

**Colloque Spécialisation touristique et vulnérabilité :
réalités et enjeux pour le développement soutenable des petits territoires insulaires
La Réunion – 4 au 6 décembre 2014**

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**Air accessibility as a key to understand the economic
dependency of islands to tourism?**

(Réunion, Mauritius, Seychelles, Maldives)



Framework:

1. Background and issues
2. Trends in air services
3. The air access tool serving the tourism strategy
4. Conclusion

Background and issues:

The tourism development of islands is heavily dependent on the efficiency of air transport => island states to endow an airline.

Last decade : structural changes can be observed, both in the field of air transport and tourism :

- Air transport has become highly competitive with the arrival of new operators that destabilize the historical companies.
- Tourism, born in Western countries (eighteenth century), affected the lower classes with the advent of mass tourism and is now experiencing dissemination in emerging countries.

Main question => what are the consequences of these changes on the tourism system of the studied insular spaces.

Air transport and tourism development :

In the 1960s and 1970s, the Indian Ocean islands support their economic development on tourism. For Mauritius, Maldives and Seychelles, the access to independence is accompanied by the creation of a national company. The special status of Reunion slows tourism development.

Destinations	Opening international links	Independence	Creation of flag carrier	Opening first international hotel
Mauritius	1945	1968	1967 Air Mauritius	1952
Maldives	1981 (international airport)	1965	1974 Air Maldives	1971 (island-hotel)
Seychelles	1972	1976	1977 Air Seychelles	1973
Reunion		French Department since 1946	1933 RLAF (Air France) + Réunion Air Service (1974) becomes Air Austral	

Quality of air access :

-The indicator of the number of airlines that fly to each destination to measure international openness can be used.

Destinations	Status of flag carrier	Number of airlines which deserve the destination in 2011	Number of airlines which deserve the destination in 2014	Number of countries desserved in 2011	Number of countries desserved in 2014
Maldives	Air Maldives, bankrupt in 2000	18	25	14, Europa, Middle-East and Asia	17, Europa, Middle-East and Asia
Seychelles	Air Seychelles, still alive but in code-share with Etihad	6	7	6, Europa, Middle-East, Asia and Africa	6, Europa, Middle-East, Asia and Africa
Mauritius	Air Mauritius, still alive	14	13	17, Europa, Middle-East, Asia, Africa and Australia	16, Europa, Middle-East, Asia, Africa and Australia
Reunion	Air France and Air Austral, still alive	5	6	7, Europa, Asia, Africa and Oceania	8, Europa, Asia, Africa

=> Voluntarism of Mauritius and the Maldives to attract a large number of operators to support the growth of tourist flows.

Quality of air access:

- But these numbers are not sufficient to capture the complexity of relations between the policies of the islands studied and the strategies of air players.
- Each destination proposes its answer to the new air competition depending on national issues.

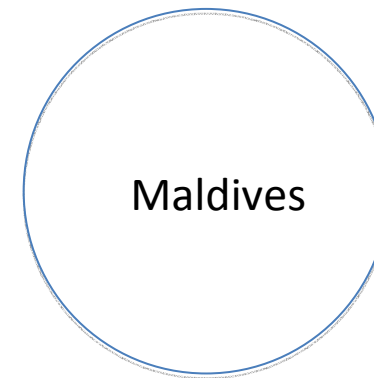
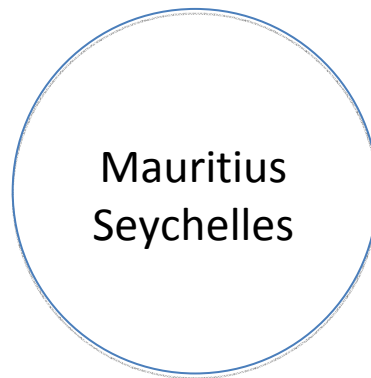
Protectionism



Limited tourist flow



Opening



Growth of tourist arrivals + economy dependent on tourism

Maldives:

- a logic of extraversion guided by the needs of the tourism industry ;
- confronted to competition, the national carrier, Air Maldives, was declared bankrupt in 2000
 - => opening to all companies. The opening of lines come mainly from Asian countries (SpiceJet from India, Korean Air from South Korea, China Southern and Hongkong airlines from China).

