

INTERNATIONAL TRAVEL & TOURISM

1st Quarter 2003

1. Passenger Traffic

1.1 Total Passenger Traffic

During the first quarter of 2003, a total of 234,021 arrivals were registered against 251,296 departures, i.e. an excess of 17,275 departures over arrivals. Compared to the same period of the preceding year, these figures represent a slight decrease of 0.7% in arrivals and an increase of 1.2% in departures. Movements by sea accounted for 5.4% of arrivals and 5.1% of departures. Further details on monthly trends are given in Table 1.

1.2 Excursionists

Total arrivals by air included 2,754 “excursionists”, i.e. visitors arriving and leaving on the same day. Of these excursionists, 930 (33.8%) came from Reunion Island while 490 (17.8%) came from France. Total arrivals by sea included 8,553 “cruise excursionists” (5,099 passengers and 3,454 crews) aboard 10 cruise ships, which visited our port during the first quarter of 2003.

1.3 Mauritian Residents

The number of Mauritian residents travelling abroad during the first three months of 2003 rose by 4.4% to stand at 38,419 against 36,788 for the same period of year 2002. The following changes were recorded in the number of Mauritians visiting the major destinations: United Kingdom (+18.4%), Malagasy Republic (+30.7%), Reunion Island (+2.7%), France (+2.4%), India (+1.5%), Australia (+0.9%), Republic of South Africa (-1.1%), Singapore (-15.0%), Hong Kong (-16.8%) and Saudi Arabia (-47.1%). A more elaborate distribution of countries visited is presented in Table 2.

1.4 Tourist Arrivals

Tourist arrivals during the first quarter of 2003 were more or less at the same level as in 2002, that is 181,538 compared to 181,659. Further details are given in Tables 3 to 6.

Around 90.0% of the tourists came mainly for holidays while 4.1% were on business/conference trips, and another 4.6% were in transit (Table 4).

Arrivals from Europe, which accounted for 67.6% of total tourist arrivals, dropped by 3.2% to 122,757 during the first quarter of 2003 against 126,836 in the corresponding quarter of 2002. Arrivals from France, our leading market, representing 31.3% of total tourist arrivals and 46.2% of the European market, fell by 5.4% to reach a figure of 56,740 at the end of March 2003. Arrivals from Germany also regressed by 11.6%. On the other hand, arrivals from United Kingdom went up by 8.5% and from Italy by 2.9%. Trends among the other European countries were as follows: Spain (+7.4%), Sweden (+4.1%), Switzerland (-5.5%), Netherlands (-7.8%), Austria (-8.0%) and Belgium (-15.8%).

For the first quarter of 2003, arrivals from Africa, with a share of 24.7% of total tourist arrivals, rose by 2.6% to 44,805. Arrivals from the major generating countries, Reunion Island and Republic of South Africa decreased by 1.0% and 5.2% respectively. Changes in arrivals from other African countries were as follows: Malagasy Republic (+106.2%), Comoros (+78.5%), Seychelles (+25.5%), Kenya (-30.0%) and Zimbabwe (-59.3%).

Tourist arrivals from the Asian market grew by 29.1% for the period under review and constituted 5.5% of total tourist arrivals. Arrivals from India, our major source on this continent, rose by 26.4% to attain 4,375. The performance of other Asian countries was as follows: United Arab Emirates (+259.1%), People's Republic of China (+59.7%), Singapore (+10.2%), Malaysia (+10.0%), Japan (-11.5%) and Hong Kong (-44.3%).

Arrivals from Oceania rose by 9.6% mainly due to an increase of 4.1% in arrivals from Australia.

An increase of 21.3% was noted in arrivals from America. This was the result of growths from USA (+24.7%), Canada (+9.2%) and other American countries (+24.9%).

2. Tourist Nights

The number of nights spent by tourists during the first quarter of 2003 is estimated at 1.8 million, representing a decrease of 0.3% over the corresponding quarter of 2002.

