

TOURISM BUSINESS COUNCIL OF SOUTH AFRICA

TRENDS AND INDICATORS REPORT

May 2018



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INTRODUCTION

- This trends and indicators report is a quarterly TBCSA report compiled by the Knowledge Management, Research Policy and Strategic Projects unit. This report is a culmination of collated statistical data that is readily available from different sources. It serves the purpose of informing the TBCSA board of the trends in Tourism both globally and within South Africa.
- This report presents high level trends and indicators in the travel and tourism industry. Sources used or cited in this report range from the WTTC, PWC, Stats SA, IATA, UNTWO and ACSA.
- This report should be read in conjunction with the following reports (WTTC report 2018; Stats SA's Tourism and Migration report, April 2018 IATA Air Passenger Reports; UNTWO World Tourism Barometer and ACSA Aviation Barometer.

TRAVEL AND TOURISM CONTRIBUTION

Global Contribution

- The Direct Travel & Tourism GDP grew by 4.6% in 2017; the sector last saw higher growth than this in 2011.
- Global international tourist arrivals grew by 6.7% in 2017, a strong acceleration in growth compared to 3.9% in 2016.
- The strongest recorded growth in North Africa (13.4%), largely attributed to Tunisia.
- There was also strong growth of 4.8% for the Middle East region, following a decline in 2016.
- Strong growth was also recorded across other major regions, including Europe (8.4%) while Asia Pacific (5.8%), Sub-Saharan Africa (5.1%) and the Americas (2.9%) also enjoyed robust growth.
- Global international air passenger traffic also recorded strong performance in 2017, with full year growth of 7.9%, compared to growth of 6.7% for 2016.
- Contributing to this strong global performance was particularly strong growth in Asia Pacific (9.4%), Europe (8.2%), Africa (7.6%) and the Middle East (6.6%).
- North America also recorded robust growth of 4.8% for 2018.
- Regional hotel performance was positive across most world regions in 2017, except, somewhat surprisingly given other key performance indicators, the Middle East, which recorded a decline across all three measures of hotel performance.
- North Africa recorded stand out growth rates across all key performance indicators.
- Solid growth was recorded across all hotel metrics in Europe, the Americas and Asia Pacific.
- Strong 2017 performance in North Africa looks to be continuing in early 2018, while solid performance has also been recorded in Europe and North America across all KPIs.
- The direct contribution of Travel & Tourism to GDP was USD2,570.1bn (3.2% of total GDP) in 2017, and is forecast to rise by 4.0% in 2018, and to rise by 3.8% pa, from 2018-2028, to USD3,890.0bn (3.6% of total GDP) in 2028
- The total contribution of Travel & Tourism to GDP was USD8,272.3bn (10.4% of GDP) in 2017, and is forecast to rise by 4.0% in 2018, and to rise by 3.8% pa to USD12,450.1bn (11.7% of GDP) in 2028
- In 2017 Travel & Tourism directly supported 118,454,000 jobs (3.8% of total employment). This is expected to rise by 2.4% in 2018 and rise by 2.2% pa to 150,139,000 jobs (4.2% of total employment) in 2028.

- In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 9.9% of total employment (313,221,000 jobs). This is expected to rise by 3.0% in 2018 to 322,666,000 jobs and rise by 2.5% pa to 413,556,000 jobs in 2028 (11.6% of total)
- Visitor exports generated USD1,494.2bn (6.5% of total exports) in 2017. This is forecast to grow by 3.9% in 2018, and grow by 4.1% pa, from 2018-2028, to USD2,311.4bn in 2028 (6.9% of total).
- Travel & Tourism investment in 2017 was USD882.4bn, or 4.5% of total investment. It should rise by 4.8% in 2018, and rise by 4.3% pa over the next ten years to USD1,408.3bn in 2028 (5.1% of total)

Source: WTTC 2018.