Seychelles:

- Again, deficit of the national carrier, but Etihad (Abu Dhabi) enters the capital (40%) allowing Air Seychelles to revive its flights
- Partnership that has implications on air network structure and access to territories :
 - provides access to the global network of Etihad (54 countries served and growth) ;
 - requires a correspondence in the hub of Etihad (Abu Dhabi).

Mauritius:

- Voluntarism of the Government to preserve the national company while opening up to foreign partners : Air France, Emirates (Dubai).
- Objective : to route more tourists and thus to meet the expectations of hoteliers , but difficult to measure up to the ambitions of the Gulf companies : Emirates has positioned two daily A380 !...

Reunion island:

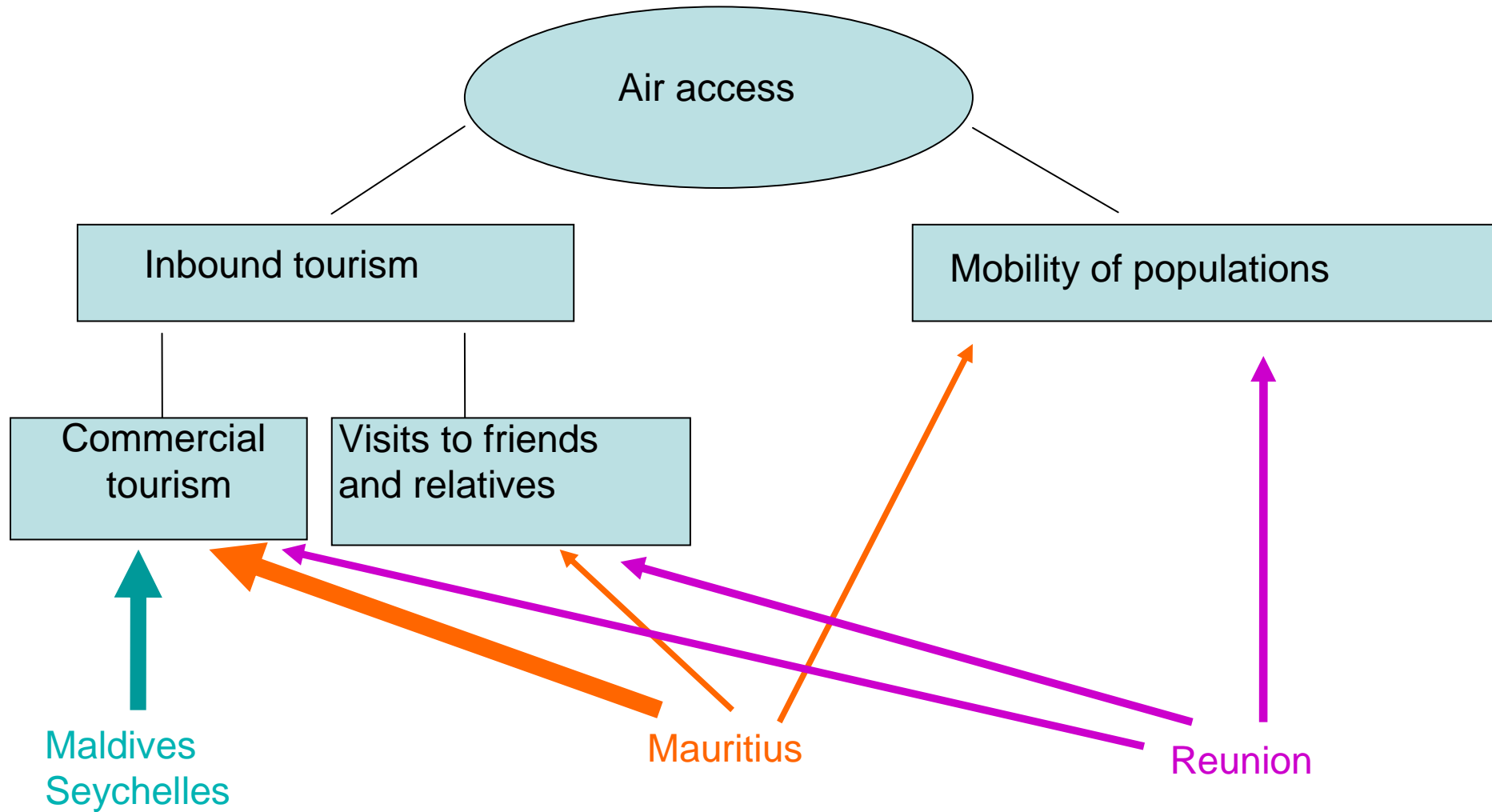
- Dominant position of Air Austral which has a virtual monopoly. Island serviced only by French companies (Air France, Corsair, XL Airways).

