2022 | Hotel Chain Development Pipelines in Africa

W HOSPITALITY GROUP


Barcelo
Tanger
Front Page:
Oaks Apartments
Egypt

Foreword

This is the 14th edition of our annual Hotel Chain Development Pipelines in Africa report and analysis, and the third to be produced in the throes of the COVID-19 pandemic. Happily, it does appear that we are at the beginning of the end of the pandemic – the Africa CDC (an agency of the African Union) reported that as of mid-February 2022 "the overall daily reported number of new cases across the continent is on a downward trend".

Most of the contributors to this report have commented that, unlike in 2020 when they were locked down, 2021 saw a resurgence in interest in new development and conversions. The hotel chains' developers were able to get back on the road (or rather, on planes!), for those essential face-to-face interactions.

It was inevitable that the pandemic would result in a slowdown in pipeline growth, as was the case in 2020, but even that wasn't such a bad year for signing, with 20 per cent more rooms added to the pipeline at the height of the crisis compared to five years before that, in 2015. So there does seem to be some resilience, at least in the African arena, when it comes to getting new branded hotels on board. And here's a fascinating fact – the number of deals signed by the hotel chains in 2021, and the number of rooms added to their development pipeline, is almost exactly the same as 2019, which we see as the last "normal" year!

In early 2022 the hotel chains' development pipelines now total 447 hotels with around 80,300 rooms, just a fraction up on 2021 – notwithstanding the volume of signings, we tracked 29 hotels with about 6,200 rooms that opened last year (that's around 8 per cent of that year's pipeline), plus the hotel chains had another "clear-out" of prospective new hotels that were just never going to happen. This is prudent – whilst they need to show growth, it has to be real growth, or shareholders will question the credibility of the numbers.

There are many reasons to be optimistic about the future of the hotel industry in Africa. With some exceptions, the countries of Africa are lagging behind Europe, the Americas et al when it comes to the hospitality industry, but whilst the scale is small (the development pipeline in China, one country, is almost nine times that in Africa's 54 nations!) the opportunities are there, and not to be ignored.

The historical growth of the hotel 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.

As in previous years we have quantified the recent 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 data from 42 international and regional hotel chains, reporting their pipeline activity for 120 of their brands for which they have signed deals in Africa.

Development activity continues to be mainly in city centres, 331 hotels of the total 447 in the pipeline, that's 74 per cent of the deals and 72 per cent of the rooms – resorts account for nearly all of the balance, 23 per cent of deals and 26 per cent of rooms. There are only 12 hotels planned at airports in the whole of Africa, curious considering the importance of air travel on the continent. Of note is that the proportion of new deals for resort hotels is up considerably in 2021, now accounting for 20 per cent of deals and 29 per cent of rooms signed that year, compared to just 10 per cent in 2020. Is this an impact of the pandemic, which has seen greater consumer demand for resorts than for city centres, bringing greater investor interest in that sector? Most of the new resort signings have been in the traditional tourist magnets of East and North Africa, but the Republic of Benin in West Africa has two new resorts coming, from Banyan Tree and Club Med, which will put this relatively new destination on the international map.

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 2022. A full list of the hotel chains included is provided in Appendix 1. We're really pleased to welcome two new international brands this year, Campbell Gray Hotels and GHM, both adding a deal apiece in Egypt.

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

March 2022


Radisson Blu Resort, Mosi-oa-Tunya,
Livingstone

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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.

This report has been compiled using the data on signed deals in early 2022 from 42 regional (African) and international hotel chains. To be included in this report, Africa-based chains need to operate in (or are planning on expanding into) more than one country on the continent, and the international hotel chains in more than one country globally. We do not, therefore, include hotel chains which are domestic, i.e. operate in only one African country. If you would like to participate in our survey, and meet the criteria stated above, then please do get in touch.

42
Chains

In addition, the deals need to be legally-binding management, franchise or other agreements (some of the hotel 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 pre-planning stage (i.e. still on paper) from those that are on-site, in the construction phase. "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 hotel chains' pipelines, then they are included in the analysis.

54
Countries

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.

We were unable to obtain data from two hotel chains who participated in previous years, so we have adjusted the historical data to provide like-for-like comparisons and trends. Keen observers will therefore find that the figures provided in this report for 2020 and before are not the same as shown in our previous reports – it's deliberate!

Four Seasons Resort
Sharm El Sheikh

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Azalaï
Dakar

80,291
rooms

447
hotels

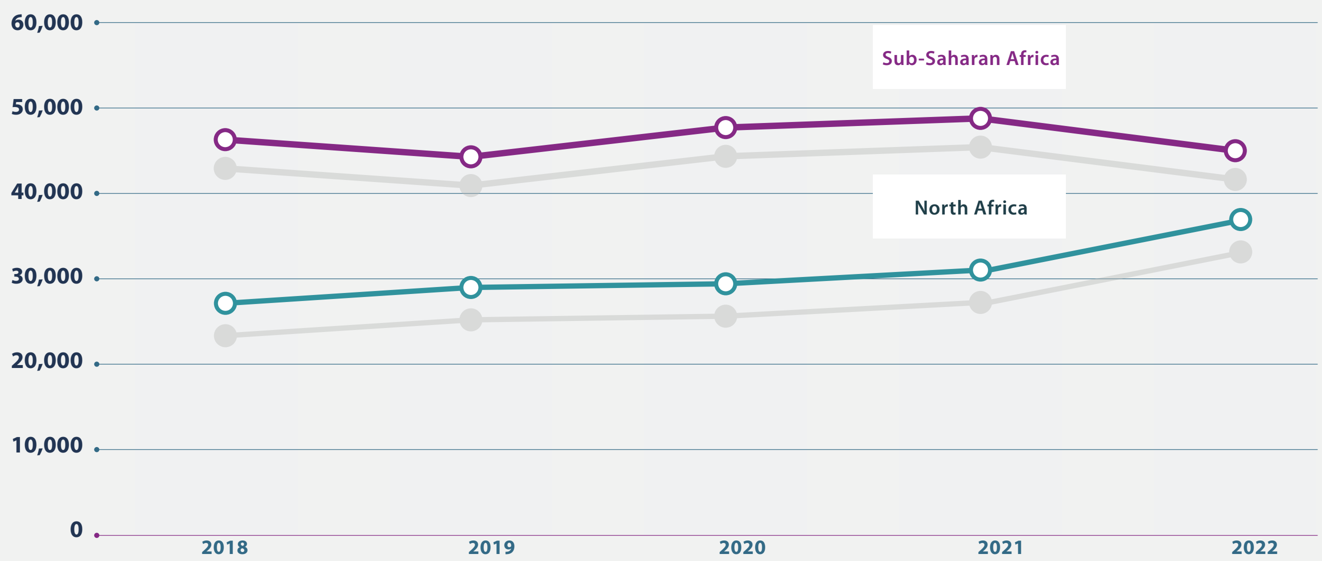
The African hotel chain development pipeline now totals 447 hotels with 80,291 rooms. This total has been analysed initially according to two main regions, i.e. North Africa (we count this as five countries – Morocco, Algeria, Tunisia, Libya and Egypt) and sub-Saharan Africa (49 countries, including the Indian Ocean islands). The pipeline in sub-Saharan Africa is down 6 per cent on 2021 (measured by rooms), whilst in North Africa the total is up by 12 per cent. This is the first year in many that the sub-Saharan African pipeline has decreased, and this is for three main reasons: fewer new opportunities in the region; opening of some 2,700 rooms in 15 hotels last year, and a pipeline "cleansing" which the hotel chains do periodically (the last one was in 2019) to remove some no-hopers.

Table 1: Hotel Chain Development Pipelines in Africa 2022
Regional Summary

	2018		2019		2020		2021		2022	
	Hotels	**Rooms**	**Hotels**	**Rooms**	**Hotels**	**Rooms**	**Hotels**	**Rooms**	**Hotels**	**Rooms**
North Africa	118	28,303	122	28,702	119	29,050	134	31,547	166	35,280
Sub-Saharan Africa	294	46,731	270	44,395	283	47,684	289	47,855	281	45,011
TOTAL	**412**	**75,034**	**392**	**73,097**	**402**	**76,734**	**423**	**79,402**	**447**	**80,291**

Although the pipeline total is above the 2020 and 2021 figures, sub-Saharan Africa is falling behind, with fewer rooms in 2022 – the growth has been entirely in North Africa, specifically in Egypt, which on its own has seen growth of 40 per cent in pipeline rooms. Of the six sub-Saharan countries in the top 10 (see Table 4) only Cape Verde has seen an increase (33 per cent), whilst the "power houses", i.e. Nigeria, Ethiopia, Kenya and South Africa have between them seen a decline of 29 per cent (Nigeria is down 41 per cent).

Chart 1: Hotel Chain Development Pipelines in Africa 2022
Regional Summary



The hotel chains have deals signed in 42 countries in Africa, as shown in Table 2 and on the map. West Africa leads with 13 countries (out of a total of 18), followed by the Southern & Indian Ocean sub-region where there are 11 countries with pipeline development activity. Central Africa has seen increased activity, now with deals in five of the eight countries in the sub-region lag, Gabon and Chad joining the group this year.