South African Overview

The WTTC Travel and Tourism Economic impact report for 2018 reveals the following:

- The direct contribution of Travel & Tourism to GDP was ZAR136.1bn (USD10.2bn), 2.9% of total GDP in 2017 and is forecast to rise by 2.4% in 2018, and to rise by 3.6% pa, from 2018-2028, to ZAR197.9bn (USD14.9bn), 3.3% of total GDP in 2028.
- The total contribution of Travel & Tourism to GDP was ZAR412.5bn (USD31.0bn), 8.9% of GDP in 2017, and is forecast to rise by 2.9% in 2018, and to rise by 3.5% pa to ZAR598.6bn (USD44.9bn), 10.1% of GDP in 2028.
- In 2017 Travel & Tourism directly supported 726,500 jobs (4.5% of total employment). This is expected to rise by 1.0% in 2018 and rise by 2.9% pa to 980,000 jobs (5.2% of total employment) in 2028.
- In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry was 9.5% of total employment (1,530,500 jobs). This is expected to rise by 3.3% in 2018 to 1,580,500 jobs and rise by 2.8% pa to 2,082,000 jobs in 2028 (11.1% of total).
- Visitor exports generated ZAR126.7bn (USD9.5bn), 9.2% of total exports in 2017. This is forecast to grow by 3.4% in 2018, and grow by 5.3% pa, from 2018-2028, to ZAR219.6bn (USD16.5bn) in 2028, 11.4% of total.
- Travel & Tourism investment in 2017 was ZAR71.0bn, 8.2% of total investment (USD5.3bn). It should rise by 3.4% in 2018, and rise by 4.4% pa over the next ten years to ZAR112.7bn (USD8.5bn) in 2028, 10.1% of total

Africa Overview

- The direct contribution of Travel & Tourism to GDP was USD72.8bn (3.3% of total GDP) in 2017, and is forecast to rise by 4.0% in 2018, and to rise by 4.1% pa, from 2018-2028, to USD113.2bn (3.3% of total GDP) in 2028.
- The total contribution of Travel & Tourism to GDP was USD177.6bn (8.1% of GDP) in 2017, and is forecast to rise by 3.7% in 2018, and to rise by 4.2% pa to USD278.2bn (8.1% of GDP) in 2028.
- In 2017 Travel & Tourism directly supported 9,297,000 jobs (2.6% of total employment). This is expected to rise by 3.2% in 2018 and rise by 2.7% pa to 12,519,000 jobs (2.6% of total employment) in 2028.
- In 2017, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 6.5% of total employment (22,771,000 jobs). This is expected to rise by 3.1% in 2018 to 23,482,000 jobs and rise by 2.7% pa to 30,769,000 jobs in 2028 (6.4% of total).
- Visitor exports generated USD48.7bn (9.7% of total exports) in 2017. This is forecast to grow by 4.1% in 2018, and grow by 4.5% pa, from 2018-2028, to USD78.5bn in 2028 (8.9% of total).
- Travel & Tourism investment in 2017 was USD28.2bn, or 5.7% of total investment. It should rise by 2.6% in 2018, and rise by 4.6% pa over the next ten years to USD45.5bn in 2028 (6.2% of total).

TOURISTS ARRIVALS – MARCH 2018

- According to Stats SA's latest Tourism and Migration report, in April 2018 3 582 842 travellers (arrivals, departures and transits) passed through South Africa's ports of entry. These were made up of 1 027 709 South African residents and 2 555 133 foreign travellers.
- For South African residents, the volume of arrivals increased by 2,7% (from 515 265 in April 2017 to 529 412 in April 2018), departures decreased by 9,9% (from 552 015 in April 2017 to 497 432 in April 2018), and transits increased by 10,2% (from 785 in April 2017 to 865 in April 2018). 6,9% (from 1 395 241 in April 2017 to 1 298 709 in April 2018), departures decreased by 9,1% (from 1 317 866 in April 2017 to 1 198 469 in April 2018), and transits decreased by 4,0% (from 60 347 in April 2017 to 57 955 in April 2018).

Leading Overseas Countries whose citizens visited SA

- In April 2018, the distribution of overseas tourists was as follows: Europe, 113 734 (58,6%); North America, 33 332 (17,2%); Asia, 24 444 (12,6%); Australasia, 11 136 (5,7%); Central and South America, 8 362 (4,3%) and the Middle East, 3 009 (1,6%).
- The ten leading overseas countries whose tourists visited South Africa in April 2018 were United Kingdom (UK), 31 641 (16,3%); United States of America (USA), 27 775 (14,3%); Germany, 19 827 (10,2%); France, 15 861 (8,2%); The Netherlands, 10 892 (5,6%); Australia, 9 740 (5,0%), India, 7 652 (3,9%), China, 7 280 (3,8%); Canada, 5 557 (2,9%) and Brazil, 5 247 (2,7%).
- Tourists from these ten countries constituted 72,9% of all tourists from overseas countries.
- The number of tourists increased for three of the ten leading countries (Brazil, China and Canada), but decreased for Germany, UK, India, The Netherlands, Australia, France and USA
- Brazil had the largest increase of 16,3% (from 4 511 tourists in April 2017 to 5 247 in April 2018) while Germany had the largest decrease of 28,5% (from 27 720 tourists in April 2017 to 19 827 in April 2018)

