

INTERNATIONAL TRAVEL & TOURISM

1st Quarter 2004

1. Passenger Traffic

1.1 Total Passenger Traffic

Passenger traffic for the first quarter of 2004 totalled 486,264, made up of 237,975 arrivals and 248,289 departures. Compared to the same period of year 2003, these figures represent an increase of 1.7% in arrivals and a decrease of 1.2% in departures. Movements by sea accounted for 3.8% of both arrivals and departures. Further details on monthly trends are given in Table 1.

1.2 Excursionists

Total arrivals by air included 3,707 “excursionists”, i.e. visitors arriving and leaving on the same day. Of these excursionists, 1,153 (31.1%) came from Reunion Island and 677 (18.3%), from France. Total arrivals by sea included 5,230 “cruise excursionists” (2,604 passengers and 2,626 crews) aboard 7 cruise ships, which visited our port during the first three months of 2004.

1.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad went up by 5.6% to stand at 40,558 against 38,419 for the first quarter of 2003. The following changes were observed in the number of Mauritians visiting the major destinations: Saudi Arabia (+141.9%), India (+22.7%), Australia (+19.0%), Malagasy Republic (+17.4%), United Kingdom (+11.8%), France (+4.2%), Hong Kong (+1.7%), Republic of South Africa (-6.3%), Reunion Island (-11.2%) and Singapore (-30.1%). Table 2 shows a more detailed distribution of countries visited.

1.4 Tourist Arrivals

Tourist arrivals rose by 1.5% from 181,538 in the first quarter of 2003 to 184,278 in the first quarter of 2004. Further details on tourist arrivals are given in Tables 3 to 6.

Around 91% of the tourists came mainly for holidays while 3.7% were on business/conference trips and another 3.7% were in transit (Table 4).

Arrivals from Europe, which accounts for 68% of total tourist arrivals, rose by 1.6% to 124,760 during the first quarter of 2004 against 122,757 in the same quarter of 2003. Arrivals from France, our leading market representing 33% of total tourist arrivals and 48% of the European market, expanded by 6.6% and attained 60,502 during this period. A growth was also noted in arrivals from Italy (+12.1%). Conversely, decline was recorded in arrivals from the other major generating countries: United Kingdom (-7.3%) and Germany (-10.8%). Trends among the other countries were as follows: Austria (+4.1%), Sweden (+2.7%), Belgium (-3.1%), Switzerland (-9.8%), Netherlands (-16.7%) and Spain (-26.3%).

For the reference period, arrivals from Africa, with a share of 25% of total tourist arrivals, grew by 3.3% to 46,284. Increases were noted in arrivals from the major markets of the region, Republic of South Africa by 25.1% and Reunion Island by 2.5%. Changes in arrivals from other African countries were as follows: Zimbabwe (+34.8%), Kenya (+31.0%), Malagasy Republic (-6.1%), Comoros (-14.2%) and Seychelles (-42.3%).

Tourist arrivals from the Asian market regressed by 4.9% for the period under review and constituted 5% of total tourist arrivals. Arrivals from India, our major source on this continent, went up by 12.3% to reach 4,912. The performance of other Asian countries was as follows: Hong Kong (+2.5%), People's Republic of China (-1.9%), United Arab Emirates (-17.2%), Japan (-18.0%), Malaysia (-20.7%) and Singapore (-35.3%).

Arrivals from Oceania fell by 6.1% mainly due to a significant drop of 60.4% in arrivals from the other Oceanian countries which offset a marginal rise of 0.5% from Australia.

Arrivals from the continent of America contracted by 6.8%, being the result of net effect of a decrease of 15.7% from USA coupled with growths of 10.6% and 0.2% from Canada and "Other American" countries respectively.

2. Tourist Nights

Total tourist nights spent in the country during the first three months of 2004 is estimated at 1.81 million, representing an increase of 1.7% over the same period of the preceding year.

3. Hotel Statistics

At the end of March 2004, there was a total of 94 registered hotels in operation. Owing to renovation, five hotels were not operational. The total room capacity for these registered hotels was 9,563 with 19,527 bed places (Table 7). The room occupancy rate for all hotels for the first quarter of 2004 averaged 67% while the bed occupancy rate was 59% (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 7,222 with 14,749 bedplaces, representing 75.5% of both total room capacity and total bedplaces. The average room occupancy rate for these hotels for the first three months of 2004 was of the order of 70% while bed occupancy rate averaged 62% (Table 8).

4. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first quarter of 2004 were of the order of Rs 6,598 million, i.e. an excess of 40.2% compared to Rs 4,705 million for the same period of 2003 (Table 6).

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% more than the previous year. Of this number, 74.1% or 16,497 were engaged in hotels (Table 9).

6. Forecast Year 2004

During the first quarter of 2004, the performance of some major European markets like United Kingdom and Germany were below expectation. However, in the light of increase in air seat capacity and joint promotional campaigns by some hotels and the tourism authorities, the initial forecast of 740,000 tourist arrivals is maintained. According to the Bank of Mauritius, tourist earnings for the year will be around Rs 20,850 million.

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May 2004

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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, 2002 - 2004

Month	2002		2003		2004	
	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures
January	82,203	98,297	82,764	101,301	86,669	106,951
February	63,657	63,562	66,756	62,720	69,256	63,267
March	89,745	86,466	84,501	87,275	82,050	78,071
<i>1st Quarter</i>	<u>235,605</u>	<u>248,325</u>	<u>234,021</u>	<u>251,296</u>	<u>237,975</u>	<u>248,289</u>
April	63,961	69,431	70,795	65,828		
May	67,030	69,414	68,044	71,992		
June	54,781	51,274	57,261	55,374		
<i>2nd Quarter</i>	<u>185,772</u>	<u>190,119</u>	<u>196,100</u>	<u>193,194</u>		
<i>1st Semester</i>	421,377	438,444	430,121	444,490		
July	75,786	62,403	77,754	62,785		
August	73,431	84,849	76,492	88,513		
September	65,381	65,607	66,150	65,894		
<i>3rd Quarter</i>	<u>214,598</u>	<u>212,859</u>	<u>220,396</u>	<u>217,192</u>		
<i>Jan. to Sep.</i>	635,975	651,303	650,517	661,682		
October	81,830	77,979	80,491	75,517		
November	78,362	75,840	77,614	70,212		
December	94,939	77,399	96,368	76,779		
<i>4th Quarter</i>	<u>255,131</u>	<u>231,218</u>	<u>254,473</u>	<u>222,508</u>		
<i>2nd Semester</i>	469,729	444,077	474,869	439,700		
Whole Year	891,106	882,521	904,990	884,190		

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
1st Quarter of 2003 and 2004**

Country of disembarkation	1st Quarter 2003	1st Quarter 2004	% Change
EUROPE	12,142	13,166	8.4
Belgium	237	147	-38.0
France	4,966	5,176	4.2
Germany	496	655	32.1
Italy	756	757	0.1
Switzerland	388	508	30.9
United Kingdom	5,256	5,875	11.8
Other European	43	48	11.6
AFRICA	14,337	13,393	-6.6
Kenya	251	348	38.6
Malagasy Republic	1,112	1,305	17.4
Reunion	8,389	7,453	-11.2
Seychelles	721	691	-4.2
S. Africa, Rep. of	3,671	3,439	-6.3
Zimbabwe	188	94	-50.0
Other African	5	63	1,160.0
ASIA	10,179	11,933	17.2
Hong Kong SAR ¹	1,116	1,135	1.7
India	3,606	4,424	22.7
Malaysia	386	934	142.0
Singapore	2,145	1,500	-30.1
Saudi Arabia	731	1,768	141.9
Other Asian ²	2,195	2,172	-1.0
OCEANIA	1,662	1,976	18.9
Australia	1,661	1,976	19.0
Other Oceanian	1	-	-100.0
AMERICA	19	11	-42.1
U.S.A	4	1	-75.0
Canada	14	10	-28.6
Other American	1	-	-100.0
NOT STATED	80	79	-1.3
All Countries	38,419	40,558	5.6