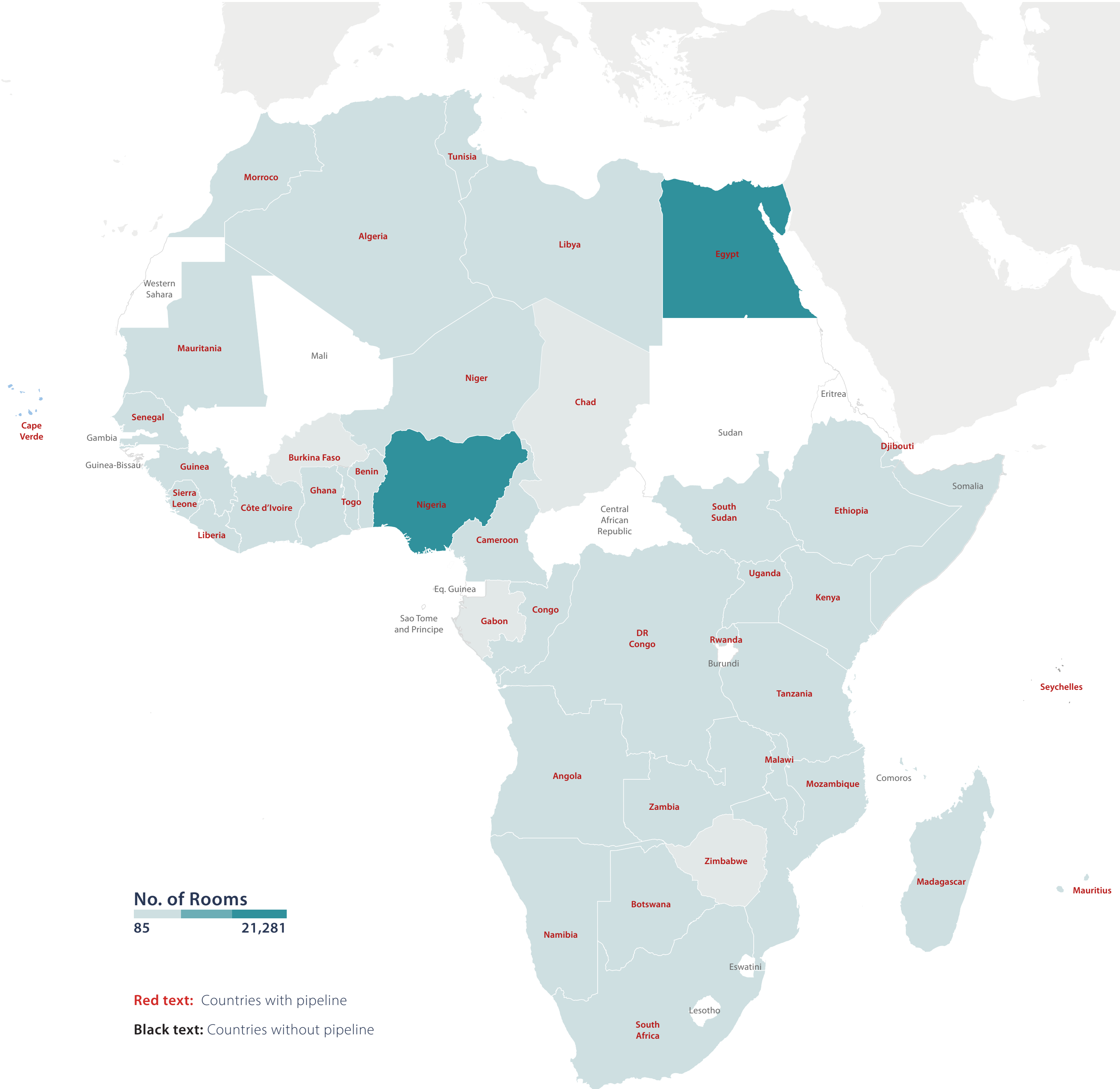
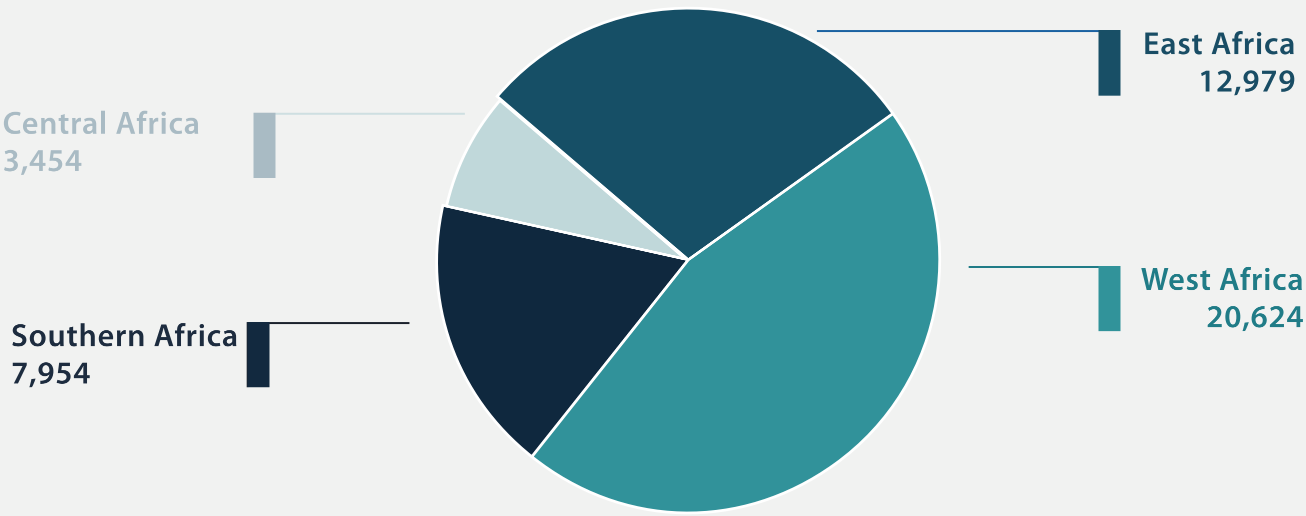


Table 2: Hotel Chain Development Pipelines in Africa 2022 Countries with Hotel Chain Pipeline Deals				
North	**Southern and Indian Ocean**	**West**	**East**	**Central**
Algeria	Angola	Benin Republic	Djibouti	Cameroon
Egypt	Botswana	Burkina Faso	Ethiopia	Chad
Libya	Madagascar	Cape Verde	Kenya	Congo
Morocco	Malawi	Côte d'Ivoire	Rwanda	DR Congo
Tunisia	Mauritius	Ghana	Somalia	Gabon
	Mozambique	Guinea	South Sudan	
	Namibia	Liberia	Tanzania	
	Seychelles	Mauritania	Uganda	
	South Africa	Niger		
	Zambia	Nigeria		
	Zimbabwe	Senegal		
		Sierra Leone		
		Togo		

Chart 2 provides our analysis of the distribution of pipeline rooms in sub-Saharan Africa. West Africa has the main pipeline activity with 20,624 rooms (46 per cent of the regional total), followed by East Africa with 29 per cent. The six sub-Saharan African countries in the top 10 account for 54 per cent of the region's total.

Chart 2: Hotel Chain Development Pipelines in Africa 2022
Sub-Saharan Africa Sub-Regional Breakdown (Rooms)



This distribution is largely unchanged since 2019, although West Africa is slightly down (from 49 per cent of the regional total) with Central Africa increasing its share.

There are 12 countries in Africa with no reported chain pipeline hotels. These are some of the smallest countries on the continent, with the exception of Sudan which is one of the largest. There has been progress, 10 years ago there were 19 countries with no reported deals. Of the 12 countries with no deals, nine already have branded supply, and only three – Burundi, Central African Republic and Eritrea - have no deals and no existing branded supply.

Table 3: Hotel Chain Development Pipelines in Africa 2022 Countries with no Branded Pipeline			
Southern and Indian Ocean	**West**	**East**	**Central**
Comoros Islands Eswatini Lesotho	Guinea Bissau Mali The Gambia	Burundi Eritrea Sudan	Central African Republic Equatorial Guinea São Tomé and Principe

Table 4 shows the top 10 countries by number of rooms in the pipeline. Together, they account for 67 per cent of the total hotels in the survey, and 74 per cent of the rooms.

Table 4: Hotel Chain Development Pipelines in Africa 2022 Top 10 Countries by Number of Rooms				
		Hotels	**Rooms**	**Average Size**
1	**Egypt**	85	21,281	250
2	**Morocco**	50	7,209	144
3	**Nigeria**	33	5,619	170
4	**Ethiopia**	29	5,206	180
5	**Cape Verde**	17	4,639	273
6	**Algeria**	15	3,202	213
7	**Kenya**	24	3,155	131
8	**South Africa**	21	3,133	149
9	**Tunisia**	14	2,918	208
10	**Senegal**	13	2,693	207
	Total	**301**	**59,055**	**196**

Egypt not only leads the country table, with over 21,000 rooms in 85 hotels (up 20 per cent on last year), but is streaking ahead of the pack, with almost three times the number of rooms in second-placed Morocco, and almost four times Nigeria, which was top of the table for so many years. And with continued signing activity (20 hotels with about 5,250 rooms last year) Egypt now accounts for over 25 per cent of the total pipeline.

This signing spree was led by Accor (5 deals with 2,131 rooms), IHG (6 deals, 1,107 rooms), Marriott International (4 deals, 986 rooms) and Hilton (3 deals, 720 rooms). Radisson Hotel Group and Deutsche Hospitality signed one each. IHG's deal includes four Indigo-branded hotels, the first in Africa.

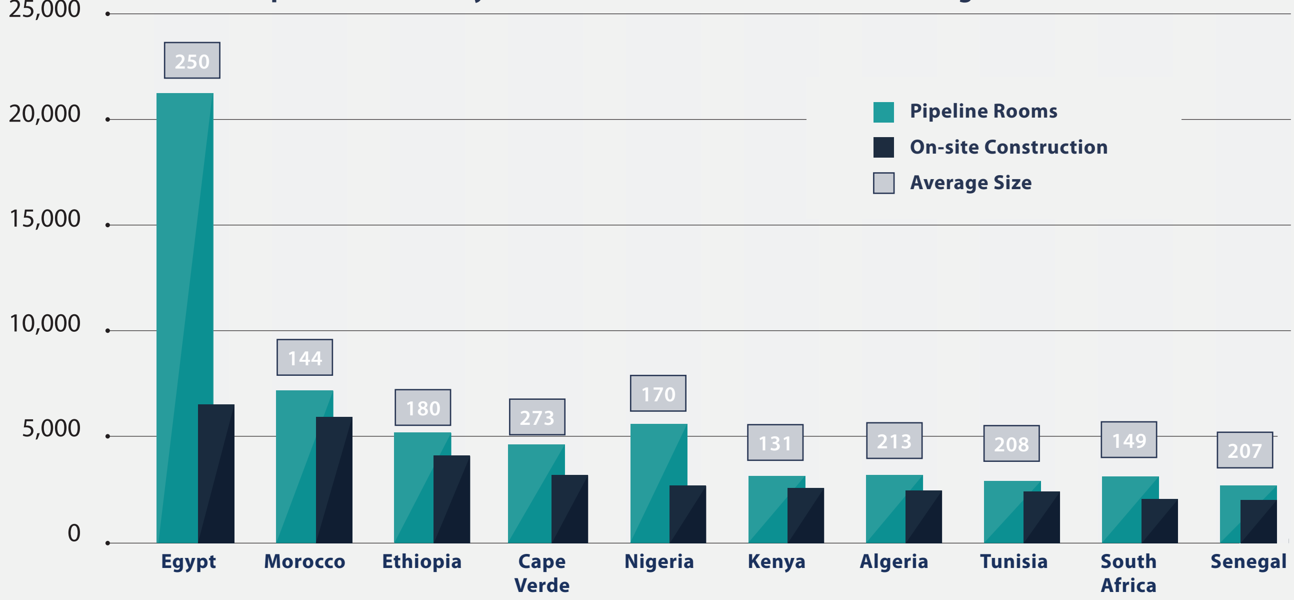
Morocco moves into second place this year, ahead of Nigeria, which is slipping down the rankings. Radisson signed nine hotels in Morocco in 2021, of which four opened the same year, with the remaining five (802) rooms included in the Morocco total above. Accor, Ascott, BWH and Marriott International were all active in Morocco last year, contributing to an 18 per cent increase in pipeline rooms.

Nigeria, once the leader on the continent, has seen a significant reduction in the pipeline, with several deals cancelled due to a lack of activity, and only three deals signed in 2021. Ascott signed a deal in Lagos to bring its Citadines brand to Africa for the first time, to join other planned hotels under that brand in Morocco and Cameroon

> **“The signing of our first portfolio development in Egypt strengthens our foothold in the country and simultaneously marks the debut of Hotel Indigo, our boutique lifestyle brand, in Africa at scale.”**
>
> *Haitham Mattar, Managing Director, IHG Middle East and Africa & South West Asia*

Chart 3 shows the top 10 countries by number of planned rooms and their average size. Egypt and Cape Verde have hotels which on average are much larger, 250 rooms and 273 rooms respectively, the majority being seaside vacation resorts.

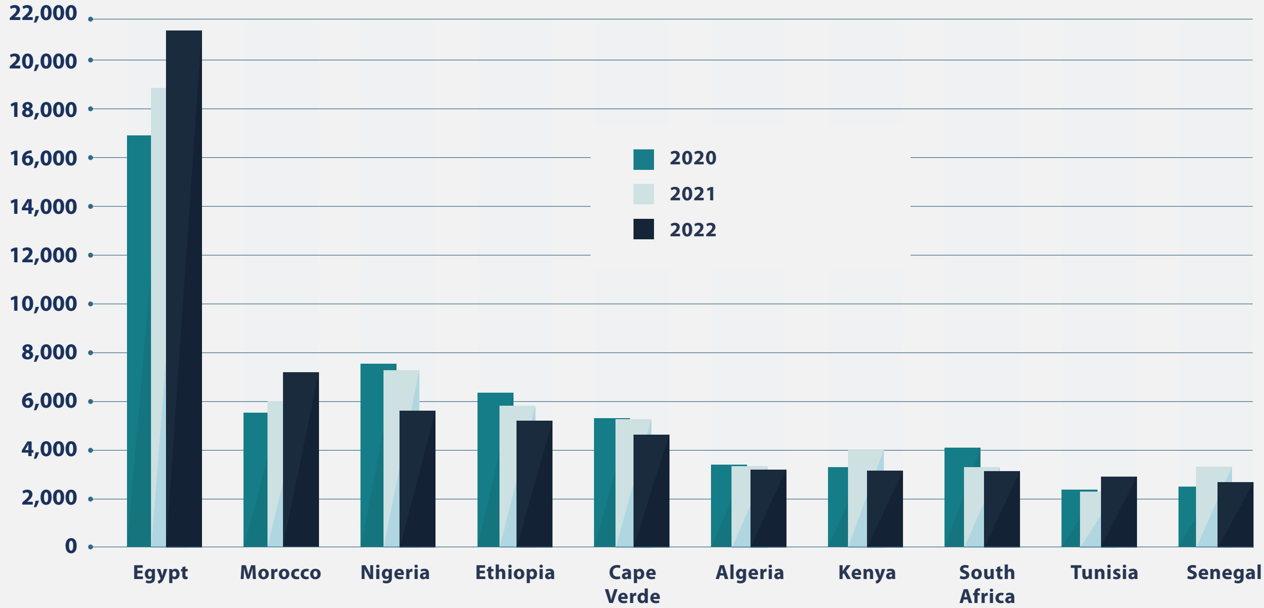
Chart 3: Hotel Chain Development Pipelines in Africa 2022
Top 10 Countries by Number of Planned Rooms and Average Size



Of the 10 largest hotels in the pipeline, four are in Egypt, two are in Cape Verde, and one each in Algeria, Senegal, Tanzania (Zanzibar) and Tunisia. The average size of the top 10 hotels is 678 rooms (down from 728 rooms in 2021), compared to an average of 180 rooms for the total pipeline. The largest hotel in the pipeline is one of Accor's 1,351 room Swissôtel-branded hotels in Egypt, with over 1,300 rooms – and Accor also boasts the smallest hotel with just 8 rooms in the Siringit Migration Camp.

