



47
chains

41
countries

92,193
rooms



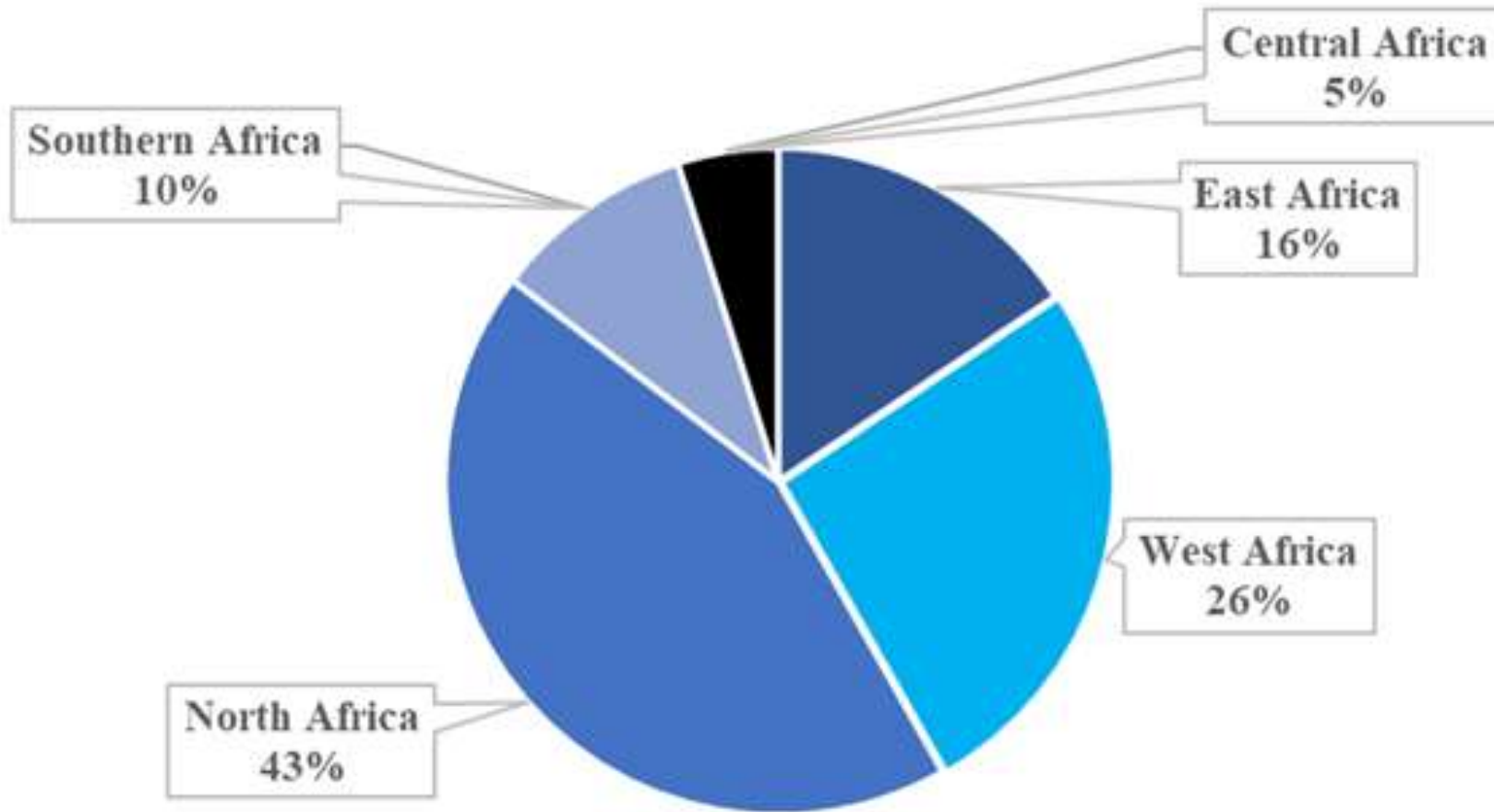
134
brands

524
hotels

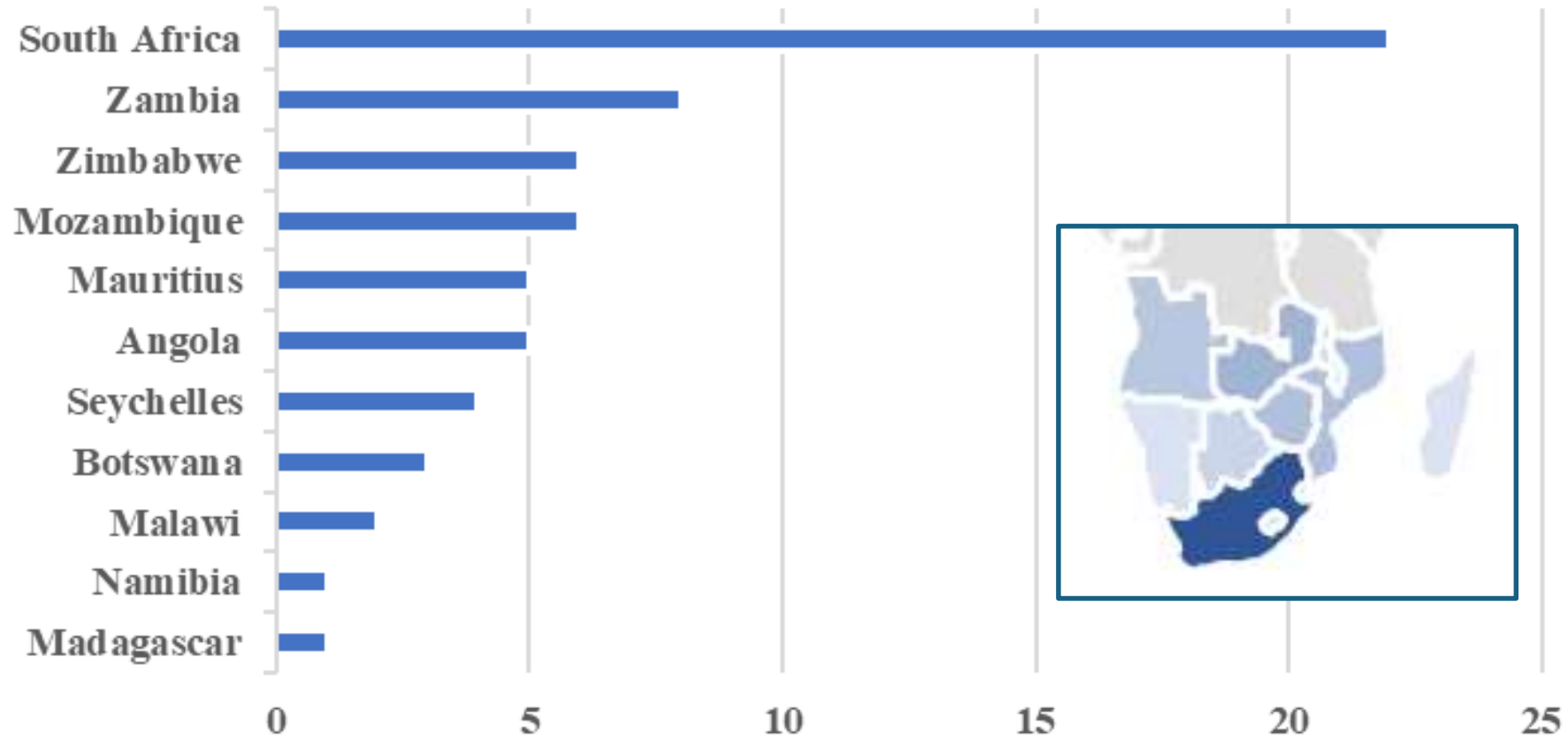
9.2%
growth



Hotel Chain Development Pipelines in Africa 2024 Regional Breakdown (Rooms)



Hotel Chain Development Pipelines in Africa 2024 Southern Africa Snapshot





What is a Pipeline?