Tourists from African countries

- Tourists from Africa, 657 020 (97,8%) came from SADC countries.
- The distribution of the remaining tourists from Africa is as follows: West Africa, 7 525 (1,1%); East and Central Africa, 5 982 (0,9%); and North Africa 1 307 (0,2%).
- The ten leading SADC countries in terms of the number of tourists visiting South Africa in April 2018 were: Zimbabwe, 199 567 (30,4%); Lesotho, 163 989 (25,0%); Mozambique, 109 483 (16,7%); Swaziland, 74 359 (11,3%); Botswana, 50 536 (7,7%); Namibia, 17 214 (2,6%); Malawi, 14 774 (2,2%); Zambia 13 868 (2,1%); Angola, 4 849 (0,7%) and Tanzania, 3 133 (0,5%).
- Tourists from these ten countries constituted 99,2% of all tourists from the SADC countries.
- The number of tourists increased for six of the ten leading countries (Angola, Malawi, Tanzania, Zimbabwe, Lesotho and Mozambique), and decreased for four (Botswana, Namibia, Swaziland and Zambia).
- Angola showed the largest increase of 35,1% (from 3 590 tourists in April 2017 to 4 849 in April 2018), while Botswana showed the largest decrease of 38,0% (from 81 570 tourists in April 2017 to 50 536 in April 2018).
- The ten leading countries in terms of the number of tourists visiting South Africa in April 2018 from 'other' African countries from 'other' African countries were: Nigeria, 4 480 (30,2%); Kenya, 2 540 (17,1%); Ghana, 1 825 (12,3%); Uganda, 1 185 (8,0%); Ethiopia, 722 (4,9%); Egypt, 599 (4,0%); Gabon, 487 (3,3%); Cameroon, 421 (2,8%); Côte d'Ivoire, 248 (1,7%) and Senegal, 246 (1,7%).
- Tourists from these ten countries constituted 86,1% of all tourists from 'other' African countries.
- The number of tourists increased for six of the ten leading countries (Ghana, Ethiopia, Senegal, Côte d'Ivoire, Uganda and Kenya) and decreased for the other four leading countries (Egypt, Gabon, Nigeria and Cameroon).
- Egypt showed the largest decrease of 22,1% (from 769 tourists in April 2017 to 599 in April

- Ghana showed the largest increase of 23,3% (from 1 480 tourists in April 2017 to 1 825 in April 2018)

In terms of the purpose of visit:

- In April 2018, the majority of tourists, 841 588 (97,1%), were in South Africa for holiday compared to 17 546 (2,0%); 7 202 (0,8%) and 558 (0,1%) who were in South Africa for business, study and for medical treatment, respectively.
- A total of 10 909 (98,0%) tourists from Australasia, 8 184 (97,9%) from Central and South America, 32 347 (97,0%) from North America, 109 619 (96,4%) from Europe, 22 876 (93,6%) from Asia and 2 749 (91,4%) from the Middle East were in South Africa for holiday.
- Compared to other overseas regions, Europe had the highest number of tourists, 109 619 (58,7%) who came for holiday, 3 368 (56,4%) who came for business, 687 (53,9%) who came for study and 60 (69,0%) who came for medical treatment.
- Middle East had the highest proportion of its tourists who came to South Africa for business, 6,7% (203), and for study purposes, 1,8% (55).
- Asia had the second highest proportion of tourists who came for business, 5,3% (1 307) and for study purposes, 1,0% (254).
- The majority of African tourists, 653 925 (97,3%) came to South Africa for holiday.
- 640 970 (97,6%) of tourists from the SADC countries were on holiday; 12 955 (87,5%) of tourists from 'other' African countries came for the same purpose.
- Tourists on holiday from 'other' African countries constituted 89,6% (6 746); 85,9% (5 141); and 81,7% (1 068) for West Africa, East and Central Africa and North Africa, respectively
- Business persons constituted 7,2% (1 067) of tourists from 'other' African countries and 1,6% (10 446) from the SADC countries. North Africa had the highest proportion, 14,2% (185) of its tourists who came to South Africa for business purposes
- Students made up the highest proportion, 4,8% (711) of tourists from 'other' African countries compared with 0,8% (5 216) from the SADC countries. East and Central Africa had the highest proportion of its tourists, 6,0% (356) who came to South Africa for study purposes.

