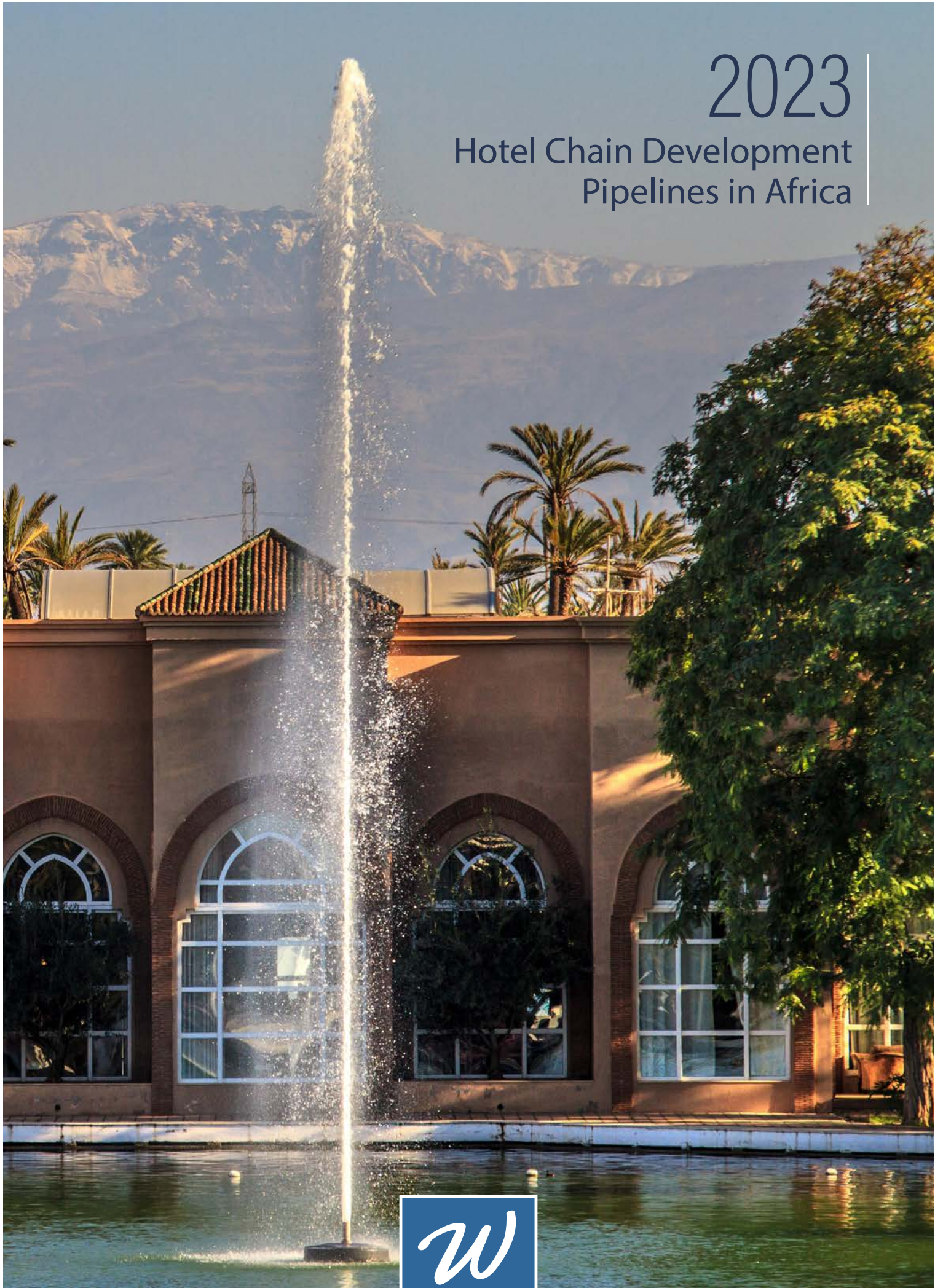


2023

Hotel Chain Development
Pipelines in Africa





**MGallery
Nairobi**

**Front Page:
Barcelo Palmeraie
Marrakech**

This is the 15th edition of our annual Hotel Chain Development Pipelines in Africa survey and analysis. This year we recorded data from 45 international and regional hotel chains (some with nil returns), reporting their pipeline activity for 119 of their brands for which they have signed deals in Africa.

As of early 2023 the chains' development pipelines total 482 hotels with 84,427 rooms, up 5 per cent on 2022. We tracked 31 hotels with about 5,000 rooms that opened last year (around 6 per cent of that year's pipeline), plus some of the chains had another "clear-out" of deals that have been in their development pipeline for years, and that they could see were just never going to happen. This is prudent – whilst they need to show growth, it has to be real growth, or shareholders and analysts will question the credibility of the numbers.

For each of the 482 pipeline deals, we collect up to 18 data points – that's a total of almost 9,000 "bits"! We slice and dice the data in many ways, quantifying it at regional, country and location (city, resort or airport), by chain scale, construction status and in so many ways, as detailed in this report. Our analyses provide useful information for investors, governments, hospitality and real estate professionals, students and others seeking an understanding of the present and future of the hotel industry in Africa.

It's easy to be negative about some of the countries of Africa, especially when one considers the macro-level data. But at the micro-level, at which a new hotel or resort development sits, there continue to be many opportunities for the hotel chains and their owners to exploit. That's why we at W Hospitality Group continue to be optimistic about the future growth of the hotel industry in Africa – and we are not alone! Although there are exceptions, many cities and resorts are far behind their counterparts in Europe, the Americas, Asia et al in terms of both development and branded hotel penetration.

The growth of the hotel chains' presence and pipeline in Africa has been a really positive story, and we are proud to be closely involved with it. We are based in Africa (celebrating 20 years since the establishment of our office in Lagos in 2003) and, in addition to the research work carried out for this report each year, we have provided professional advice to the owners and operators of several of the deals that are included in the data.

We are extremely grateful to the hotel chains who contributed to our report this year, both those stalwarts who provide their data every year (thank you!), and those new to the survey in 2023. A full list of the hotel chains and their brands who provided their data is provided in Appendix 1. We're really pleased to welcome seven new chains this year, namely Aleph Hospitality, Eurostars Hotel Group, Kerten Hospitality, Leva Hotels, Pan Pacific Hotels & Resorts, TIME Hotels & Resorts and TUI BLUE Hotels & Resorts. We're aware of several other brands seeking to plant their first flag in Africa, and we look forward to welcoming them soon.

Should you have any comments and questions on the report, or would like to discuss how to obtain additional analyses to those included here, then please do get in touch.



119
Brands



45
Chains

Trevor J Ward
Managing Director
W Hospitality Group
Lagos, Nigeria

March 2023

**Meliá
Wildlife Lodge
Ngorongoro**



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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 2023 from 45 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.

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 or resort 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.

45
Chains

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.

54
Countries

“In construction” is, however, a phrase that (at least in Africa!) we always feel the need to explain - 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 recorded in the hotel chains’ development pipelines, then they are included in the analysis.

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’ve collected data from seven new hotel chains this year – Aleph, Eurostars, Kerten, Leva, Pan Pacific, TIME and TUI, Aleph being our first white-label operator, who between them have 37 hotels in their development pipelines. Where appropriate, therefore, we have include reference in the text to “same store” totals, for better comparison of growth.

**Eurostars
Casablanca**





**Conrad Rabat
Arzana**

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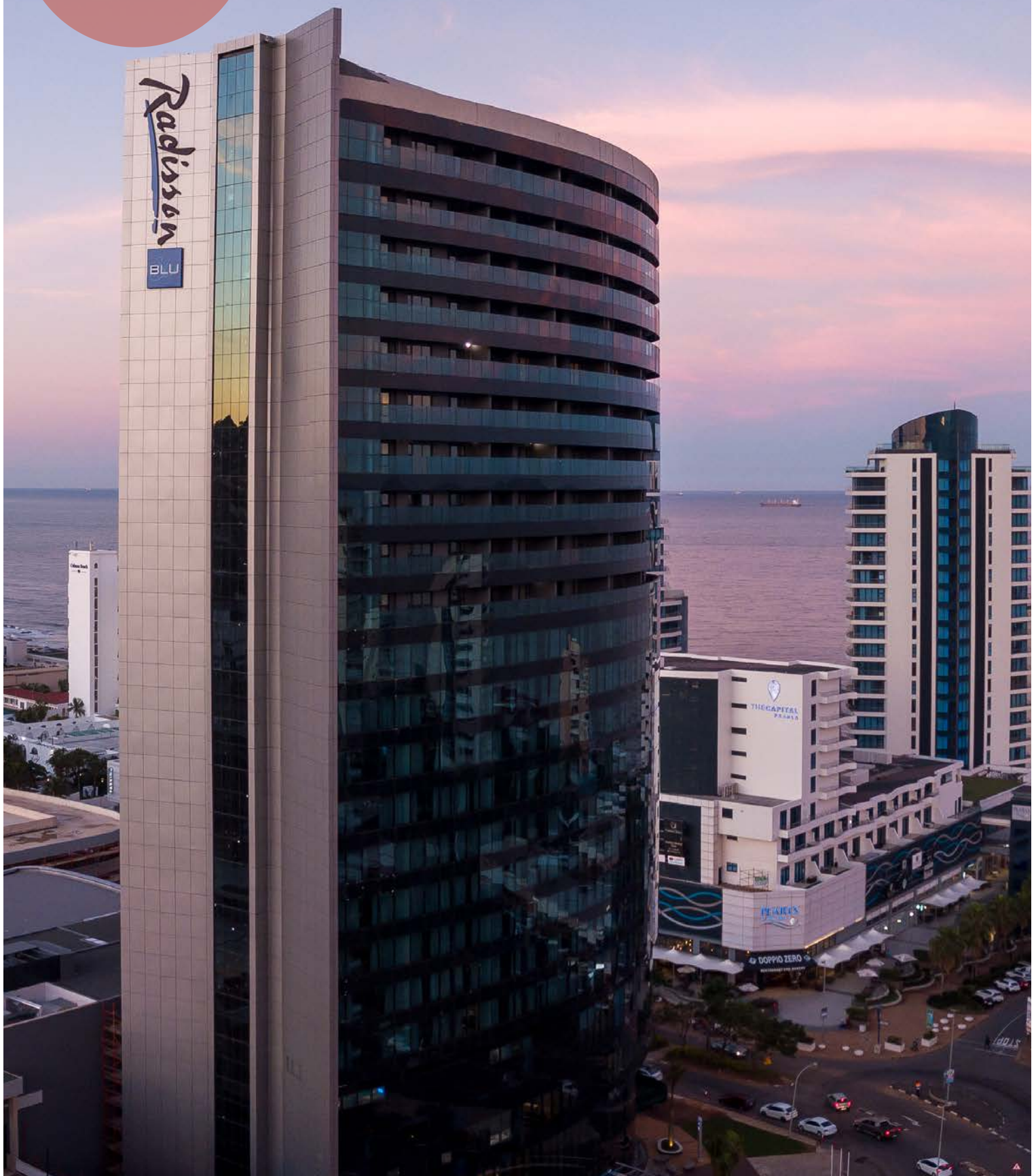
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Radisson Blu Hotel
Durban



Section 1: Regional Summary

The African hotel chain development pipelines now totals 482 hotels with 84,427 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 up 6 per cent on 2022 (measured by rooms), whilst in North Africa the total is up by 4 per cent.

482
hotels

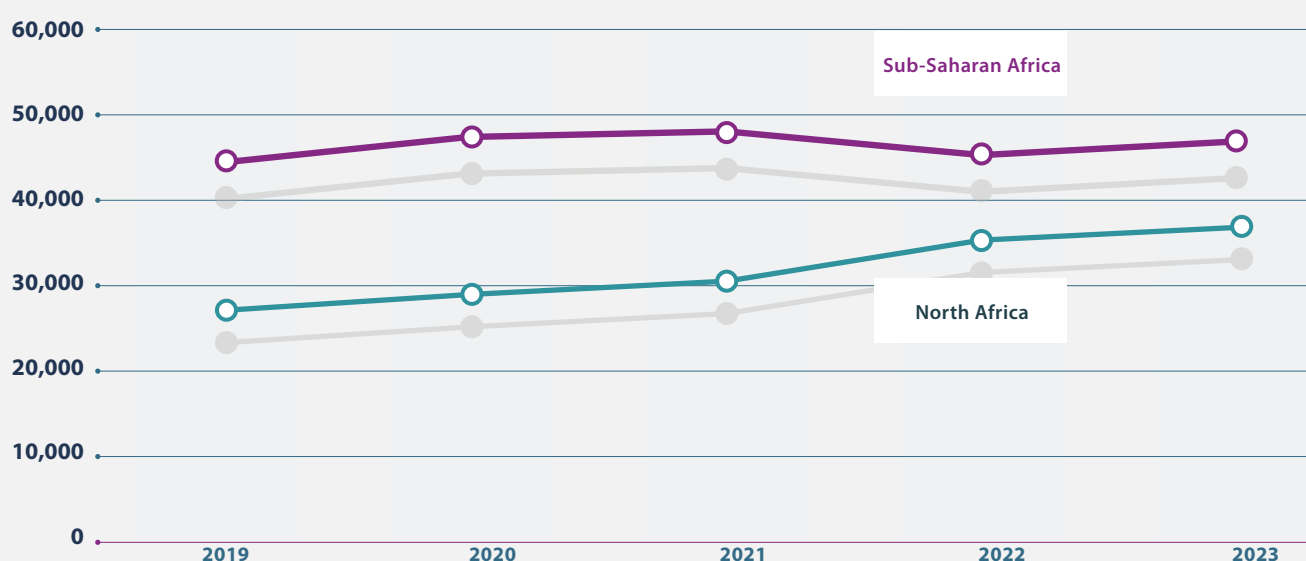
84,427
rooms

**Table 1: Hotel Chain Development Pipelines in Africa 2023
Regional Summary**

	2019		2020		2021		2022		2023	
	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms	Hotels	Rooms
North Africa	122	28,702	119	29,050	134	31,547	166	35,280	175	36,677
Sub-Saharan Africa	270	44,395	283	47,684	289	47,855	281	45,011	307	47,750
TOTAL	392	73,097	402	76,734	423	79,402	447	80,291	482	84,427

As noted previously, we welcomed seven new contributors, with between them 37 hotels and just under 5,500 rooms, of which about half are in North Africa. On a “same store” basis, i.e. counting only those chains that contributed in 2022, the 2023 total is marginally down on 2022, at 445 hotels and 79,000 rooms, but this is comprised of almost the same number of rooms in sub-Saharan Africa as last year, and a 4 per cent decrease in North Africa. Digging into the data shows that, despite the fact that there were 35 new projects signed in North Africa in 2022 (same store), the decrease in the region was because there were 16 new openings (see Table 7) and some “cleaning-house” activity by one of the major international hotel chains.