A process to achieve growth, to convert leads into income, to create value

What is a Pipe Dream?

A desire or idea that will likely not work





? DOES ?

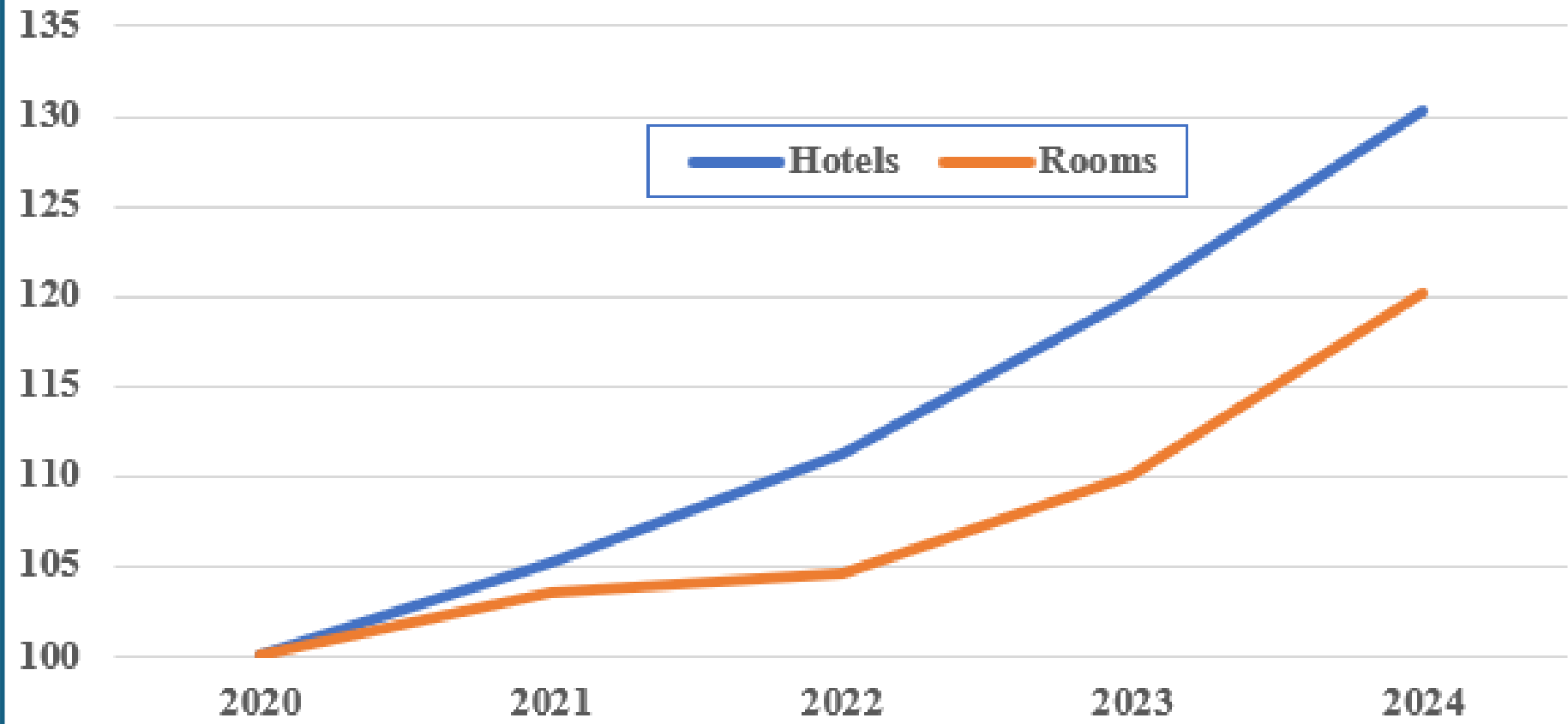
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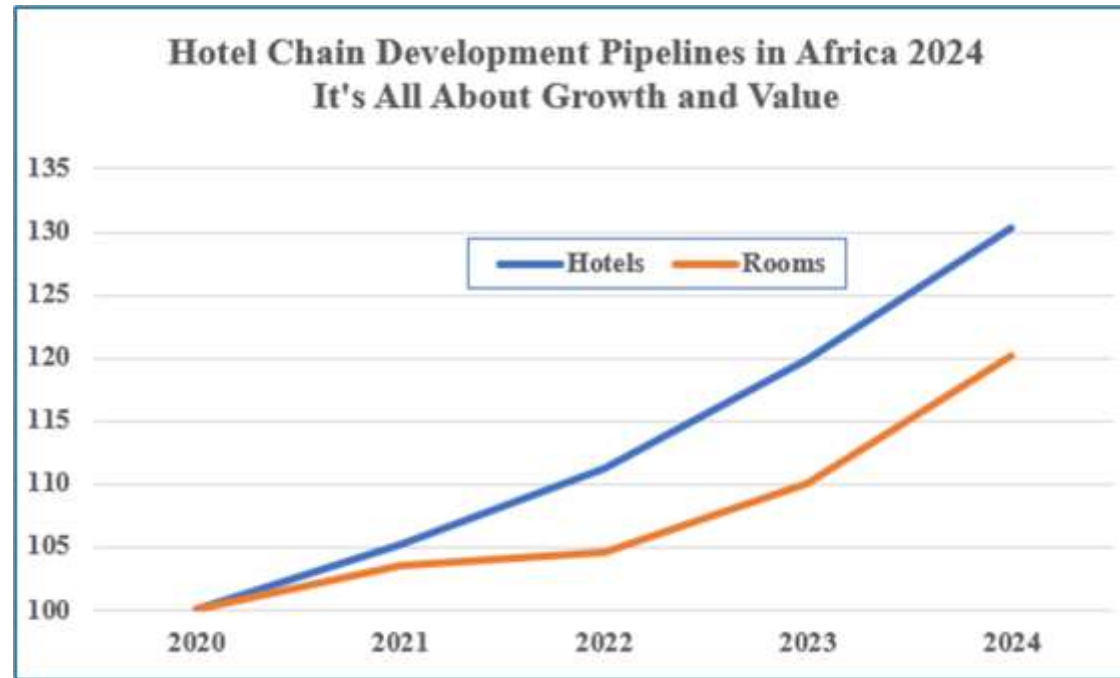


