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INDUSTRY UPDATE

PRESS RELEASE

29 October 2021

Marriott Leads With the Largest U.S. Hotel Construction Pipeline at Q3'21 Close

2 min

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PORTSMOUTH, NH - According to the third quarter report by analysts at Lodging Econometrics (LE), the franchise companies leading the U.S. construction pipeline with the greatest number of new construction projects are Marriott International with 1,286 projects/166,174 rooms, Hilton Worldwide with 1,223 projects/139,742 rooms, and InterContinental Hotels Group (IHG) with 769 projects/77,558 rooms. The construction pipelines for these three franchise companies comprise an impressive 68% of the total construction pipeline projects.

The leading brands by project count in the construction pipeline for each of these three companies are Hilton's Home2 Suites by Hilton with 402 projects/41,846 rooms, IHG's Holiday Inn Express with 301 projects/28,852 rooms, and Marriott's Fairfield Inn with 246 projects/23,653 rooms. These three mid-market brands alone account for 20% of the projects in the total construction pipeline.

Other significant brands in the pipeline for these franchises include Hilton's Hampton by Hilton, reaching a cyclical peak, with 271 projects/28,311 rooms and Tru by Hilton with 224 projects/21,518 rooms; Marriott's TownePlace Suites with 204 projects/19,5693 rooms and Residence Inn with 203 projects/25,132 rooms; IHG's Avid Hotel with 152 projects/13,255 rooms and Staybridge Suites with 122 projects/12,564 rooms.

In the third quarter alone, Marriott opened 60 new



Lodging Econometrics

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rooms and IHG opened 25 new hotels in Q3/2,459 rooms accounting for 9% of rooms. Year-to-date, through the end of the third quarter in 2021, Marriott has opened 212 new hotels/28,298 rooms accounting for 32% of new hotels and 33% of new rooms; Hilton has opened 169 new hotels/21,786 rooms, accounting for 25% of new hotels and 26% of newly opened rooms, and IHG opened 98 new hotels/9,828 rooms, accounting for 15% of new hotels and 12% of rooms opened in the U.S.

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The LE forecast for new hotel openings in 2021 anticipates that Marriott will open 243 projects/32,944 rooms by year-end. Hilton is expected to open a total of 207 projects/26,056 rooms in 2021, and IHG is on track to open 145 projects/14,451 rooms. In 2022, LE forecasts Marriott will open 245 new hotels/31,470 rooms, IHG will open 204 new hotels/20,737 rooms, and Hilton is expected to open 192 new hotels/22,090 rooms.

About Lodging Econometrics (LE)

For nearly 25 years, Lodging Econometrics (LE) has been the industry-leading provider of global hotel intelligence and decision-maker contact information. LE custom-builds business development database programs for hotel franchise companies looking to accelerate their brand growth, hotel ownership and management companies seeking to expand their real estate portfolios, and lodging industry vendors wanting to increase their sales. To learn more about our business development programs contact us: +1 603.431.8740 or info@lodgingeconometrics.com.

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