1. Is air access put at the service of tourism?

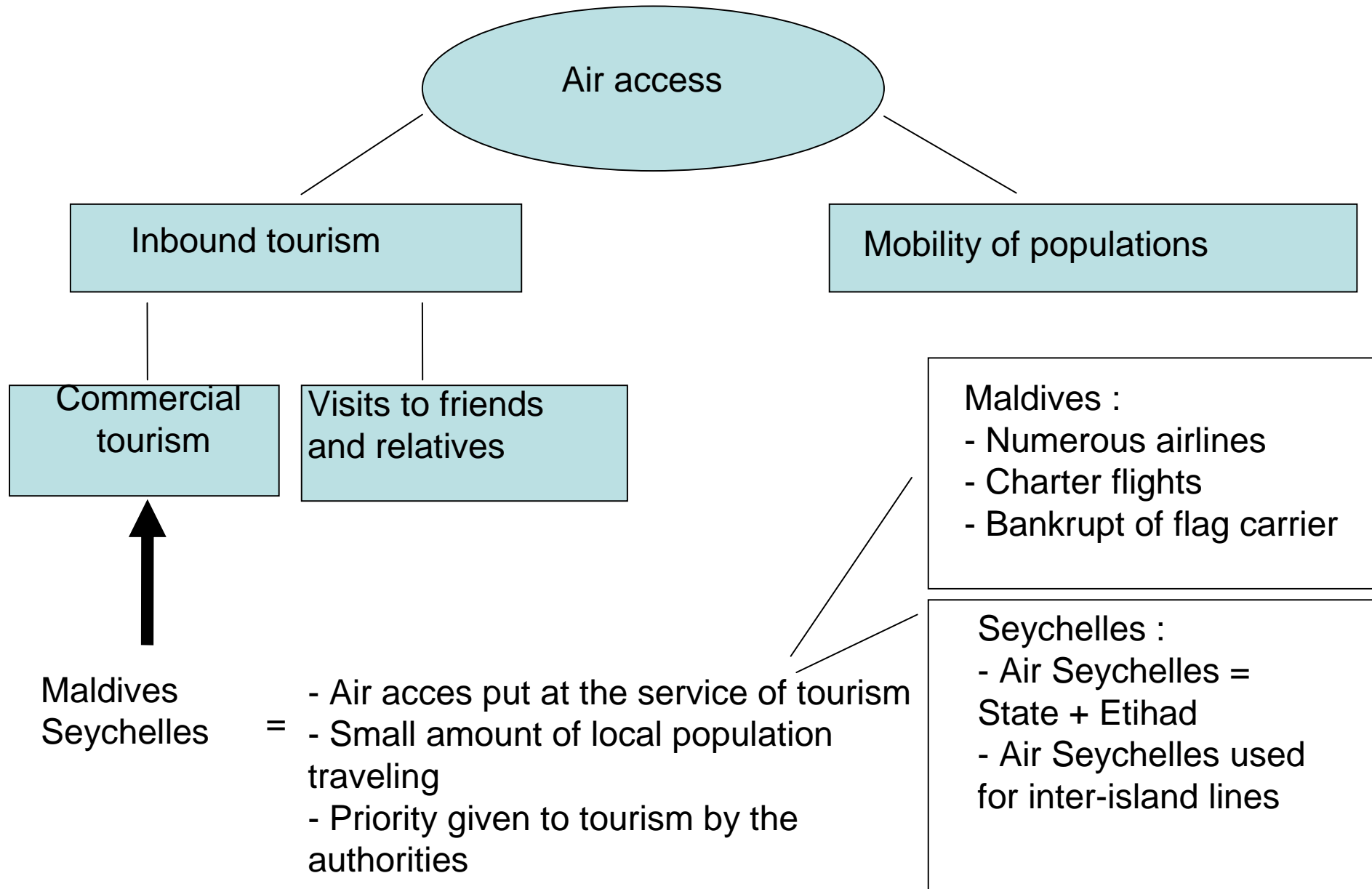
Types of passengers' mobilities

