Strategy 2017

The Tourism Sector

Strategy 2017

- Double GDP by 2017
- To be primarily driven by tourism (35%), fisheries and financial services

Tourism Strategy

To attain self-sustaining economic growth by securing targeted increases in the number of visitor arrivals and the amount spent by each tourist

Year	Arrival Target	Avg. Spend
2007	154,000	$150
2017	360,000	$215

Getting There

How are we going to meet these targets?

Getting There

- **Marketing Strategy**
  - – Create marketing fund for tourism (US$4 million)
  - – Consumer advertising
    - TV programmes
    - E – marketing
  - – Promote Niche Markets

Getting There

- **Ensure marketable products – Value for money**
  - New Hotel rooms coming online
  - Encourage hotels to upgrade and/or renovate as part of Seychelles Secrets.
  - Introduce a National Hotel Classification System
  - Improve service delivery
    - Seychelles Tourism Academy- Reinventing SHTTC
    - Revamp the U-First Program
    - Scheme of Service and Code of Conduct
    - Improve the Complaints Bureau
  - Enforce Health and Safety Legislation

Getting There

- **Product Diversification**: **Island Developments**
  - Eden Island – Residential
  - Ile Aurore – Golf Resort & Casino
  - Alphonse – Tented Luxury Fly Fishing Holidays
  - Desroches – Hotel & Residential
  - Poivre – Marina
  - Platte – Hotel and Residential
  - Farquhar – A world within Another world
  - Astove
  - Assumption
  - Cosmoledo
  - Providence

Getting There

- **Improve access to the Seychelles Islands**
  - Air Seychelles International Network
  - Other carriers – EK, QR, UU, KQ, DE
  - Encourage charters from emerging markets such as Russia, China, Japan, Korea, Israel
  - Expand the domestic Network routes.
  - Develop facilities at port and Marinas to encourage Cruise Ships, Mega Yachts, etc…

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Capacity Building

Catering for the rise in arrivals

Accommodation

❖ *Need to increase the number of beds/rooms*

Timeline for the additional rooms in the Hotel Industry (based on approved projects), 2008 - 2013

	2008	2009	2010	2011	2012	2013
Total number of rooms to come online per year	**493**	**759**	**738**	**645**	**647**	**400**
Cumulative	**493**	**1252**	**1990**	**2635**	**3282**	**3682**
Small Tourism Establishments	193	66	0	9	0	0
Large Hotels	300	693	738	636	647	400
Estimated Number of rooms in the Hotel Industry	**3070**	**3587**	**4385**	**5030**	**5677**	**6077**
Reduction in the number of rooms due to closedown	*489*	*302*				
Reopenings of these hotels		*60*	*60*			

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Labour Requirements

❖ ***Staffs requirements for the hotel projects***

Timeline for the total number of staff needed in the Hotel Industry, 2008 - 2013

	2008	2009	2010	2011	2012	2013
Total number of staff required	**1049**	**1795**	**1398**	**1506**	**1736**	**1500**
Small Establishments	180	64	0	7	0	0
Large Hotels	869	1731	1398	1499	1736	1500
Cumulative	**1049**	**2844**	**4242**	**5748**	**7484**	**8984**

Supply of Construction materials for the whole Economy

	2006	2007 Q1	2007 Q2
Crusher Dust	95,056	21,493	23,125
Plastering Dust	22,513	4,667	5,688
Aggregates	71,390	18,145	18,725
Blocks No.	4,357,616	1,133,337	971,954

In Cubic meters

Construction Materials for TI

❖ *Major construction materials for the new hotels*

Year	2007	2008	2009	2010	2011	2012	2013
Cement Bags	323,917	1,638,805	1,661,444	1,432,348	955,408	395,873	95,616
Crusher Dust (m^3)	14,362	72,664	73,668	63,510	42,362	17,553	42,420
Aggregates (m^3)	12,834	64,934	65,831	56,753	37,856	15,686	3,789
Block (Number)	1,186,881	6,004,827	6,087,782	5,248,240	3,500,759	1,450,538	350,351
100 mm	99,009	500,918	507,838	437,812	292,030	121,003	29,226
150 mm	837,295	4,236,155	4,294,676	3,702,385	2,469,640	1,023,294	247,158
200 mm	250,577	1,267,754	1,285,268	1,108,043	739,089	306,241	73,967

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Airline Seat Capacity: International Trend *(by end 2007)*

Airline	Airline Code	Country of Origin	Airport Code	Aircraft type	No. of seats	No. of flights per week	Total Capacity per week
Air Seychelles	HM	France	CDG	B767 - 300	239	6	1434
Air Seychelles	HM	England	LHR	B767 - 300	239	2	478
Air Seychelles	HM	Italy	FCO	B767 - 300	239	3	717
Air Seychelles	HM	South Africa	JNB	B767 - 300	239	2	478
Air Seychelles	HM	Singapore / Bangkok	SIN	B767 - 300	239	2	478
Air Seychelles	HM	Mauritius	MRU	B767 - 300	239	4	956
Condor	DE	Germany	MUC	B767 - 300	260	1	260
Emirates	EK	Dubai	DXB	A330	251	4	1004
Qatar	QR	Doha	DOH	A320	144	4	576
Kenya Airways	KQ	Kenya	NBO	B767 - 300	116	3	348
TOTAL					**2205**	**31**	**6729**