**Chart 1: Hotel Chain Development Pipelines in Africa 2023
Regional Summary**



The two regions are, of course, very different, with just five countries in North Africa and 37 in sub-Saharan Africa (that's the number of countries with a pipeline, see Tables 2 and 3). So the simple arithmetic is 35 potential new hotels per country in North Africa, and just eight per country in sub-Saharan Africa. Both regions have their “giants” – Egypt and Morocco in North Africa, Nigeria, Ethiopia, Cape Verde, South Africa and Kenya in sub-Saharan Africa. The actual numbers per country are provided in Appendix 2.

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, Gabon and Chad joining the group this year.

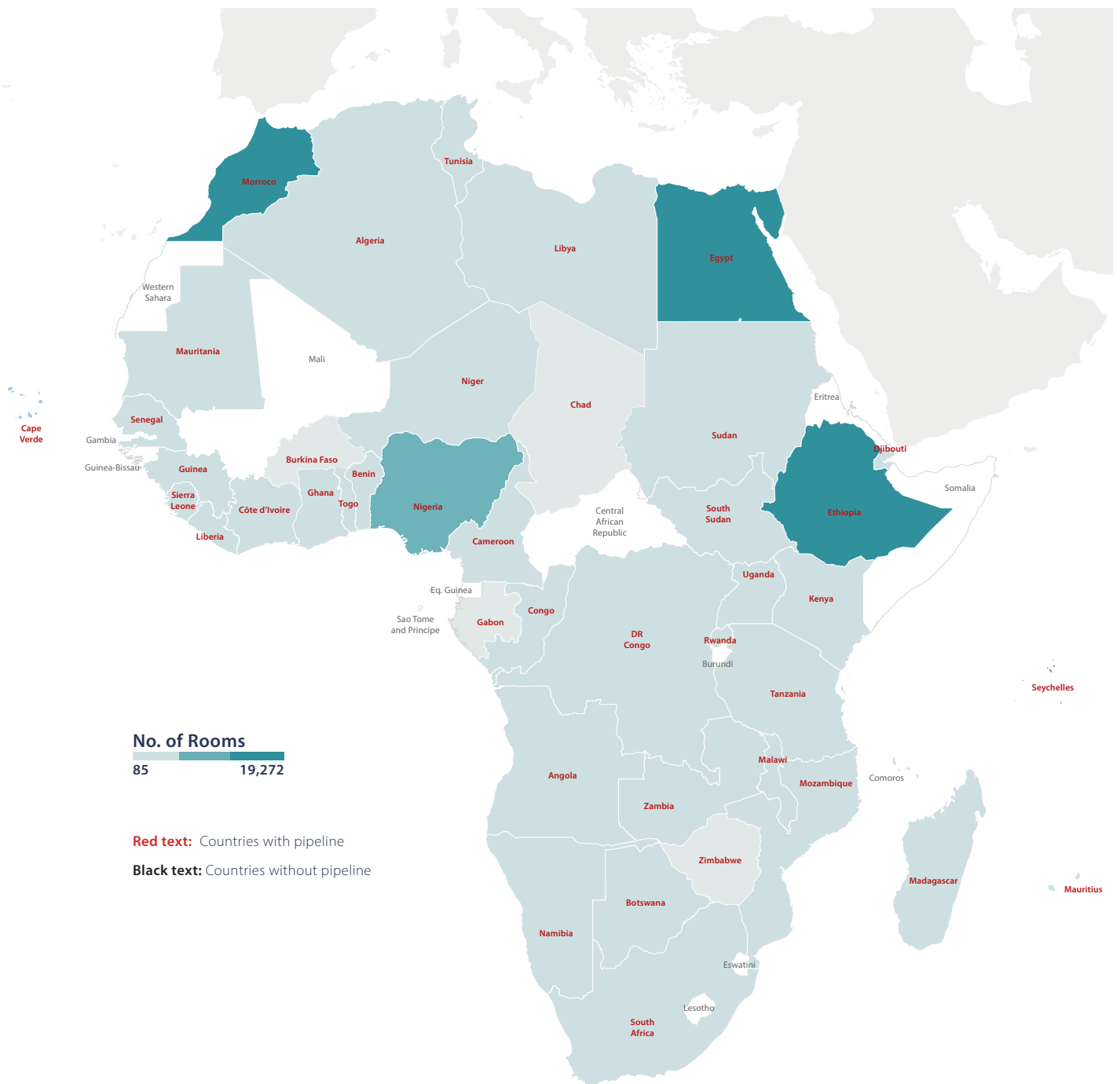
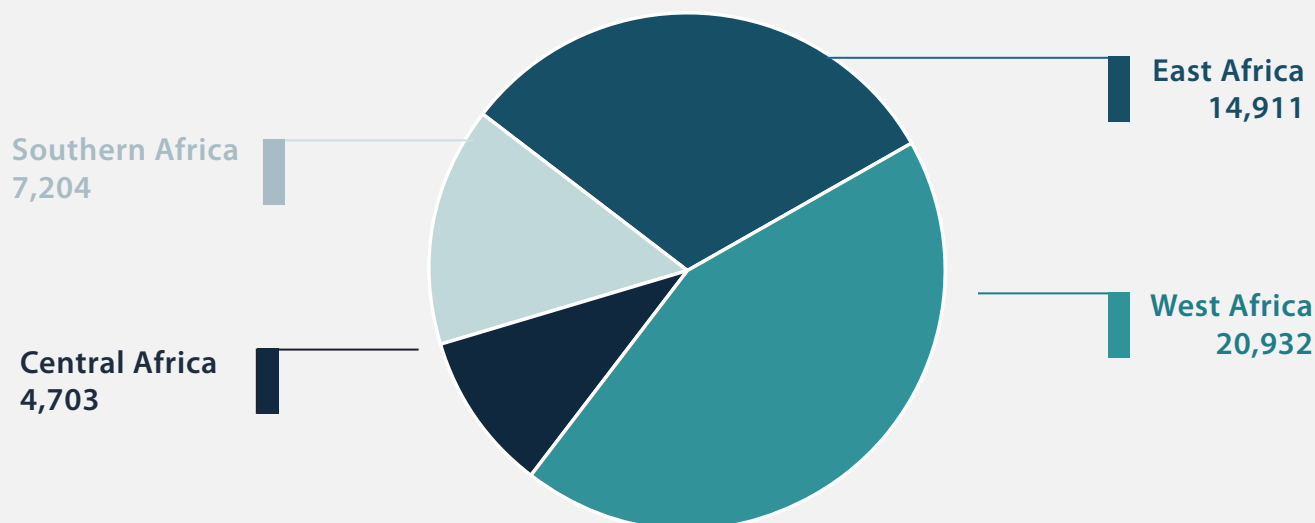


Table 2: Hotel Chain Development Pipelines in Africa 2023
Countries with Hotel Chain Pipeline Deals

North	Southern and Indian Ocean	West	East	Central
Algeria Egypt Libya Morocco Tunisia	Angola Botswana Madagascar Malawi Mauritius Mozambique Namibia Seychelles South Africa Zambia Zimbabwe	Benin Republic Burkina Faso Cape Verde Côte d'Ivoire Ghana Guinea Liberia Mauritania Niger Nigeria Senegal Sierra Leone Togo	Djibouti Ethiopia Kenya Rwanda South Sudan Sudan Tanzania Uganda	Cameroon Chad Congo DR Congo Gabon

Chart 2 provides the distribution of pipeline rooms in sub-Saharan Africa in a pie chart. 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 2023
Sub-Saharan Africa Sub-Regional Breakdown (Rooms)



West Africa is losing its share of the total (down from 49 per cent of the 2022 regional total), despite having the largest number of countries. Central Africa is increasing its share, particularly in Cameroon and the Democratic Republic of Congo (DRC).

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

Table 3: Hotel Chain Development Pipelines in Africa 2023
Countries with no Branded Pipeline

Southern and Indian Ocean	West	East	Central
Comoros Islands Eswatini Lesotho	Guinea Bissau Mali The Gambia	Burundi Eritrea Somalia	Central African Republic Equatorial Guinea São Tomé and Príncipe

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 2023
Top 10 Countries by Number of Rooms

		Hotels	Rooms	Average Size
1	Egypt	103	24,944	242
2	Nigeria	42	6,772	161
3	Morocco	46	6,369	138
4	Ethiopia	33	6,129	186
5	Kenya	25	3,729	149
6	Cape Verde	14	3,660	261
7	Algeria	15	2,862	191
8	South Africa	21	2,768	132
9	Senegal	15	2,650	177
10	Côte d'Ivoire	16	2,445	153
	Total	330	62,328	189

Egypt leads the country table, with almost 25,000 rooms in 103 hotels, and is streaking ahead of the pack, with more than three times the number of rooms in second-placed Nigeria, and nearly three times third-place Morocco. With continued signing activity (26 hotels with about 8,000 rooms in 2022) Egypt now accounts for fully 30 per cent of the total pipeline. That's almost one third of the total, in one country out of 54!

This signing spree in Egypt was led (as last year) by Accor (eight deals with 3,796 rooms), Marriott International (six deals, 1,250 rooms), IHG (four deals, 977 rooms), and Hilton (four deals, 815 rooms). Four Seasons, Radisson Hotel Group, TUI BLUE and TIME signed one each. In addition, there were one or two deals that were both signed and opened in 2022, which don't feature in the pipeline.

Nigeria moves into second place this year, with 11 new deals signed in 2022, by BWH Hotel Group (two Best Western Plus-branded hotels), Marriott International (four hotels under their Marriott Hotels & Resorts, Protea and Residence Inn brands), Wyndham (a Wyndham and a Ramada), Continent (two deals) and one by newcomer Leva.

It's interesting that whilst the top two countries, Egypt and Nigeria, are both facing serious economic challenges, all the same they are seeing considerable deal signing activity.

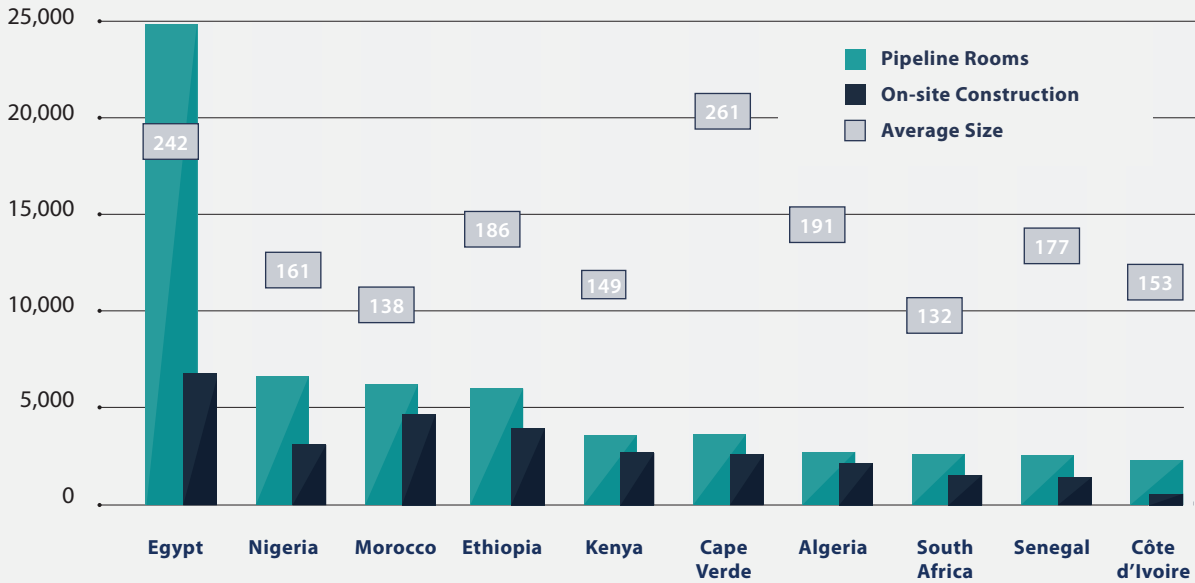
“ Our mission is to make hotel travel possible for all, and this is particularly important for Africa, which is a key market for us with its extensive and ongoing infrastructure improvements resulting in the steady growth of travel demand. We recently achieved new signings in Lagos, and we look forward to continuing building our presence throughout Africa. ”

*Panos Loupasis
Vice President Development, Middle East, Eurasia & Africa, Wyndham Hotel Group.*

In Nigeria, only three deals were signed in 2021, compared to 11 last year, and Egypt was up more than 50 per cent on its 2021 total of 18 new deals. It is worthy of note, however, that whilst Egypt saw the opening of four internationally-managed hotels last year, Nigeria saw just two, and none in the major cities of Lagos and Abuja.

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, 242 rooms and 261 rooms respectively, the majority being seaside vacation resorts. South Africa and Morocco have the smallest average number of rooms of the top 10 countries.

