

INTERNATIONAL TRAVEL & TOURISM

1st Semester 2003

1. Passenger Traffic

1.1 Total Passenger Traffic

Passenger traffic for the first half of 2003 totalled 874,611, made up of 430,121 arrivals and 444,490 departures. Compared to the corresponding period of the preceding year, these figures represent increases of 2.1% in arrivals and 1.4% in departures. Movements by sea accounted for 4% of both arrivals and departures. Further details on monthly trends are given in Table 1.

1.2 Excursionists

Total arrivals by air included 4,993 “excursionists”, i.e. visitors arriving and leaving on the same day. Of these excursionists, 1,567 (31.4%) came from Reunion Island while 982 (19.7%) came from France. Total arrivals by sea included 8,933 “cruise excursionists” (5,139 passengers and 3,794 crews) aboard 11 cruise ships which visited our port during the first semester of 2003.

1.3 Mauritian Residents

The number of Mauritian residents travelling abroad went down by 1.5% from 72,165 for the first semester of 2002 to 71,056 for the same period in 2003 and accounted for 16% of total departures. The following trends were recorded in the number of Mauritians visiting the major destinations: Malagasy Republic (+69.0%), United Kingdom (+15.0%), Australia (+9.8%), India (+3.8%), Republic of South Africa (-1.6%), France (-4.0%), Reunion Island (-4.2%), Saudi Arabia (-44.9%), Singapore (-56.4%) and Hong Kong (-65.0%). A more detailed distribution of countries visited is presented in Table 2.

1.4 Tourist Arrivals

Tourist arrivals for the first six months of 2003 increased by 3.9% from 322,707 in 2002 to 335,306 in 2003. Further details are given in Tables 3 to 6.

Most (90.0%) of the tourists came mainly for holidays while 4.6% were on business/conference trips, and another 3.6% were in transit (Table 4).

Arrivals from Europe, which accounted for 66.8% of total tourist arrivals, rose by 2.5% to 224,045 during the first half of 2003 compared to 218,596 in the corresponding semester of 2002. Arrivals from France, our leading market, representing 29.0% of total tourist arrivals and 43.4% of the European market, dropped by 3.3% to reach 97,130. Arrivals from Italy also contracted by 1.3%. On the other hand, arrivals from United Kingdom went up by 18.1% and from Germany by 0.5%. Trends among the other European countries were as follows: Spain (+23.4%), Switzerland (+10.5%), Sweden (+7.9%), Austria (+2.3%), Belgium (-5.9%) and Netherlands (-11.6%).

For the period January to June 2003, arrivals from Africa, with a share of 24.2% of total tourist arrivals, increased by 2.8% to 81,092. Arrivals from Reunion Island, the major generating country of the region, were up by 1.6%, while those from the Republic of South Africa fell by 1.1%. Changes in arrivals from other African countries were as follows: Comoros (+51.9%), Malagasy Republic (+42.8%), Seychelles (-2.4%), Kenya (-7.8%) and Zimbabwe (-54.8%).

Tourist arrivals from the Asian market grew by 21.1% for the reference period and constituted 6.6% of total tourist arrivals. Arrivals from India, our major source on this continent, went up by 42.0% to attain 13,884. Among the other Asian countries, the following trends were noted: United Arab Emirates (+390.6%), People's Republic of China (-0.7%), Japan (-18.8%), Malaysia (-34.9%), Singapore (-45.1%) and Hong Kong (-53.1%).

Arrivals from Oceania went up by 18.5% due largely to an increase of 17.6% in arrivals from Australia.

An increase of 9.9% was recorded in arrivals from America. This was the result of growths from USA (+7.1%), Canada (+4.4%) and other American countries (+22.4%).

2. Tourist Nights

The number of nights spent by tourists during the first half of 2003 is estimated at 3.3 million, up by 3.5% over the same period of 2002 (Table 6).

3. Hotel Statistics

At the end of June 2003, there was a total of 94 registered hotels in operation. Owing to renovation, three hotels were not operational. The total room capacity for these registered hotels in operation was 9,574 with 19,515 bed places (Table 7). The room occupancy rate for all hotels for the first semester of 2003 averaged 62% while the bed occupancy rate was 54% (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 37 (39% of all registered hotels). These "Large" hotels had a room capacity of 7,209 with 14,715 bedplaces, representing 75.3% of total room capacity and 75.4% of total bedplaces. The average room occupancy rate for these hotels for the first six months of 2003 was of the order of 64%, while bed occupancy rate averaged 57% (Table 8).

4. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first semester of 2003 were of the order of Rs 8,956 million, down by 3.6% when compared to Rs 9,288 million registered 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 22,261 at the end of March 2003, that is 5.4% higher than last year. Of this number, 74.1% or 16,497 were engaged in hotels (Table 9).

6. Forecast Year 2003

On the basis of information obtained from the major stakeholders of the tourist industry, the initial forecast of 700,000 tourist arrivals for 2003 is maintained, i.e. a growth of 2.7% over the figure of 681,648 registered in 2002. According to the Bank of Mauritius, tourism receipts will be around Rs 18,100 million, as initially estimated in May 2003.

Central Statistics Office

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August 2003

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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 **C**ommonwealth of **I**ndependent **S**tates, 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	70,795	65,828
May	65,600	69,705	67,030	69,414	68,044	71,992
June	54,696	51,854	54,781	51,274	57,261	55,374
2nd Quarter	190,481	190,201	185,772	190,119	196,100	193,194
1st Semester	409,514	424,081	421,377	438,444	430,121	444,490
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 - June of 2002 and 2003**

Country of disembarkation	Jan - June 2002	Jan - June 2003	% Change
EUROPE	23,225	24,527	5.6
Belgium	257	420	63.4
France	10,292	9,880	-4.0
Germany	847	1,081	27.6
Italy	1,254	1,193	-4.9
Switzerland	935	835	-10.7
United Kingdom	9,580	11,013	15.0
Other European	60	105	75.0
AFRICA	28,298	28,205	-0.3
Kenya	554	556	0.4
Malagasy Republic	1,308	2,210	69.0
Reunion	17,129	16,403	-4.2
Seychelles	1,586	1,598	0.8
S. Africa, Rep. of	7,257	7,142	-1.6
Zimbabwe	356	287	-19.4
Other African	108	9	-91.7
ASIA	17,860	15,404	-13.8
Hong Kong SAR ¹	3,197	1,119	-65.0
India	6,236	6,470	3.8
Malaysia	1,076	387	-64.0
Singapore	5,145	2,243	-56.4
Saudi Arabia	1,419	782	-44.9
Other Asian ²	787	4,403	459.5
OCEANIA	2,375	2,609	9.9
Australia	2,375	2,608	9.8
Other Oceanian	-	1	-
AMERICA	12	26	116.7
U.S.A	2	6	200.0
Canada	10	19	90.0
Other American	-	1	-
NOT STATED	395	285	-27.8
All Countries	72,165	71,056	-1.5

¹ Special Administrative Region of China

² Including United Arab Emirates

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

Month	Number		
	2001	2002	2003 ¹
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	57,217
May	51,969	53,813	54,710
June	38,496	39,048	41,841
<i>2nd Quarter</i>	<u>145,259</u>	<u>141,048</u>	<u>153,768</u>
<i>1st Semester</i>	315,789	322,707	335,306
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	

¹ Provisional**Table 4 :- Tourist arrivals by main purpose of visit,
January - June of 2002 and 2003**

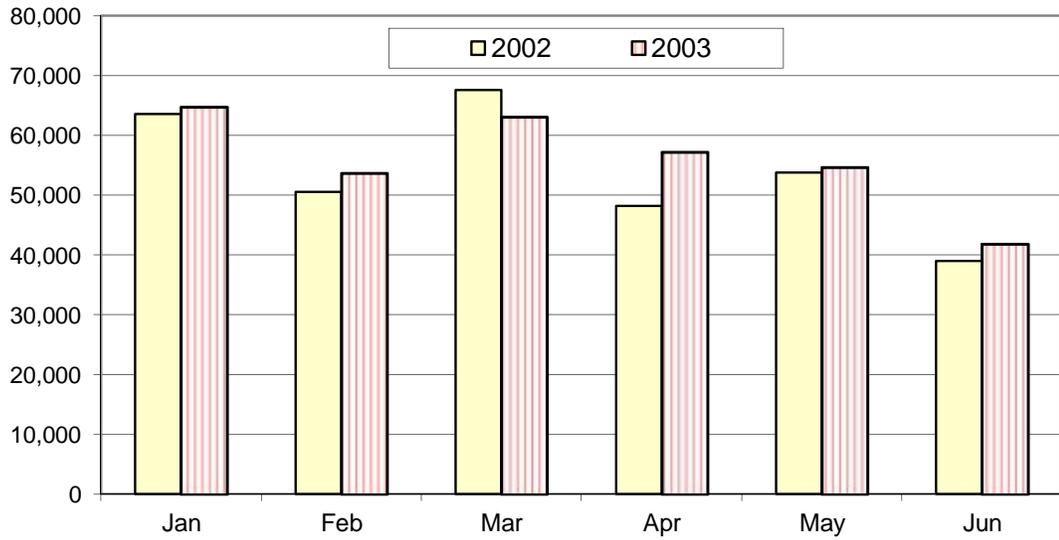
Purpose of visit	Jan - June 2002	Jan - June 2003	% Change
Holiday	294,139	302,717	2.9
Business	11,253	12,518	11.2
Transit	11,049	11,928	8.0
Conference	2,128	3,007	41.3
Sports	520	476	-8.5
Other & Not Stated	3,618	4,660	28.8
Total	322,707	335,306	3.9