2. The issue of new tourist customers

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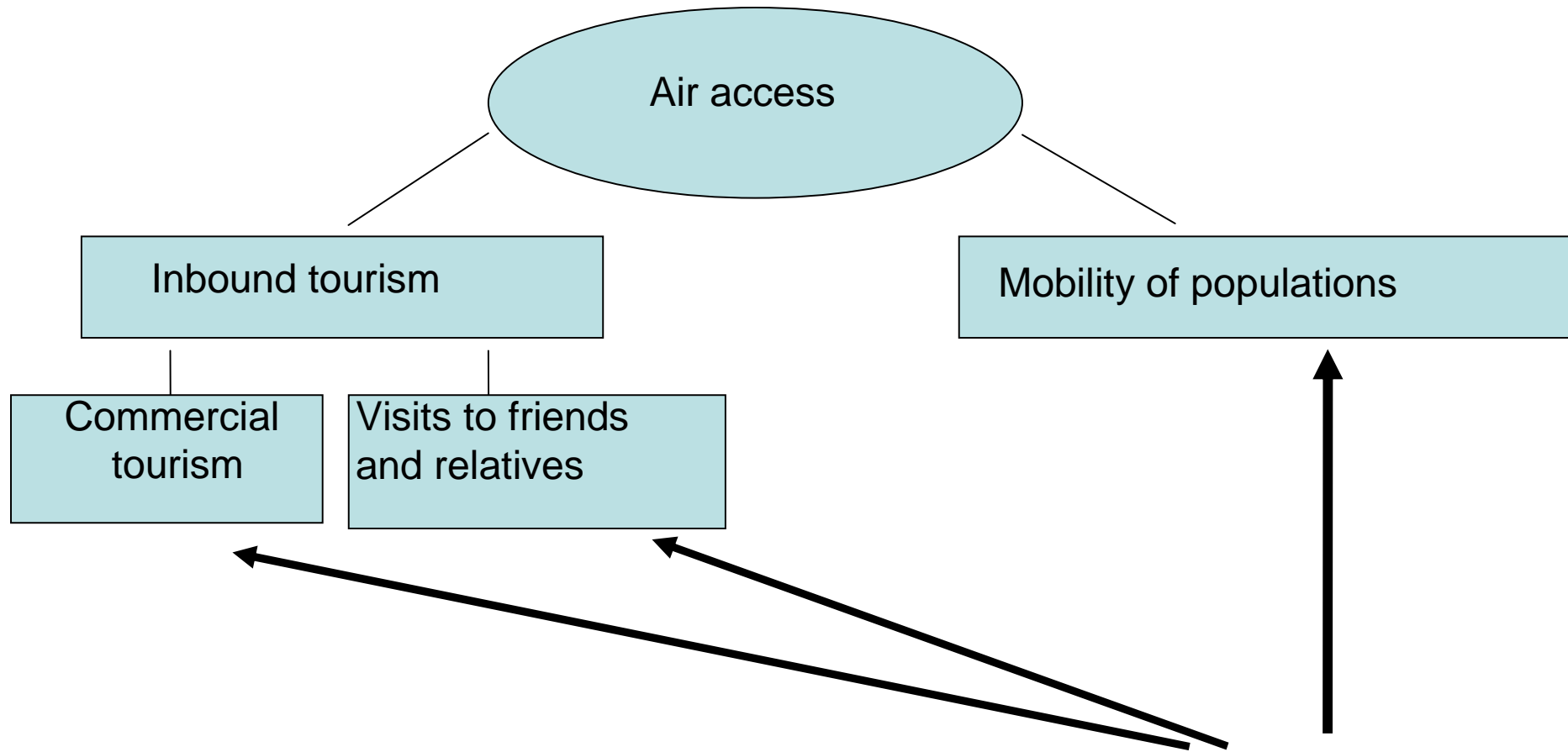
Maldives
Seychelles