**Chart 3: Hotel Chain Development Pipelines in Africa 2023
Top 10 Countries by Number of Planned Rooms and Average Size**



Of the 10 largest hotels in the pipeline, five are in Egypt, two are in Cape Verde, and one each in Algeria, Tanzania (Zanzibar) and Tunisia. The average size of the top 10 hotels is 723 rooms (up from 678 rooms in 2021), compared to an average of 175 rooms for the total pipeline. The largest hotel in the pipeline is again one of Accor's, a 1,837 room Rixos-branded hotel in Egypt – and Accor also boasts some of the smallest hotels with under 20 rooms in its Mantis Collection.

**Chart 4: Hotel Chain Development Pipelines in Africa 2023
Top 10 Countries by Number of Planned Rooms 2021-2023**

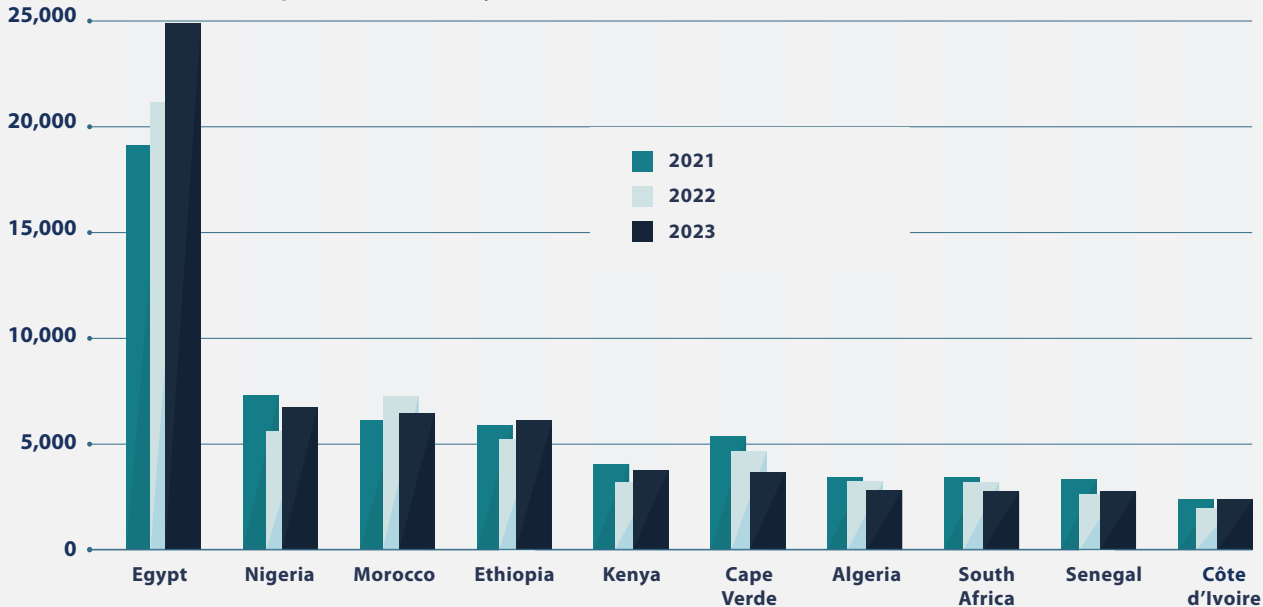


Chart 4 tracks the development activity in the top 10 countries in the last three years. Egypt has seen consistent growth year on year. Increases in Kenya, Ethiopia and Nigeria together made up for the reductions in some of the other countries' pipelines, which followed openings in 2022 such as the 522-room Riu Baobab in Senegal, and the 207-room Radisson Blu in Durban, South Africa. Table 7 provides information on opening activities in 2022.

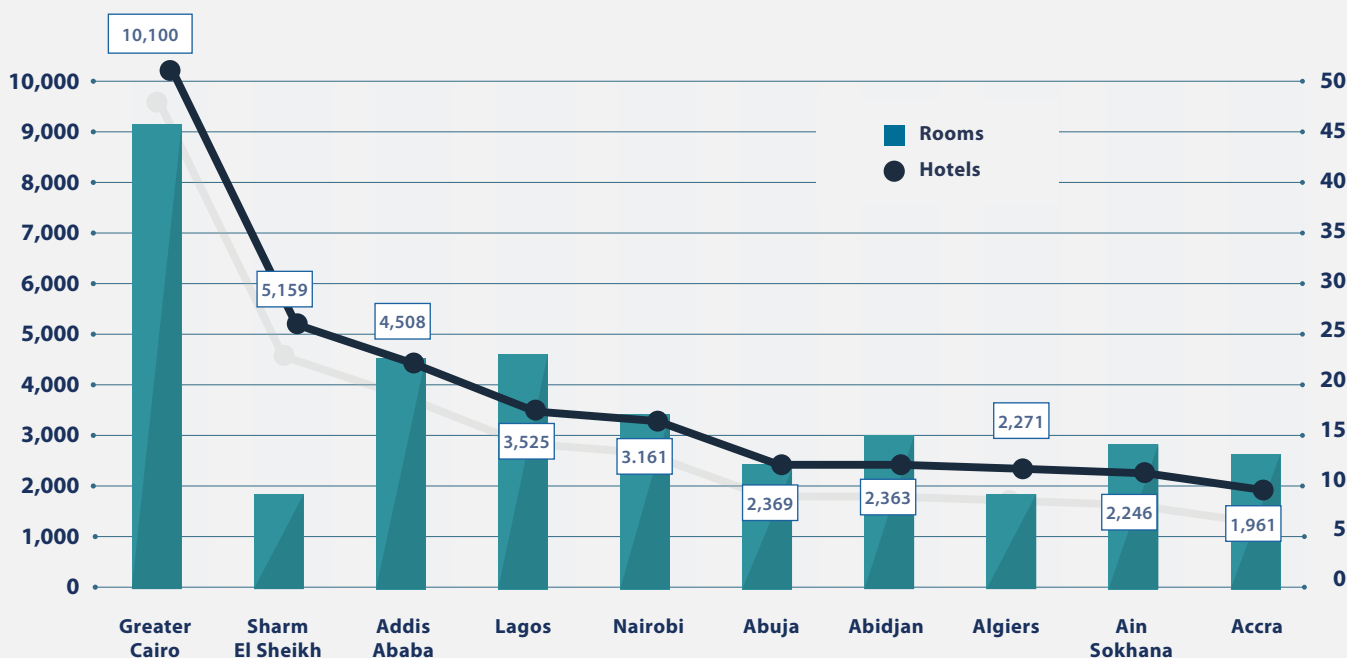
Appendix 2 provides country by country information on the hotel chains' development activity.

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

“ TUI boasts unparalleled expertise in the design, development, and successful operation of leisure hotel brands, as well as in the development of holiday destinations. The company's TUI BLUE brand has already gained significant popularity in Africa, with successful operations in North Africa, Cape Verde, and Zanzibar. As TUI looks towards further expansion, it has identified TUI BLUE as a key player in the group's plans. ”

*Wesam Okasha
Head of Global Development, TUI BLUE Hotels & Resorts*

**Chart 5: Hotel Chain Development Pipelines in Africa 2023
Top 10 Cities by Number of Planned Rooms**

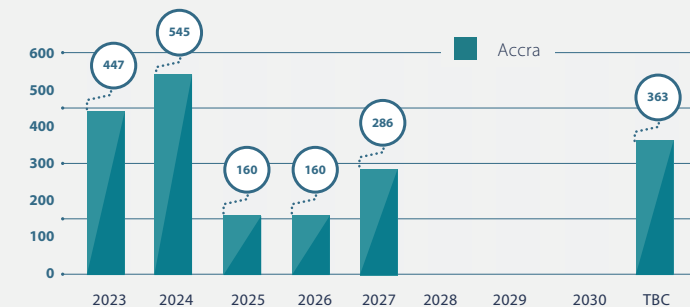
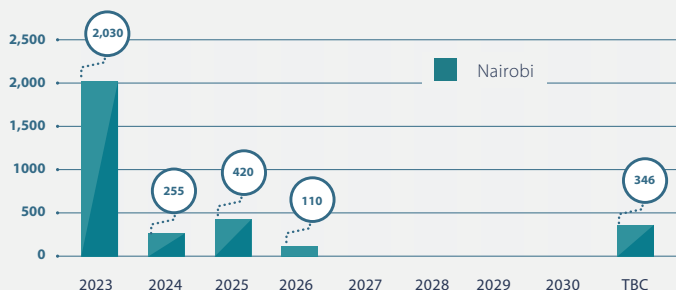
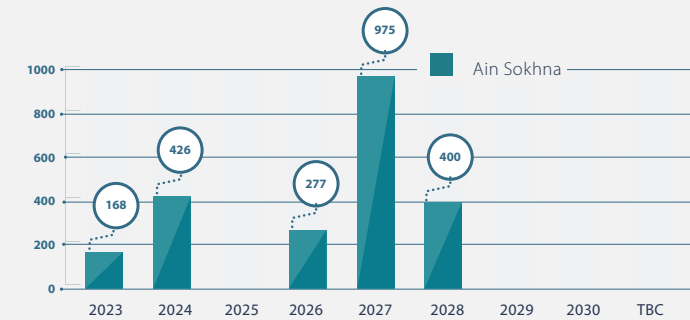
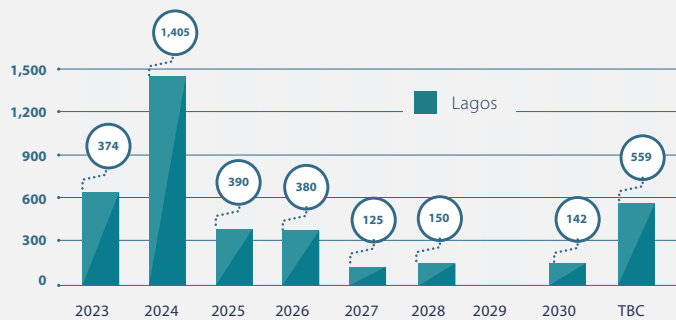
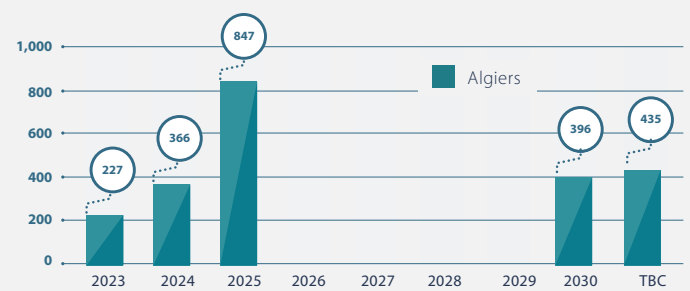
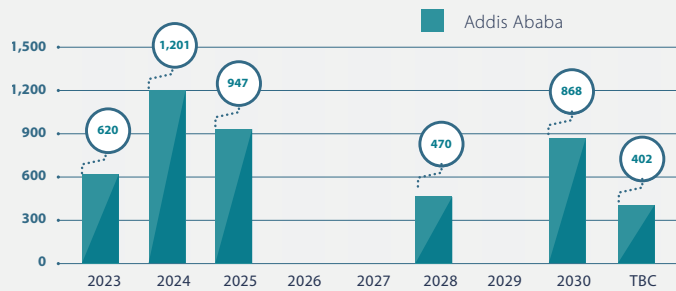
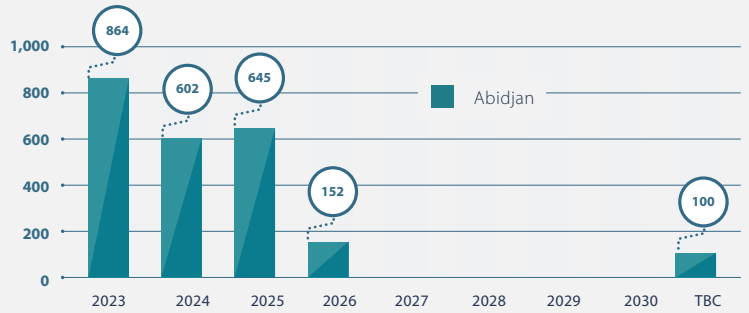
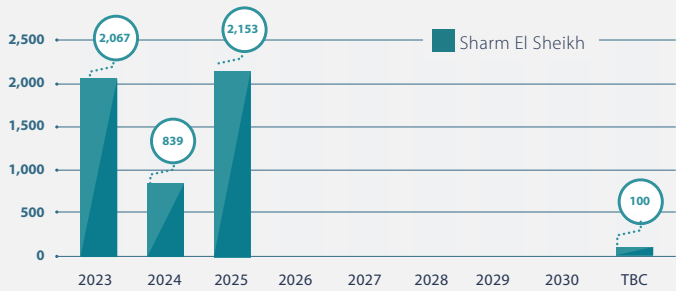
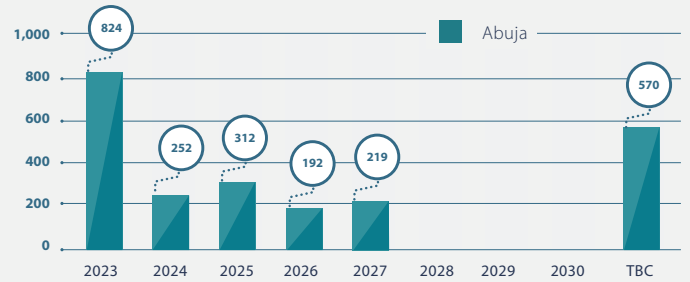
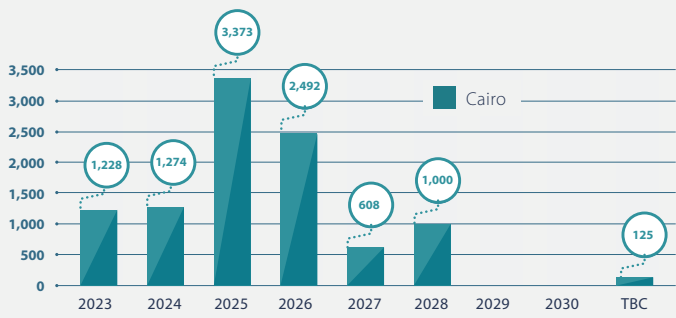


Greater Cairo has by far the largest pipeline (12 per cent of the entire pipeline!), followed by Sharm El Sheikh and Addis Ababa. Note the huge difference in the average size of hotels, ranging from 573 rooms in Sharm El Sheikh to about 150 rooms in Lagos and Accra. Ain Sokhana, on Egypt's Red Sea coast, enters the list this year, with several hotels signed by survey newcomer Kerten Hospitality in an upcoming master planned resort there.