Chart 4 tracks the development activity in the top 10 countries in the last three years. Egypt has seen consistent growth year on year. With the exception of Senegal, all the countries in sub-Saharan Africa have experienced declining pipelines, with Nigeria and Ethiopia experiencing the largest percentage falls.

Chart 4: Hotel Chain Development Pipelines in Africa 2022
Top 10 Countries by Number of Planned Rooms 2020-2022

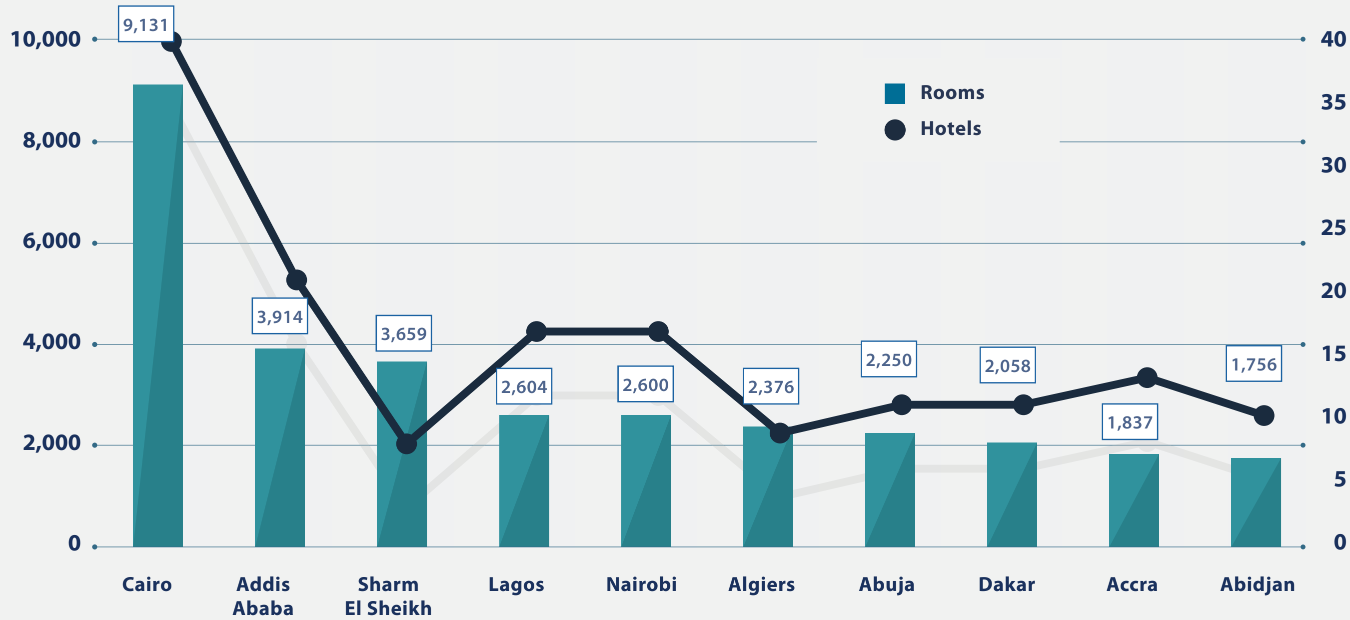


Appendix 2 provides country by country information on the hotel chains' development activity.

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

> **2020 and 2021 were both challenging years for the hospitality industry. However, this was an opportunity which prompted all of us to embrace a more flexible mindset, while re-thinking our business strategies and adjusting our goals. The opening of new hotels during these past two years required us to be more patient with the obvious delays caused by the important COVID-19 restrictions implemented by various authorities around the world.**
>
> *Henri Kennedie,*
> *President and CEO, Swiss International*

Chart 5: Hotel Chain Development Pipelines in Africa 2022
Top 10 Cities by Number of Planned Rooms



Cairo has by far the largest pipeline (11 per cent of the entire pipeline!), followed by Addis Ababa and Sharm El Sheikh, with Lagos, Nairobi, Algiers, Abuja and Dakar all at much the same level. Note the huge difference in the average size of hotels, ranging from 457 rooms in Sharm El Sheikh to 141 rooms in Accra. Note also that five cities of the top 10 are in West Africa – Lagos, Abuja, Dakar, Accra and Abidjan.

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

Chart 6: Hotel Chain Development Pipelines in Africa 2022
Top 10 Cities - Anticipated Additions to Supply (Rooms)

There are, potentially. some large increases in supply, in cities such as Cairo, Nairobi and Abidjan in the short term, but it is always "potentially", with completion of projects facing considerable headwinds these days, including delays in imported materials and the scarcity of funding.


Sofitel
Cotonou

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 2022
Top 10 Brands by Number of Planned Hotels and Rooms

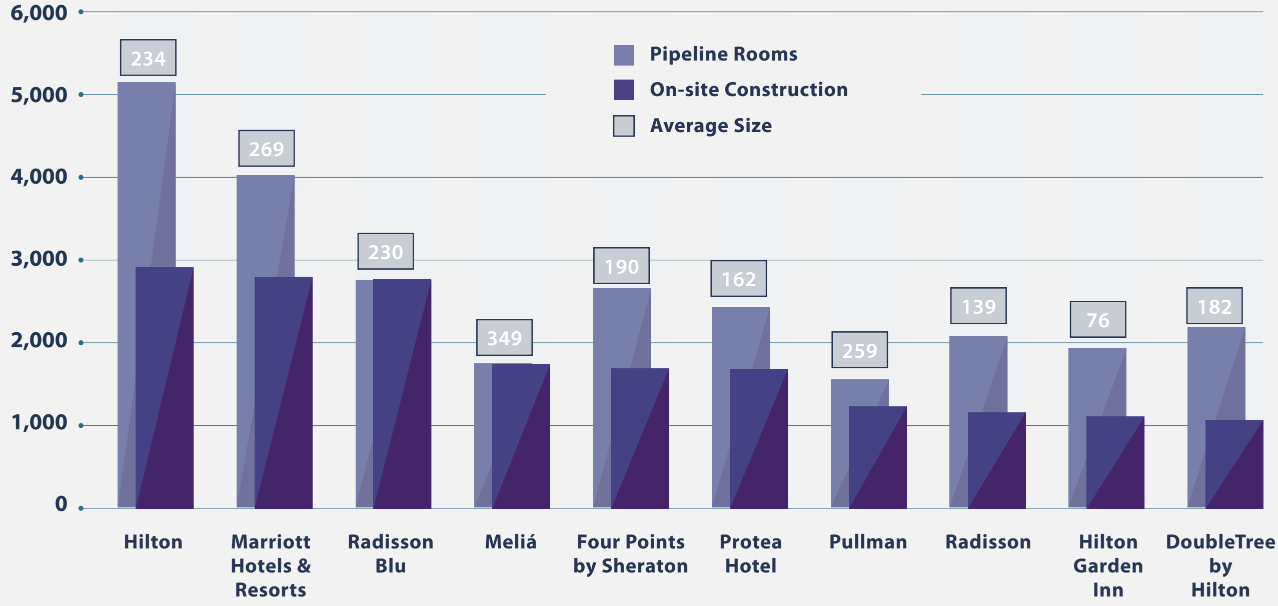
Rank by Hotels				Rank by Rooms				Change on 2021	Average Size Rooms
		Hotels	Rooms		Brand	Hotels	Rooms		
1	Hilton	22	5,158	1	Hilton	22	5,158	-5.0%	234
2	Fairmont (Accor)	18	3,924	2	Marriott Hotels & Resorts	15	4,031	11.3%	269
3	Mövenpick (Accor)	16	3,862	3	Fairmont (Accor)	18	3,924	8.2%	218
4=	Radisson	15	2,082	4	Mövenpick (Accor)	16	3,862	19.6%	241
4=	Protea Hotel (Marriott International)	15	2,429	5	Swissôtel (Accor)	10	3,312	68.9%	331
4=	Novotel (Accor)	15	2,380	6	Radisson Blu	12	2,757	-7.3%	230
4=	Marriott Hotels & Resorts	15	4,031	7	Four Points by Sheraton (Marriott International)	14	2,656	14.3%	190
8	Four Points by Sheraton (Marriott International)	14	2,656	8	Protea Hotel (Marriott International)	15	2,429	-5.9%	162
9=	Radisson Blu	12	2,757	9	Novotel (Accor)	15	2,380	0.2%	159
9=	DoubleTree by Hilton	12	2,189	10	DoubleTree by Hilton	12	2,189	12.4%	182

Hilton tops the list of brands this year by both measures (this is only hotels branded as Hilton, and doesn't include other brands in the Hilton chain – likewise with Marriott Hotels & Resorts, this is the ranking for Marriott International's eponymous brand). Hilton has been there at the top for several years, and the top 10 are entirely within four hotel chains, Accor, Hilton, Marriott International and Radisson Hotel Group. Although Swissôtel's number of hotels is lower than the other brands, the average size of its hotels is much larger (40 per cent above rival Hilton), hence its inclusion in the by-rooms ranking. Swissôtel also has the highest increase in pipeline rooms by brand, with some very large hotels signed in 2021 – in Egypt, of course! Two of Accor's other brands, Fairmont and Mövenpick, also saw high increases in their pipeline this year, as did Marriott International's eponymous brand, and its Four Points by Sheraton brand.

"Hilton has a proud history of pioneering travel and tourism in Africa for over 50 years. Today we have 100 hotels trading or in development under our portfolio of world class brands and see great long-term confidence in the region. In spite of the disruption caused by Covid-19, we continue to look to the future and add to our pipeline, which now contains over 10,000 rooms. Recent openings include Mango House Seychelles our first LXR Hotels & Resorts property in Africa which is positioned in the luxury segment of the market."

Andrew McLachlan
Managing Director Development
Sub-Saharan Africa, Hilton.

Chart 7: Hotel Chain Development Pipelines in Africa 2022
Top 10 Brands by Number of Planned Rooms, Average Size and Status



In the ranking by number of rooms under construction, Meliá, Pullman and Hilton Garden Inn join the list, with Hilton remaining at the top – number 1 both by number of pipeline rooms and the number of rooms actually on site. Marriott Hotels & Resorts and Radisson Blu have a similar number to Hilton under construction. Two brands, Radisson Blu and Meliá, have all their new hotels under construction.

The previous analysis is by individual **brands** (see also Appendix 3). Several of the hotel chains have more than one brand which they are seeking to expand or establish in Africa – Marriott International has signed deals for 21 different brands (out of the total of 30 in their portfolio), up from 18 last year, and Accor for 16 (total 55).