No, it does not
(well, mostly not)



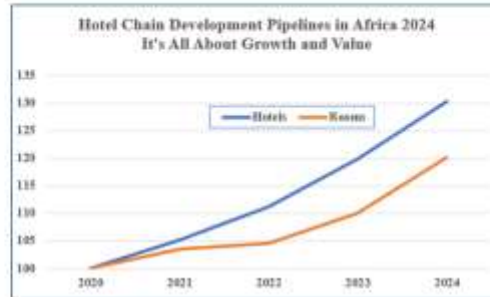
Hotel Chain Development Pipelines in Africa 2024 It's All About Growth and Value





Well, yes, but growth
in what? What
creates value?



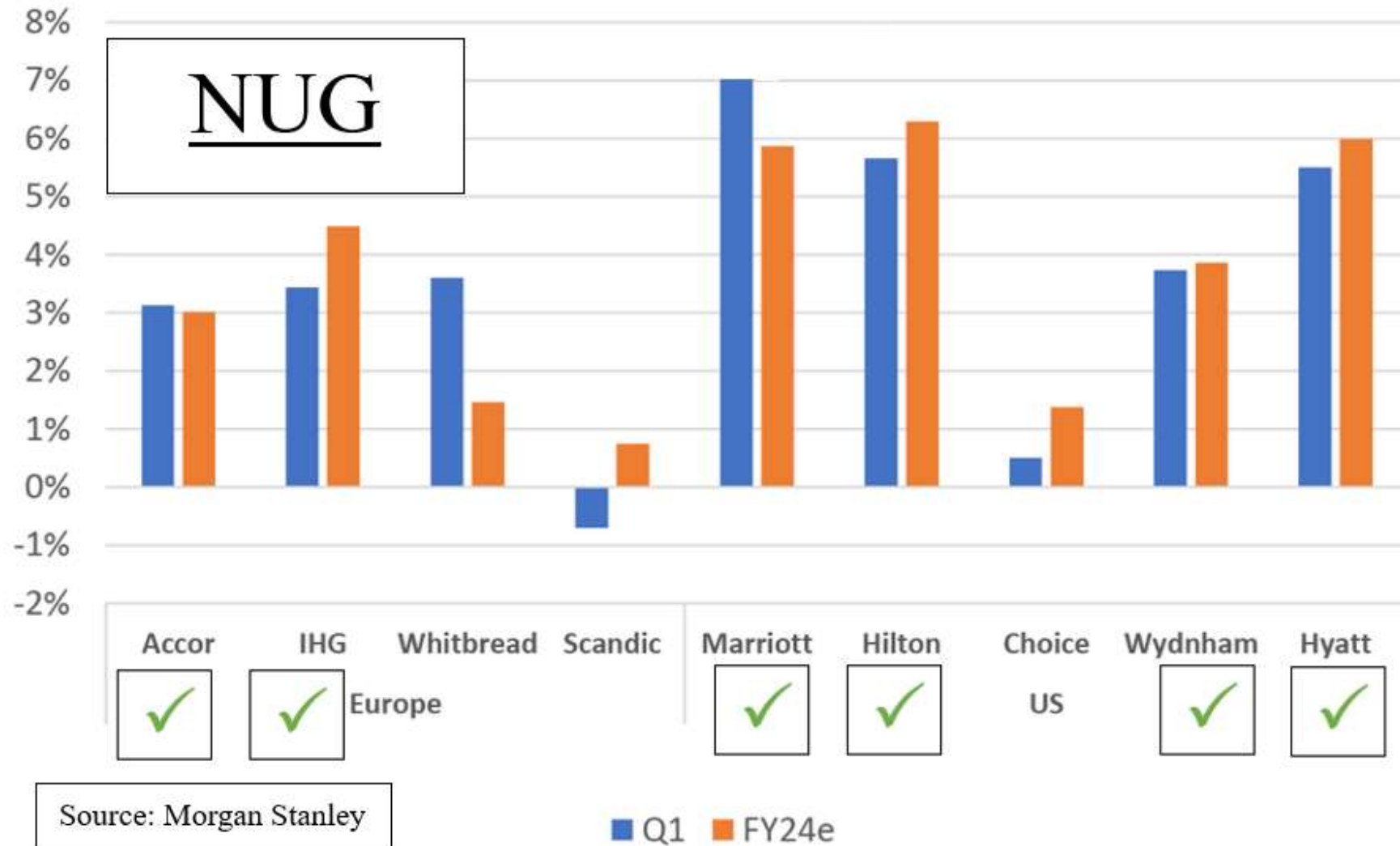


Well, yes, but growth in what?
What creates value?

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For the Hotel Stocks,
it's all About
Net Unit Growth

NUG



“Development Pipeline?”

“We tend to ignore it pretty much because we just don't know:

- Whether it is funded
- When it will open
- How much of it will get deleted.