(Is it just a coincidence that 6 out of the top ten cities and resorts begin with the letter A!)

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 2023
Top 10 Cities - Anticipated Additions to Supply (Rooms)**



There are, potentially, some large increases in supply, in cities such as Cairo, Nairobi and Sharm El Sheikh in the short term, with Nairobi due to open fully 64 per cent of its pipeline this year. But it is always “potentially”, the actualisation rate last year was about 30 per cent (see Table 17), and developers are facing considerable headwinds these days, including delays in imported materials and the scarcity of funding.



Four Seasons
Hotel
Luxor

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 2023
Top 10 Brands by Number of Planned Hotels and Rooms**

Rank by Hotels		Rank by Rooms				Change on 2022	Average Size Rooms		
		Hotels	Rooms		Brand	Hotels	Rooms		
1	Hilton	28	6,324	1	Hilton	28	6,324	22.6%	226
2	Protea Hotels (Marriott International)	20	2,984	2	Marriott Hotels & Resorts	15	4,305	6.8%	287
3	Four Points by Sheraton (Marriott International)	17	2,987	3	Rixos (Accor)	5	3,312	342.8%	662
4=	Marriott Hotels & Resorts	15	4,305	4	Four Points by Sheraton (Marriott International)	17	2,987	12.5%	176
4=	Radisson	15	2,351	5	Protea Hotels (Marriott International)	20	2,984	22.8%	149
6	DoubleTree by Hilton	14	2,630	6	DoubleTree by Hilton	14	2,630	20.1%	188
6=	Novotel (Accor)	14	2,106	7	Radisson	15	2,351	12.9%	157
8	Hilton Garden Inn	12	1,918	8	Swissôtel (Accor)	7	2,206	-33.4%	315
9=	Fairmont (Accor)	10	2,147	9	Fairmont (Accor)	10	2,147	-45.3%	215
9=	Mövenpick (Accor)	10	1,948	10	Novotel (Accor)	14	2,106	-11.5%	150

Once again, Hilton tops the list of brands 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, achieving a 22.6 per cent increase in signed rooms this year, and the top 10 are entirely within four global hotel chains, Accor, Hilton, Marriott International and Radisson Hotel Group. It looks like Accor have been (prudently) cleaning out their pipeline, removing some old Swissôtel and Novotel deals (most of them in North Africa), hence the reduction in their 2023 numbers. Fairmont was also "cleaned" a little, but Accor opened four Fairmont-branded hotels in Morocco, with nearly 500 rooms between them, which was 13 per cent of their 2022 pipeline for the brand.

“ Accor signings in 2022 were especially highlighted by brand conversions in strategic African cities such as the iconic Cape Grace in Cape Town as well as key operating hotels in Lagos and Nairobi. This year has started with great momentum in the industry and we are thrilled to be able to offer even more conversion friendly brands, such as the newly launched Handwritten collection, ideal for individually managed properties looking to be part of a larger ecosystem. ”

Kim Irmmler
Development Director, sub-Saharan Africa, Accor.

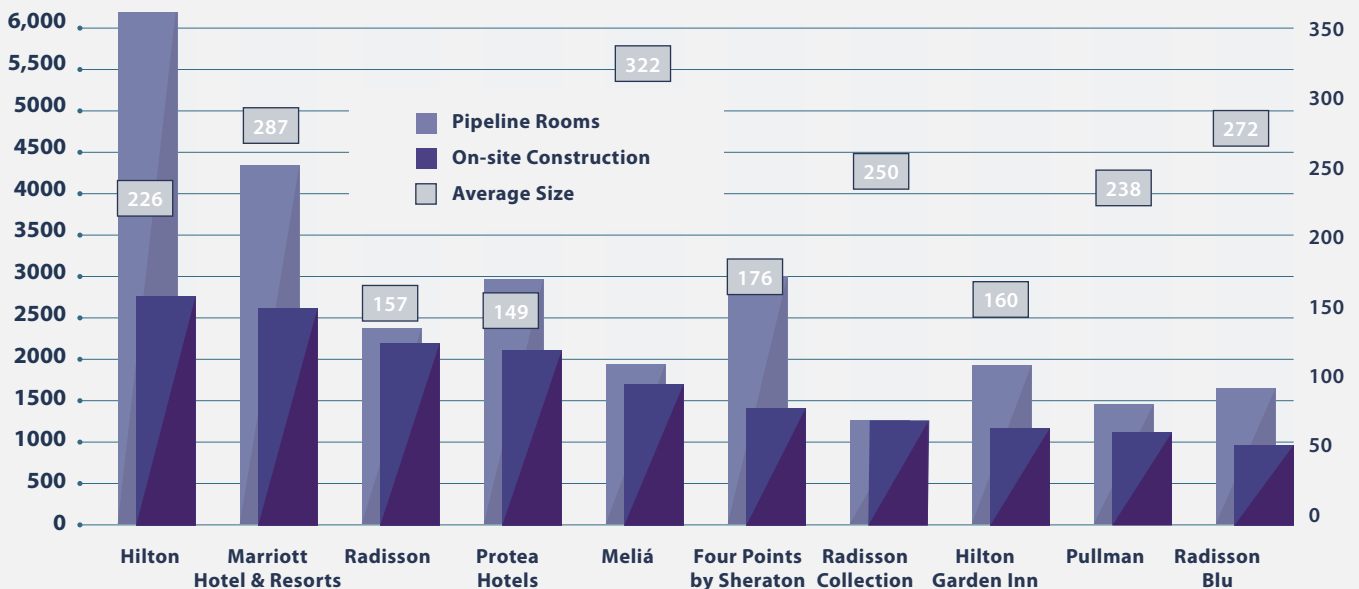
Accor was able to replace much of what was opened or cancelled with signings for five large-scale (average size 662 rooms!) Rixos-branded resorts.

Marriott achieved double-digit increases in their Four Points by Sheraton and Protea Hotels brands, with DoubleTree by Hilton and Radisson also seeing good growth.

“ 2022 was a year of strong growth for Hilton in Africa, led by the significant momentum seen in Morocco - where we opened Conrad Rabat Arzana, Hilton Taghazout Bay Beach Resort & Spa and Hilton Garden Inn Casablanca Sud, as well as signed agreements for new properties in 14 locations across the continent. Examples of new hotel signings include Waldorf Astoria Tanger, DoubleTree by Hilton Ben Guerir, DoubleTree by Hilton Marina Agadir Hotel & Residences, Hilton Douala, Hilton Garden Inn Douala, and Hilton Garden Inn Phoenix Mauritius. ”

*Carlos Khneisser
Vice President, Development,
Middle East & Africa, Hilton.*

**Chart 7: Hotel Chain Development Pipelines in Africa 2023
Top 10 Brands by Number of Planned Rooms, Average Size and Status**



In the ranking by number of rooms under construction, Meliá, Radisson Collection, Pullman and Radisson Blu join the list, giving Radisson Hotel Group three of their five brands in the top 10. This means they are closer to that ultimate goal, which is to open hotels and generate income. Hilton remain at the top – number 1 both by number of pipeline rooms and the number of rooms actually on site, with Marriott Hotels & Resorts close behind. All of the five Radisson Collection hotels are under construction.

“ We remain optimistic on the growth of hospitality across Africa. Our team did an incredible job in 2022 by signing 25 deals across the continent. We now look forward to building on this momentum in 2023. We continue to see demand from owners and franchisees for our world-renowned brands and we look forward to further strengthening our footprint in primary and secondary markets in the continent. ”

*Karim Cheltout,
Regional Vice President Development,
Marriott International Inc.*

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 22 different brands (out of the total of 30 in their portfolio), and Accor for 18 (total 42).

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

Table 6: Hotel Chain Development Pipelines in Africa 2023 Top 10 Hotel Chains by Number of Planned Rooms						
		Hotels	Rooms	Change on 2021	Average Size	Share of Total
1	Marriott International	123	22,776	12.5%	185	27.0%
2	Accor	89	17,484	-16.2%	196	20.7%
3	Hilton	67	12,427	18.3%	185	14.7%
4	Radisson Hotel Group	30	5,572	-10.8%	186	6.6%
5	IHG	25	4,268	32.1%	171	5.1%
6	Meliá Hotels & Resorts	7	1,983	13.8%	283	2.3%
7	Kerten Hospitality	13	1,889	-	145	2.2%
8	Hyatt Hotels & Resorts	11	1,792	-10.2%	163	2.1%
9	Wyndham	9	1,426	19.5%	158	1.7%
10	Ascott	11	1,322	20.0%	120	1.6%
	Total	385	70,939	2.8%	184	84.0%

As in previous years, two international hotel chains, France-based Accor and the USA’s Marriott International, top the table, with Marriott pulling firmly into the lead this year. Growth begets growth, and with 70+ brands between them they’re perhaps better available to meet most owner’s branding requirements. Together, these two giants account for almost 50 per cent of the total pipeline rooms, and the top 10 between them represent 84 per cent of the total.

We commented in the brands section about “cleansing” of pipelines, meaning some deals have been removed (they don’t appear in the data provided to us, and haven’t opened), plus the reduction of pipelines because of hotels opening in 2022. It’s appropriate therefore to look at who was opening hotels in Africa in 2022, as shown in Table 7.

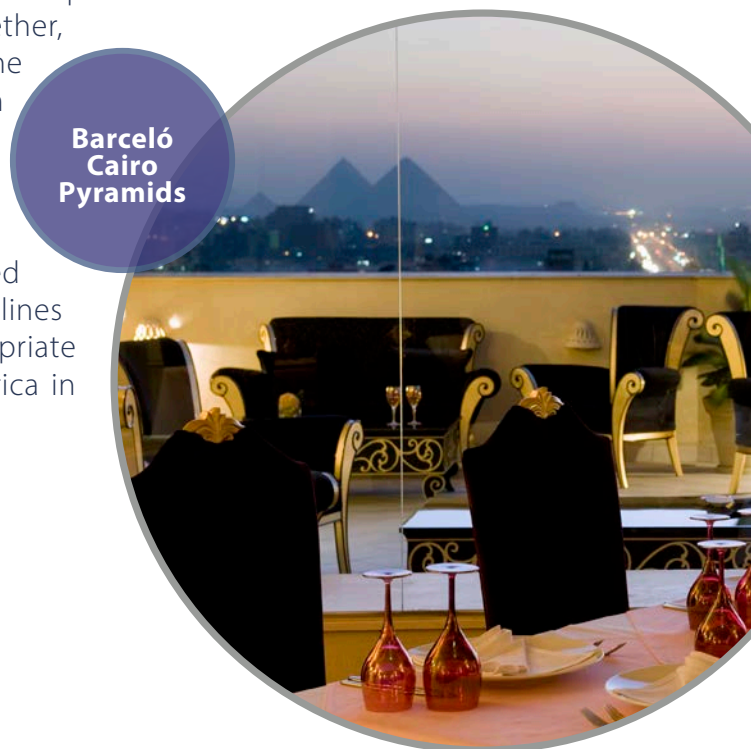


Table 7: Hotel Chain Development Pipelines in Africa 2023
Hotel Openings - 2022 Actual and Projected 2023

	Actual Openings 2022		Projected Openings 2023	
	Hotels	Rooms	Hotels	Rooms
Radisson Hotel Group	9	1,219	8	949
Riu Hotels & Resorts	2	983	-	-
Marriott International	4	601	40	6,152
Accor	4	477	16	3,588
Hilton	3	445	4	875
Deutsche Hospitality	1	401	-	-
IHG	2	309	-	-
Pestana Hotel Group	1	174		
GHM	1	86	-	-
Hyatt Hotels & Resorts	1	81	5	724
The Urban Hotel Group	1	75	2	120
BWH Hotel Group	1	62	8	718
Swiss International Hotels & Resorts	1	44	-	-
TOTAL	31	4,957	129	19,206

We include in Appendix 4 a list of hotels that we have tracked that opened in 2022 – apologies for any that we missed! 16 of these hotels opened in three countries in North Africa – Egypt, Morocco and Tunisia – with 2,509 rooms, half of the total that opened, the balance in eight countries in sub-Saharan Africa.

Radisson have been opening hotels at a faster pace than any other operator, with some hotels opening the same year as they are signed – four in Morocco in 2021, and one in Tunisia in 2022. Marriott are projecting a massive number of openings in 2023 (see Table 18), more than opened in total for all the chains in 2022, and Accor are projecting a catch-up with eight times their 2022 result.