- Air access put at the service of tourism
- Small amount of local population traveling
- Priority given to tourism by the authorities

Maldives :
- Numerous airlines
- Charter flights
- Bankrupt of flag carrier

Seychelles :
- Air Seychelles = State + Etihad
- Air Seychelles used for inter-island lines

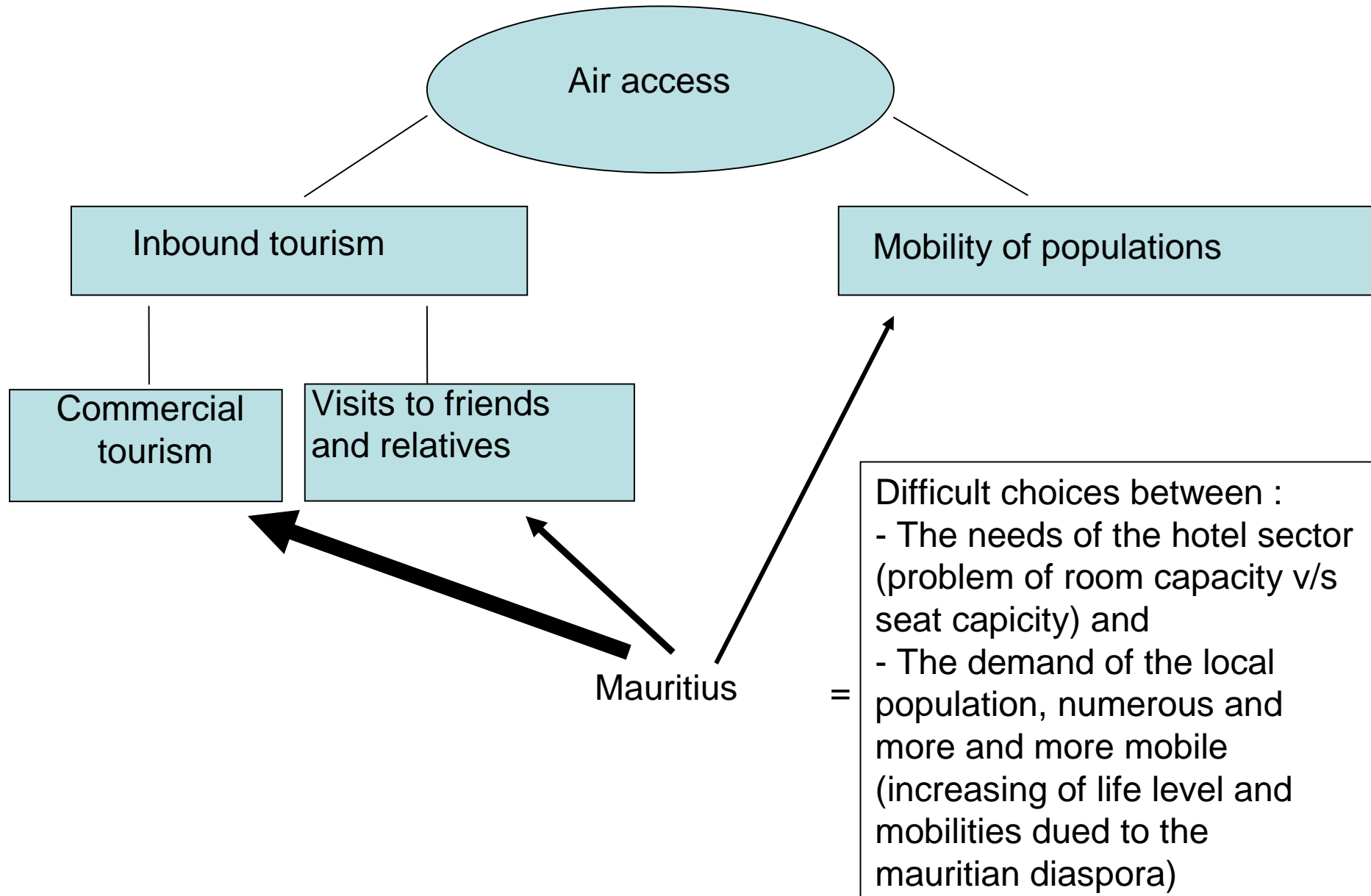
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Lack of coherence between commercial tourism development and air access development :
-VFR (strengthened by the strong link with the mainland) makes tourism less profitable ;
- Air access put at the service of the local population and VFR from France (Air Austral strategy)