3. Hotel Statistics

At the end of March 2003, there was a total of 96 registered hotels in operation. Owing to renovation, one hotel was not operational. The total room capacity for these registered hotels was 9,638 with 19,671 bed places (Table 7). The room occupancy rate for all hotels for the first three months of 2003 averaged 66% while the bed occupancy rate was 58% (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 38 (40% of all registered hotels). These "Large" hotels had a room capacity of 7,293 with 14,903 bedplaces, representing 75.7% of total room capacity and 75.8% of total bedplaces. The average room occupancy rate for these hotels for the first three months of 2003 was of the order of 68%, while bed occupancy rate averaged 60% (Table 8).

4. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first quarter of 2003 were of the order of Rs 4,705 million, which is 6.0% less than the figure of Rs 5,005 million recorded for the corresponding period of 2002.

5. Employment

According to the Survey of Employment and Earnings, direct employment in travel and tourism establishments employing 10 persons or more, stood at 21,116 at the end of March 2002, that is 5.9% higher than last year. Of this number, 75.3% or 15,890 were engaged in hotels (Table 9).

6. Forecast Year 2003

Based on information gathered from the major stakeholders of the tourist industry, it is estimated that the number of tourist arrivals for 2003 will be around 700,000 (+2.7%). Tourism receipts, according to the bank of Mauritius, are expected to be about Rs 18,100 million.

Central Statistics Office

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Explanatory Notes

1. Tourist

A tourist is defined as a non-resident staying for more than 24 hours but less than a year, who is not involved in any gainful occupation in the country during his/her stay.

2. Transit

A transit passenger is one who stops over in the country for flight connections to other destinations. There are two types of transit passengers:

Type I : Passengers who do not leave the transit area of the airport or the harbour.

Type II : Passengers who do leave the airport or harbour and stay in the country for more than 24 hours but only for flight connection purposes.

Only Type II transit passengers, as defined above, are included in the definition of "Tourists".

3. Excursionist or Same-day Visitor

Excursionists are non-resident visitors, other than those who do not leave the airport, who stay in the country for less than 24 hours. They also include passengers as well as crews of *cruise ships*.

4. Tourist Nights

"Tourist nights" means the total number of nights spent in the country by tourists, as defined above, during the period under review.

5. Large Hotels

Large hotels are well established beach hotels with more than 80 rooms.

6. CIS

CIS denotes the **Commonwealth of Independent States**, which consists of the states of the former Soviet Union.

Table 1:- Passenger Traffic by month 2001 - 2003

| Month | 2001 | | 2002 | | 2003 | |
|---------------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | Arrivals | Departures | Arrivals | Departures | Arrivals | Departures |
| January | 83,006 | 96,568 | 82,203 | 98,297 | 82,764 | 101,301 |
| February | 62,662 | 63,034 | 63,657 | 63,562 | 66,756 | 62,720 |
| March | 73,365 | 74,278 | 89,745 | 86,466 | 84,501 | 87,275 |
| 1st Quarter | 219,033 | 233,880 | 235,605 | 248,325 | 234,021 | 251,296 |
| April | 70,185 | 68,642 | 63,961 | 69,431 | | |
| May | 65,600 | 69,705 | 67,030 | 69,414 | | |
| June | 54,696 | 51,854 | 54,781 | 51,274 | | |
| 2nd Quarter | 190,481 | 190,201 | 185,772 | 190,119 | | |
| 1st Semester | 409,514 | 424,081 | 421,377 | 438,444 | | |
| July | 77,552 | 63,875 | 75,786 | 62,403 | | |
| August | 72,980 | 83,574 | 73,431 | 84,849 | | |
| September | 63,876 | 66,230 | 65,381 | 65,607 | | |
| 3rd Quarter | 214,408 | 213,679 | 214,598 | 212,859 | | |
| Jan. to Sep. | 623,922 | 637,760 | 635,975 | 651,303 | | |
| October | 73,660 | 70,007 | 81,830 | 77,979 | | |
| November | 72,147 | 70,362 | 78,362 | 75,840 | | |
| December | 88,453 | 72,167 | 94,939 | 77,399 | | |
| 4th Quarter | 234,260 | 212,536 | 255,131 | 231,218 | | |
| 2nd Semester | 448,668 | 426,215 | 469,729 | 444,077 | | |
| Whole Year | 858,182 | 850,296 | 891,106 | 882,521 | | |