“ BWH Hotel Group is excited about future development possibilities in African markets, fuelled by strong interest in our brands in markets like Kenya and Ethiopia which seems to be moving in the right direction again. There is a brighter outlook for South Africa too with advance bookings for 2023 looking far healthier than last year. We are also actively looking for our first luxury hotels to join our strong portfolio of over 150 WorldHotels in the higher end market space. Africa is the one global region missing from that portfolio which is something we are working hard to address. ”

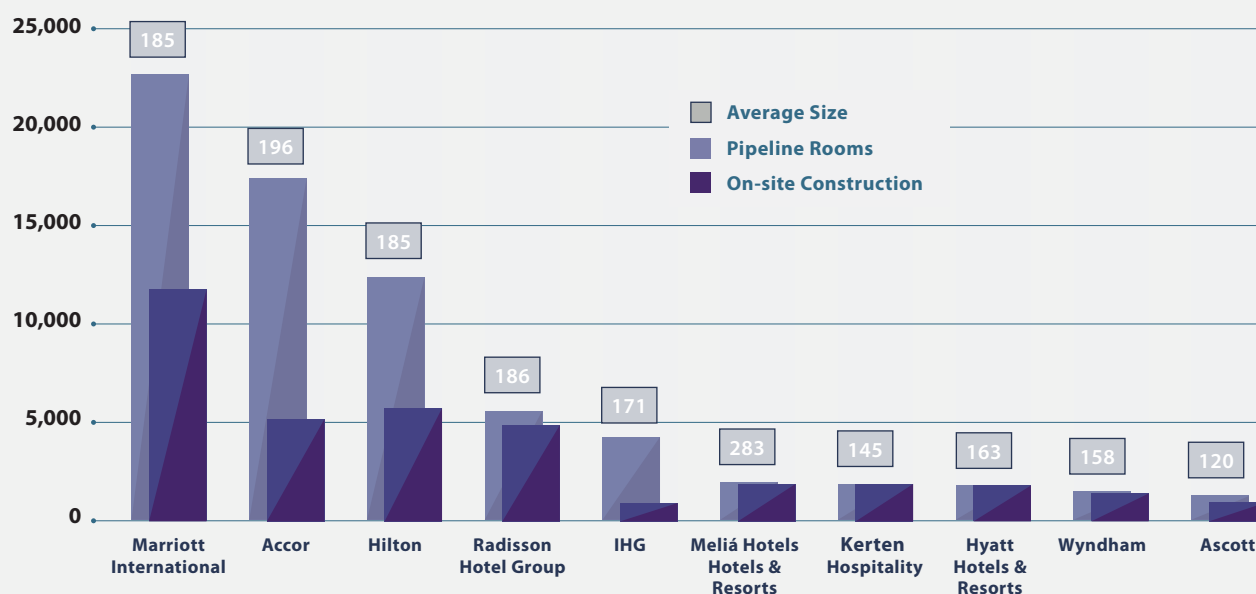
*Neville Graham
 Managing Director International Member Services,
 BWH Hotel Group.*

“ In the last two years only, Radisson Hotel Group opened over 16 hotels in Africa and secured over 25 new hotels, representing more than 4,800 additional rooms to our portfolio. Our balanced development strategy across the continent along with our tailored approach and responsiveness, enable us to stay relevant to our owners. Our rate of materialization and openings is a testimony to the quality of our pipeline but also translates our conversion strategy in repositioning existing hotels under one of our Radisson Hotel Group brands. 2023 is already anticipated to remain positive with nine hotel openings during the year, which will only reinforce our Group’s presence across the region and will further cement our leadership as the most geographically diverse hotel company across Africa. ”

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

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

Chart 8: Hotel Chain Development Pipelines in Africa 2023
Top 10 Hotel Chains by Number of Planned Rooms, Average Size and Status



Hyatt Hotels & Resorts and Kerten Hospitality 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 may be constrained. Marriott International have about half of their rooms under construction, with Accor at about one third because so many of their pipeline hotels are recent signings – about two thirds were signed in and after 2019.

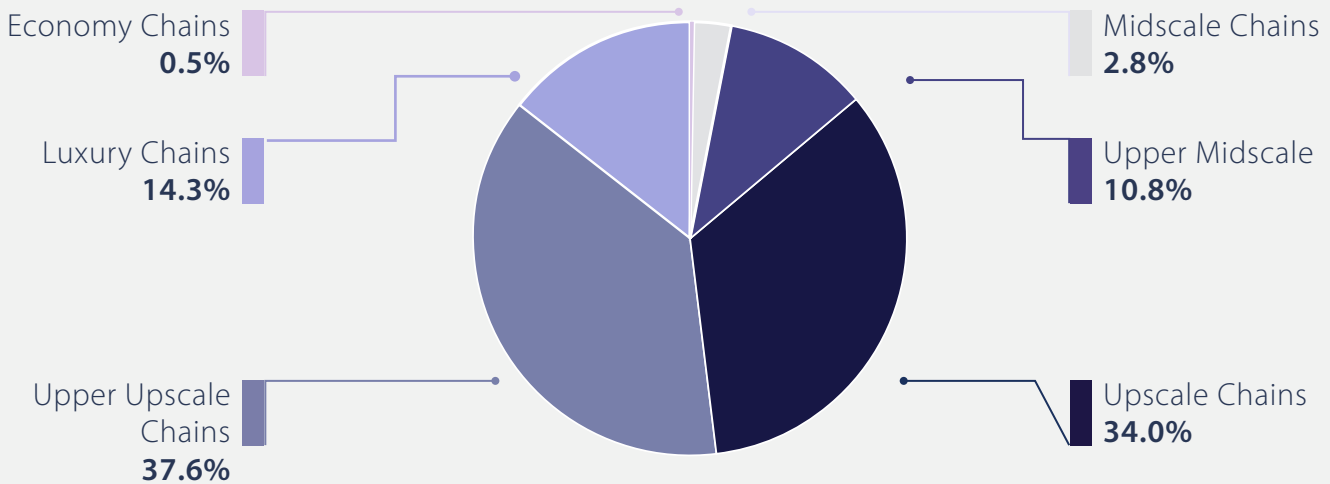
Further detail regarding each hotel chain is provided in Appendix 5.

Tables 8 and 9, and Chart 9, analyse the total pipeline by STR's chain scales (which we use in preference to star ratings, which vary too much from country to country, and sometimes between regions in the same country).

Table 8: Hotel Chain Development Pipelines in Africa 2023
STR Chain Scale Analysis

	Hotels	Rooms	Share	Brands per scale	Average Size (Rooms)
Economy	4	441	0.5%	2	110
Midscale	22	2,371	2.8%	9	108
Upper Midscale	70	9,122	10.8%	20	130
Upscale	166	28,730	34.0%	36	173
Upper Upscale	141	31,724	37.6%	31	225
Luxury	79	12,039	14.3%	21	152
TOTAL	482	84,427	100.0%	119	175

Chart 9: Hotel Chain Development Pipelines in Africa 2023
Hotel Chain Scale Analysis

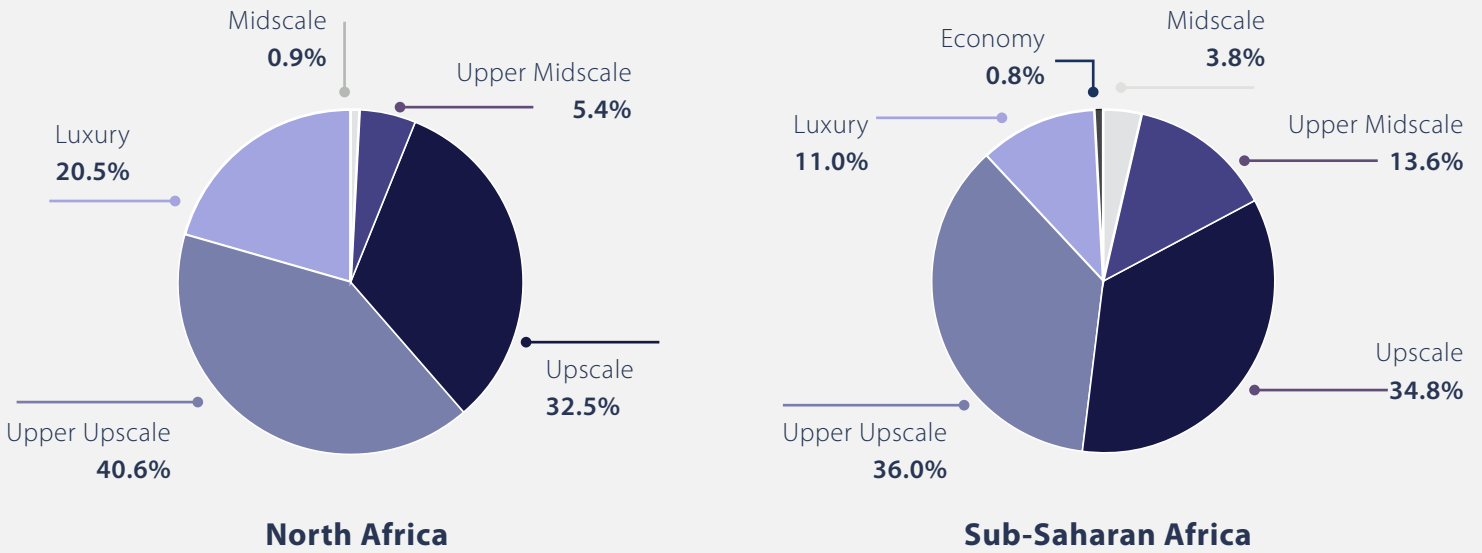


This is pretty much unchanged year on year, with the majority of the pipeline in the Upscale and Upper Upscale chain scales. There's still no sign of any increase in the economy and midscale segments, despite the (to us) obvious opportunities there. Whilst the brands are not averse to expanding their Economy and Midscale footprint in Africa, they generally require multiple-site deals with an owner, they're 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 segment is being exploited by independent one-off properties (sometimes very small chains) of very varying quality, which quickly become obsolete.

Table 9 and Chart 10 compare the chain scales by region:

Table 9: Hotel Chain Development Pipelines in Africa 2023						
STR Chain Scale Analysis by Region						
	North Africa			Sub-Saharan Africa		
	Hotels	Rooms	Share	Hotels	Rooms	Share
Economy	-	-	-	4	441	0.8%
Midscale	3	258	0.9%	19	2,113	3.8%
Upper Midscale	13	1,560	5.4%	57	7,562	13.6%
Upscale	49	9,326	32.5%	117	19,404	34.8%
Upper Upscale	49	11,659	40.6%	92	20,065	36.0%
Luxury	35	5,886	20.5%	44	6,153	11.0%
TOTAL	149	28,689	100.0%	333	55,738	100.0%

Chart 10: Hotel Chain Development Pipelines in Africa 2023
STR Chain Scale Analysis by Region



There's more activity in the Midscale and Upper Midscale segments in sub-Saharan Africa, and less in the Luxury segment.

“ BWH Hotel Group sees Africa as a key region of its future growth both in EMEA and internationally. We have taken steps to increase our commitment to African owners by hiring our first ever Director of Development in Nairobi as well as a Sales Manager in Johannesburg. We have 7 hotels in our active pipeline in Africa, 5 of which should activate in 2023 and double that amount moving towards signing soon. With this level of interest, as well as our investment in the African team we fully expect 2023 to be our best year yet in terms of African development of our global brands. ”

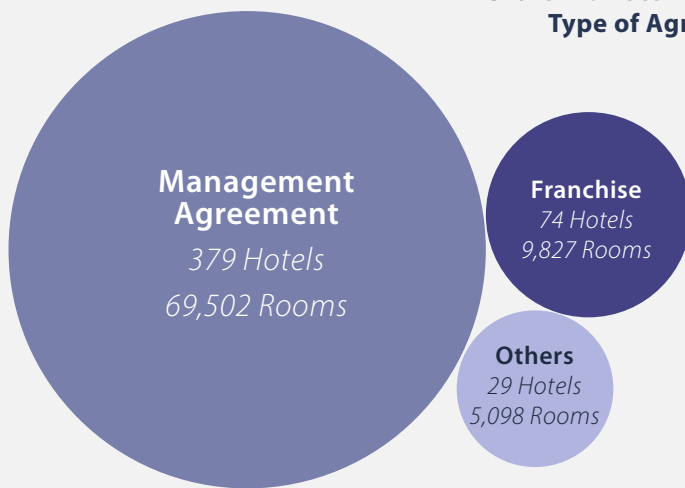
*Neville Graham,
 Managing Director International Member Services,
 BWH Hotel Group.*

“ Meliá Hotels International is thrilled to have announced two new signatures in iconic places of the African continent during 2022: The Seychelles and Ngorongoro in Tanzania. Looking forward to further expanding our footprint in the most well-known leisure destinations on the continent during 2023 and 2024. ”

*Carlos Sánchez Zuazaga,
 Development PMO, Global Development,
 Meliá Hotels International.*

Our analysis of the types of agreement signed by the hotel chains (Chart 11) shows that whilst the majority, 79 per cent, are management contracts, there is a definite increase in the number of franchise deals being signed. Franchises now account for 15 per cent of pipeline deals, up from 11 per cent last year, with 31 signed in 2022 compared to 20 in 2021. Marriott International are leading this trend, with fully 19 franchise agreements signed in 2022, after only about half that number in 2021; Accor, BWH Hotel Group, Continent, IHG, Radisson, TUI and Wyndham signed the other 12 franchise deals. It doesn't seem that long ago when the international chains – with the exception of BWH Hotel Group – were totally unenthusiastic about the idea of franchising in Africa.

Chart 11: Hotel Chain Development Pipelines in Africa 2023
Type of Agreement - Number of Deals and Rooms



Owners increasingly want franchises, and there’s obviously a growing willingness on the part of some of the hotel chains to offer them; this trend is aided by the increase in the presence of third party, “white label” management companies such as Aleph, who signed four franchise deals in 2022. This trend has clearly contributed to Marriott’s growth in their pipeline in 2022 – of the 24 deals they signed last year, just five were management agreements and the rest were franchises. Radisson now have a brand – Radisson Individuals – geared solely towards owner-operators.

The average size of a franchise hotel tends to be a lot smaller, at 133 rooms, than a managed hotel (183 rooms).

The ‘Other’ category includes joint ventures between hotel chains and hotel owners, owner-operators such as Azalai and Onomo, and a small number of leases; there’s still little sign that the lease model is gaining any traction in Africa, but one chain is the exception. Eurostars, part of Spain’s Hotusa Group, and a newcomer to the survey this year, favours the lease route to expansion, with seven out of its eight deals (in both North Africa and sub-Saharan Africa) being leases.