HOTEL PERFORMANCE

- Tourist attractions posted record numbers of visitors in December 2016, with visitor numbers at Cape Point in Table Mountain National Park up 15%, Robben Island up 4%, Kirstenbosch National Botanical Gardens up 6%, and the Aerial Cableway at Table Mountain up 0.3% over a record year in 2015.
- In addition to the amendment of certain visa regulations, the devaluation of the rand made South Africa a more attractive destination, while added routes from London, Frankfurt, Doha and Addis Ababa, among other countries accommodated more visitors.
- Business tourism has increased, benefiting in part from the creation of the National Convention Bureau in 2012. South Africa has been successful in converting business visitors to tourists, as according to research conducted by the National Convention.
- Bureau, 40% of people who come to South Africa for a business convention or conference return within five years as tourists. Tourism contributed 10% to South Africa's GDP in 2016, up from 9% in 2015.
- We project the number of foreign overnight visitors to South Africa to increase an additional 5.6% in 2017 and then grow at rates below 4% annually beginning in 2018, averaging 3.9% compounded annually to 12.15 million in 2021.
- Domestic travel edged up 1.5% in 2016, below the 1.7% increase in 2015, as economic growth slowed.
- We look for domestic tourism to increase by 2.2% in 2017 and average 3.0% compounded annually over the entire forecast period, rising to an estimated 6.35 million in 2021 from 5.48 million in 2016.
- Over the past five years, the occupancy rate has edged up, surpassing the 60% level and reaching 61.2% in 2016. This gain has stimulated interest and a number of new hotels are expected to open in the next five years.

- Economic growth is expected to pick up marginally in 2017 with a projected 0.8% increase followed by a 1.6% gain in 2018. The economy is then expected to grow at annual rates in excess of 2% over the 2019-21 period.
- Three-star hotels accounted for 36% of all available hotel rooms in South Africa
- For four-star hotels, guest nights rose 5.1% in 2016.
- Five-star hotels had the highest occupancy rates in the market at 79.3% in 2016.

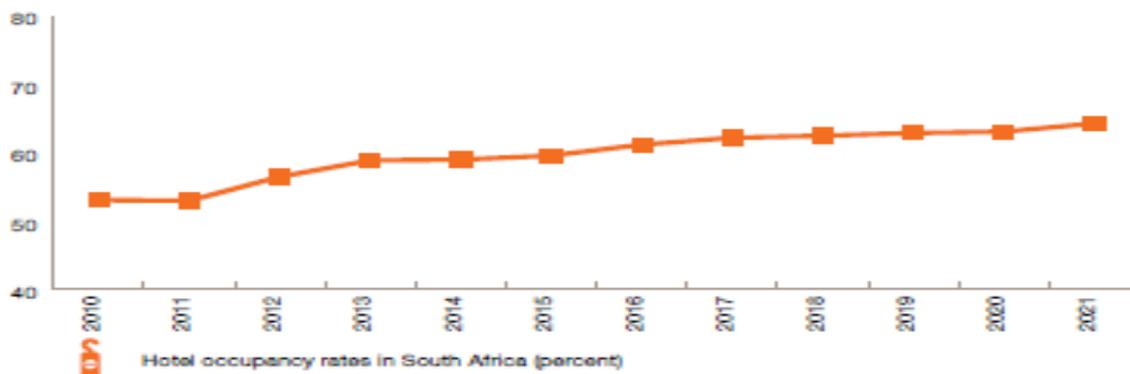
The total number of travellers in South Africa will reach a projected 18.5 million by 2021, a 3.6% compound annual increase from 15.5 million in 2016.