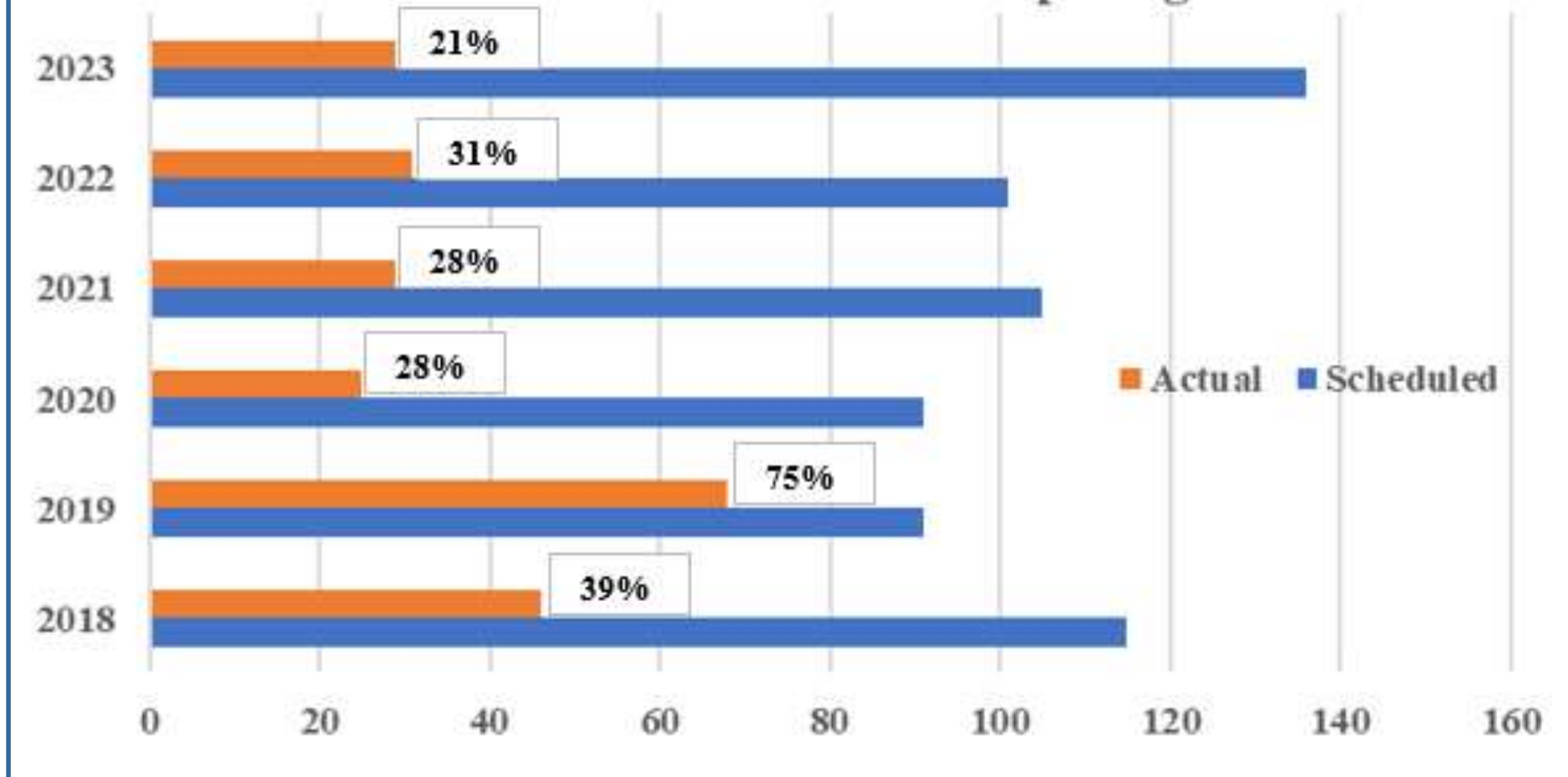
“It doesn't in itself add any value, but of course without it, you won't generate NUG”.