¹ Special Administrative Region of China

² Including United Arab Emirates

Table 3:- Tourist arrivals by month, 2002 - 2004

Month	Number		
	2002	2003	2004 ¹
January	63,551	64,762	66,543
February	50,554	53,647	54,104
March	67,554	63,129	63,631
<u>1st Quarter</u>	<u>181,659</u>	<u>181,538</u>	<u>184,278</u>
April	48,187	57,217	
May	53,813	54,710	
June	39,048	41,841	
<u>2nd Quarter</u>	<u>141,048</u>	<u>153,768</u>	
1st Semester	322,707	335,306	
July	56,709	58,403	
August	53,395	56,844	
September	49,774	50,293	
<u>3rd Quarter</u>	<u>159,878</u>	<u>165,540</u>	
Jan. to Sep.	482,585	500,846	
October	65,291	64,917	
November	61,326	61,984	
December	72,446	74,271	
<u>4th Quarter</u>	<u>199,063</u>	<u>201,172</u>	
2nd Semester	358,941	366,712	
Whole Year	681,648	702,018	

¹ Provisional**Table 4 :- Tourist arrivals by main purpose of visit,
1st Quarter of 2003 and 2004**

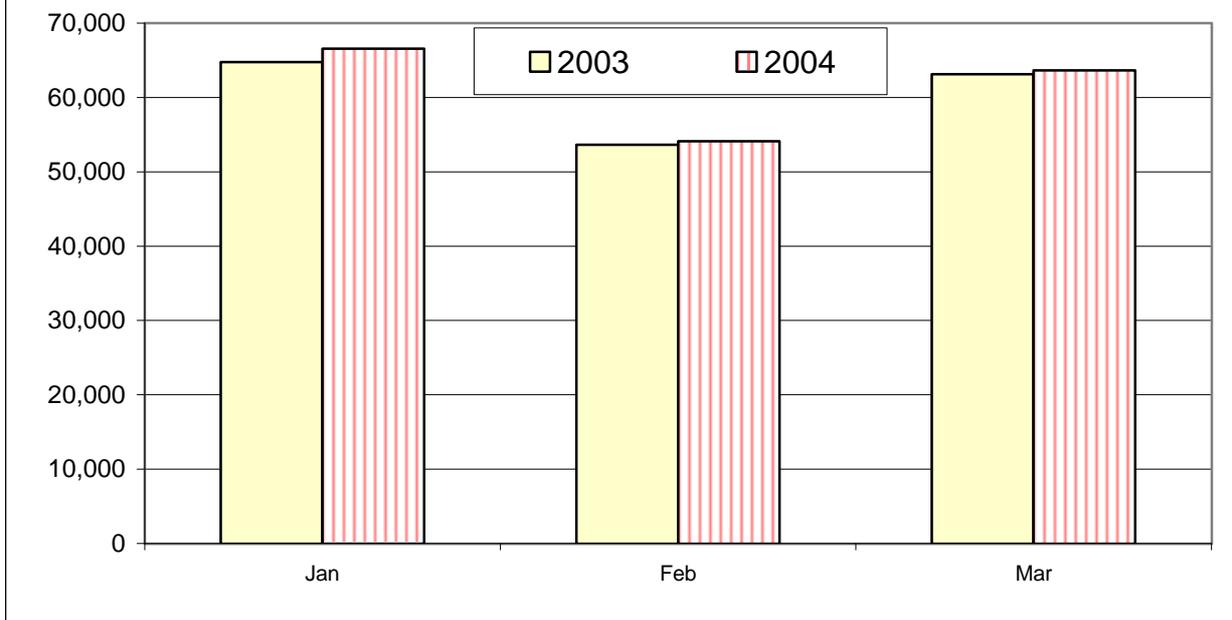
Purpose of visit	1st Quarter 2003	1st Quarter 2004	% Change
Holiday	163,286	167,872	2.8
Business	6,191	6,015	-2.8
Transit	8,364	6,886	-17.7
Conference	1,211	891	-26.4
Sports	140	309	120.7
Other & Not Stated	2,346	2,305	-1.7
Total	181,538	184,278	1.5

Table 5 : - Tourist Arrivals by Country of Residence, January - March of 2003 and 2004