Travel and tourism to South Africa (millions)

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2017-21 CAGR
Foreign overnight visitors	8.07	8.34	9.19	9.53	9.55	8.90	10.04	10.80	11.00	11.38	11.75	12.15	
% change	15.1	3.3	10.2	3.7	0.2	-8.8	12.8	5.8	3.8	3.5	3.3	3.4	3.9
Domestic travellers	5.13	5.43	4.97	5.09	5.31	5.40	5.48	5.80	5.75	5.93	6.13	6.35	
% change	14.3	5.8	-8.5	2.4	4.3	1.7	1.5	2.2	2.7	3.1	3.4	3.8	3.0
Total	13.20	13.77	14.16	14.62	14.86	14.30	15.52	16.20	16.75	17.31	17.88	18.50	
% change	14.8	4.3	2.8	3.2	1.6	-3.8	8.5	4.4	3.4	3.3	3.3	3.5	3.6

Sources: Statistics South Africa, PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates

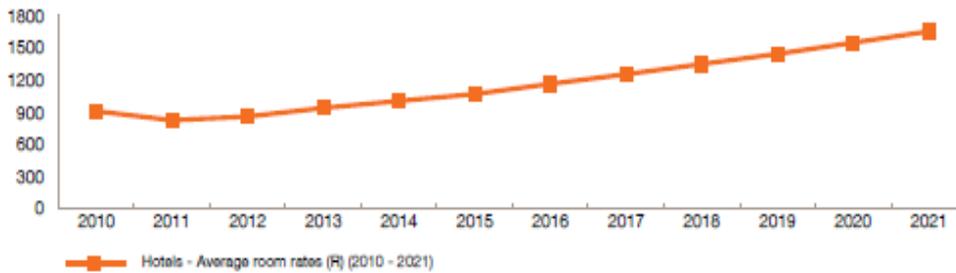
Fig. 4 Hotel occupancy rates in South Africa (%)



Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates

Hotels outlook: 2017-2021

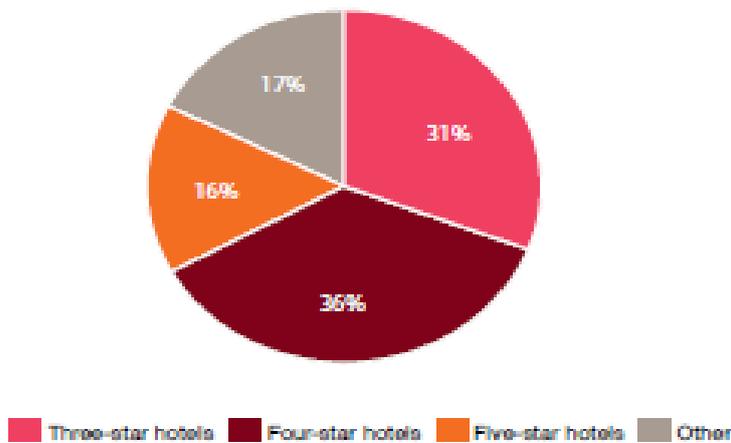
Fig. 5 Hotels: Average room rates, 2010-2021 (R)



Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates

Hotel room revenue is expected to expand to R24.8 billion in 2021, up 9.3% compounded annually from R15.9 billion in 2016.