“ Eurostars Hotel Company is committed to search, actively and prospectively, business opportunities in Africa, a market where we have high expectations and where we expect to grow in the upcoming years after having signed 9 hotels in different African countries in previous years, with two upcoming openings scheduled in Casablanca during 2023. ”

*Emilio Godoy,
 Africa Hotel Investment & Development Manager,
 Eurostars Hotel Company.*

“ 2022 was a positive year for Aleph. We doubled our portfolio in Africa, and our current pipeline and the overall outlook for hospitality on the continent give us the confidence to anticipate continuous organic growth there over the next two years. We anticipate the opening of our African development office in Q4 this year. ”

*Bani Haddad,
 Managing Director,
 Aleph Hospitality*

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

Table 10: Hotel Chain Development Pipelines in Africa 2023 Top 10 Hotel Chains: Pipeline vs Existing Hotels in Africa							
		Pipeline		Existing		Pipeline vs Existing (Rooms)	Potential Total (Rooms)
		Hotels	Rooms	Hotels	Rooms		
1	Marriott International	123	22,776	135	24,898	91%	47,674
2	Accor	89	17,484	161	27,506	64%	44,990
3	Hilton	67	12,427	46	12,056	103%	24,483
4	Radisson Hotel Group	30	5,572	59	11,788	47%	17,360
5	IHG	25	4,268	33	6,576	65%	10,844
6	Meliá Hotels & Resorts	7	1,983	10	2,776	71%	4,759
7	Kerten Hospitality	13	1,889	0	0	-	1,889
8	Hyatt Hotels & Resorts	11	1,792	12	2,124	84%	3,916
9	Wyndham	9	1,426	7	1,114	128%	2,540
10	Ascott	11	1,322	1	164	806%	1,486
TOTAL		385	70,939	464	89,002	80%	159,941

The ratio of pipeline rooms to existing, at 80 per cent, is about 10 per cent up on last year. In percentage terms, Wyndham and Ascott are experiencing high growth on their existing footprint, albeit from a low base.

“ Today, we have more than 112 hotels either trading or in the pipeline in Africa consisting of over 25,000 rooms. Our growth strategy is focused on markets across the continent, as we work in partnership with investors to grow our portfolio of brands in city and leisure resort locations. As we look to the year ahead, we expect to welcome incredible new additions to our Hilton portfolio, including the debut of Waldorf Astoria in Egypt with the opening of Waldorf Astoria Cairo Heliopolis, as well a brand new Hilton for Cairo with the opening of Hilton Cairo Nile Maadi. We will debut Waldorf Astoria in the Seychelles with the opening of Waldorf Astoria Platte Island, return to Tunisia with the opening of Hilton Skanes Monastir Beach Resort and bolster our presence in the Kenyan hospitality market with the opening of Kwetu Nairobi, Curio Collection by Hilton. ”

Carlos Khneisser
Vice President, Development,
Middle East & Africa, Hilton.

**Hilton
Taghazout**



Section 3: Status of Hotel Development Activity

It's all very well looking at the deals signed, by whom, and where, and all the other analysis that we do, but a deal that remains just a piece of paper has little value to a hotel chain's shareholders – it's opening the hotel and generating profits is what counts, and the objective that all this activity is seeking to achieve. So as well as looking at the overall quantum of the countries' and hotel chains' pipelines in Africa, we look also at the status of their hotel development activity.

Table 11 details the status of the deals by region, regarding whether construction has started. The figures are largely unchanged from last year, with a greater proportion under construction in sub-Saharan Africa than in North Africa, because of the large number of recent signings in the latter, particularly in Morocco and Egypt.

**Table 11: Hotel Chain Development Pipelines in Africa 2023
Sub-Saharan Africa vs. North Africa by Pipeline Status**

	Hotels	Rooms		
		Total	Onsite Construction	
North Africa	175	36,677	16,486	45%
Sub-Saharan Africa	307	47,750	27,463	58%
TOTAL	482	84,427	43,949	52%

The trouble is, what is meant by "under construction"? In other parts of the world, the meaning would be pretty clear, from at least Monday to Friday there are trucks and cranes moving, lots of noise, and people with hard hats moving around, metaphorically putting brick on brick. In Africa, that's not, sadly, always the case - starting construction does not necessarily mean that a hotel will ever open, the likelihood varying considerably from country to country. Whilst those deals that are "onsite construction" are in a more advanced stage than those which are "on paper", they may or may not be more likely to represent hotels that will open. Dakar, Lagos, Cotonou, Addis Ababa, Rabat, Algiers and others all have half-built hotel structures, sadly distressing to look at, stranded like that in some cases for many years (15 years at the extreme).

**Kempinski Msasa
Lodge
Lake Manyara**



Table 12 shows the pipeline status of the top 10 countries. Despite its clear leadership in the absolute pipeline numbers, Egypt has the lowest percentage of rooms onsite, due to its relatively “young” pipeline; of the total 103 deals there, half were signed in 2020 and later, and that’s nearly 60 per cent of the rooms. In contrast, Morocco and Algeria have some of the highest ratios of rooms under construction on the continent. After Egypt, Nigeria has quite a low percentage onsite, and we note also that of the 22 hotels around the country that have started construction, eight of them, with about half of the “onsite” rooms, have stalled and the sites are closed.

**Table 12: Hotel Chain Development Pipelines in Africa 2023
Top 10 Countries by Pipeline Status**

Rank		Hotels	Rooms		
			Total Pipeline	Onsite Construction	
1	Egypt	103	24,944	6,868	27.5%
2	Nigeria	42	6,772	3,229	47.7%
3	Morocco	46	6,369	4,830	75.8%
4	Ethiopia	33	6,129	4,130	67.4%
5	Kenya	25	3,729	2,885	77.4%
6	Cape Verde	14	3,660	2,534	69.2%
7	Algeria	15	2,862	2,286	79.9%
8	South Africa	21	2,768	1,663	60.1%
9	Senegal	15	2,650	1,532	57.8%
10	Côte d'Ivoire	16	2,445	687	28.1%
	TOTAL	330	62,328	30,644	49.2%

Table 13 looks at the top 10 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 is not very far behind.

**Table 13: Hotel Chain Development Pipelines in Africa 2023
Top 10 Brands by Pipeline Status**

		Hotels	Rooms		
			Total	Onsite Construction	
1	Hilton	28	6,324	2,747	43.4%
2	Marriott Hotels & Resorts	15	4,305	2,612	60.7%
3	Rixos (Accor)	5	3,312	-	-
4	Four Points by Sheraton (Marriott International)	17	2,987	1,389	46.5%
5	Protea Hotels (Marriott International)	20	2,984	2,089	70.0%
6	DoubleTree by Hilton	14	2,630	883	33.6%
7	Radisson	15	2,351	2,199	93.5%
8	Swissôtel (Accor)	7	2,206	-	-
9	Fairmont (Accor)	10	2,147	88	4.1%
10	Novotel (Accor)	14	2,106	957	45.4%
	TOTAL	145	31,352	12,964	41.3%

All of Rixos' pipeline was signed (in Egypt) in 2022, so that explains the lack of rooms under construction.

Radisson (the brand) has the highest percentage of rooms onsite, so in percentage terms they do appear able to convert their deals into open hotels (as shown in Table 7, Radisson Hotel Group opened nine hotels in 2022, more than any other chain).

Table 14 shows the status of the top 10 hotel chains' pipelines.

Table 14 Hotel Chain Development Pipelines in Africa 2023 Top 10 Hotel Chains' Pipeline Status					
		Hotels	Rooms		
			Total	Onsite Construction	
1	Marriott International	123	22,776	11,760	51.6%
2	Accor	89	17,484	5,096	29.1%
3	Hilton	67	12,427	5,665	45.6%
4	Radisson Hotel Group	30	5,572	4,750	85.2%
5	IHG	25	4,268	838	19.6%
6	Meliá Hotels & Resorts	7	1,983	1,795	90.5%
7	Kerten Hospitality	13	1,889	1,889	100.0%
8	Hyatt Hotels & Resorts	11	1,792	1,792	100.0%
9	Wyndham	9	1,426	1,276	89.5%
10	Ascott	11	1,322	815	61.6%
	TOTAL	385	70,939	35,676	50.3%



**Avani
Barbarons
Seychelles**

“ Since our entry into Africa in the early 2000s, we have continued as pioneers into new markets, confident in their potential for growth. We currently have 11 hotels under operation and final development. Today the mother continent remains a key part of our expansion strategy, as we seek to further strengthen our presence across Africa by partnering with major local and international players. Our upcoming openings will be with three lodges in Tanzania and a hotel in Brazzaville
Christophe Piffaretti,
 Chief Development Officer, Kempinski ”

Kerten Hospitality and Hyatt Hotels & Resorts have all of their pipeline under construction, but Marriott International, the world’s largest hotel chain, with the largest number of rooms and the largest African development pipeline, has three times the number of onsite rooms of those two hotel chains put together. Hilton is in second place after Marriott International, but as seen in Table 13 can claim the largest onsite brand.

The Top 10 combined have over 80 per cent of all the chain hotel rooms under construction in Africa, and the top four – Marriott International, Accor, Hilton and Radisson Hotel Group – account for 62 per cent of the total; this is down from 66 per cent last year, but this is due to the addition of new chains contributing to the survey this year.

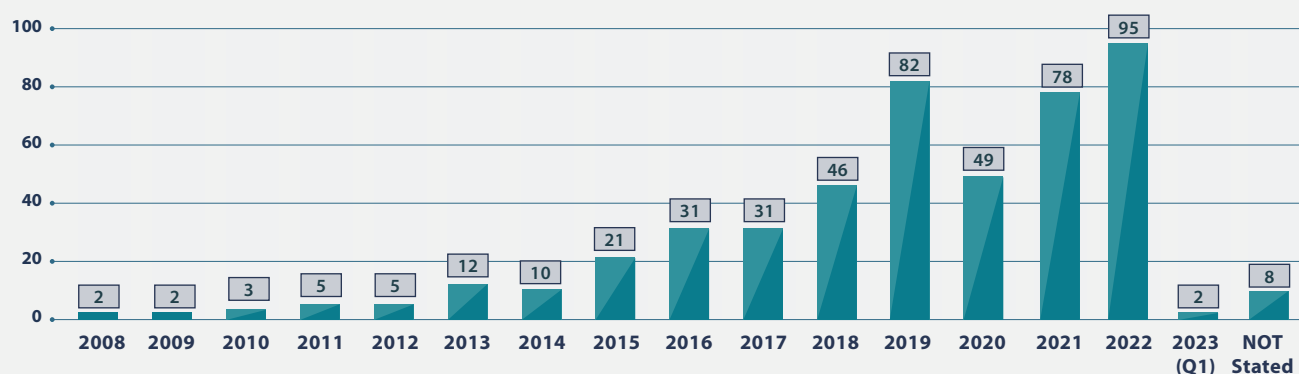
In Table 15 we detail when the hotel chains’ pipeline deals were signed; 97 were signed in 2022 and early 2023 – actually a few more were signed in 2021 and opened the same year, such as Radisson Hotel Group’s portfolio in Morocco, and are therefore not recorded here. The table shows only the hotels that are still in the pipeline as of the beginning of 2023, many others having opened or been deleted from the pipeline.

Table 15: Hotel Chain Development Pipelines in Africa 2023 Years the Deals Were Signed – Number of Hotels	
2008	2
2009	2
2010	3
2011	5
2012	5
2013	12
2014	10
2015	21
2016	31
2017	31
2018	46
2019	82
2020	49
2021	78
2022	95
2023 (Q1)	2
Not Stated	8

“ The group’s pan-African ambition leads to have a foothold in eight countries by the end of 2024, with a total of 10 finalized hotel projects. These past 10 years have been about investment and structuring, and we are now entering an era of consolidation with numerous projects to pursue on the continent. ”

*Jorgen Jorgensen
CEO, Mangalis Hotel Group.*

Chart 12: Hotel Chain Development Pipelines in Africa 2023
Years the Deals Were Signed – Number of Hotels



There are still some really old deals in there, and one wonders why the hotel chains keep them on their books. Some chains undertake regular “cleansing” of their pipelines - rightly so, in order not to portray false expectations to management, shareholders and analysts.

We have further analysed the data to quantify the hotels that were scheduled to open each year since 2018 (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 16: Hotel Chain Development Pipelines in Africa 2023
2015-2020 Scheduled vs. Actual Hotel Openings

	Scheduled	Actual	Actualisation
2018	115	46	39%
2019	91	68	75%
2020	91	25	28%
2021	105	29	28%
2022	101	31	31%
TOTAL	503	199	40%

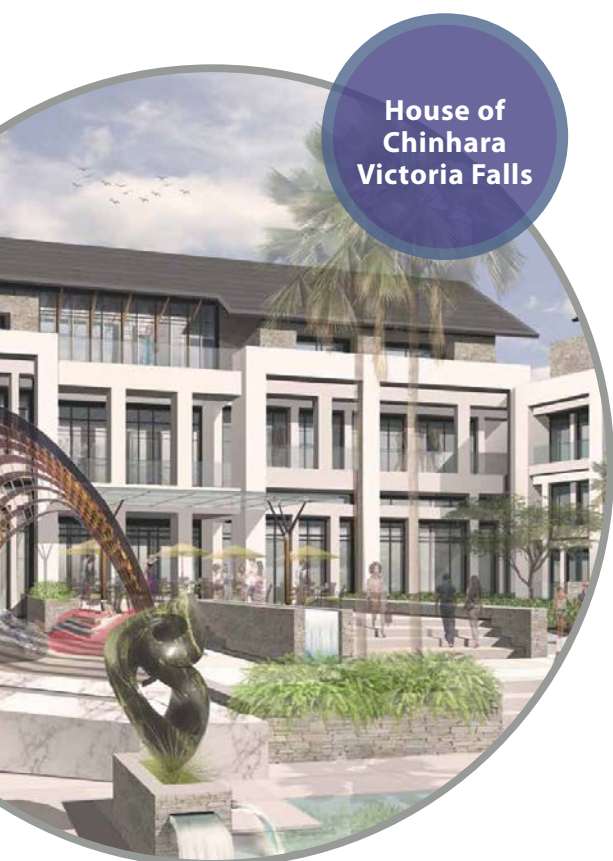
As with so many things, we look back to the heady days of 2019 as being “normal”, and it certainly seemed then that the pipelines were becoming much more real. No surprises that 2020 and 2021 were pretty awful – in the two years combined, that’s just 54 hotels opened in the 54 countries in Africa (no, 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 three years.

