



196+ roundtable
south africa+

lesotho, south africa

online
(30.06.2021)

20
participants

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NOTES

1) calculated as per PKF sample; includes all
properties with at least 100 rooms; 2) as per 31
December 2020; 3) as per the PKF contract
database; 4) from the viewpoint of hotel groups

supply

292 properties	53,709 rooms ¹
67% branded rooms	85% chain affiliated rooms

group / brand profile

- › strongest brand: **Southern Sun**
- › strongest group: **Tsogo Sun**
- › fastest growing brand: **Marriott**
- › fastest growing group: **Marriott**
- › strongest regional brand
(global presence): **Southern Sun**
- › fastest growing regional brand: **City Lodge**

key takeaways

- › The recent move back to level 4 lock down in South Africa is wreaking havoc with the industry after seeing small green shoots mainly led by domestic tourism.
- › The luxury sector can only recover with a decent level of international tourism returning since discounting to accommodate the local market will only work in the short term.
- › International tourism was set for a recovery for the coming season, depending on the regime of travel restrictions and quarantines in source markets.
- › The construction pipeline is constrained and any projects that did not start on solid ground will not materialise. A lot more confidence is sought before projects receive funding.

pipeline

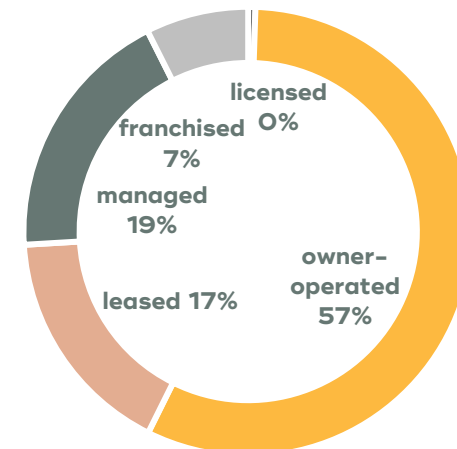
30 properties	6,639 rooms ^{1,2}
14 hotels under construction	16 planned hotels

selected openings of 2020

- › Hotel Sky Sandton, Johannesburg, 453 rooms
- › Marriott Johannesburg Melrose Arch, Johannesburg, 306 rooms
- › The Leonardo Sandton, Johannesburg, 240 rooms
- › Hilton Garden Inn Umhlanga Arch, Umhlanga, 203 rooms
- › hi Monte, Johannesburg, 123 rooms

contracts

198 properties	37,809 rooms under contract ^{2,3,4}
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