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

Country of residence	Jan - June 2002	2003 ¹							% Change 2003/2002
		Jan	Feb	Mar	Apr	May	Jun	Jan - June	
EUROPE	218,596	38,932	40,739	43,086	40,500	33,724	27,064	224,045	2.5
Austria	4,568	875	995	742	690	1,029	340	4,671	2.3
Belgium	5,032	604	622	891	1,008	738	874	4,737	-5.9
France	100,408	19,136	17,962	19,642	16,327	14,092	9,971	97,130	-3.3
Germany	27,747	4,475	4,769	5,790	5,385	4,147	3,322	27,888	0.5
Italy	19,792	4,158	4,242	3,731	3,999	1,569	1,830	19,529	-1.3
Netherlands	2,258	243	398	381	356	304	314	1,996	-11.6
Spain	3,425	350	507	746	921	778	926	4,228	23.4
Sweden	2,341	578	747	466	346	169	219	2,525	7.9
Switzerland	7,414	1,366	1,427	1,498	1,951	1,150	800	8,192	10.5
United Kingdom	34,248	4,521	6,190	6,990	7,724	8,070	6,954	40,449	18.1
CIS	1,955	677	327	269	369	525	164	2,331	19.2
Other European	9,408	1,949	2,553	1,940	1,424	1,153	1,350	10,369	10.2
AFRICA	78,855	21,522	7,772	15,511	12,330	14,655	9,302	81,092	2.8
Comoros	376	72	68	92	107	137	95	571	51.9
Kenya	796	92	81	137	210	101	113	734	-7.8
Malagasy Rep.	3,564	952	869	835	971	831	632	5,090	42.8
Reunion	44,056	15,955	2,731	8,579	4,982	8,974	3,534	44,755	1.6
Seychelles	5,891	890	897	1,122	1,111	989	740	5,749	-2.4
S/ Africa Rep. of	20,145	2,753	2,646	4,054	3,997	2,981	3,497	19,928	-1.1
Zimbabwe	1,895	105	108	169	259	144	71	856	-54.8
Other African	2,132	703	372	523	693	498	620	3,409	59.9
ASIA	18,147	2,675	4,004	3,273	2,980	5,045	3,996	21,973	21.1
Hong Kong SAR ²	653	99	67	70	30	22	18	306	-53.1
India	9,778	1,019	1,744	1,612	2,082	4,361	3,066	13,884	42.0
Japan	873	138	221	173	78	49	50	709	-18.8
Malaysia	948	166	228	114	47	29	33	617	-34.9
P. Rep. of China	1,511	422	453	379	142	57	47	1,500	-0.7
Singapore	1,560	175	290	269	50	32	40	856	-45.1
United Arab Emirates	233	80	201	132	193	212	325	1,143	390.6
Other Asian	2,591	576	800	524	358	283	417	2,958	14.2
OCEANIA	3,667	767	537	612	853	755	821	4,345	18.5
Australia	3,426	653	497	559	809	728	783	4,029	17.6
Other Oceanian	241	114	40	53	44	27	38	316	31.1
AMERICA	3,377	849	574	625	535	498	629	3,710	9.9
USA	1,854	504	304	363	298	237	279	1,985	7.1
Canada	772	120	120	165	115	113	173	806	4.4
Other American	751	225	150	97	122	148	177	919	22.4
OTHER & N.STATED	65	17	21	22	19	33	29	141	116.9
All Countries	322,707	64,762	53,647	63,129	57,217	54,710	41,841	335,306	3.9