= Reunion Island

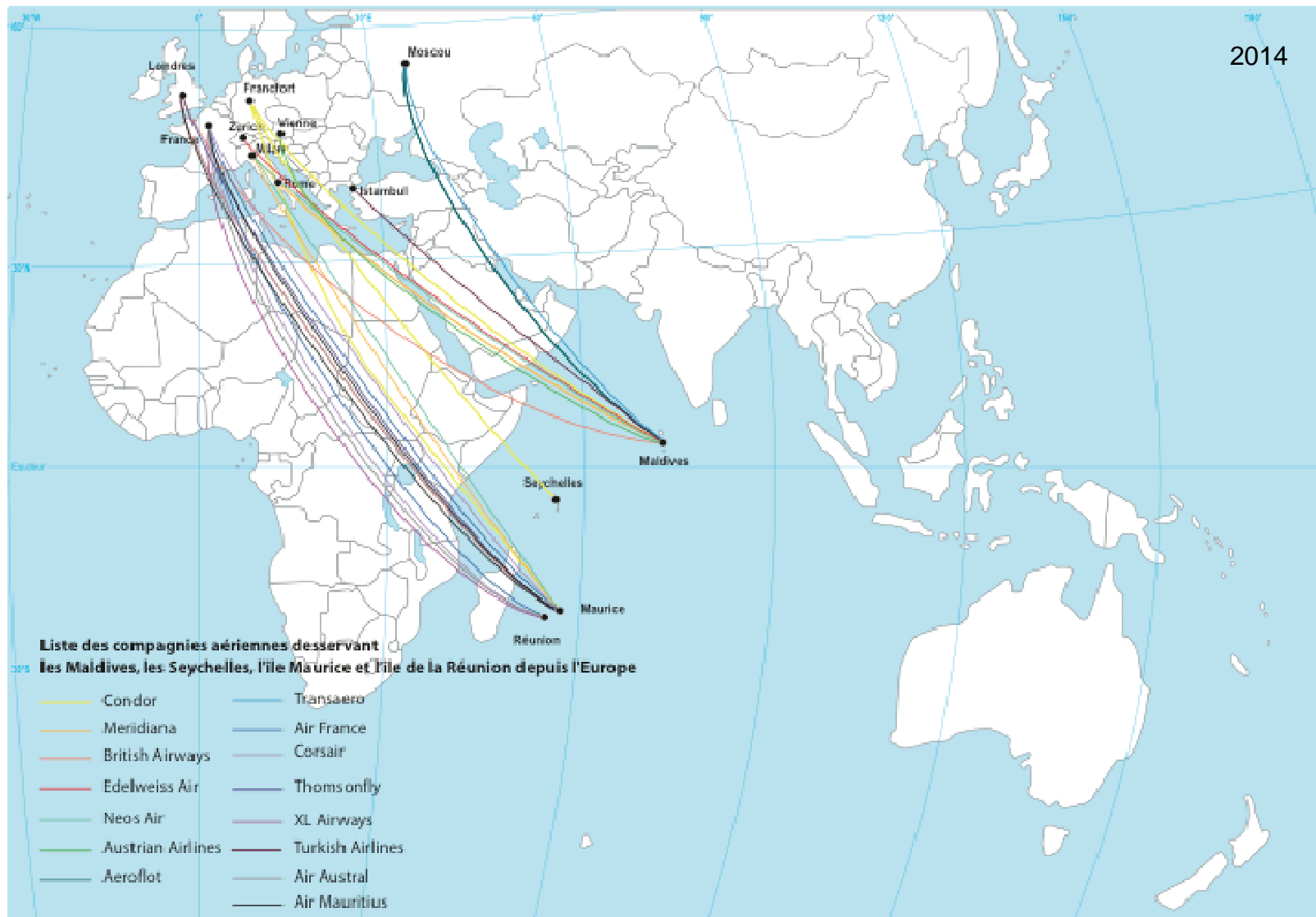
1. Is air access put at the service of tourism ? Types of passengers' mobilities