Country of residence	1st Quarter 2003	2004 ¹				% Change Q1 2003 to Q1 2004
		Jan	Feb	Mar	1st Quarter	
EUROPE	122,757	40,479	41,712	42,569	124,760	1.6
Austria	2,612	993	994	733	2,720	4.1
Belgium	2,117	785	660	607	2,052	-3.1
France	56,740	20,597	19,415	20,490	60,502	6.6
Germany	15,034	4,265	4,424	4,726	13,415	-10.8
Italy	12,131	4,161	4,300	5,137	13,598	12.1
Netherlands	1,022	243	356	252	851	-16.7
Spain	1,603	268	386	527	1,181	-26.3
Sweden	1,791	543	808	488	1,839	2.7
Switzerland	4,291	1,325	1,383	1,161	3,869	-9.8
United Kingdom	17,701	4,409	5,908	6,090	16,407	-7.3
CIS	1,273	856	301	313	1,470	15.5
Other European	6,442	2,034	2,777	2,045	6,856	6.4
AFRICA	44,805	21,786	7,891	16,607	46,284	3.3
Comoros	232	66	64	69	199	-14.2
Kenya	310	55	69	282	406	31.0
Malagasy Rep.	2,656	764	877	853	2,494	-6.1
Reunion	27,265	15,708	2,672	9,564	27,944	2.5
Seychelles	2,909	499	574	606	1,679	-42.3
S. Africa, Rep. of	9,453	4,237	3,186	4,400	11,823	25.1
Zimbabwe	382	130	127	258	515	34.8
Other African	1,598	327	322	575	1,224	-23.4
ASIA	9,952	3,235	3,260	2,968	9,463	-4.9
Hong Kong SAR ²	236	103	77	62	242	2.5
India	4,375	1,363	1,899	1,650	4,912	12.3
Japan	532	163	79	194	436	-18.0
Malaysia	508	219	87	97	403	-20.7
P. Rep. of China	1,254	532	357	341	1,230	-1.9
Singapore	734	163	130	182	475	-35.3
United Arab Emirates	413	149	142	51	342	-17.2
Other Asian	1,900	543	489	391	1,423	-25.1
OCEANIA	1,916	430	507	863	1,800	-6.1
Australia	1,709	390	490	838	1,718	0.5
Other Oceanian	207	40	17	25	82	-60.4
AMERICA	2,048	588	717	603	1,908	-6.8
USA	1,171	274	393	320	987	-15.7
Canada	405	147	128	173	448	10.6
Other American	472	167	196	110	473	0.2
OTHER & N.STATED	60	25	17	21	63	5.0
All Countries	181,538	66,543	54,104	63,631	184,278	1.5

