

# South Africa - Travel & Tourism: An infrastructure driven market (Strategy, Performance and Risk Analysis)

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## Abstracts

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### SUMMARY

Total revenue in South Africa's travel and tourism industry declined at CAGR of -7.2%, from 14.1 billion in 2012 to 10.4 billion in 2016. It will post a forecast-period CAGR of 4.8% to reach US\$13.0 billion in 2021, supported by an increase in hotel revenue at a CAGR of 7.6%. Public private partnerships (PPPs) in national parks are a key driver of tourism and offer potential investors opportunities in adventure activities, eco-tourism properties, and retail propositions. In April 2017, Sanparks showcased 55 new investment opportunities in 10 of its national parks during an investment conference held in Sandton. In 2016, six million people visited 19 national parks in South Africa.

Robust infrastructure and adventure tourism are also helping to drive South Africa's travel and tourism industry. The country's tourism infrastructure has enabled it to host international events such as the 2003 Cricket World Cup, the 2007 T20 Cricket World Cup, and the 2010 FIFA World Cup.

MarketLine Premium's industry reports provides a comprehensive overview and include sections on risk and reward, key industry trends and drivers, SWOT analysis, industry benchmarking, competitive landscape, industry innovation, deals and key developments.

### KEY HIGHLIGHTS

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## Domestic trips to drive tourist volumes

Total tourist volumes rose at a review-period CAGR of 2.9%, from 39.3 million in 2012 to 44.1 million in 2016. Volumes will post a forecast-period CAGR of 4.6% to reach 54.7 million in 2021. Growth is expected to be realized through government initiatives allocating funds to the industry; in 2016, it allocated US\$7.5 million to the promotion of domestic tourism. The strengthening of currencies against the rand is encouraging South Africans to make more domestic trips. Domestic tourist volumes rose at a review-period CAGR of 2.9%, from 25.1 million in 2012 to 28.2 million in 2016 and will post a forecast-period CAGR of 4.6% to reach 35.0 million in 2021. Total international departures rose at a review-period CAGR of 2.3%, from 9.2 million in 2012 to 10.1 million in 2016. Departures will post a forecast-period CAGR of 4.4%, from 10.5 million in 2017 to 12.4 million in 2021. International arrivals rose at a review-period CAGR of 3.7%, from 5.0 million in 2012 to 5.8 million in 2016 and will post a forecast-period (2017-2021) CAGR of 4.8% to reach 7.3 million in 2021.

## Increase in number of tourists to drive car rental fleet size

South Africa's car rental fleet size rose at a review-period CAGR of 4.1%, from 58,706 in 2012 to 69,006 in 2016, and will post a forecast-period CAGR of 5.4% from 71,881 in 2017 to 88,835 in 2021, due to an increase in number of inbound business tourists.

## New hotel establishments to drive revenue growth

Total revenue generated from hotels recorded a review-period CAGR of -4.3%, falling from US\$1.9 billion in 2012 to US\$1.6 billion in 2016. It will post a forecast-period CAGR of 7.6% to reach US\$2.2 billion in 2021. Upscale hotels contributed the most to total revenues during the review period (2012-2016), however luxury hotels are set to outpace them over the forecast period.

## SCOPE

**Risk & Reward Index** - The Risk & Reward Index compares the lucrativeness of the South African travel and tourism industry with other countries in the region via a set of specific risk and reward parameters.

**Industry Snapshot and Industry View** - Key travel and tourism industry statistics, including revenue and expenditure in key segments and trends driving market

performance.

Industry SWOT Analysis - Discover the strengths, weaknesses, opportunities and threats impacting market performance.

Industry Benchmarking - Benchmarks the South African travel and tourism industry's performance against regional and global markets in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, travel intermediary revenue, and tourism expenditure growth.

Competitive Landscape - Overview of players in the South African travel and tourism industry, specifically airlines, hotels and car rental companies split by category and compared against their peers across a set of relevant industry indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the South African travel and tourism industry compared to other countries in the Middle-East and Africa?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the South African travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the South African travel and tourism industry?

What are the South African travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the South African travel and tourism industry?

## Contents

Risk & Reward Index  
Industry Snapshot  
Industry View  
Industry SWOT Analysis  
Industry Benchmarking  
Industry Performance  
Competitive Landscape  
Innovation  
Deals  
Key Developments  
Appendix

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