2. The issue of new tourist customers:

- The traditional market consists of European customers. The air network is largely oriented towards Europe;
- Special case of Reunion Island which is served only from mainland France by 4 airlines.

Liaisons aériennes entre l'Europe et les Maldives, les Seychelles, l'île Maurice et l'île de la Réunion



2. The issue of new tourist customers:

- Growing importance of the Gulf companies with Dubai and Abu Dhabi serving as hubs between Europe, Asia and the islands.

: Liaisons aériennes entre l'Europe et les Maldives, les Seychelles, l'île Maurice et l'île de la Réunion



The issue of new tourist customers:

- Asian customers, particularly Chinese, are a critical growth driver.

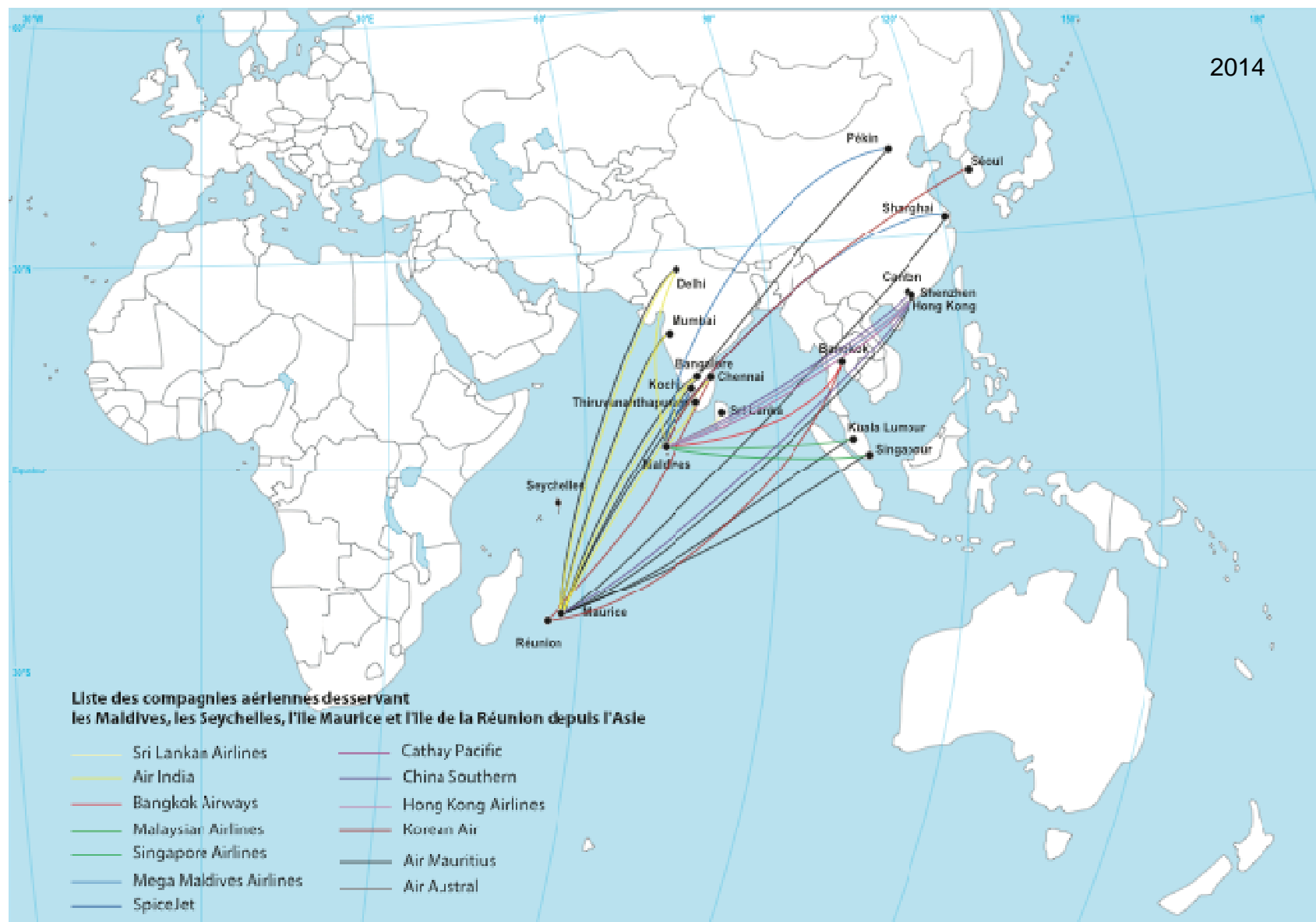
Only Maldives and Mauritius have direct flights to China.

In Maldives, Chinese customers have become the first customers (29.5% in 2013, 330 000 tourists against 40 000 in 2008).

In Mauritius, tension between the importance of the historical customers and the search for new markets. Difficulty to adapt to clienteles with different expectations.

In Maldives, the choices made for tourist facilities (separation of the islands reserved for tourists and those inhabited; specialization by nationality of hotel Islands) facilitate the reception of different clienteles.

Liaisons aériennes entre l'Asie et les Maldives, les Seychelles, l'île Maurice et l'île de la Réunion



The issue of new tourist customers :

The Indian Ocean islands are relevant places to observe the changes of the tourism systems.

Transportation is indicative of these dynamics and air transport in particular is a key element in the tourism economy.

Several contradictions and vulnerabilities factors emerge:

- Some islands reveal a form of dependence on an airline, whether national or foreign;
- National airlines are hardly competitive in an increasingly competitive environment and are saved only by partnerships;
- Constraints appear to reconcile different clienteles and to answer to diversified needs.

Conclusion

Main question : what is the link between supply and the choices made by island destinations concerning their tourism policy?

Geographical constraints have made of air access a key point for tourism development and evolution.

Comparable situations at the beginning (1960's and 1970's) of this development and a diversification in the evolutions after (from protectionism to opening).

It shows that if **air access is a key point** to launch a destination, tourism also strongly **needs a good coordination between all stakeholders** (airlines, governments, hoteliers and TO)

And sometimes, **the stakeholders** of air transport and the ones of tourism **don't have exactly the same interests**. Tourism should be the priority but some choices are made that reveal prejudicial to the tourism sector (commercial tourism).

This research also revealed **the importance of the political status and context** in the choices made. Other researches possible now around this question.

Importance also to **distinguish tourists and local populations** among travelers to develop real tourism development policies without restraining the mobilities of local populations.