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

> **"As we closed yet another unprecedented year for our industry in 2021, it is important to thank the trust demonstrated by our partners and investors. Despite all these persistent challenges and disruptions, investor sentiment in our sector remains strong. We continue to grow our current network and pave our path for the future by adding high quality new properties to our pipeline."**
>
> *Max Cergneux,*
> *Chief Development Officer,*
> *Louvre Hotels Group*

Table 6: Hotel Chain Development Pipelines in Africa 2022
Top 10 Hotel Chains by Number of Planned Rooms

		Hotels	Rooms	Change on 2021	Average Size	Share of Total
1	**Accor**	107	20,857	8.4%	195	26.0%
2	**Marriott International**	103	20,248	8.1%	197	25.2%
3	**Hilton**	55	10,505	1.5%	191	13.1%
4	**Radisson Hotel Group**	35	6,248	-3.3%	179	7.8%
5	**IHG**	17	3,136	10.8%	184	3.9%
6	**Barceló Hotel Group**	8	2,488	0.0%	311	3.1%
7	**Hyatt Hotels & Resorts**	12	1,995	-9.4%	166	2.5%
8	**Meliá Hotels & Resorts**	5	1,743	-10.8%	349	2.2%
9	**Louvre Hotels Group**	11	1,273	-4.2%	116	1.6%
10	**Minor Hotels**	6	1,203	-	201	1.5%

Two international hotel chains, France-based Accor and the USA's Marriott International, top the table, with Accor slightly in the lead but with only around 600 rooms more than the Americans; even the average size of rooms is very much the same. Together, these two giants account for an amazing 51 per cent of the total pipeline rooms.

And note that the growth in the size of their development pipelines is also very similar; at the front of the pack these two really are neck and neck! Hilton's pipeline grew very little last year, and Radisson Hotel Group's went into reverse, but then they did cancel just over 1,500 rooms' worth of deals, the same number as were signed in 2021 (which in this analysis is actually under-reported, because they signed and opened four hotels with 1,000 rooms in Morocco last year).

Whilst the base for their growth is much smaller than the top three hotel chains, IHG is worthy of mention, with over 10 per cent growth. As noted, IHG signed a deal for four Indigo-branded hotels in Egypt, with 650 rooms in total, as well as a 300-room InterContinental hotel in Cairo's New Capital.

There is a clear gap between the first two (Accor and Marriott International) and the next two (Hilton and Radisson Hotel Group), and between the top five (including IHG) and "the others" - the top five account for over 75 per cent of all of the pipeline rooms. And these top 10 hotel chains have almost 90 per cent of the pipeline.

Ascott and CityBlue had good signing years in 2021, both achieving new deals in East and West Africa, whilst The Latitude Group is venturing out of Southern Africa into Central Africa, and The Urban Group continues its expansion in Southern Africa.

"In 2021, our openings and signings offered a glimpse of our accelerated growth ambition in the continent, with an equal focus on expanding our footprint in existing markets and entering new markets and locations."

Haitham Mattar,
Managing Director,
IHG Middle East and Africa & South West Asia

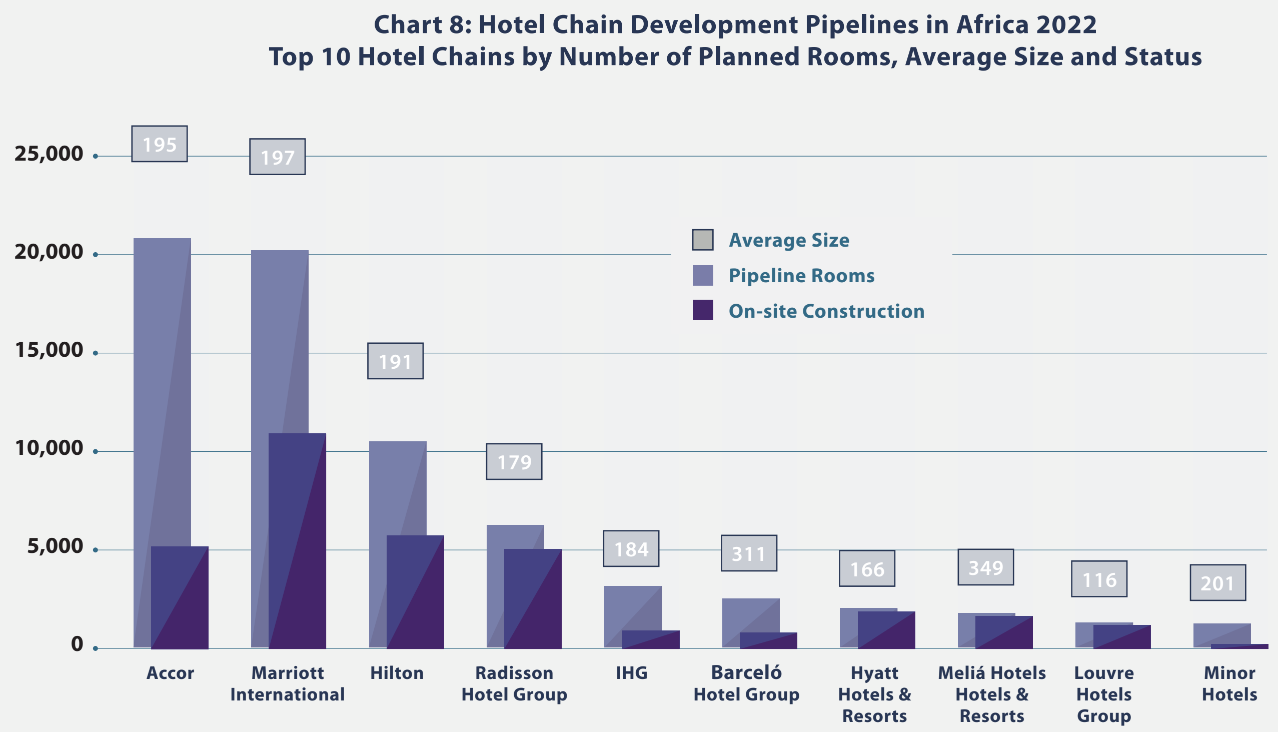
"2021 was an excellent year for our expansion in Sub-Saharan Africa with our signings in Cameroon, Nigeria, Côte d'Ivoire and Senegal. As the serviced apartments have proven resilient even during the pandemic extraordinary times, an increasing number of owners and investors on the continent are interested in leveraging on Ascott's world-leading brands and expertise in the extended-stay model."

Hafid Mirabti,
Director of Business Development,
Ascott International

"We've had a busy lockdown. Everyone has taken it on the chin operationally but we found the time to develop two new brands over the course of the pandemic. One is a luxury 5-star concept and the other is a budget travellers container concept that mixes room types and price points."

Christopher Jannou,
Managing Partner,
The Urban Hotel Group

Chart 8 shows the status of the hotel chains' pipelines.



Hyatt Hotels & Resorts, Meliá Hotels & Resorts and Louvre Hotels Group have their entire pipelines under construction – which is great in one sense, but in another it means that without further deals signed, their potential for further growth in operational hotels is limited. Marriott International have a much greater number of rooms under construction, with Accor behind because so many of their pipeline hotels are recent signings – about half were signed in and after 2019.

Continent Hotel
Akure

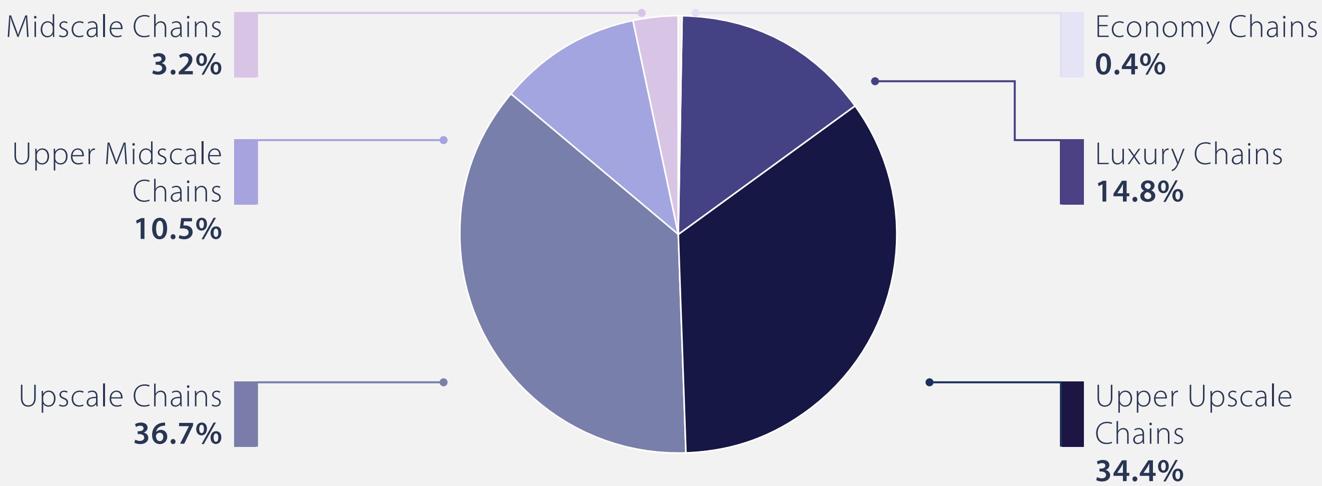
Further detail regarding each hotel chain is provided in Appendix 4.

Tables 7 and 8, and Chart 9, analyse the total pipeline by STR's chain scales (which we use because of our well-known distaste for infinitely-variable star ratings).

Table 7: Hotel Chain Development Pipelines in Africa 2022
Hotel Chain Scale Analysis

	Hotels	Rooms	Share	Brands per Scale	Average Size (rooms)
Economy	3	315	0.4%	2	105
Midscale	22	2,588	3.2%	10	118
Upper Midscale	63	8,443	10.5%	19	134
Upscale	158	29,435	36.7%	36	186
Upper Upscale	125	27,601	34.4%	28	221
Luxury	76	11,909	14.8%	21	157
TOTAL	**447**	**80,291**	**100.0%**	**116**	**180**

Chart 9: Hotel Chain Development Pipelines in Africa 2022
Hotel Chain Scale Analysis



It is still the case that the vast majority of the pipeline is in the Upscale and Upper Upscale chain scales, with Luxury in third place. It is a continuing worry (at least to us) that Economy and Midscale are stuck at less than 4 per cent of the total, the same as last year. We remain utterly convinced that there are considerable opportunities for the expansion of Economy and Midscale brands in Africa, positioned to cater for the (pre-pandemic) rising volume of intra-Africa travel, as well as to growing numbers of (during and probably post-pandemic) domestic travellers.

But there is little sign that the hotel chains and investors are moving in that direction. When we analyse the hotel chain scales in which deals were signed, comparing 2020 with 2021, there has been a shift away from Economy and Midscale (and even Luxury) to Upscale and Upper Upscale signings, as shown in Table 8.

"I believe that the defining trend for our industry in the coming months will be the continued rise of domestic tourism, as more people seek comfort travel within their own back yard, and a stronger surge in long-haul travel, driven by a pent-up appetite for new discoveries and adventures. Travellers seek deeper connections with nature in less dense destinations, underlining the opportunity for hospitality projects and services in off-the-beaten track locations."

Panos Loupasis,
VP Development, Middle East, Eurasia & Africa,
Wyndham Hotels & Resorts

Table 8: Hotel Chain Development Pipelines in Africa 2022
Hotel Chain Scale Analysis – Annual Comparison of Deals Signed

	2020		2021		
	Hotels	**Rooms**	**Rooms**	**Rooms**	**Change (Rooms)**
Economy	2	228	-	-	-100%
Midscale	14	1,325	5	698	-47%
Upper Midscale	12	1,511	12	1,299	-14%
Upscale	16	2,591	36	4,738	111%
Upper Upscale	10	1,883	26	6,552	248%
Luxury	17	2,473	8	1,095	-61%
TOTAL	**71**	**10,011**	**87**	**14,382**	**44%**

Whilst the brands are not averse to expanding their Economy and Midscale footprint in Africa, they generally require multiple-site deals with an owner, not at all keen on single-site deals because of the central costs of supporting the brand. Finding developers with the resources – not just finance, but also sites with clean title – has proved elusive.