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
January - March of 2002 and 2003**

| Country of disembarkation | 1st Quarter 2002 | 1st Quarter 2003 | % Change |
|----------------------------|------------------|------------------|--------------|
| EUROPE | 11,089 | 12,142 | 9.5 |
| Belgium | 119 | 237 | 99.2 |
| France | 4,851 | 4,966 | 2.4 |
| Germany | 454 | 496 | 9.3 |
| Italy | 752 | 756 | 0.5 |
| Switzerland | 452 | 388 | -14.2 |
| United Kingdom | 4,438 | 5,256 | 18.4 |
| Other European | 23 | 43 | 87.0 |
| AFRICA | 14,126 | 14,337 | 1.5 |
| Kenya | 343 | 251 | -26.8 |
| Malagasy Republic | 851 | 1,112 | 30.7 |
| Reunion | 8,171 | 8,389 | 2.7 |
| Seychelles | 783 | 721 | -7.9 |
| S. Africa, Rep. of | 3,711 | 3,671 | -1.1 |
| Zimbabwe | 160 | 188 | 17.5 |
| Other African | 107 | 5 | -95.3 |
| ASIA | 9,703 | 10,179 | 4.9 |
| Hong Kong SAR ¹ | 1,341 | 1,116 | -16.8 |
| India | 3,552 | 3,606 | 1.5 |
| Malaysia | 504 | 386 | -23.4 |
| Singapore | 2,523 | 2,145 | -15.0 |
| Saudi Arabia | 1,381 | 731 | -47.1 |
| Other Asian ² | 402 | 2,195 | 446.0 |
| OCEANIA | 1,646 | 1,662 | 1.0 |
| Australia | 1,646 | 1,661 | 0.9 |
| Other Oceanian | - | 1 | - |
| AMERICA | 6 | 19 | 216.7 |
| U.S.A | 1 | 4 | 300.0 |
| Canada | 5 | 14 | 180.0 |
| Other American | - | 1 | - |
| NOT STATED | 218 | 80 | -63.3 |
| All Countries | 36,788 | 38,419 | 4.4 |

¹ Special Administrative Region of China

² Including United Arab Emirates

Table 3:- Tourist arrivals by month, 2001 - 2003

| Month | Number | | |
|---------------------|----------------|----------------|----------------|
| | 2001 | 2002 | 2003* |
| January | 65,122 | 63,551 | 64,762 |
| February | 49,464 | 50,554 | 53,647 |
| March | 55,944 | 67,554 | 63,129 |
| <i>1st Quarter</i> | <u>170,530</u> | <u>181,659</u> | <u>181,538</u> |
| April | 54,794 | 48,187 | |
| May | 51,969 | 53,813 | |
| June | 38,496 | 39,048 | |
| <i>2nd Quarter</i> | <u>145,259</u> | <u>141,048</u> | |
| <i>1st Semester</i> | 315,789 | 322,707 | |
| July | 57,274 | 56,709 | |
| August | 52,923 | 53,395 | |
| September | 48,953 | 49,774 | |
| <i>3rd Quarter</i> | <u>159,150</u> | <u>159,878</u> | |
| <i>Jan. to Sep.</i> | 474,939 | 482,585 | |
| October | 59,325 | 65,291 | |
| November | 57,326 | 61,326 | |
| December | 68,728 | 72,446 | |
| <i>4th Quarter</i> | <u>185,379</u> | <u>199,063</u> | |
| <i>2nd Semester</i> | 344,529 | 358,941 | |
| Whole Year | 660,318 | 681,648 | |

* Provisional

**Table 4 :- Tourist arrivals by main purpose of visit,
1st Quarter 2002 / 2003**

| Purpose of visit | 1st Quarter 2002 | 1st Quarter 2003 | % Change |
|--------------------|---------------------|---------------------|-------------|
| Holiday | 168,081 | 163,286 | -2.9 |
| Business | 4,962 | 6,191 | 24.8 |
| Transit | 5,844 | 8,364 | 43.1 |
| Conference | 801 | 1,211 | 51.2 |
| Sports | 215 | 140 | -34.9 |
| Other & Not Stated | 1,756 | 2,346 | 33.6 |
| Total | 181,659 | 181,538 | -0.1 |