Fig. 6 Total room revenue by category, 2016

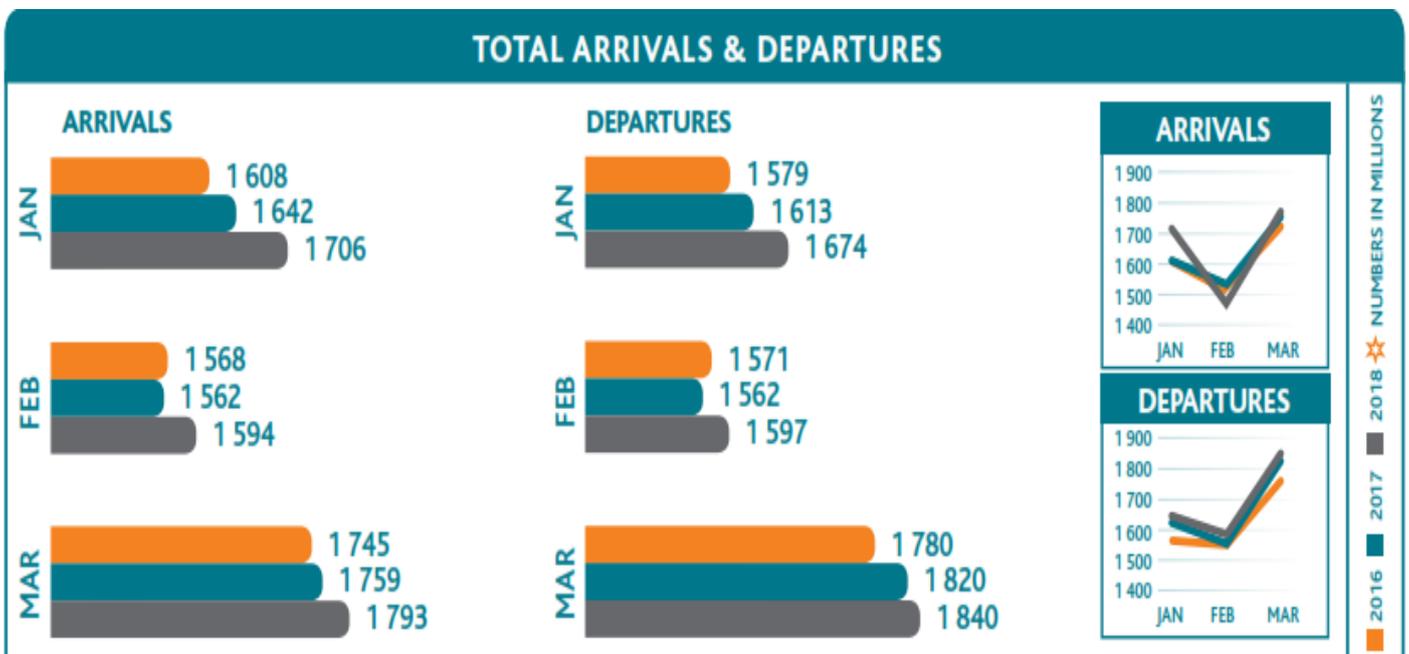


Sources: PricewaterhouseCoopers LLP, Wilkofsky Gruen Associates

AVIATION

- More than 40 million passengers were processed through Airports Company South Africa’s nine airports for the first time in the financial year to the end of March 2018.
- The 40-million figure was achieved in spite of more modest passenger figures for the months of January to March, which saw growth of 2.48% compared to the same period in 2017.
- Cape Town International Airport continued to lure international travellers, experiencing a growth of almost 10% in the period from January to March.
- King Shaka International Airport also continued to build its domestic passenger base, with a growth of 8.47% in the first three months of 2018.
- The total number of passengers from all nine airports in the 2017/18 financial year was 41.49 million, an increase of 4% over the previous financial year when passenger growth was 3.2%.
- The total number of passengers using Airports Company South Africa airports was 1.6 million higher than in the previous financial year.
- O. R. Tambo International Airport remains Africa’s largest and busiest airport, with a total of 21.23 million passengers in the financial year.

- King Shaka International Airport experienced the highest growth, with passenger numbers increasing by 7.7% to 5.64 million for the financial year.
- Cape Town International Airport continued its strong performance in attracting international passengers and airlines, with a growth of 16% for the year.
- The six regional airports saw total passenger growth of 3.78% in the year. George Airport was the standout performer with passenger growth of 8.5%, putting it over the 800 000-passenger mark for the first time.
- International arrivals increased by 3.68%, which translates to an extra 53 394 passengers, bringing the total to 1 502 516 passengers.
- International departures rose by 2.10%, with an increase of 30 850 passengers, totalling 1 496 737 passengers.
- Regional arrivals decreased by 1.55% to 119 602 passengers.
- Regional departures decreased by 1.03% to 122 135 passengers.
- Domestic arrivals experienced an increase of 79 540 passengers, a 2.36% increase from the previous year.
- Domestic departures increased by 91 499, 2.70% increase from the same period last year.



Source (Aviation Barometer, Q1, 2018). www.airports.co.za. Accessed on 19 June 2018.

Air passenger market analysis

- Year-on-year growth in industry-wide revenue passenger kilometres (RPKs) slowed to 6.2% in April 2018, down from a 12-month high of 9.7% in March.
- Industry-wide revenue passenger kilometers (RPKs) increased by 6.2% in year-on-year terms in April, while the industry-wide load factor posted yet another monthly record high (82.3% of available seat kilometers).
- 2018 is on track to be another year of above-trend RPK growth. However, reduced stimulus from lower airfares and a moderate slowdown in economic growth ahead of the summer passenger peak, are both expected to see RPK growth slow slightly in calendar-year 2018 relative to that seen last year.
- Domestic India RPKs posted double-digit annual growth for the 44th month in a row, while airlines based in Asia Pacific topped the international RPK growth chart for the first time since December.
- Annual industry-wide domestic RPK growth rose to 8.5% in April, from 8.1% in March.
- Industry-wide available seat kilometers (ASKs) increased by 5.9% year-on-year in April.
- Year-on-year growth in international RPKs slowed to 4.8% in April, having jumped to 10.6% in March.