¹ Provisional² Special Administrative Region of China

**Chart 1 - Monthly Distribution of Tourist Arrivals,
January - June of 2002 and 2003**



**Chart 2 - Tourist Arrivals from Top Ten Markets,
January - June of 2002 and 2003**

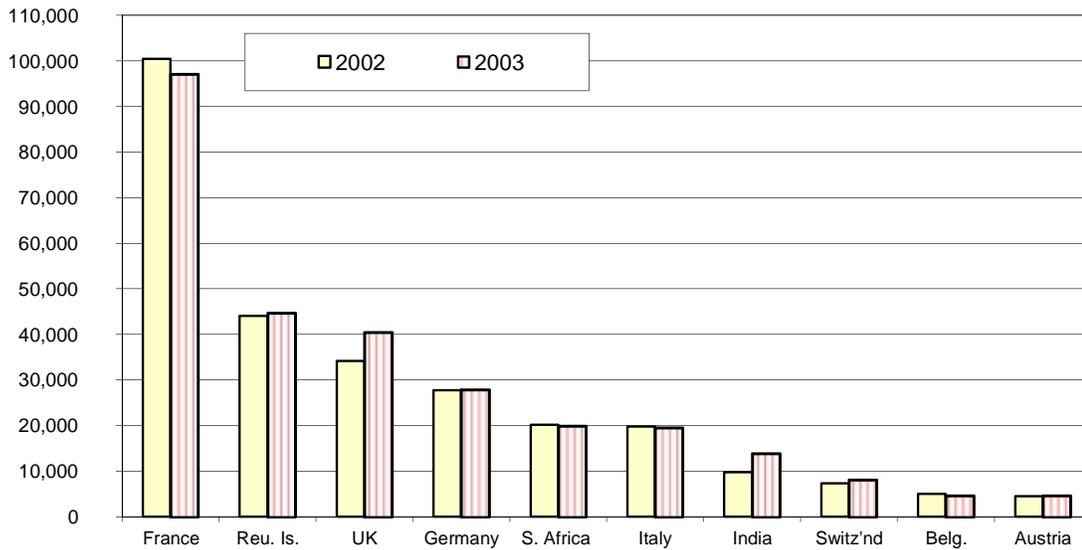


Table 6 :- Selected Tourism Statistics, 2000 - 2003

Year		Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
	2000	656,453	6,413	14,234
	2001	660,318	6,528	18,166
	2002	681,648	6,769	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
2002	4th Qr.	185,379	1,832	5,297
	2nd Semester	344,529	3,404	9,757
	1st Qr.	181,659	1,795	5,005
	2nd Qr.	141,048	1,404	4,283
2002	1st Semester	322,707	3,199	9,288
	3rd Qr.	159,878	1,584	4,041
	4th Qr.	199,063	1,986	4,999
	2nd Semester	358,941	3,570	9,040
2003 ²	1st Qr.	181,538	1,785	4,705
	2nd Qr.	153,768	1,527	4,251
	1st Semester	335,306	3,312	8,956

¹ Source: Bank of Mauritius² Provisional**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
2003 ¹	4th Qr.	95	9,623	19,597
	1st Qr.	96	9,638	19,671
	2nd Qr.	94 ²	9,574	19,515

¹ Provisional² Excluding three hotels 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 ¹		2001		2002		2003 ¹	
	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
<i>1st Quarter</i>	<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	63	55	70	62	68	61	67	59
May	64	56	67	59	62	55	68	61	73	65	64	56
June	50	43	50	45	49	43	51	46	53	47	50	44
<i>2nd Quarter</i>	<u>60</u>	<u>53</u>	<u>60</u>	<u>54</u>	<u>58</u>	<u>51</u>	<u>64</u>	<u>57</u>	<u>65</u>	<u>58</u>	<u>60</u>	<u>53</u>
<i>1st Semester</i>	66	58	66	59	62	54	70	62	71	64	64	57
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		
<i>3rd Quarter</i>	<u>63</u>	<u>55</u>	<u>64</u>	<u>56</u>			<u>66</u>	<u>59</u>	<u>69</u>	<u>62</u>		
<i>Jan. to Sep.</i>	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		
<i>4th Quarter</i>	<u>70</u>	<u>62</u>	<u>74</u>	<u>65</u>			<u>75</u>	<u>67</u>	<u>78</u>	<u>69</u>		
<i>2nd Semester</i>	66	58	67	60			70	63	70	62		
Whole Year	66	58	67	59			70	62	70	62		

¹ Provisional

Table 9 :- Employment in the tourist industry as at end of March, 1999 - 2003

Year	1999¹	2000¹	2001	2002	2003²
Establishments					
Restaurants	1,168	1,256	1,269	1,252	16,497
Hotels	11,835	13,239	15,023	15,890	1,719
Travel and Tourism	3,232	3,316	3,652	3,974	4,045
Total	16,235	17,811	19,944	21,116	22,261

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

² Provisional

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