Table 5 : - Tourist Arrivals by Country of Residence, January - March of 2002 and 2003

| Country of residence | 1st Quarter 2002 | 2003 ¹ | | | | % Change 2003/2002 |
|-----------------------------|------------------|-------------------|---------------|---------------|----------------|--------------------|
| | | Jan | Feb | Mar | 1st Quarter | |
| EUROPE | 126,836 | 38,932 | 40,739 | 43,086 | 122,757 | -3.2 |
| Austria | 2,838 | 875 | 995 | 742 | 2,612 | -8.0 |
| Belgium | 2,515 | 604 | 622 | 891 | 2,117 | -15.8 |
| France | 59,966 | 19,136 | 17,962 | 19,642 | 56,740 | -5.4 |
| Germany | 17,015 | 4,475 | 4,769 | 5,790 | 15,034 | -11.6 |
| Italy | 11,784 | 4,158 | 4,242 | 3,731 | 12,131 | 2.9 |
| Netherlands | 1,109 | 243 | 398 | 381 | 1,022 | -7.8 |
| Spain | 1,492 | 350 | 507 | 746 | 1,603 | 7.4 |
| Sweden | 1,720 | 578 | 747 | 466 | 1,791 | 4.1 |
| Switzerland | 4,540 | 1,366 | 1,427 | 1,498 | 4,291 | -5.5 |
| United Kingdom | 16,320 | 4,521 | 6,190 | 6,990 | 17,701 | 8.5 |
| CIS | 1,217 | 677 | 327 | 269 | 1,273 | 4.6 |
| Other European | 6,320 | 1,949 | 2,553 | 1,940 | 6,442 | 1.9 |
| AFRICA | 43,651 | 21,522 | 7,772 | 15,511 | 44,805 | 2.6 |
| Comoros | 130 | 72 | 68 | 92 | 232 | 78.5 |
| Kenya | 443 | 92 | 81 | 137 | 310 | -30.0 |
| Malagasy Rep. | 1,288 | 952 | 869 | 835 | 2,656 | 106.2 |
| Reunion | 27,546 | 15,955 | 2,731 | 8,579 | 27,265 | -1.0 |
| Seychelles | 2,318 | 890 | 897 | 1,122 | 2,909 | 25.5 |
| S/ Africa Rep. of | 9,971 | 2,753 | 2,646 | 4,054 | 9,453 | -5.2 |
| Zimbabwe | 938 | 105 | 108 | 169 | 382 | -59.3 |
| Other African | 1,017 | 703 | 372 | 523 | 1,598 | 57.1 |
| ASIA | 7,709 | 2,675 | 4,004 | 3,273 | 9,952 | 29.1 |
| Hong Kong SAR ² | 424 | 99 | 67 | 70 | 236 | -44.3 |
| India | 3,460 | 1,019 | 1,744 | 1,612 | 4,375 | 26.4 |
| Japan | 601 | 138 | 221 | 173 | 532 | -11.5 |
| Malaysia | 462 | 166 | 228 | 114 | 508 | 10.0 |
| P. Rep. of China | 785 | 422 | 453 | 379 | 1,254 | 59.7 |
| Singapore | 666 | 175 | 290 | 269 | 734 | 10.2 |
| United Arab Emirates | 115 | 80 | 201 | 132 | 413 | 259.1 |
| Other Asian | 1,196 | 576 | 800 | 524 | 1,900 | 58.9 |
| OCEANIA | 1,748 | 767 | 537 | 612 | 1,916 | 9.6 |
| Australia | 1,642 | 653 | 497 | 559 | 1,709 | 4.1 |
| Other Oceanian | 106 | 114 | 40 | 53 | 207 | 95.3 |
| AMERICA | 1,688 | 849 | 574 | 625 | 2,048 | 21.3 |
| USA | 939 | 504 | 304 | 363 | 1,171 | 24.7 |
| Canada | 371 | 120 | 120 | 165 | 405 | 9.2 |
| Other American | 378 | 225 | 150 | 97 | 472 | 24.9 |
| OTHER & N.STATED | 27 | 17 | 21 | 22 | 60 | 122.2 |
| All Countries | 181,659 | 64,762 | 53,647 | 63,129 | 181,538 | -0.1 |