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Airline Seat Capacity: Requirements

Year	2008	2009	2010	2011	2012	2013
Visitor Arrivals	161,563	170,139	188,765	197,841	220,097	248,201
Airline seats - required	**555,048**	**582,800**	**646,908**	**685,723**	**754,295**	**852,354**
Europe - airline seats	441,541	455,167	495,855	515,664	563,836	633,299
Africa - airline seats	55,505	58,280	64,691	68,572	75,430	85,235
Asia - airline seats	38,853	46,624	58,222	68,572	75,430	85,235
Oceania - airline seats	4,163	5,828	8,086	10,286	13,200	17,047
America - airline seats	14,986	16,901	20,054	22,629	26,400	31,537
Airline Load Factor	75%	75%	75.2%	75.1%	75.6%	74.9%

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Airline Seat Capacity: International

- Air Seychelles (HM) Fleet:
  - One additional B 767-200 by Dec 2007
  - Two new B787 ‘Dreamliners’ by 2010
- Identify potential inactive & operational ASAs and establish contacts with the relevant partners
- Review existing operational ASAs and consult with respective airlines and aeronautical authorities with the objective of increasing frequency of flights
- Identify potential new ASAs

Airline Seat Capacity: Domestic

- Air Seychelles Fleet
  - Two additional Twin Otters b/w 2008 & 2009
  - Acquisition of 3rd Twin Otter possible
- IDC Fleet
  - One new Y12 aircrafts for tourism by late 2008
  - One new Beech Craft 19 by mid 2009
- Helicopter Operators
  - One additional operator Zil Air to be licensed late 2007
  - Increase Fleet capacity of existing Operators
- Seats can be easily added should there be an increase in demand

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Airport Capacity

❖ ***Ensuring smooth flow of traffic at the SIA***

- Short term Plan
  - Extension & Renovation of international and domestic terminal
    - New baggage handling systems and enhanced check-in facilities
    - New vehicular parking area (200 slots) Pay parking
    - Extension on Concourse
- Medium term Plan
  - Construction of new International and Domestic Terminals
    - Review Existing Master Plan
- Enhance the level of services such as ground handling and Immigration

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Land & Sea Transport Capacity

- Car Hires
  - Encourage existing fleet to increase number of cars to maximum of 30 cars. Currently only 7 operators have optimum cars in fleet while 21 operators have between 20-29 cars in fleet.
  - Demand for additional Hired vehicles is on the rise.
- Taxis
- Public Sea transport
  - Three additional by 2010 to increase the number to 10

Car Hire Capacity

Tourism Strategy 2017

Car Hires	Base Year 2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
No. of Visitors: estimates per Strategy 2017	154,000	161,563	170,139	188,765	197,841	220,097	248,201	278,343	310,593	336,401	359,266
End of Year Stock of Cars	1,414	1,559	1,679	1,940	2,068	2,380	2,774	3,197	3,649	4,011	4,332
Tourism Demand New Cars		97	80	174	85	208	263	282	302	241	214
Local Demand New Cars (50% of Tourism Demand		48	40	87	42	104	131	141	151	121	107
Total New Cars		145	120	261	127	312	394	423	452	362	321
Replacement of Fleet- Based on 5year rule		48	138	265	343	388	145	120	261	127	312
Total import of cars per annum		193	258	526	470	700	539	543	714	489	633

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Recreational Activities

- ***Increase Visitor spending and experience***

- **Increase the level of recreational activities**
  - Consult with the stakeholders to establish the requirements
    - Yacht/Live Aboard
    - Boat Charter (Hire Crafts)
    - Fishing
    - Dive Centres
    - Golf
    - Water Sports Centres
    - New Special Interest Excursions / Tour guiding
    - Eating out - Speciality Restaurants
    - Island day visits
    - Duty Free Shopping

STRATEGY 2017 SUMMARY

YEAR	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
GDP DOUBLING (R Mn.)	4704	5132	5560	5987	6415	6843	7270	7698	8126	8339	8553
VISITORS											
Visitor Arrival Targets	151234	161563	170139	188765	197841	220097	248201	278343	310593	336401	359266
% Change per annum	8%	7%	5%	11%	5%	11%	13%	12%	12%	8%	7%
Est. No. of Hotel Rooms	3066	3070	3587	4385	5030	5677	6077	6077	6077	6077	6077
CAPACITY BUILDING											
Est. Labour Reqd.		1049	1795	1398	1506	1736	1500				
Est. Employment in Hotels	6452	7501	9296	10694	12200	13936	15436	15436	15436	15436	15436
AIRLINE											
Airline Seats Required	555048	555048	582800	646908	685723	754295	852354	946113	1050185	1144702	1224831
Europe	449589	441541	455167	495855	515664	563836	633299	698704	770836	835060	888002
Africa	55505	55505	58280	64691	68572	75430	85235	94611	105018	114470	122483
Asia	33303	38853	46624	58222	68572	75430	85235	94611	105018	114470	122483
America	13876	14986	16901	20054	22629	26400	31537	36898	43058	49222	55117
Oceania	2775	4163	5828	8086	10286	13200	17047	21288	26255	31479	36745
Airline Load Factor	70%	75%	75%	75.2%	75.1%	75.6%	74.9%	75.2%	75.3%	75.0%	75.2%

Thank You Old Friends!

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