The five 2021 Midscale deals were signed by Best Western, Ibis Styles (Accor - three hotels) and Ramada Encore (Wyndham Hotels & Resorts). In the Luxury segment, the signings in 2020 were skewed towards North Africa, with almost 75 per cent of the new rooms there, but in 2021 it was the reverse, with 60 per cent in sub-Saharan Africa, in such "new" locations as Cotonou, Djibouti and Yaoundé.

"One of the challenges, particularly in Africa, has been the lack of international finance. We know of one project where US$10 million is required to complete it, the developer was told local financing was the only option but at rates of 24%-26% it is not viable. Other issues are difficulties accessing forex, weak currencies in a number of African countries, as well as supply chain delays, all of which have hampered progress significantly in 2021."

Neville Graham,
Managing Director International Member Services,
BWH Hotel Group.

Table 9 shows the number of hotels that the hotel chains opened in 2021 (those we have been able to track, that is), ranked by number of rooms.

Table 9: Hotel Chain Development Pipelines in Africa 2022 Hotels Opened in 2021		
	Hotels	**Rooms**
Marriott International	6	1,392
Radisson Hotel Group	5	1,284
Deutsche Hospitality	2	803
Club Med	2	605
IHG	2	440
Accor	2	327
CityBlue Hotels	1	249
Hyatt Hotels & Resorts	1	249
Meliá Hotels & Resorts	1	211
Mangalis Hotel Group	1	206
BWH Hotel Group	2	180
Onomo Hotels	1	146
The Urban Hotel Group	2	135
Hilton	1	41
TOTAL	**29**	**6,268**

It's not a huge number, the chains expected around 100 rooms to open last year, but of course the result has to be seen in the context of the pandemic with its various negative impacts all round. Deutsche Hospitality and Club Med each opened two large resorts, the former under its Steigenberger Hotels & Resorts brand. In Table 16 we provide historical data on the realisation of the hotel chains' pipeline expectations – we can just hope that we can soon get back to 2019 levels, or better.

"2021 has been a positive and encouraging year for development, with the opening of Club Med Seychelles on the private island of Sainte Anne and the signing of management and marketing contracts for our future eco-resort in Ouidah, Benin. More than ever, the African continent remains a priority in our development strategy to reveal new destinations and reach new markets."

Tiphaine Renard,
Development Analyst,
Club Med

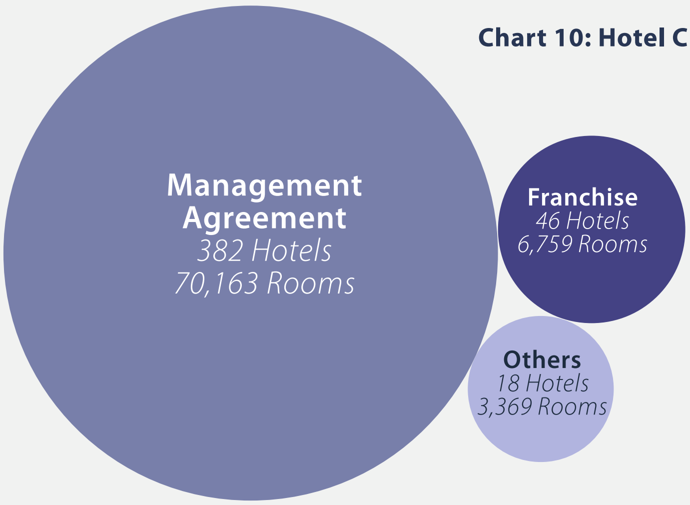
"While the pandemic has no doubt slowed the global pipeline for all hotel brands, we were encouraged that BWH Hotel Group managed to activate globally an impressive 86 hotels in 2021. In Africa it was a slow year with only 2 activations in 2021, but we have every expectation that 2022 and 2023 will be a lot stronger."

Neville Graham,
Managing Director International Member Services, BWH Hotel Group.

Our analysis of the types of agreement signed by the hotel chains (Chart 10) shows that the vast majority, 85 per cent, are still management contracts, but we are seeing a definite increase in the number of franchise deals signed; there have as well been instances of management agreements on existing hotels being converted to franchises. Franchises now account for 11 per cent of pipeline deals, up from 7 per cent last year, with 20 signed in 2021 compared to 11 in 2020. Marriott International signed eight franchise agreements in 2021, after only three in 2020; BWH Hotel Group (Best Western and other brands) signed three.

We had been seeing more interest in this type of deal from owners (actually, in some cases it is a demand from owners who are not prepared to cede control of the operation) and a growing willingness on the part of the hotel chains to offer them, especially with an increase in the presence of third party, "white label" management companies such as Aleph. In their endeavours to resume pipeline growth, we expect to see more franchise agreements signed in 2022.

Chart 10: Hotel Chain Development Pipelines in Africa 2022
Type of Agreement



The 'Other' category includes joint ventures between hotel chains and hotel owners, and owner-operators such as Azalaï and Onomo, as well as a very small number of leases, which virtually all hotel chains refuse even to look at in Africa.

Table 10 compares the hotel chains' pipelines with their existing presence in Africa.

Table 10: Hotel Chain Development Pipelines in Africa 2022
Top 10 Hotel Chains: Pipeline vs Existing Hotels in Africa

		Pipeline		Existing		Pipeline vs Existing (Rooms)	Potential Total (Rooms)
		Hotels	Rooms	Hotels	Rooms		
1	**Accor**	107	20,857	154	26,660	78%	47,517
2	**Marriott International**	103	20,248	132	24,762	82%	45,010
3	**Hilton**	55	10,505	44	11,721	90%	22,226
4	**Radisson Hotel Group**	35	6,248	52	10,845	58%	17,093
5	**IHG**	17	3,136	29	6,452	49%	9,588
6	**Barceló Hotel Group**	8	2,488	14	3,215	77%	5,703
7	**Hyatt Hotels & Resorts**	12	1,995	11	2,044	98%	4,039
8	**Meliá Hotels & Resorts**	5	1,743	10	2,810	62%	4,553
9	**Louvre Hotels Group**	11	1,273	42	5,297	24%	6,570
10	**Minor Hotels**	6	1,203	30	1,935	62%	3,138
TOTAL		**359**	**69,696**	**518**	**95,741**	**73%**	**165,437**

The ratio of pipeline rooms to existing, at 73 per cent, is the same as recorded last year. Accor, Marriott International, Hilton and Hyatt Hotels & Resorts are not far from doubling their existing footprint.

> **In 2021 we experienced an increase in demand by hotel investors across the region for Hilton branded hotels and management. We continued to execute our development plan and grow our three focus brands in the region with new signings under Hilton Hotels & Resorts, DoubleTree by Hilton and Hilton Garden Inn. We also signed our first Embassy Suites by Hilton which is positioned in the longer stay segment of the market as we responded to the demand for this type of hotel product in Africa.**
>
> *Andrew McLachlan,*
> *Managing Director Development*
> *Sub-Saharan Africa, Hilton*

Golden Tulip
Zanzibar
Airport

Section 3: Status of Hotel Development Activity

As well as looking at the overall quantum of the countries' and hotel chains' pipelines in Africa, in this section we present the status of their hotel development activity. Table 11 details the status of the deals in North Africa and sub-Saharan Africa, regarding whether construction has started. A far great proportion of the total, and a greater proportion, are under construction in sub-Saharan Africa, because of the large number of recent signings in North Africa.

Table 11: Hotel Chain Development Pipelines in Africa 2022
Sub-Saharan Africa vs. North Africa by Pipeline Status

	Hotels	Rooms		
	Total	Total	Onsite Construction	
North Africa	166	35,280	17,006	48%
Sub-Saharan Africa	281	45,011	26,168	58%
TOTAL	**447**	**80,291**	**43,174**	**54%**

Getting to the onsite construction phase is good for the hotel chains, and for many others involved – a new hotel means jobs created, tax revenues for the government, enhanced business in the supply chain, more marketing spend for the destination, and so on. So those deals which are "onsite construction" are in a more advanced stage than those which are "on paper", and are more likely to represent hotels that will open. Observers of the African hotel construction industry will of course know that starting construction does not necessarily mean that a hotel will ever open, the likelihood varying considerably from country to country. A case in point - the oldest (years since signing) deal in the pipeline is in Dakar (sorry, we're not naming names!) and dates back to a signing in 2008, it's classified as "onsite" but construction has been stalled for many years. There are several other similarly ageing but stalled deals.

Table 12 shows the pipeline status of the top 10 countries. In North Africa, Morocco, Tunisia and Algeria have some of the highest ratios of rooms under construction to total pipeline, in contrast to Egypt, with the lowest percentage onsite due to its relatively "young" pipeline. Nigeria has quite a low percentage onsite, and we note also that of the 15 hotels there that have started construction, no fewer than eight, with half of the rooms, have stalled and the sites are closed.

Table 12: Hotel Chain Development Pipelines in Africa 2022
Top 10 Countries by Pipeline Status

Rank	Countries	Hotels	Rooms		
			Total	Onsite Construction	
1	**Egypt**	85	21,281	6,142	28.9%
2	**Morocco**	50	7,209	5,577	77.4%
3	**Ethiopia**	29	5,206	3,871	74.4%
4	**Cape Verde**	17	4,639	3,016	65.0%
5	**Nigeria**	33	5,619	2,544	45.3%
6	**Kenya**	24	3,155	2,450	77.7%
7	**Algeria**	15	3,202	2,337	73.0%
8	**Tunisia**	14	2,918	2,280	78.1%
9	**South Africa**	21	3,133	1,948	62.2%
10	**Senegal**	13	2,693	1,919	71.3%

Table 13 looks at the brands according to pipeline status. Although its percentage under construction is lower than most others in the top 10, Hilton (the brand) still has the highest number of rooms on site construction, but Marriott Hotels & Resorts and Radisson Blu are not very far behind.

Table 13: Hotel Chain Development Pipelines in Africa 2022 Top 10 Brands by Pipeline Status					
			Rooms		
Rank		**Hotels**	**Total Pipeline**	**Onsite Construction**	
1	**Hilton**	22	5,158	2,904	56%
2	**Marriott Hotels & Resorts**	15	4,031	2,788	69%
3	**Radisson Blu**	12	2,757	2,757	100%
4	**Meliá Hotels & Resorts**	5	1,743	1,743	100%
5	**Four Points by Sheraton**	14	2,656	1,689	64%
6	**Protea Hotel**	15	2,429	1,678	69%
7	**Pullman**	6	1,551	1,230	79%
8	**Radisson**	15	2,082	1,160	56%
9	**Hilton Garden Inn**	11	1,932	1,108	57%
10	**DoubleTree by Hilton**	12	2,189	1,066	49%

Hilton (the hotel chain) has three brands in the top 10 (Hilton, Hilton Garden Inn and DoubleTree by Hilton), Marriott International two (Four Points by Sheraton and Protea) and Accor just the one (Pullman). Meliá Hotels & Resorts has five large resort hotels, all of which are under construction in Cape Verde.

Table 14 shows the status of the hotel chains' pipelines.

Table 14 Hotel Chain Development Pipelines in Africa 2022 Top 10 Hotel Chains by Pipeline Status					
			Rooms		
		Hotels	**Total**	**Onsite Construction**	
1	**Marriott International**	103	20,248	11,495	56.8%
2	**Hilton**	55	10,505	6,043	57.5%
3	**Accor**	107	20,857	5,473	26.2%
4	**Radisson Hotel Group**	35	6,248	5,326	85.2%
5	**Hyatt Hotels & Resorts**	12	1,995	1,995	100.0%
6	**Meliá Hotels & Resorts**	5	1,743	1,743	100.0%
7	**Louvre Hotels Group**	11	1,273	1,273	100.0%
8	**Wyndham Hotel Group**	8	1,193	1,073	89.9%
9	**IHG**	17	3,136	979	31.2%
10	**Barceló Hotel Group**	8	2,488	862	34.6%

Hyatt Hotels & Resorts, Meliá Hotels & Resorts and Louvre Hotels Group have their entire pipeline under construction, but Marriott International, the world's largest hotel chain, with the largest number of rooms and the largest African development pipeline, have more than double those three hotel chains put together. Accor just beats Radisson Hotel Group into third place, but can be anticipated to leap higher in the rankings once more of its Egypt pipeline starts to move to site.