¹ Provisional² Special Administrative Region of China

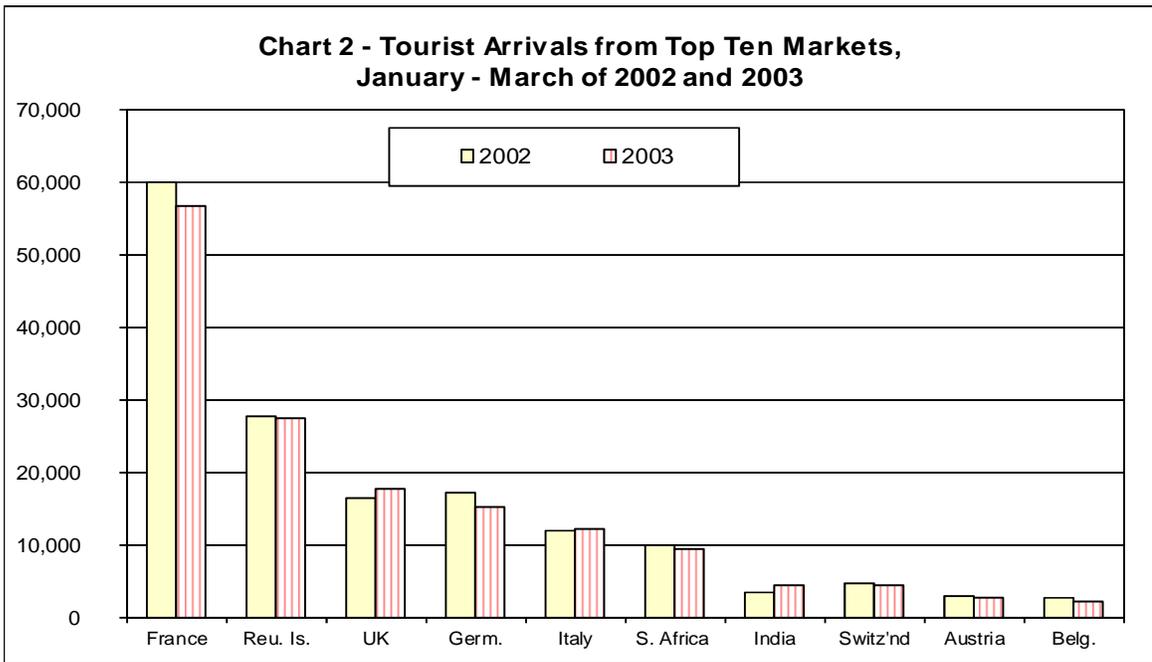
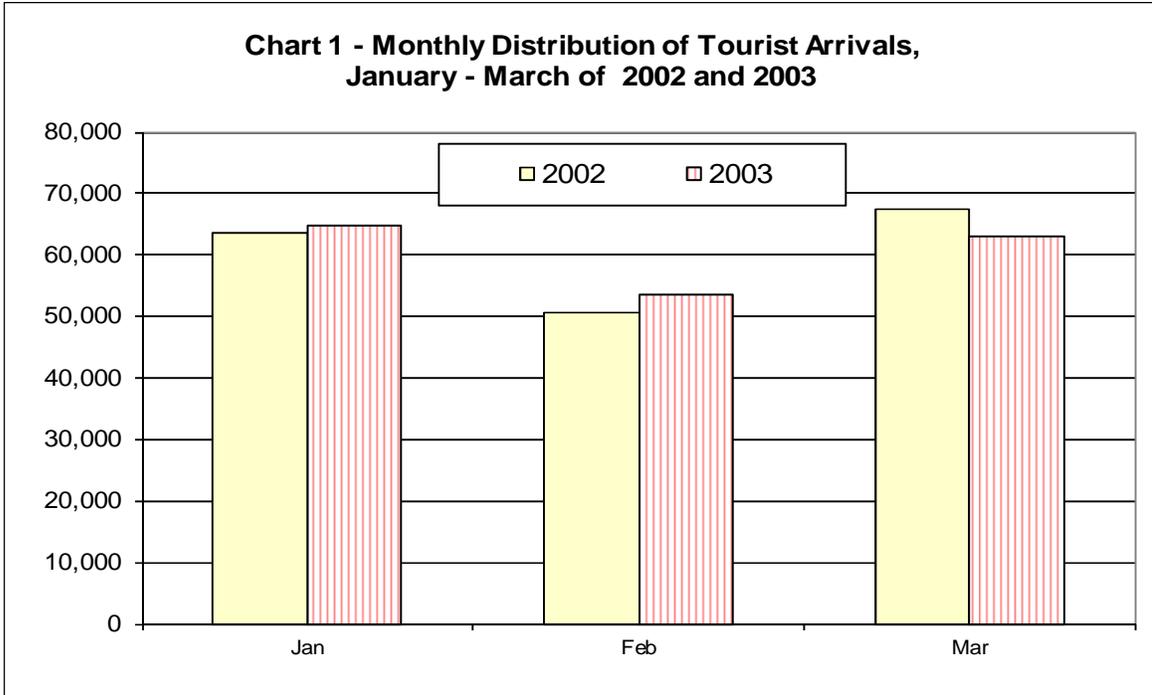