Table 17 shows the anticipated future opening years of the pipeline hotels, as per the hotel chains’ expectations.

**Table 17: Hotel Chain Development Pipelines in Africa 2023
Anticipated Opening Years of Pipeline Deals**

	Hotels	Rooms	Cumulative New Rooms Open
2023	129	19,206	19,206
2024	115	18,469	37,675
2025	93	18,957	56,632
2026	49	9,041	65,673
2027	23	5,130	70,803
2028	13	2,450	73,253
2029	-	-	73,253
2030	14	3,440	76,693
TBC	46	7,734	84,427
Total	482	84,427	

Of the total 84,427 rooms in the pipeline, over 37,500 rooms (about 45 per cent) are expected by the hotel chains to open in 2023 and 2024. This is much higher than the expected “two-year” opening total recorded last year, at about 30,000 rooms, presumably a catch up from so many delayed projects during the pandemic. There are 60 hotels (about 13 per cent of total rooms) which the hotel chains really don’t know when they are likely to open – “2030” means much the same as “TBC”. This figure is also higher than last year, when there were 43 hotels and about 11 per cent of rooms in the “don’t know” category. Hopefully this not a sign of a slowdown in investor confidence?

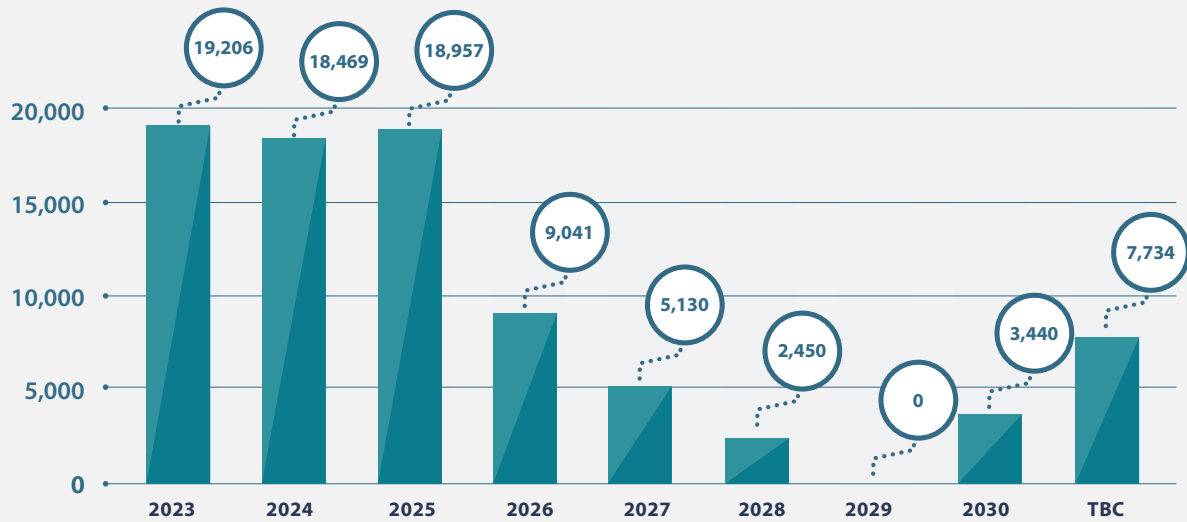


House of Chinhara Victoria Falls

“ 2022 was a significant year for IHG, marked by multiple signings and openings that accelerated our growth ambitions in the African continent. The debut of our Vignette Collection brand in Africa, with the signing of House of Chinhara Vignette Collection in Victoria Falls, bolsters our luxury portfolio and aligns with our efforts to facilitate the tourism agenda across the continent. Additionally, the signing and opening of three hotels across Kenya and Tanzania positions us for even further growth in the next 3-5 years. In 2023, we remain committed to introducing even more hotels that offer unique stays to visitors attracted to the geographically and culturally rich continent.

Haitham Mattar,
Managing Director,
IHG India, Middle East and Africa.

**Chart 13: Hotel Chain Development Pipelines in Africa 2023
Anticipated Additions to Supply (Rooms)**



The Top 10 hotel chains account for almost 80 per cent of rooms scheduled to open in 2023 and 2024, and the top five for 65 per cent. Overall, the percentage of pipeline rooms to their existing footprint in Africa for the top 10 is about one third.

“ We are excited to announce the upcoming relaunch of our Avani Barbarons resort in the Seychelles. Following an extensive renovation the property will be rebranded to Avani+ when it reopens in Q4 this year and we are looking forward to welcoming back our guests and showcasing an elevated experience of our Avani brand. ”

*Amir Golbarg
Senior Vice President of Operations Middle East and Africa,
Minor Hotels.*

**Table 18: Hotel Chain Development Pipelines in Africa 2023
Top 10 Hotel Chains Opening Hotels in 2023 and 2024**

		Hotels Opening	Rooms Opening	Average Size	New Rooms Increase on Existing
1	Marriott International	58	9,137	158	37%
2	Accor	32	6,774	212	25%
3	Radisson Hotel Group	24	4,502	188	38%
4	Hilton	20	3,685	184	31%
5	Wyndham	7	1,136	162	102%
6	Ascott	9	1,065	118	649%
7	Hyatt Hotels & Resorts	7	1,022	146	48%
8	Meliá Hotels & Resorts	5	960	192	35%
9	Kerten Hospitality	7	830	119	-
10	IHG	6	531	89	8%
	Total	175	29,642	169	33%

“ In 2022, we have signed our first Citadines Aparthotel in Djibouti, which is our 8th county in Africa. The outlook for the year 2023 and beyond is extremely positive for us as we experience an increased demand for Ascott’s leading brands in the serviced apartments concept after the opening of “Somerset Westview Nairobi”. Africa holds a great potential for Ascott’s growth plan, and we remain committed to delivering value to our partners and investors through our brands in the standards as well as the performance. ”

Hafid Mirabti,
Director of Business Development, Middle East, Africa & Turkey, Ascott.

Four Seasons
Hotel Rabat
at Kasr Al Bahr



The contributors to this survey don't only provide their pipeline data, and the lovely pictures that we use to illustrate the report, they also give us their comments on their experiences of signing deals in Africa, and their expectations for the future. The quotations are all from senior executives directly engaged on the expansion of their brands in Africa – they're the people out there in the field, trying to convince owners (and their consultants!) to select them as their technical and operating partners.

Despite the challenges of new hotel development in Africa (and globally), the quotes from the industry are uniformly positive – “we remain optimistic about the growth of hospitality in Africa” says Marriott International's Karim Cheltout, “BWH Hotel Group sees Africa as a key region of its future growth” from BWH's Neville Graham and “Africa holds a great potential for [our] growth plans” remarks Ascott's Hafid Mirabti. Not a single person mentioned the global pandemic as having any impact on their deal signing going forward.

Those challenges referred to above are not unique to Africa – increasing construction costs, delays in supply lines (easing now), limited access to foreign exchange, equity and debt..... Sound familiar? Some or all of them are affecting development elsewhere as well, but the compounding factor seems to be the perception of risk for the continent. These perceptions tend to be at two extremes – those already invested in Africa see the continent as a highly attractive investment proposition, whilst those new to the continent see it through the “always only bad news and foreign aid” lens.

We commented in the Foreword about the difference between the macro-level assessment and the micro-level opportunity. Understanding the risk-reward returns has nothing to do with “Africa” as a continent, it's necessary to look deeper than the national metrics to study the fundamentals of any specific project, be it new build, acquisition or conversion. Sure, the national risks have to be understood – an inability to repatriate fees and profits in a hard currency could kill a deal. But the flip side may be to reinvest those “trapped funds” in other growth opportunities, and we're seeing exactly that happen in Nigeria, with increasing acquisition activity recently.

We report in this edition of our survey on the “actualisation” of the pipeline, including a list of those hotels that opened in 2022 that we could track in Appendix 5. Of course, this is only the chain hotels that opened, it would be a task beyond us to track each and every independent hotel that opened in 54 countries! It has to be of some concern that only 31 chain hotels opened last year, out of a scheduled 101 hotels, and whilst this is up on 2020 and 2021, it's still a pretty low figure. We believe that there is still a hangover from the impact of the COVID-19 pandemic, and that 2023 and 2024 can get back to the heights of 2019, when 75 per cent of the scheduled openings did in fact take place.

Of the total 84,427 rooms in this year's pipeline, 244 hotels with over 37,500 rooms (about 45 per cent) are expected to open in 2023 and 2024 – that's a huge percentage, and if we can achieve that 75 per cent actualisation rate, that will be 183 new hotels and over 28,000 new rooms, creating tens of thousands of direct jobs and contributing hugely to local supply chains, with a resulting increase in living standards in the community.

There's a tale to be told about every country in Africa, every hotel chain (active or not) and every brand, and about every deal. We've mentioned some of those stories in this report, but sometimes we feel that this report just scratches the surface of this amazing industry! Every year we analyse the data, and find a new way of slicing and dicing the figures, to try and understand not just the big picture but also the minutiae of the who, the what, the where, the when and (sometimes) the why. Do contact us if you are looking for any specific analysis.

We wish all our contributors, our readers and the global hospitality industry a prosperous 2023, and look forward to reporting further positive activity from the hotel chains next year, in their development activity but, most importantly, in getting those hotels and resorts open!



**Wyndham
Lagos Ikeja**

**Radisson
Blu Resort
Mosi-oa-Tunya,
Livingstone**

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2023
Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Brands
Accor	Aparthotel Adagio Fairmont ibis ibis Styles Mama Shelter Mantis Mercure MGallery Mövenpick Novotel Novotel Living Pullman Pullman Living Raffles Rixos So/ Sofitel Swissôtel
Aleph	- (white label)
Ascott	Ascott Citadines Citadines Connect Somerset
Azalaï Hotels Group	Azalaï
Banyan Tree Hotels & Resorts	Banyan Tree Banyan Tree Veya Dhawa
Barceló Hotels & Resorts	Barceló
BWH Hotel Group	Best Western Best Western Plus Best Western Premier
CityBlue Hotels	C3 Residences by CityBlue Urban by CityBlue
Club Med	Club Med
Continent Worldwide	Continent
Deutsche Hospitality	Steigenberger Hotels & Resorts
Dusit International	Dusit Thani Dusit Princess
Eurostars Hotel Group	Exe Hotels Eurostars Hotels
Four Seasons Hotels & Resorts	Four Seasons
Hilton	Canopy by Hilton Curio Collection by Hilton DoubleTree by Hilton Embassy Suites Hampton by Hilton Hilton Hilton Garden Inn Waldorf Astoria

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2023
Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Brands
Hyatt International	Hyatt Centric Hyatt House Hyatt Place Hyatt Regency Park Hyatt
IHG	Crowne Plaza Holiday Inn Hotel Indigo InterContinental Six Senses Staybridge Suites Vignette Collection voco
Kempinski Hotels	Kempinski
Kerten Hospitality	Cloud7 Hotel Cloud7 Residences The House Hotel The House Residence
Leva Hotels	Leva Hotels
Louvre Hotels Group	Golden Tulip Kyriad Sarovar
Mangalis Hotel Group	Noom Seen Yaas
Marriott International	AC Hotels Aloft Hotels Autograph Collection Courtyard by Marriott Delta Hotels Element by Westin Fairfield by Marriott Four Points by Sheraton JW Marriott Le Méridien Marriott Executive Apartments Marriott Hotels and Resorts Moxy Protea Hotels Renaissance Residence Inn Ritz-Carlton Sheraton St. Regis Tribute W Hotels Westin Hotels & Resorts
Meliá Hotels International	Meliá Hotels & Resorts The Meliá Collection
Minor Hotel Group	AVANI Oaks
Onomo Hotels	Onomo
Pan Pacific Hotels & Resorts	Pan Pacific
Planhotel	Sandies
Radisson Hotel Group	Park Inn by Radisson Radisson Radisson Blu Radisson Collection Radisson Individuals

APPENDIX 1
Hotel Chain Development Pipelines in Africa 2023
Contributors to the Survey – Hotel Chains & Brands

Hotel Chains	Brands
Swiss International Hotels & Resorts	Swiss International
TIME Hotels & Resorts	TIME Hotels & Resorts
TUI BLUE	TUI BLUE TUI MAGIC LIFE
Urban Hotels	The Urban
Wyndham Hotels and Resorts	Howard Johnson by Wyndham Ramada Ramada Encore Ramada Plaza 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.