London-based leisure analyst





Hotel Chain Development Pipelines in Africa 2024 Scheduled vs. Actual Hotel Openings



THE OBJECTIVE



Which was largely achieved
in 2019



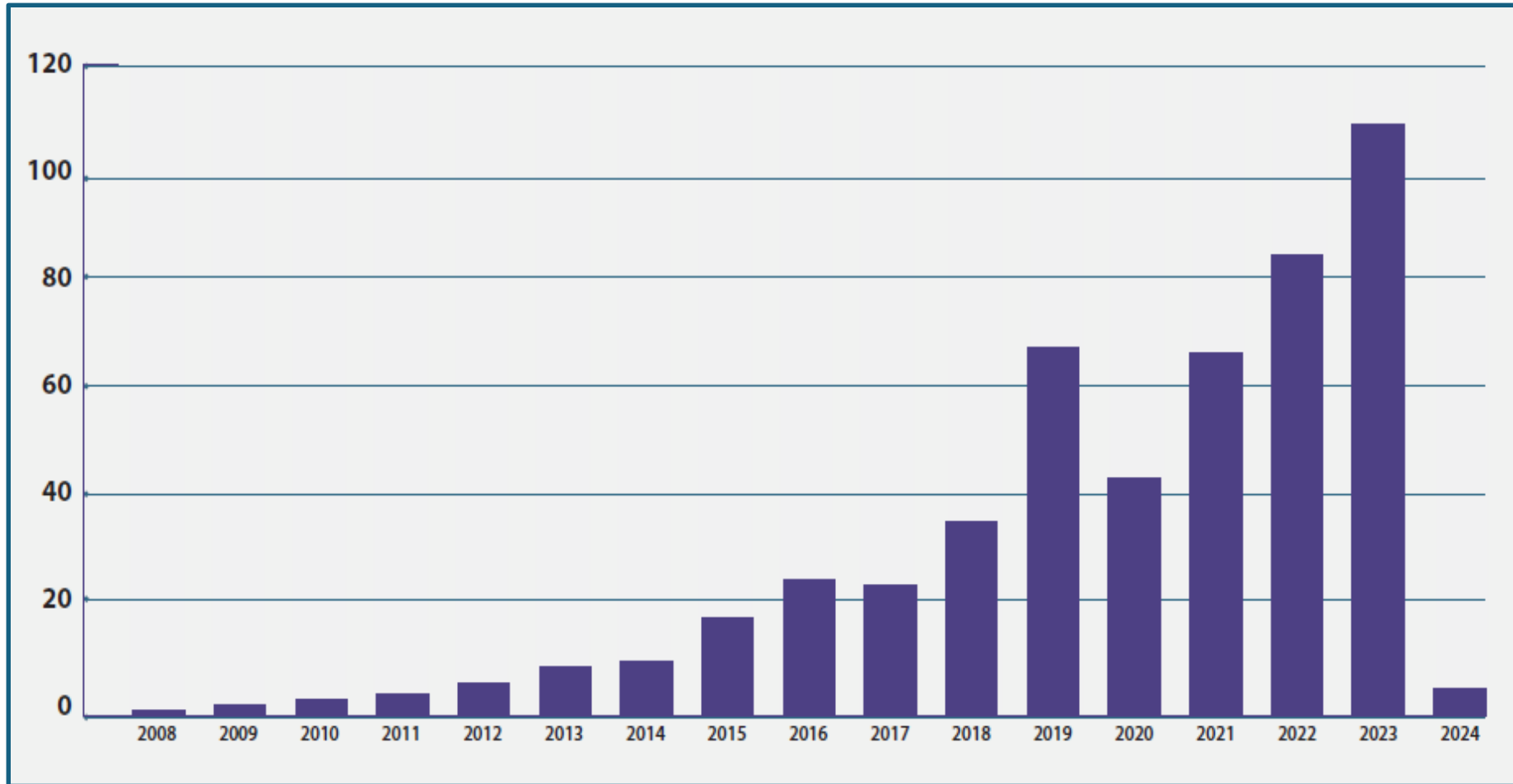
BUT WHAT ABOUT
THIS ONE?