Table 6 :- Selected Tourism Statistics, 2000 - 2003

| Year | | Tourist arrivals (Number) | Tourist nights (000) | Tourism receipts ² (Rs million) |
|--------------------------|---------------------|------------------------------|-------------------------|--|
| | 2000 | 656,453 | 6,413 | 14,234 |
| | 2001 | 660,318 | 6,528 | 18,166 |
| | 2002 | 681,648 | 6,769 ³ | 18,328 |
| 2001 | 1st Qr. | 170,530 | 1,682 | 4,584 |
| | 2nd Qr. | 145,259 | 1,442 | 3,825 |
| | 1st Semester | 315,789 | 3,124 | 8,409 |
| | 3rd Qr. | 159,150 | 1,572 | 4,460 |
| | 4th Qr. | 185,379 | 1,832 | 5,297 |
| | 2nd Semester | 344,529 | 3,404 | 9,757 |
| 2002 | 1st Qr. | 181,659 | 1,790 | 5,005 |
| | 2nd Qr. | 141,048 | 1,400 | 4,283 |
| | 1st Semester | 322,707 | 3,190 | 9,288 |
| | 3rd Qr. | 159,878 | 1,580 | 4,041 |
| | 4th Qr. | 199,063 | 1,980 | 4,999 |
| | 2nd Semester | 358,941 | 3,560 | 9,040 |
| 2003 ¹ | 1st Qr. | 181,538 | 1,785 | 4,705 |

¹ Provisional² Source: Bank of Mauritius³ Revised**Table 7:- Hotels, rooms and bedplaces, 2000 - 2003**

| Year | Number as at end of period | | | |
|--------------------------|----------------------------|-----------------|-----------|--------|
| | Hotels | Rooms | Bedplaces | |
| | 2000 | 95 | 8,657 | 17,776 |
| | 2001 | 95 | 9,024 | 18,350 |
| | 2002 | 95 | 9,623 | 19,597 |
| 2001 | 1st Qr. | 95 | 8,667 | 17,796 |
| | 2nd Qr. | 95 | 8,715 | 17,972 |
| | 3rd Qr. | 95 | 8,640 | 17,718 |
| | 4th Qr. | 95 | 9,024 | 18,350 |
| 2002 | 1st Qr. | 94 | 8,770 | 17,846 |
| | 2nd Qr. | 89 | 8,136 | 16,588 |
| | 3rd Qr. | 92 | 8,317 | 16,875 |
| | 4th Qr. | 95 | 9,623 | 19,597 |
| 2003 ¹ | 1st Qr. | 96 ² | 9,638 | 19,671 |

