in Africa, 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. Our services are integral parts of the process of realising a successful project, and delivering profitability post-completion. For many years we have been regarded as the market leader in sub-Saharan Africa due to the market and financial expertise of our staff, our experience of the global and African hotel industry, our commitment to our clients and our desire to see them succeed.

Our team has experience of more than 90 countries, including 39 in Africa, both developed and developing, and at all market levels, from deluxe hotels to roadside lodges, exclusive health clubs to public recreation facilities, and from the master planning of thousand hectare sites to the best use of city blocks. This experience is essential when advising on multi-million dollar projects, in order to bring first-hand knowledge of success factors – and sometimes how not to do it.

We have worked with most of the major international and regional hotel companies, as well as multilateral funding agencies, financial institutions and governments, and individual entrepreneurs. Our clients benefit from our relationships with senior executives in these stakeholders, and our knowledge of how they operate.

We are regarded as the foremost international expert on the hotel industry in West Africa – and this expertise is considered by our clients to be of great benefit to them. In recognition of our expertise, we were awarded the accolade of Tourism Investment Advisor of the Year 2008, and again in 2011, by Africa Investor magazine, for our work on projects in Africa, where we have been able to "make it happen". The award has not been made since 2011.

We are a founder member of Hotel Partners Africa (HPA), a group of consultants and advisers offering complementary services to hotel developers and owners. In the complex world of hotel development and management, where a client's specific needs must be balanced with all the processes and requirements to satisfy funders, manage risk, oversee cost efficient and fit-for-purpose construction, contract negotiation with operators, asset management, valuations, sales and acquisitions, and recruitment, HPA is a unique professional and integrated complete-solutions provider with integrity, experience and a proven track record, providing a seamless service throughout the lifecycle of a hotel project.

HPA has a highly proactive team with long-standing relationships with major players, particularly branded chains, developers, fund managers and property owners. The partners are based in Lagos, London, Addis Ababa and Florida.