Chart 1 – Air passenger volumes

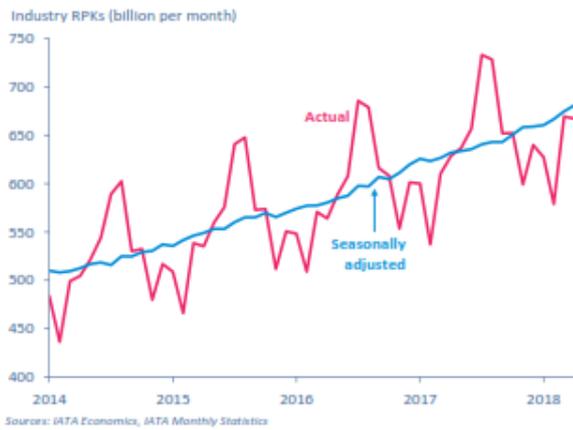
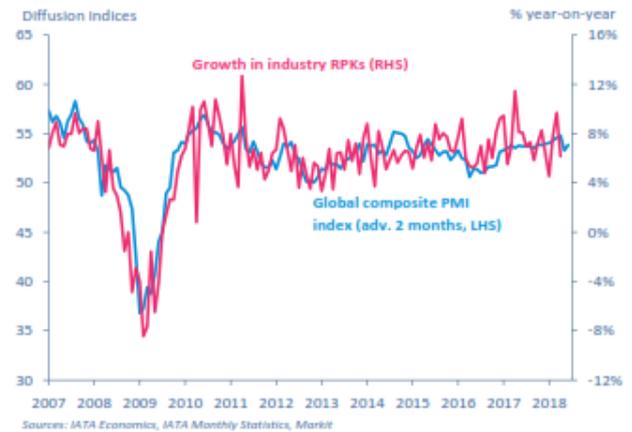


Chart 2 – Air passenger volume growth and global composite business confidence measure



Air passenger market overview - April 2018

	World share ¹	April 2018 (% year-on-year)				% year-to-date			
		RPK	ASK	PLF (%-pt) ²	PLF (level) ³	RPK	ASK	PLF (%-pt) ²	PLF (level) ³
TOTAL MARKET	100.0%	6.2%	5.9%	0.2%	82.3%	7.0%	6.0%	0.8%	81.3%
International	63.8%	4.8%	4.9%	-0.1%	81.4%	6.7%	5.6%	0.8%	80.5%
Domestic	36.2%	8.5%	7.6%	0.7%	84.0%	7.5%	6.6%	0.7%	82.6%

¹% of industry RPKs in 2017 ²Year-on-year change in load factor ³Load factor level

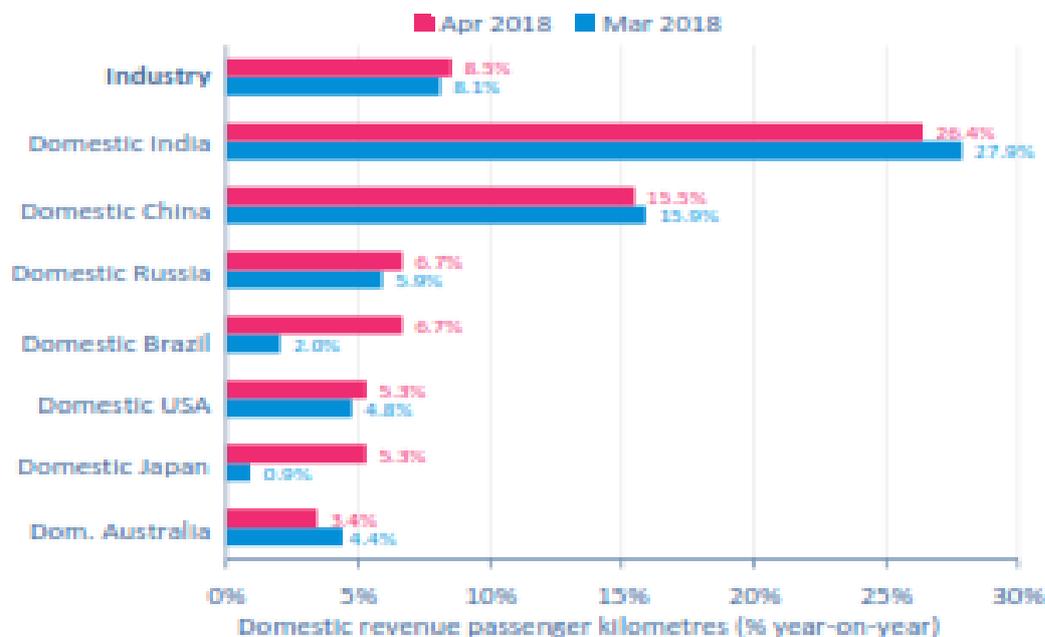
Air Passenger Market Analysis – April 2018

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Source: IATA April 2018 – Air Passenger Market Analysis.