The Top 10 combined have 82 per cent of all the chain hotel rooms under construction in Africa, and the top four – Marriott International, Hilton, Accor and Radisson Hotel Group – account for 66 per cent of the total, up from 58 per cent last year.

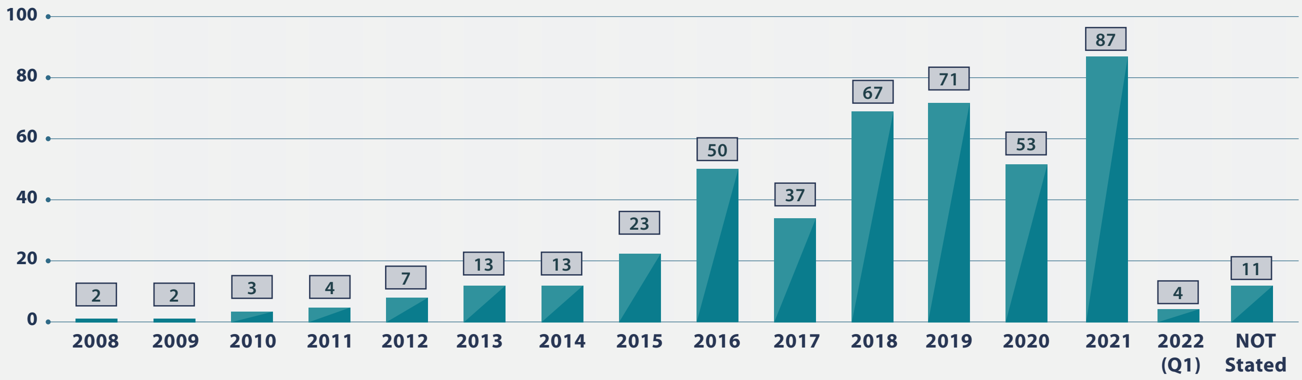
"Despite the challenges imposed by Covid-19 over the last 24 months, Radisson Hotel Group has been able to conclude 2021 as a record year in terms of growth across EMEA, but in particular across Africa. 2021 was marked for us with 14 additional signings, 5 hotel openings including a portfolio transaction in Morocco which has positioned our group as one of the leading operators in the country within a short time."

Ramsay Rankoussi, Vice President,
Development – Africa & Turkey,
Radisson Hotel Group

In Chart 11 we show when the hotel chains' pipeline deals were signed; 91 were signed in 2021 and early 2022 – actually a few more were signed in 2021 and opened the same year, such as Radisson Hotel Group's portfolio in Morocco, and are therefore not recorded here. The chart shows only the hotels that are still in the pipeline as of the beginning of 2022, many others having opened or been deleted from the pipeline.

The Chedi
El Gouna

Chart 11: Hotel Chain Development Pipelines in Africa 2022
Years the Deals were Signed - Number of Hotels



There are some very, very old deals in there, and one wonders what influences the hotel chains to keep them on their lists – hope? Owner pressure? Back in 2018/19, and again last year, the hotel chains undertook some quite severe clearance, deleting from their pipelines those deals that they believed wouldn't materialise. Perhaps more is required, but then sometimes it's a question of "leave it on there, you never know….".

We have further analysed the data to quantify the hotels that were scheduled to open each year since 2017 (according to the data provided by the hotel chains at the beginning of each year), and have compared those expectations with what actually happened.

Table 15: Hotel Chain Development Pipelines in Africa 2022
2017-2021 Scheduled vs. Actual Hotel Openings

	Scheduled	Actual	Actualisation
2017	95	51	54%
2018	115	46	39%
2019	91	68	75%
2020	91	25	28%
2021	105	29	28%
TOTAL	**497**	**219**	**44%**

As with so many things, we look back to the heady days of 2019 as being "normal", and it certainly seemed then that the pipelines were beginning much more real. No surprises that 2021 and 2022 were pretty awful – in the two years combined, that's just 54 hotels opened in the 54 countries in Africa (no, not one in each!). Almost four times that number are scheduled to open this year and next, many of which have been delayed from the past two years.

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

Table 16: Hotel Chain Development Pipelines in Africa 2022 Anticipated Opening Years of Pipeline Deals			
	Hotels	**Rooms**	**Cumulative New Rooms Open**
2022	99	13,767	13,767
2023	101	15,556	29,323
2024	82	16,080	45,403
2025	79	17,596	62,999
2026	24	4,554	67,553
2027	12	2,533	70,086
2028	7	1,400	71,486
2030	10	2,402	73,888
TBC	33	6,403	80,291
Total	**447**	**80,291**	

Of the total 80,291 rooms in the pipeline, almost 30,000 rooms (about 37 per cent) are expected by the hotel chains to open in 2022 and 2023. For 43 hotels (about 10 per cent), the hotel chains really don't know when they are likely to open – note that "2030" means much the same as "TBC".

> "Despite the delays experienced in new openings due to Covid-19, we are happy with our post-pandemic successes with new developments. We are sure of increasing our market share in Africa by at least 250% before the end of 2023."
>
> *Professor Wasiu Babalola FIH,*
> Senior Vice President,
> Continent Worldwide Hotels.

Chart 12: Hotel Chain Development Pipelines in Africa 2022
Anticipated Additions to Supply (Rooms)

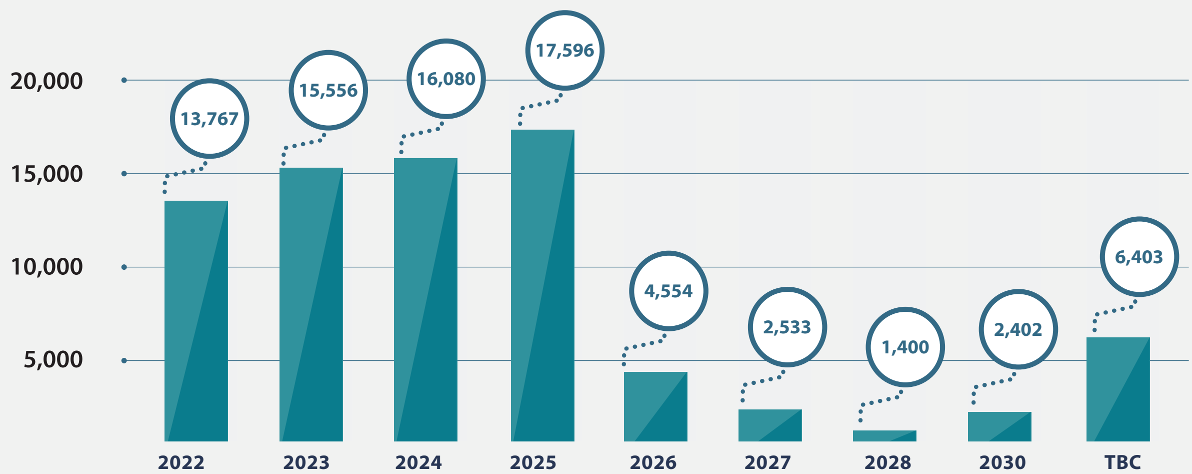


Table 17 shows the number of rooms that are scheduled to open and those actually onsite, by year. There are some 5,800 rooms due to open this year and next but with (so the hotel chains say) not a spade yet in the ground. It looks to us like wishful thinking and/or the occasional slip of the pen…..

Table 17: Hotel Chain Development Pipelines in Africa 2022
Anticipated Opening Years of Pipeline Rooms – Onsite Construction

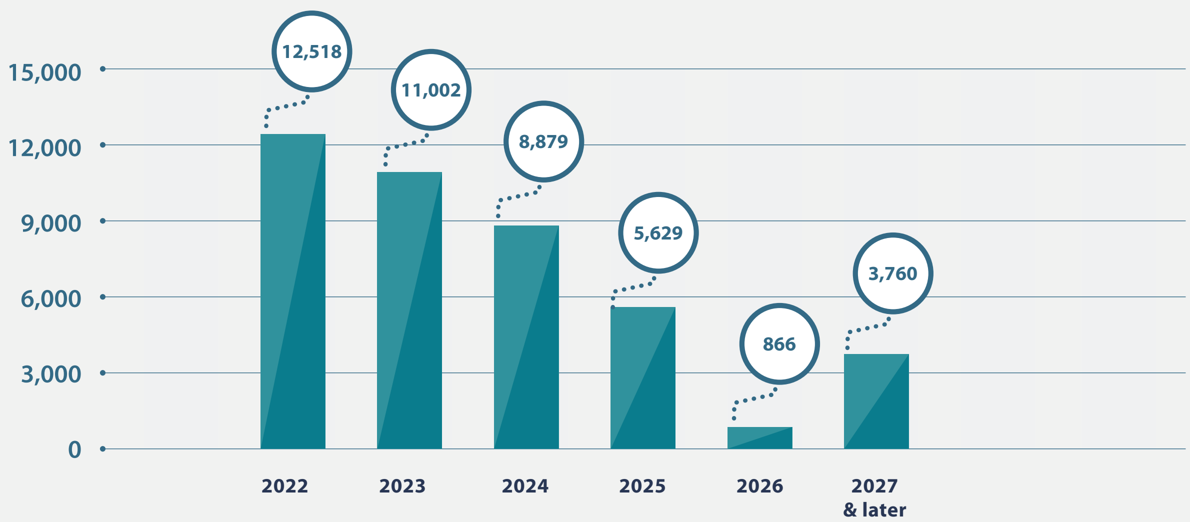
	Rooms	Onsite Construction	
2022	13,767	12,518	90.9%
2023	15,556	11,002	70.7%
2024	16,080	8,879	55.2%
2025	17,596	5,629	32.0%
2026	4,554	866	19.0%
2027 and later	12,738	3,760	33.6%
TOTAL	**80,291**	**42,654**	**53.8%**

We all know, and have experienced first-hand, that many things in Africa, including hotel development and construction, can be slow, but over 4,500 of the rooms scheduled to open in 2026 or later (about 30 per cent) are already under construction – that's, like, really slow!!

"We expect to maintain a similar momentum in terms of growth but we have also multiple openings lined up across the continent which will represent new market entries and which will further cement Radisson Hotel Group as the most diverse hotel company in Africa with a presence across over 30 countries."

Ramsay Rankoussi, Vice President, Development
Africa & Turkey, Radisson Hotel Group

Chart 13: Hotel Chain Development Pipelines in Africa 2022
Anticipated Opening Years of Pipeline Deals - Onsite Construction



The Top 10 hotel chains account for 80 per cent of the rooms scheduled to open in 2022 and 2023, and the top four for 62 per cent. Overall, the percentage of pipeline rooms for the top 10 to their existing coverage is just over a quarter. CityBlue is set to almost triple its rooms supply!

Table 18: Hotel Chain Development Pipelines in Africa 2022
Top 10 Hotel Chains Opening Hotels in 2022 and 2023

Rank		Hotels	Rooms	Average Size	New Rooms Increase on Existing
1	**Marriott International**	39	6,743	173	27.2%
2	**Accor**	30	4,666	156	17.5%
3	**Radisson Hotel Group**	24	3,481	145	32.1%
4	**Hilton**	19	3,235	170	27.6%
5	**Hyatt Hotels & Resorts**	8	1,249	156	61.1%
6	**Louvre Hotels Group**	10	1,150	115	21.7%
7	**Wyndham Hotel Group**	5	821	164	73.6%
8	**IHG**	5	729	146	11.2%
9	**CityBlue Hotels**	8	656	82	179.2%
10	**Azalaï Hotels Group**	3	611	204	62.2%
	TOTAL	**151**	**23,341**	**155**	**25.8%**

> **"The post-pandemic period is surely the most opportune time for CityBlue a flexible, African-born brand to take market share. It's our big chance to take control of the African narrative, East and West."**
>
> *Jameel Verjee*
> *Founder & CEO CityBlue Hotels.*

Best Western Plus The Athena Hotel, Kampala

The data provided in this 14th annual report are a mixed bag, with good signs and some not-so good ones. The total development pipeline is up on last year – not a lot, but up is up! There are four new countries with new branded hotel deals, and 2021 was a good year for several hotel chains in terms of signings, especially as they were able to get back out there and sign in person. There is no indication that any deals were lost from the pipeline because of owner cancellations; plenty of delays, but that's a global phenomenon, not just in Africa.