It was signed in 20🐢



Hotel Chain Development Pipelines in Africa 2024 Years the Deals Were Signed



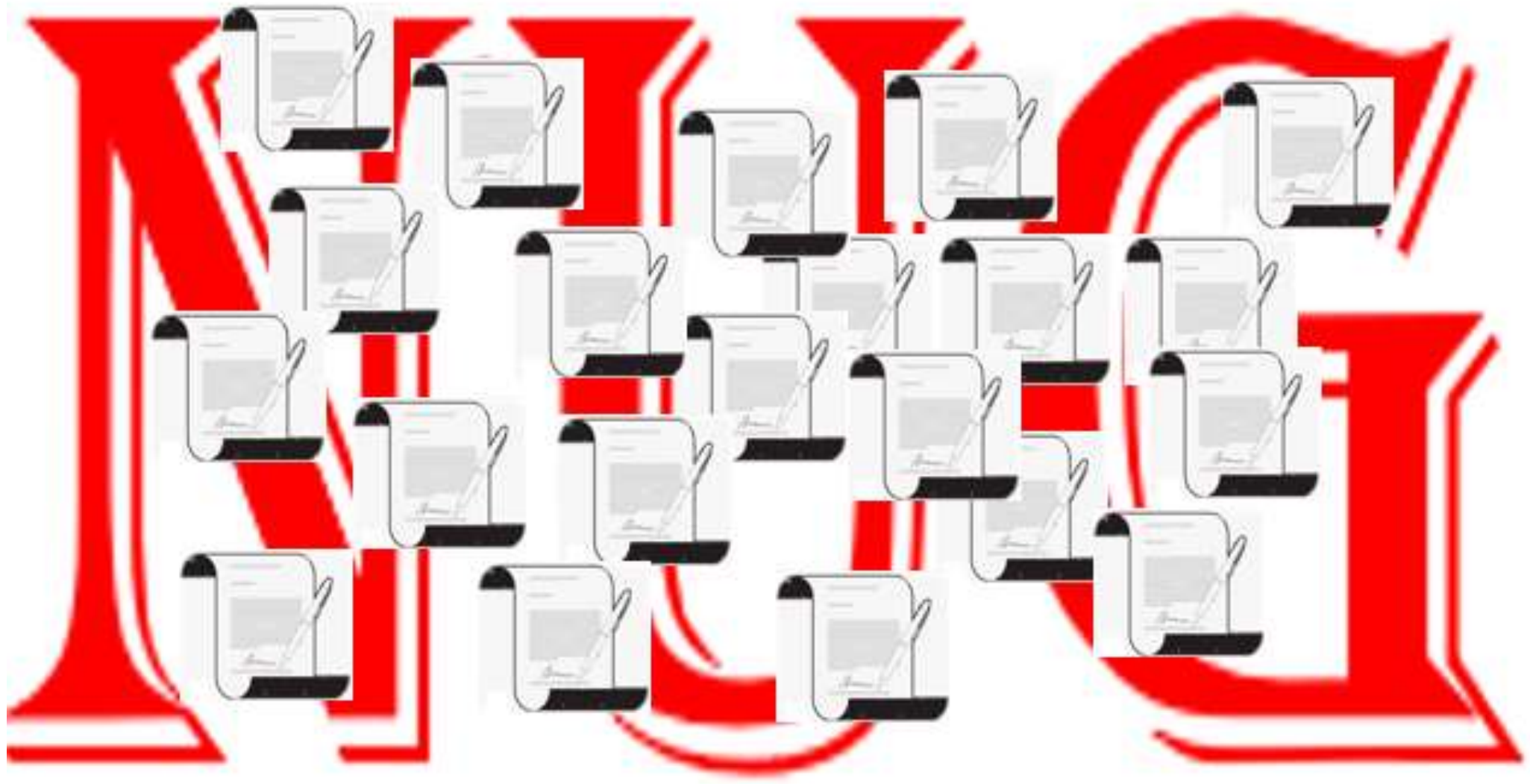
THOUGHTS AND TAKEAWAYS



THE OBJECTIVE

It hasn't
changed!







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