The chart below shows the Revenue Passenger Kilometres by market

Chart 5 – Domestic RPK growth by market



Sources: IATA Economics, IATA Monthly Statistics

Air passenger market analysis in Africa

- Industry-wide RPKs grew by 4.6% year on year in Jan.
- Business confidence in South Africa moved above the key index level of 50 for the 1st time in 6mths.
- On a trade-weighted basis, the US\$ rose a modest 0.3% in Feb, after consecutive monthly declines. The largest moves amongst the main regional currencies were a 0.6% & 0.8% mom rise in the KES & ZAR vs the US\$.
- For the African airlines, RPKs grew by a moderate 2.8% in year on year terms in Jan, down from 4.1% in Dec.
- Amongst the main international markets for the region, Africa-Europe & Africa-Asia lead the way with Pax volumes currently up 6.8% & 4.5% year on year, respectively.

TOURISM BUSINESS INDEX- HALF YEAR 2017

- Overall, the Tourism Industry experienced significantly lower than normal business performance recording an index of 71,4, which is lower than the anticipated 80,4 forecast for Q3 and Q4 2017 and notably down from the 82,7 experienced in the first half of 2017.
- Anticipated business performance for the next half year is slightly more than current performance at 72,4. This is worse than the then anticipated 80,4 for Q3 and Q4 2017 and shows an expectation which is continuing to become ever more pessimistic.
- Business performance for the 2nd half of 2017 reflects actual performance well below normal levels and more or less in line with expected performance at 66,3 compared to an anticipated 66,1.
- The Accommodation Sector forecasts that business performance for the 1st 6 months of 2018 will remain poor with a continuing significantly worse than normal performance anticipated at 66,2.
- Other Tourism Businesses recorded worse than normal business performance, at 75,4, which is lower than 91,4, the level that was expected for the 2nd half of 2017.
- A forecast index of 77,1 is anticipated for the 1st half of 2018 reflecting a very slightly more optimistic outlook from Other Tourism Businesses for better business performance compared to the last the last 6 months of 2017.
- When looking at expected performance for the year ahead, the Accommodation Sector records a pessimistic outlook with a negative balance statistic of -21,9%, with 45.8% of respondents anticipating that business performance will get worse during the year ahead.
- When looking at employment levels overall, the outlook remains mixed. In the Accommodation Sector for the next six months, a slightly negative employment balance statistic of -1.9% was recorded with 96,5% of respondents expecting employment levels to remain the same.
- Other Tourism Businesses record a negative balance statistic of -15,5%, the lowest statistic since 2015 during the Ebola crisis and visa/birth certificate impacts
- Insufficient domestic business demand, increases in competitive supply and cost of inputs were the greatest negative contributing factors to business performance for the Accommodation Sector, with over 40% of respondents indicating these negative factors.
- These were followed by the cost of labour, insufficient overseas business demand and insufficient overseas leisure demand (all over 30%).
- 22% of respondents indicate that a weak Rand exchange rate impacted positively on their business performance in the last half year.
- Despite these positive factors, 28% of respondents indicate that nothing has impacted positively on their business performance in the last half.

ADVANCED TECHNOLOGY

- Africa is now at a stage whereby it is continuously seeing new and existing winning companies, and this can be attributed largely to disruptive and innovative business models, and forward thinking methods.
- New companies in this era have adapted through diversifying product offerings and revenue streams.
- Some of the key elements that have led to companies across the continent realising sustainable and winning businesses include the technology revolution, intentional disruption and private-public partnerships (PPPs).
- Growth opportunities of the future lie in being able to deliver solutions digitally. Revolutionising traditional methods offering products and services assists in reducing costs, provides the opportunity of acquiring new customers at reduced rates and offers companies wider reach.
- Companies across all sectors need to learn to adapt to compete within the digital realm, and create and maintain technology strategies.

Ends.