> **"We had a record signings year in Africa, most of it was driven by the industry's resilience and optimism to overcome the Covid-19 crisis. We stayed close to our owners and franchisees to restore confidence and we worked together to innovate and structure the way we collaborate."**
>
> *Karim Cheltout,*
> Regional Vice President, Lodging Development, Africa and All-Inclusive EMEA

On the negative side, the number of new hotel openings was disappointing, a bit better than 2020, but note the expectations for 2022 and 2023, with 200 rooms slated to open by the end of next year. If we could get back to the 2019 level of actualisation, that would be 150 hotels opening, putting Africa back up there on the good-news podium. Think of all those press releases and column inches in the glossy travel mags! More importantly, think of all those jobs created by our industry. Thankfully, Africa seems less impacted by the "great resignation" that is facing the industry elsewhere, with firms in the US and Europe struggling to hire staff.

The quotes from the industry – all of them from senior executives directly engaged on the expansion of their brands in Africa – are uniformly positive, looking forward to better and better things. Some mention the challenges, but those challenges are not unique to Africa, and the fact that hotels were able to open in the height of the pandemic shows that they are not insurmountable. Certainly, financing is really difficult, with even the multilateral development banks proving to be evermore risk averse, but as travel returns and profitability rises, the sector should prove more attractive.

And one must avoid falling into the bad habit of generalising about Africa! Look at the development activity in Egypt, which seems to be turbo-charged, and remember that there is always an investor (or at least a credible sponsor) alongside the hotel chain signing each deal, they're not pipe dreams, they're serious intentions to open and operate a new hotel. Look at Morocco, a country which for more than one period in the last couple of years was shut completely to overseas visitors, yet the hotel chains are signing (and opening) new hotels there, not quite as fast as Egypt, but there's more activity there than in any country in sub-Saharan Africa.

There's a story behind ever country, every hotel chain and brand, and behind every deal. We've mentioned some of those stories in this report, to bring the dry figures to life. Every year we analyse the data, and find a new way of slicing the figures, to try and understand not just the big picture but also the minutiae of who, what, where, when and, sometimes, why. Do contact us if you are looking for any specific analysis.

The Latitude 0°, Kampala

The pandemic is not over yet, the virus is here to stay, in one form or another, and the design and operational side of the hotel business has fully taken it into consideration – in fact the global hospitality industry has provided leadership in how to deal with the challenges raised by the virus. Governments are (mostly) lifting travel and other restrictions, and that's good for the industry. Cities such as Lagos are experiencing a boom in hospitality, with domestic travel and spend leading the way – never has there been so much leisure demand for "staycations", and so many new restaurants and bars opening. Go and have a look, it's a really happening city!

We wish all our contributors, our readers and the global hospitality industry a safe and prosperous 2022, and look forward to reporting further positive activity from the hotel chains next year, not just in their development activity but also in getting many of their beautiful projects open!

> **We are pleased with the achieved signings for 2021 outpacing the number of keys signed in 2020 and even 2019, which clearly demonstrates that the confidence in the hospitality industry remains robust despite the lasting pandemic. While our outlook for 2022 is ambitious, we are confident that with our unwavering commitment to Africa through various dedicated structures and with our devoted teams on the ground, we will achieve our targets.**

Kim Irmler
Development Director Sub-Saharan Africa,
Accor

Azalaï
Dakar

Mövenpick
Gammarth

Appendices

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2022
Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Brands	
Accor	Aparthotel Adagio Fairmont Grand Mercure ibis ibis Styles Mantis Mercure MGallery	Mövenpick Novotel Pullman Pullman Living Raffles Rixos Sofitel Swissôtel
Azalaï Hotels Group	Azalaï	
Banyan Tree Hotels & Resorts	Banyan Tree Banyan Tree Veya Dhawa	
Barceló Hotels & Resorts	Barceló Occidental Royal Hideaway	
BWH Hotel Group	Best Western Best Western Plus Best Western Premier Sadie	
Campbell Gray Hotels	Campbell Gray Hotels	
CityBlue Hotels	CityBlue Residences by CityBlue	Urban by CityBlue
Club Med	Club Med	
Continent Worldwide	Continent	
Corinthia Hotels International	Corinthia	
Deutsche Hospitality	Steigenberger Hotel & Resorts	
Dusit International	Dusit Princess	
Four Seasons Hotels & Resorts	Four Seasons	
GHM	The Chedi	
Hilton	Canopy by Hilton Conrad Hotels & Resorts Curio Collection by Hilton DoubleTree by Hilton Embassy Suites	Hampton by Hilton Hilton Hilton Garden Inn Waldorf Astoria
Hyatt International	Hyatt Centric Hyatt House Hyatt Place	Hyatt Regency Park Hyatt
IHG	Crowne Plaza Holiday Inn Hotel Indigo	InterContinental Staybridge Suites voco

APPENDIX 1 Hotel Chain Development Pipelines in Africa 2022 Contributors to the Survey – Hotel Chains & Brands	
Hotel Chains	**Brands**
Kempinski Hotels	Kempinski
Louvre Hotels Group	Golden Tulip Kyriad Royal Tulip Sarovar
Mangalis Hotel Group	Noom Seen Yaas
Marriott International	AC Hotels Aloft Hotels Autograph Collection Courtyard by Marriott Delta Hotels Element by Westin Four Points by Sheraton JW Marriott Le Méridien Marriott Executive Apartments Marriott Hotels and Resorts Moxy Protea Hotels Renaissance Residence Inn by Marriott Ritz-Carlton Sheraton St. Regis Tribute W Hotel Westin
Meliá Hotels International	Meliá Hotels & Resorts
Minor Hotel Group	Anantara AVANI Oaks
Nobu Hotels	Nobu Hotel
Onomo Hotels	Onomo
Pestana Hotels & Resorts	Pestana CR7 Lifestyle Hotels Pestana Hotels
Radisson Hotel Group	Park Inn by Radisson Radisson Radisson Blu Radisson Collection Radisson Individuals
Riu Hotels & Resorts	Riu Hotels & Resorts
Six Senses Hotels, Resorts & Spas	Six Senses
Swiss-Belhotel International	Swiss-Belhotel Swiss-Belresort
Swiss International Hotels & Resorts	Royal Swiss Swiss International Swiss Spirit
The Ascott	Ascott Citadines Citadines Connect Somerset
The Latitude Hotels Group	Latitude

APPENDIX 1 Hotel Chain Development Pipelines in Africa 2022 Contributors to the Survey – Hotel Chains & Brands		
Hotel Chains	**Brands**	
Six Senses Hotels, Resorts & Spas	Six Senses	
Swiss-Belhotel International	Swiss-Belhotel Swiss-Belresort	
Swiss International Hotels & Resorts	Royal Swiss Swiss International Swiss Spirit	
The Ascott	Ascott Citadines	Citadines Connect Somerset
The Latitude Hotels Group	Latitude	
Tsogo Sun	Southern Sun	
Urban Hotels	The Urban	
Wyndham Hotels and Resorts	Howard Johnson by Wyndham Ramada Encore Ramada Plaza	Tryp by Wyndham Wyndham Wyndham Garden
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 2022 Hotels and Rooms by Country				
	Total by Country		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Algeria	15	3,202	27.0%	73.0%
Angola	2	245	63.7%	36.3%
Benin	6	1,082	77.4%	22.6%
Botswana	1	160	0.0%	100.0%
Burkina Faso	1	232	0.0%	100.0%
Cameroon	8	1,422	50.7%	49.3%
Cape Verde	17	4,639	35.0%	65.0%
Chad	1	230	0.0%	100.0%
Congo	2	321	0.0%	100.0%
Côte d'Ivoire	12	1,896	68.1%	31.9%
Democratic Republic of Congo	10	1,341	56.2%	43.8%
Djibouti	5	600	100.0%	0.0%
Egypt	85	21,281	71.1%	28.9%
Ethiopia	29	5,206	25.6%	74.4%
Ghana	15	2,212	34.4%	65.6%
Guinea	4	669	29.9%	70.1%
Kenya	24	3,155	22.3%	77.7%
Liberia	2	299	64.2%	35.8%
Libya	2	670	0.0%	100.0%
Madagascar	4	456	46.1%	53.9%
Malawi	2	324	0.0%	100.0%
Mauritania	2	354	43.5%	56.5%
Mauritius	6	742	55.0%	45.0%
Morocco	50	7,209	22.6%	77.4%
Mozambique	4	400	85.0%	15.0%
Namibia	3	588	70.4%	29.6%
Niger	2	538	100.0%	0.0%
Nigeria	33	5,619	54.7%	45.3%

APPENDIX 2
Hotel Chain Development Pipelines in Africa 2022
Hotels and Rooms by Country

	Total by Country		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	**Rooms**		
Rwanda	6	597	69.5%	30.5%
Senegal	13	2,693	28.7%	71.3%
Seychelles	3	263	0.0%	100.0%
Sierra Leone	2	306	0.0%	100.0%
Somalia	1	123	0.0%	100.0%
South Africa	21	3,133	37.8%	62.2%
South Sudan	4	587	40.0%	60.0%
Tanzania	11	1,335	65.5%	34.5%
Togo	1	85	100.0%	0.0%
Tunisia	14	2,918	21.9%	78.1%
Uganda	9	1,376	2.9%	97.1%
Zambia	13	1,603	54.8%	45.2%
Zimbabwe	1	40	100.0%	0.0%

APPENDIX 3 Hotel Chain Development Pipelines in Africa 2022 Hotels and Rooms by Brand				
	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
AC Hotels by Marriott	3	578	100%	0%
Adagio	3	333	67%	33%
Aloft	3	600	75%	25%
Anantara	2	305	51%	49%
Ascott	2	195	100%	0%
Autograph Collection	3	229	0%	100%
Avani	2	388	100%	0%
Azalaï	5	979	38%	62%
Banyan Tree	2	55	27%	73%
Banyan Tree Veya	1	20	0%	100%
Barceló	5	2,039	80%	20%
Best Western	2	132	32%	68%
Best Western Plus	2	110	0%	100%
Best Western Premier	2	222	0%	100%
Campbell Gray Hotels	1	70	100%	0%
Canopy	3	428	0%	100%
Citadines	3	427	35%	65%
Citadines Connect	1	60	0%	100%
CityBlue Hotel and Suites	5	239	0%	100%
Club Med	3	509	65%	35%
Conrad	1	120	0%	100%
Continent	3	355	24%	76%
Corinthia	1	300	0%	100%
Courtyard by Marriott	3	1,005	51%	49%
Crowne Plaza	2	398	55%	45%
Curio	2	200	0%	100%
Delta Hotels	1	158	0%	100%
Dhawa	1	110	100%	0%
DoubleTree by Hilton	12	2,189	51%	49%
Dusit Princess	1	100	0%	100%
Element	1	344	100%	0%
Embassy Suites	1	129	100%	0%
Fairmont	18	3,924	88%	12%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2022
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Four Points by Sheraton	14	2,656	36%	64%
Four Seasons	3	700	18%	82%
Golden Tulip	5	691	0%	100%
Grand Mercure	1	105	0%	100%
Hampton by Hilton	2	290	46%	54%
Hilton	22	5,158	44%	56%
Hilton Garden Inn	11	1,932	43%	57%
Holiday Inn	4	670	53%	47%
Hotel Indigo	4	650	100%	0%
Howard Johnson	1	102	0%	100%
Hyatt Centric	4	754	0%	100%
Hyatt House	2	201	0%	100%
Hyatt Place	2	341	0%	100%
Hyatt Regency	3	518	0%	100%
Ibis	1	120	100%	0%
Ibis Styles	7	1,195	87%	13%
InterContinental	4	907	61%	39%
JW Marriott	5	1,362	45%	55%
Kempinski	4	353	49%	51%
Kyriad	2	172	0%	100%
Latitude	3	190	100%	0%
Le Meridien	4	653	29%	71%
Mantis	9	268	84%	16%
Marriott Executive Apartment	4	697	35%	65%
Marriott Hotels & Resorts	15	4,031	31%	69%
Meliá	5	1,743	0%	100%
Mercure	5	741	20%	80%
MGallery	4	476	11%	89%
Mövenpick	16	3,862	93%	7%
Moxy	3	368	43%	57%
Nobu	1	71	0%	100%
Noom	1	141	0%	100%
Novotel	15	2,380	66%	34%