¹ Provisional² Special Administrative Region of China

**Chart 1 - Monthly Distribution of Tourist Arrivals,
January - March of 2003 and 2004**



**Chart 2 - Tourist Arrivals from Top Ten Markets,
January - March of 2003 and 2004**

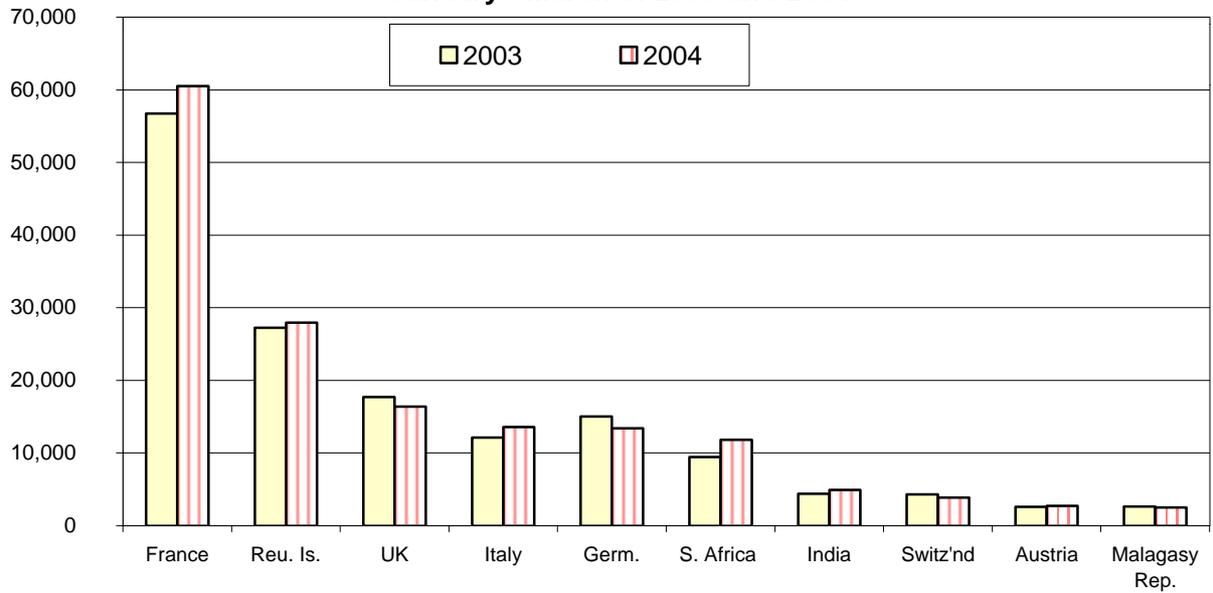


Table 6 :- Selected Tourism Statistics, 2001 - 2004

Year		Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
	2001	660,318	6,528	18,166
	2002	681,648	6,769	18,328
	2003	702,018	6,952	19,397
2002	1st Qr.	181,659	1,795	5,005
	2nd Qr.	141,048	1,404	4,283
	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	1st Qr.	181,538	1,785	4,705
	2nd Qr.	153,768	1,527	4,251
	1st Semester	335,306	3,312	8,956
	3rd Qr.	165,540	1,640	4,297
	4th Qr.	201,172	2,000	6,144
	2nd Semester	366,712	3,640	10,441
2004²	1st Qr.	184,278	1,815	6,598

¹ Source: Bank of Mauritius² Provisional

Table 7:- Hotels, rooms and bedplaces, 2001 - 2004

Year	Number as at end of period			
	Hotels	Rooms	Bedplaces	
2001	95	9,024	18,350	
2002	95	9,623	19,597	
2003	97	9,647	19,727	
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	1st Qr.	96	9,638	19,671
	2nd Qr.	94	9,574	19,515
	3rd Qr.	96	9,425	19,249
	4th Qr.	97	9,647	19,727
2004¹	1st Qr.	94 ²	9,563	19,527

¹ Provisional² Excluding five hotels not operational because of renovation works

Table 8 :- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2002 - 2004

Month	All Hotels						"Large" Hotels					
	2002		2003		2004 ¹		2002		2003		2004 ¹	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	71	63	68	59	69	61	76	68	69	61	72	64
February	69	62	66	58	64	57	74	66	69	61	68	60
March	75	66	63	56	66	58	81	72	66	58	70	62
<i>1st Quarter</i>	<u>72</u>	<u>64</u>	<u>66</u>	<u>58</u>	<u>67</u>	<u>59</u>	<u>77</u>	<u>69</u>	<u>68</u>	<u>60</u>	<u>70</u>	<u>62</u>
April	62	56	63	55			68	61	67	59		
May	67	59	62	55			73	65	64	56		
June	50	45	49	43			53	47	50	44		
<i>2nd Quarter</i>	<u>60</u>	<u>54</u>	<u>58</u>	<u>51</u>			<u>65</u>	<u>58</u>	<u>60</u>	<u>53</u>		
<i>1st Semester</i>	66	59	62	54			71	64	64	57		
July	59	52	53	47			62	56	54	48		
August	63	56	61	54			69	62	64	56		
September	69	62	63	55			76	68	67	59		
<i>3rd Quarter</i>	<u>64</u>	<u>56</u>	<u>59</u>	<u>52</u>			<u>69</u>	<u>62</u>	<u>62</u>	<u>54</u>		
<i>Jan. to Sep.</i>	65	58	61	54			71	63	63	56		
October	76	68	68	60			82	73	72	64		
November	76	67	70	61			81	71	74	65		
December	70	62	68	60			72	64	70	62		
<i>4th Quarter</i>	<u>74</u>	<u>65</u>	<u>69</u>	<u>61</u>			<u>78</u>	<u>69</u>	<u>72</u>	<u>64</u>		
<i>2nd Semester</i>	67	60	64	56			70	62	67	59		
Whole Year	67	59	63	55			70	62	66	58		

¹ Provisional

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

Year	1999 ¹	2000 ¹	2001	2002	2003 ²
Establishments					
Restaurants	1,168	1,256	1,269	1,252	1,719
Hotels	11,835	13,239	15,023	15,890	16,497
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)