¹ Provisional² Excluding one hotel not operational because of renovation works

Table 8 :- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2001 - 2003

| Month | All Hotels | | | | | | "Large" Hotels | | | | | |
|---------------------|------------|-----------|-----------|-----------|-----------|-----------|----------------|-----------|-----------|-----------|-----------|-----------|
| | 2001 | | 2002 | | 2003* | | 2001 | | 2002 | | 2003* | |
| | Room | Bed | Room | Bed | Room | Bed | Room | Bed | Room | Bed | Room | Bed |
| January | 74 | 65 | 71 | 63 | 68 | 59 | 78 | 69 | 76 | 68 | 69 | 61 |
| February | 67 | 59 | 69 | 62 | 66 | 58 | 70 | 63 | 74 | 66 | 69 | 61 |
| March | 68 | 60 | 75 | 66 | 63 | 56 | 72 | 64 | 81 | 72 | 66 | 58 |
| <u>1st Quarter</u> | <u>71</u> | <u>62</u> | <u>72</u> | <u>64</u> | <u>66</u> | <u>58</u> | <u>75</u> | <u>66</u> | <u>77</u> | <u>69</u> | <u>68</u> | <u>60</u> |
| April | 66 | 57 | 62 | 56 | | | 70 | 62 | 68 | 61 | | |
| May | 64 | 56 | 67 | 59 | | | 68 | 61 | 73 | 65 | | |
| June | 50 | 43 | 50 | 45 | | | 51 | 46 | 53 | 47 | | |
| <u>2nd Quarter</u> | <u>60</u> | <u>53</u> | <u>60</u> | <u>54</u> | | | <u>64</u> | <u>57</u> | <u>65</u> | <u>58</u> | | |
| 1st Semester | 66 | 58 | 66 | 59 | | | 70 | 62 | 71 | 64 | | |
| July | 55 | 48 | 59 | 52 | | | 57 | 51 | 62 | 56 | | |
| August | 62 | 55 | 63 | 56 | | | 65 | 58 | 69 | 62 | | |
| September | 68 | 60 | 69 | 62 | | | 74 | 66 | 76 | 68 | | |
| <u>3rd Quarter</u> | <u>63</u> | <u>55</u> | <u>64</u> | <u>56</u> | | | <u>66</u> | <u>59</u> | <u>69</u> | <u>62</u> | | |
| Jan. to Sep. | 64 | 56 | 65 | 58 | | | 68 | 60 | 71 | 63 | | |
| October | 70 | 62 | 76 | 68 | | | 76 | 67 | 82 | 73 | | |
| November | 73 | 64 | 76 | 67 | | | 78 | 70 | 81 | 71 | | |
| December | 69 | 61 | 70 | 62 | | | 72 | 64 | 72 | 64 | | |
| <u>4th Quarter</u> | <u>70</u> | <u>62</u> | <u>74</u> | <u>65</u> | | | <u>75</u> | <u>67</u> | <u>78</u> | <u>69</u> | | |
| 2nd Semester | 66 | 58 | 67 | 60 | | | 70 | 63 | 70 | 62 | | |
| Whole Year | 66 | 58 | 67 | 59 | | | 70 | 62 | 70 | 62 | | |

* Provisional

Table 9 :- Employment in the tourist industry as at end of March, 1998 - 2002

| Year | 1998 | 1999 ¹ | 2000 ¹ | 2001 | 2002 ² |
|-----------------------|---------------|--------------------------|--------------------------|---------------|--------------------------|
| Establishments | | | | | |
| Restaurants | 1,389 | 1,168 | 1,256 | 1,269 | 1,252 |
| Hotels | 11,177 | 11,835 | 13,239 | 15,023 | 15,890 |
| Travel and Tourism | 3,924 | 3,232 | 3,316 | 3,652 | 3,974 |
| Total | 16,490 | 16,235 | 17,811 | 19,944 | 21,116 |

¹ Revised in the light of new classification based on International Standard Industrial Classification Rev. 3

² Revised

Source: Survey of Employment and Earnings in large Establishments (i.e employing 10 or more persons)