APPENDIX 3 Hotel Chain Development Pipelines in Africa 2022 Hotels and Rooms by Brand				
	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Oaks	2	510	78%	22%
Occidental	2	369	0%	100%
Onomo	1	89	0%	100%
Park Hyatt	1	181	0%	100%
Park Inn by Radisson	2	237	0%	100%
Pestana CR7 Lifestyle Hotels	1	174	0%	100%
Pestana Hotels & Resorts	1	224	0%	100%
Protea Hotel	15	2,429	31%	69%
Pullman	6	1,551	21%	79%
Pullman Living	1	131	100%	0%
Radisson	15	2,082	44%	56%
Radisson Blu	12	2,757	0%	100%
Radisson Collection	4	954	0%	100%
Radisson Individuals	2	218	0%	100%
Raffles	4	578	41%	59%
Ramada Encore	2	224	0%	100%
Ramada Plaza	1	177	0%	100%
Renaissance	1	216	100%	0%
Residence Inn	6	850	82%	18%
Residences by CityBlue	1	252	0%	100%
Ritz-Carlton	6	855	40%	60%
Riu Hotels & Resorts	1	522	0%	100%
Rixos	2	748	0%	100%
Royal Hideaway	1	80	0%	100%
Royal Swiss	1	40	100%	0%
Royal Tulip	1	167	0%	100%
Sadie	1	89	0%	100%
Sarovar	3	243	0%	100%
Seen	2	146	27%	73%
Sheraton Hotel	7	1,518	62%	38%

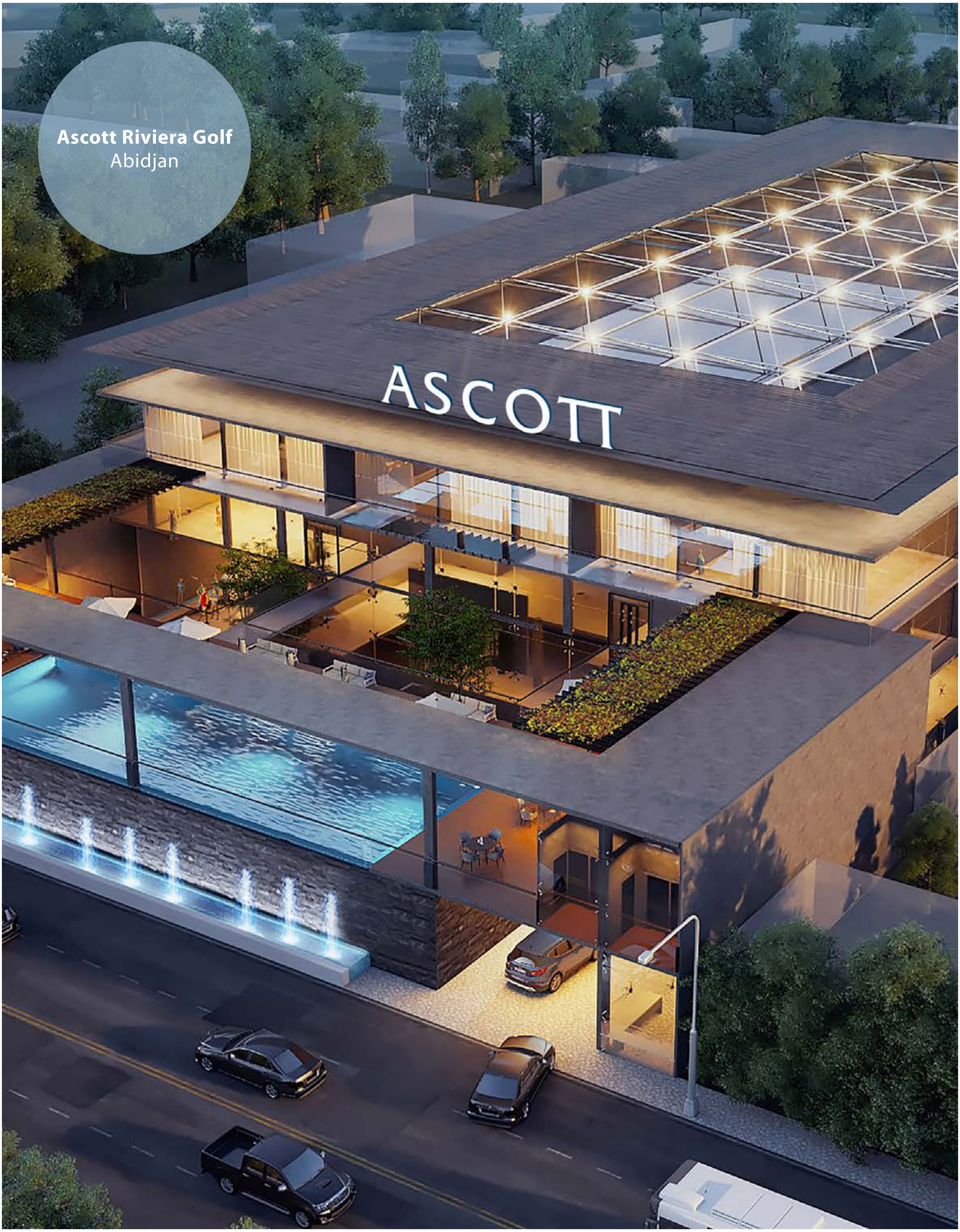
APPENDIX 3 Hotel Chain Development Pipelines in Africa 2022 Hotels and Rooms by Brand				
	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Six Senses Hotels Resorts Spas	3	94	0%	100%
Sofitel	5	1,133	84%	16%
Somerset	3	420	74%	26%
Southern Sun	1	115	0%	100%
St Regis	3	308	39%	61%
Staybridge Suites	1	150	100%	0%
Steigenberger Hotels & Resorts	2	546	27%	73%
Swiss International	3	244	0%	100%
Swiss Spirit	1	75	100%	0%
Swiss-Belhotel	1	150	0%	100%
Swiss-Belresort	1	140	0%	100%
Swissôtel	10	3,312	100%	0%
The Chedi	1	86	0%	100%
The Urban	4	280	52%	48%
Tribute Portfolio	2	199	0%	100%
Tryp by Wyndham	1	120	100%	0%
Urban by CityBlue	2	165	0%	100%
voco	2	361	64%	36%
W Hotel	2	530	0%	100%
Waldorf Astoria	1	59	0%	100%
Westin	2	662	59%	41%
Wyndham	2	458	0%	100%
Wyndham Garden	1	112	0%	100%
Yaas	2	213	66%	34%

APPENDIX 4
Hotel Chain Development Pipelines in Africa 2022
Hotels and Rooms by Hotel Chain

	Total by Hotel Chain						Pre-Construction (Planning)	Rooms on Site (Construction)		
	2021			2022					Change on 2021	
	Countries	Hotels	2018 Rooms	Countries	Hotels	Rooms			Change	% Change
Accor	19	89	19,241	23	107	20,857	74%	26%	1,616	8%
Azalaï Hotels Group	4	4	747	5	5	979	38%	62%	232	31%
Banyan Tree Hotels & Resorts	2	2	99	3	4	185	68%	32%	86	87%
Barceló Hotels Group	3	8	2,488	3	8	2,488	65%	35%	0	0%
BWH Hotel Group	6	6	603	6	7	553	8%	92%	-50	-8%
Campbell Gray Hotels	1	1	70	1	1	70	100%	0%	70	0%
CityBlue Hotels	5	6	634	7	8	656	0%	100%	22	3%
Club Med	2	3	986	3	3	509	65%	35%	-477	-48%
Continent Worldwide	2	3	355	2	3	355	24%	76%	0	0%
Corinthia Hotels	1	1	300	1	1	300	0%	100%	0	0%
Deutsche Hospitality	2	4	1,503	1	2	546	27%	73%	-957	-64%
Dusit International	1	1	100	1	1	100	0%	100%	0	0%
Four Seasons Hotels & Resorts	3	3	682	3	3	700	18%	82%	18	3%
GHM	1	1	86	1	1	86	0%	100%	0	0%
Hilton	23	55	10,348	22	55	10,505	42%	58%	157	2%
Hyatt Hotels & Resorts	8	12	2,203	9	12	1,995	0%	100%	-208	-9%
IHG	6	13	2,756	6	17	3,136	69%	31%	380	14%
Kempinski Hotels	2	4	353	2	4	353	49%	51%	0	0%
Louvre Hotels Group	7	8	990	10	11	1,273	0%	100%	283	29%
Mangalis Hotel Group	6	12	1,350	4	5	500	36%	64%	-850	-63%

APPENDIX 4
Hotel Chain Development Pipelines in Africa 2022
Hotels and Rooms by Hotel Chain

	Total by Hotel Chain						Pre-Construction (Planning)	Rooms on Site (Construction)		
	2021			2022					Change on 2021	
	Countries	Hotels	2018 Rooms	Countries	Hotels	Rooms			Change	% Change
Marriott International	26	94	18,723	29	103	20,248	43%	57%	1,525	8%
Meliá Hotels & Resorts	2	6	1,954	1	5	1,743	0%	100%	-211	-11%
Minor Hotel Group	5	5	803	6	6	1,203	78%	22%	400	50%
Nobu Hotels	-	1	71	1	1	71	0%	100%	0	0%
Onomo Hotels	2	2	235	1	1	89	0%	100%	-146	-62%
Pestana Hotels & Resorts	1	2	398	1	2	398	0%	100%	0	0%
Radisson Hotel Group	14	34	6,461	15	35	6,248	15%	85%	-213	-3%
Riu Hotels & Resorts	1	1	500	1	1	522	0%	100%	22	4%
Six Senses Hotels Resorts & Spas	1	3	74	1	3	94	0%	100%	20	27%
Swiss International	4	15	1,381	2	5	359	32%	68%	-1,022	-74%
Swiss-Belhotel International	2	2	290	2	2	290	0%	100%	0	0%
The Ascott	4	5	642	7	9	1,102	60%	40%	460	72%
The Latitude Hotels	2	2	165	3	3	190	100%	0%	25	15%
The Urban Hotel Group	3	8	631	2	4	280	52%	48%	-351	-56%
Tsogo Sun Hotels	1	1	115	1	1	115	0%	100%	0	0%
Wyndham Hotels and Resorts	4	7	1,053	5	8	1,193	10%	90%	140	13%
TOTAL	**38**	**423**	**79,402**	**42**	**447**	**80,291**	**46%**	**54%**	**-1,708**	**-2%**


Ascott Riviera Golf
Abidjan
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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 specialises in:

- market and financial feasibility studies
- acquisition appraisals
- operator selection
- franchise and management contract negotiations
- asset management

Our team has experience of more than 90 countries, including 40 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 many 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.

Our expertise in hotel development and operations is considered by our clients to be of great benefit to them. In recognition of our expertise, we were on two occasions awarded the accolade of Tourism Investment Advisor of the Year by Africa Investor magazine, for our work on projects in Africa, where we have been able to "make it happen".

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 hotel chains, developers, fund managers and property owners. The partners are based in Lagos, London, Addis Ababa and Florida.

Radisson Red Rosebank,
Johannesburg

Mantis
Masai Mara

Back Cover: Riviera Residences by CityBlue,
Accra

W HOSPITALITY GROUP

W HOSPITALITY GROUP

Tel: +234 (0) 803 321 0646

info@w-hospitalitygroup.com

www.w-hospitalitygroup.com

US$500

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