Wyndham
Lagos Ikeja

APPENDIX 2
Hotel Chain Development Pipelines in Africa 2023
Hotels and Rooms by Country

	Total by Country		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Algeria	15	2,862	20.1%	79.9%
Angola	2	245	63.7%	36.3%
Benin	6	1,091	12.4%	87.6%
Botswana	2	315	0.0%	100.0%
Burkina Faso	1	232	0.0%	100.0%
Cameroon	14	2,407	61.7%	38.3%
Cape Verde	14	3,660	30.8%	69.2%
Chad	1	230	0.0%	100.0%
Congo	2	321	0.0%	100.0%
Côte d'Ivoire	16	2,445	71.9%	28.1%
Democratic Republic of Congo	12	1,605	53.8%	46.2%
Djibouti	6	683	66.8%	33.2%
Egypt	103	24,944	72.5%	27.5%
Ethiopia	33	6,129	32.6%	67.4%
Gabon	1	140	0.0%	100.0%
Ghana	14	2,181	17.4%	82.6%
Guinea	4	669	29.9%	70.1%
Kenya	25	3,729	22.6%	77.4%
Liberia	2	299	64.2%	35.8%
Libya	1	370	0.0%	100.0%
Madagascar	1	210	100.0%	0.0%
Malawi	2	324	0.0%	100.0%
Mauritania	2	354	43.5%	56.5%
Mauritius	6	846	52.5%	47.5%
Morocco	46	6,369	24.2%	75.8%
Mozambique	5	564	89.4%	10.6%
Namibia	1	174	0.0%	100.0%
Niger	1	188	0.0%	100.0%
Nigeria	42	6,772	52.3%	47.7%

APPENDIX 2
Hotel Chain Development Pipelines in Africa 2023
Hotels and Rooms by Country

	Total by Country		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Rwanda	8	719	88.0%	12.0%
Senegal	15	2,650	42.2%	57.8%
Seychelles	4	449	41.9%	58.1%
Sierra Leone	2	306	0.0%	100.0%
South Africa	21	2,768	39.9%	60.1%
South Sudan	2	319	73.7%	26.3%
Sudan	1	57	0.0%	100.0%
Tanzania	15	1,550	63.7%	36.3%
Togo	1	85	100.0%	0.0%
Tunisia	10	2,132	0.0%	100.0%
Uganda	12	1,725	24.9%	75.1%
Zambia	8	956	53.9%	46.1%
Zimbabwe	3	353	100.0%	0.0%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2023
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	311	65%	35%
Aloft	3	600	75%	25%
Ascott	2	195	100%	0%
Autograph Collection	5	355	30%	70%
Avani	1	156	100%	0%
Azalai	5	979	38%	62%
Banyan Tree	2	55	27%	73%
Banyan Tree Veya	1	20	0%	100%
Barceló	4	1,066	57%	43%
Best Western	2	176	0%	100%
Best Western Plus	4	309	0%	100%
Best Western Premier	2	233	0%	100%
c3	1	15	100%	0%
Canopy	5	712	24%	76%
Citadines	5	647	23%	77%
Citadines Connect	1	60	0%	100%
Cloud7 Hotel	4	500	0%	100%
Cloud7 Residence	1	93	0%	100%
Club Med	3	509	0%	100%
Continent	5	495	31%	69%
Courtyard by Marriott	5	1,315	54%	46%
Crowne Plaza	1	220	100%	0%
Curio	2	202	0%	100%
Delta Hotels	2	258	0%	100%
Dhawa	1	135	100%	0%
DoubleTree by Hilton	14	2,630	66%	34%
Dusit Princess	1	100	0%	100%
Dusit Thani	1	418	100%	0%
Element	1	344	100%	0%
Embassy Suites	1	129	100%	0%
Eurostars Hotels	6	938	70%	30%
Exe Hotels	2	126	0%	100%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2023
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Fairfield Inn by Marriott	1	100	100%	0%
Fairmont	10	2,147	96%	4%
Four Points by Sheraton	17	2,987	53%	47%
Four Seasons	4	885	14%	86%
Golden Tulip	5	734	0%	100%
Hampton by Hilton	2	290	100%	0%
Hilton	28	6,324	57%	43%
Hilton Garden Inn	12	1,918	41%	59%
Holiday Inn	5	907	55%	45%
Hotel Indigo	4	650	100%	0%
Howard Johnson	1	102	0%	100%
Hyatt Centric	3	602	0%	100%
Hyatt House	1	120	0%	100%
Hyatt Place	2	341	0%	100%
Hyatt Regency	3	518	0%	100%
Ibis	2	266	55%	45%
Ibis Styles	4	516	71%	29%
InterContinental	6	1444	75%	25%
JW Marriott	6	1,392	44%	56%
Kempinski	4	353	49%	51%
Kyriad	2	172	0%	100%
Le Meridien	5	903	49%	51%
Leva Hotels	4	423	0%	100%
Mama Shelter	1	161	0%	100%
Mantis	7	216	20%	80%
Marriott Executive Apartment	4	697	35%	65%
Marriott Hotels & Resorts	15	4,305	39%	61%
Meliá	6	1,931	10%	90%
Mercure	4	581	26%	74%
MGallery	5	534	9%	91%
Mövenpick	10	1,948	87%	13%
Moxy	4	412	39%	61%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2023
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Noom	4	525	58%	42%
Novotel	14	2,106	55%	45%
Oaks	2	510	78%	22%
Onomo	1	89	0%	100%
Pan Pacific	1	128	0%	100%
Park Hyatt	2	211	0%	100%
Park Inn by Radisson	2	237	0%	100%
Protea Hotels	20	2,984	30%	70%
Pullman	6	1,428	24%	76%
Pullman Living	2	280	47%	53%
Radisson	15	2,351	6%	94%
Radisson Blu	6	1,632	41%	59%
Radisson Collection	5	1248	0%	100%
Radisson Individuals	2	104	0%	100%
Raffles	3	335	70%	30%
Ramada	1	150	100%	0%
Ramada Encore	2	224	0%	100%
Ramada Plaza	1	177	0%	100%
Renaissance	1	216	100%	0%
Residence Inn	7	930	84%	16%
Residences by CityBlue	3	307	0%	100%
Ritz-Carlton	6	855	40%	60%
Rixos	5	3312	100%	0%
Sandies	1	120	100%	0%
Sarovar	1	85	100%	0%
Seen	2	226	53%	47%
Sheraton	8	1,818	68%	32%
Six Senses Hotels Resorts Spas	4	128	42%	58%
So/	1	188	0%	100%
Sofitel	5	949	31%	69%
Somerset	3	420	39%	61%
St Regis	3	308	39%	61%
Staybridge Suites	1	150	100%	0%

APPENDIX 3
Hotel Chain Development Pipelines in Africa 2023
Hotels and Rooms by Brand

	Total by Brand		Pre-Construction (Planning)	Rooms on Site (Construction)
	Hotels	Rooms		
Steigenberger Hotels & Resorts	1	145	100%	0%
Swiss International	2	186	22%	78%
Swissôtel	7	2,206	100%	0%
The House Hotel	4	358	0%	100%
The House Residence	4	938	0%	100%
The Meliá Collection	1	52	0%	100%
The Urban	3	205	41%	59%
TIME Hotels & Resorts	4	427	0%	100%
Tribute Portfolio	3	227	0%	100%
TUI BLUE	2	588	38%	62%
TUI MAGIC LIFE	1	557	100%	0%
Urban by CityBlue	2	383	0%	100%
Vignette Collection	1	99	100%	0%
voco	3	670	100%	0%
W Hotels	2	530	0%	100%
Waldorf Astoria	3	222	23%	77%
Westin Hotels & Resorts	2	662	59%	41%
Wyndham	3	661	0%	100%
Wyndham Garden	1	112	0%	100%
Yaas	3	339	41%	59%

APPENDIX 4
Hotel Chain Development Pipelines in Africa 2023
Chain Hotels Opened in Africa in 2022

Group Name	Brand name	Hotel Name	Country	City	Rooms
Accor	Fairmont	La Marina Rabat-Salé	Morocco	Rabat	88
Accor	Fairmont	Rabat	Morocco	Rabat	186
Accor	Fairmont	Taghazout Bay Fairmont Residences	Morocco	Agadir	53
Accor	Fairmont	Taghazout Bay Resort	Morocco	Agadir	150
BWH Hotel Group	Best Western Plus		Morocco	Casablanca	62
Deutsche Hospitality	Steigenberger Hotels & Resorts	Steigenberger Tab Hotel & Nelson Village	Egypt	Taba	401
GHM	The Chedi	The Chedi El Gouna	Egypt	El Gouna	86
Hilton	Conrad	Conrad Rabat Arzana	Morocco	Rabat	120
Hilton	Hilton Garden Inn	HGI Casablanca Sud	Morocco	Casablanca	155
Hilton	Hilton	Hilton Taghazout Bay Beach Resort & Spa	Morocco	Taghazout Bay	170
Hyatt Hotels & Resorts	Hyatt House		South Africa	Johannesburg	81
IHG	Crowne Plaza	CP West Cairo Arkan	Egypt	Cairo	178
IHG	voco	VOCO The Bank Rosebank	South Africa	Johannesburg	131
Marriott International	Marriott Hotels & Resorts	Marriott Rabat Arribat Centre	Morocco	Rabat	186
Marriott International	Four Points by Sheraton	Four Points by Sheraton Kigali	Rwanda	Kigali	154
Marriott International	Autograph Collection	Le Mersenne Zanzibar, Autograph Collection	Tanzania	Zanzibar	71
Marriott International	Marriott Hotels & Resorts	Marriott Tunis	Tunisia	Tunis	190
Pestana Hotel Group	Pestana CR7 Lifestyle Hotels	Pestana CR7 Marrakech	Morocco	Marrakech	174
Radisson Hotel Group	Radisson Individuals	Marina Resort Port Ghalib Marsa Allam	Egypt	Port Ghalib	160
Radisson Hotel Group	Radisson	Radisson Hotel Antananarivo Waterfront	Madagascar	Antananarivo	30
Radisson Hotel Group	Radisson	Radisson Serviced Apartments Antananarivo City Center	Madagascar	Antananarivo	56

APPENDIX 4
Hotel Chain Development Pipelines in Africa 2023
Chain Hotels Opened in Africa in 2022

Group Name	Brand name	Hotel Name	Country	City	Rooms
Radisson Hotel Group	Radisson Blu	Radisson Blu Hotel, Antananarivo Waterfront	Madagascar	Antananarivo	160
Radisson Hotel Group	Radisson Blu	Radisson Blu Resort, Saidia Garden	Morocco	Saidia	150
Radisson Hotel Group	Radisson Blu	Radisson Blu Hotel, Durban Umhlanga	South Africa	Durban	207
Radisson Hotel Group	Radisson Blu	Radisson Blu Hotel, Juba	South Sudan	Juba	168
Radisson Hotel Group	Radisson Blu	Radisson Blu Mosi-oa-Tunya Resort, Livingstone	Zambia	Livingstone	200
Radisson Hotel Group	Radisson	Radisson Hotel Sfax	Tunisia	Sfax	88
Riu Hotels & Resorts	Riu Hotels & Resorts	Riu Jambo	Tanzania	Zanzibar	461
Riu Hotels & Resorts	Riu Hotels & Resorts	Riu Baobab	Senegal	Pointe Saréne	522
Swiss International Hotels & Resorts	Swiss International	Swiss International Nairobi - Killimani	Kenya	Nairobi	44
The Urban Hotel Group	The Urban	The Urban Lusaka	Zambia	Lusaka	75

**Somerset
Rosslyn
Nairobi**



APPENDIX 5
Hotel Chain Development Pipelines in Africa 2023
Hotels and Rooms by Hotel Chain

Total by Hotel Chain										Pre-Construction (Planning)	Rooms on Site (Construction)
	2022			2023					Change on 2022		
	Countries	Hotels	Rooms	Countries	Hotels	Rooms			Rooms	% Change	
Accor	23	107	20,857	18	89	17,484	71%	29%	-3,373	-16%	
Aleph	1	1	107	4	4	371	50%	50%	264	247%	
Ascott	7	9	1,102	8	11	1,322	38%	62%	220	20%	
Azalai Hotels Group	5	5	979	5	5	979	38%	62%	0	0%	
Banyan Tree Hotels & Resorts	3	4	185	3	4	210	71%	29%	25	14%	
Barceló Hotels & Resorts	3	8	2,488	2	4	1,066	57%	43%	-1,422	-57%	
BWH Hotel Group	6	7	553	7	8	718	0%	100%	165	30%	
CityBlue Hotels	7	8	656	3	6	705	0%	100%	49	7%	
Club Med	3	3	509	3	3	509	0%	100%	0	0%	
Continent Worldwide	2	3	355	2	5	495	31%	69%	140	39%	
Deutsche Hospitality	1	2	546	1	1	145	100%	0%	-401	-73%	
Dusit International	1	1	100	2	2	518	81%	19%	418	418%	
Eurostars Hotel Group	4	7	907	5	8	1,064	62%	38%	157	17%	
Four Seasons Hotels & Resorts	3	3	700	3	4	885	14%	86%	185	26%	
Hilton	22	55	10,505	24	67	12,427	54%	46%	1,922	18%	
Hyatt International	9	12	1,995	8	11	1,792	0%	100%	-203	-10%	
IHG	6	17	3,136	6	25	4,268	80%	20%	1,132	36%	
Kempinski Hotels	2	4	353	2	4	353	49%	51%	0	0%	
Kerten Hospitality	1	13	1,889	1	13	1,889	0%	100%	0	0%	
Leva Hotels	0	0	0	3	4	423	0%	100%	423	-	

APPENDIX 5
Hotel Chain Development Pipelines in Africa 2023
Hotels and Rooms by Hotel Chain

	Total by Hotel Chain							Pre-Construction (Planning)	Rooms on Site (Construction)	Change on 2022	
	2022			2023							
	Countries	Hotels	2018 Rooms	Countries	Hotels	Rooms			Change	% Change	
Louvre Hotels Group	10	11	1,273	6	8	991	9%	91%	-282	-22%	
Mangalis Hotel Group	4	5	500	6	9	1,090	52%	48%	590	118%	
Marriott International	29	103	20,248	31	123	22,776	48%	52%	2,528	12%	
Meliá Hotels International	1	5	1,743	3	7	1,983	9%	91%	240	14%	
Minor Hotel Group	6	6	1,203	3	3	666	83%	17%	-537	-45%	
Onomo Hotels	1	1	89	1	1	89	0%	100%	0	0%	
Pan Pacific Hotels & Resorts	1	1	128	1	1	128	0%	100%	0	0%	
Planhotel	0	0	0	1	1	120	100%	0%	120	-	
Radisson Hotel Group	15	35	6,248	13	30	5,572	15%	85%	-676	-11%	
Swiss International Hotels & Resorts	2	5	359	2	2	186	22%	78%	-173	-48%	
TIME Hotels & Resorts	2	2	174	3	3	205	41%	59%	31	18%	
TUI BLUE Hotels & Resorts	1	1	557	3	4	427	0%	100%	-130	-23%	
Urban Hotels	2	4	280	2	3	1,145	68%	32%	865	309%	
Wyndham Hotels and Resorts	5	8	1,193	5	9	1,426	11%	89%	233	20%	
TOTAL	42	456	81,917	42	482	84,427	48%	52%	2,510	3%	

Kempinski
Msasa Lodge
Lake Manyara



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 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.



**Pelican Hotel
Accra**



**Noom Hotel
Bouaké
Côte d'Ivoire**

**Back Cover:
TUI BLUE
Bahari Zanzibar**



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