

INTERNATIONAL TRAVEL & TOURISM

1st Semester 2004

1. Passenger Traffic

1.1 Total Passenger Traffic

Passenger traffic for the first semester of 2004 totalled 877,427, made up of 434,983 arrivals and 442,444 departures. Compared to the corresponding period of year 2003, these figures represent an increase of 1.1% in arrivals and a marginal decline of 0.5% in departures. Movements by sea accounted for 2.6% of both arrivals and departures. Further details on monthly trends are given in Table 1.

1.2 Excursionists

Total arrivals by air included 5,973 “excursionists”, i.e. visitors arriving and leaving on the same day. Of these excursionists, 1,691 (28.3%) came from Reunion Island and 1,080 (18.1%), from France. Total arrivals by sea included 5,252 “cruise excursionists” (2,604 passengers and 2,648 crews) aboard 8 cruise ships, which visited our port during the first six months of 2004.

1.3 Mauritian Residents

During the reference period, the number of Mauritian residents travelling abroad went up by 12.9% to stand at 80,226 compared to 71,056 for the first half of 2003. The following major changes were observed in the number of Mauritians visiting the major destinations: Malaysia (+312.4%), Hong Kong (+171.0%), Saudi Arabia (+126.1%), Singapore (+35.9%), Australia (+30.0%), United Kingdom (+26.7%), India (+23.9%), Malagasy Republic (+21.6%), France (+3.5%), Republic of South Africa (-5.8%) and Reunion Island (-8.8%). Table 2 shows a more detailed distribution of countries visited.

1.4 Tourist Arrivals

Tourist arrivals edged 0.8% lower from 335,306 in the first half of 2003 to 332,677 in the first semester of 2004. Further details on tourist arrivals are given in Tables 3 to 6.

Around 91% of the tourists came mainly for holidays while 4.5% were on business/conference trips and another 3.4% were in transit (Table 4).

Arrivals from Europe, which accounts for 67.0% of total tourist arrivals, declined by 0.5% to 222,827 during the first six months of 2004 against 224,045 in the same period of 2003. Arrivals from France, our leading market representing 30.2% of total tourist arrivals and 45.1% of the European market, expanded by 3.6% and attained 100,586 during this period. A growth was also noted in arrivals from Italy (+10.7%). Conversely, decline was recorded in arrivals from the other major generating countries: United Kingdom (-3.0%) and Germany (-10.8%). Negative growths were also registered from the other countries: Netherlands (-2.1%), Sweden (-5.1%), Austria (-6.1%), Spain (-15.7%), Switzerland (-16.3%) and Belgium (-18.0%).

For the period under review, arrivals from Africa, with a share of 23.7% of total tourist arrivals, decreased by 2.6% to 78,954. Arrivals from Reunion Island, the major market of the region, contracted by 5.0% while those from Republic of South Africa expanded by 20.4%. Changes in arrivals from other African countries were as follows: Zimbabwe (+27.2%), Kenya (+4.2%), Malagasy Republic (-17.6%), Comoros (-20.3%) and Seychelles (-39.7%).

Tourist arrivals from the Asian market, which constituted 6.6% of total, went down by 0.2% to reach 21,936. Arrivals from India, our major source on this continent, fell by 10.0% to reach 12,491. The performance of other Asian countries was as follows: People's Republic of China (+59.9%), Hong Kong (+56.2%), Malaysia (+44.1%), Singapore (+34.7%), Japan (+15.2%) and United Arab Emirates (-31.5%).

Arrivals from Oceania rose by 11.0% due mainly to a growth of 12.3% in arrivals from Australia.

Arrivals from the continent of America increased by 7.5%, being the result of net effect of growths of 27.8% from Canada and 4.8% from USA, coupled with a decrease of 4.7% from "Other American" countries.

2. Tourist Nights

Total tourist nights spent in the country during the first six months of 2004 is estimated at 3.3 million, down by 0.7% over the same period of the preceding year (Table 6).

3. Hotel Statistics

At the end of June 2004, there was a total of 97 registered hotels in operation. Owing to renovation, four hotels were not operational. The total room capacity for these registered hotels was 9,944 with 20,295 bed places (Table 7). The room occupancy rate for all hotels for the first semester of 2004 averaged 61% while the bed occupancy rate was 54% (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 39 (40% of all registered hotels). These "Large" hotels had a room capacity of 7,437 with 15,185 bedplaces, representing 74.8% of both total room capacity and total bedplaces. The average room occupancy rate for these hotels for the first half of 2004 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 2004 were of the order of Rs 12,075 million, i.e. an excess of 34.8% compared to Rs 8,956 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 22,600 at the end of March 2004, that is 1.5% higher than the previous year. Of this number, 74.8% or 16,900 were engaged in hotels (Table 9).

6. Forecast Year 2004

Information gathered from stakeholders of the tourism industry indicates that tourist arrivals might not reach the targeted figure of 740,000. In fact, during the past six months the performance of some of our main markets such as Reunion Island, United Kingdom and Germany, has been below expectations. The initial forecast for 2004 has therefore been revised downwards to 725,000. According to the Bank of Mauritius, tourism receipts for the year will be around Rs 23,500 million.

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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	72,901	66,782
May	67,030	69,414	68,044	71,992	69,183	71,206
June	54,781	51,274	57,261	55,374	54,924	56,167
<i>2nd Quarter</i>	<u>185,772</u>	<u>190,119</u>	<u>196,100</u>	<u>193,194</u>	<u>197,008</u>	<u>194,155</u>
<i>1st Semester</i>	421,377	438,444	430,121	444,490	434,983	442,444
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,
January - June of 2003 and 2004**

Country of disembarkation	Jan - June 2003	Jan - June 2004	% Change
EUROPE	24,527	27,855	13.6
Belgium	420	180	-57.1
France	9,880	10,221	3.5
Germany	1,081	1,314	21.6
Italy	1,193	1,270	6.5
Switzerland	835	846	1.3
United Kingdom	11,013	13,951	26.7
Other European	105	73	-30.5
AFRICA	28,205	26,881	-4.7
Kenya	556	763	37.2
Malagasy Republic	2,210	2,687	21.6
Reunion	16,403	14,957	-8.8
Seychelles	1,598	1,503	-5.9
S. Africa, Rep. of	7,142	6,726	-5.8
Zimbabwe	287	179	-37.6
Other African	9	66	633.3
ASIA	15,404	21,856	41.9
Hong Kong SAR ¹	1,119	3,032	171.0
India	6,470	8,017	23.9
Malaysia	387	1,596	312.4
Singapore	2,243	3,049	35.9
Saudi Arabia	782	1,768	126.1
Other Asian ²	4,403	4,394	-0.2
OCEANIA	2,609	3,391	30.0
Australia	2,608	3,391	30.0
Other Oceanian	1	0	-100.0
AMERICA	26	17	-34.6
U.S.A	6	3	-50.0
Canada	19	14	-26.3
Other American	1	0	-100.0
NOT STATED	285	226	-20.7
All Countries	71,056	80,226	12.9

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	55,599
May	53,813	54,710	53,974
June	39,048	41,841	38,826
<u>2nd Quarter</u>	<u>141,048</u>	<u>153,768</u>	<u>148,399</u>
1st Semester	322,707	335,306	332,677
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,
January - June of 2003 and 2004**

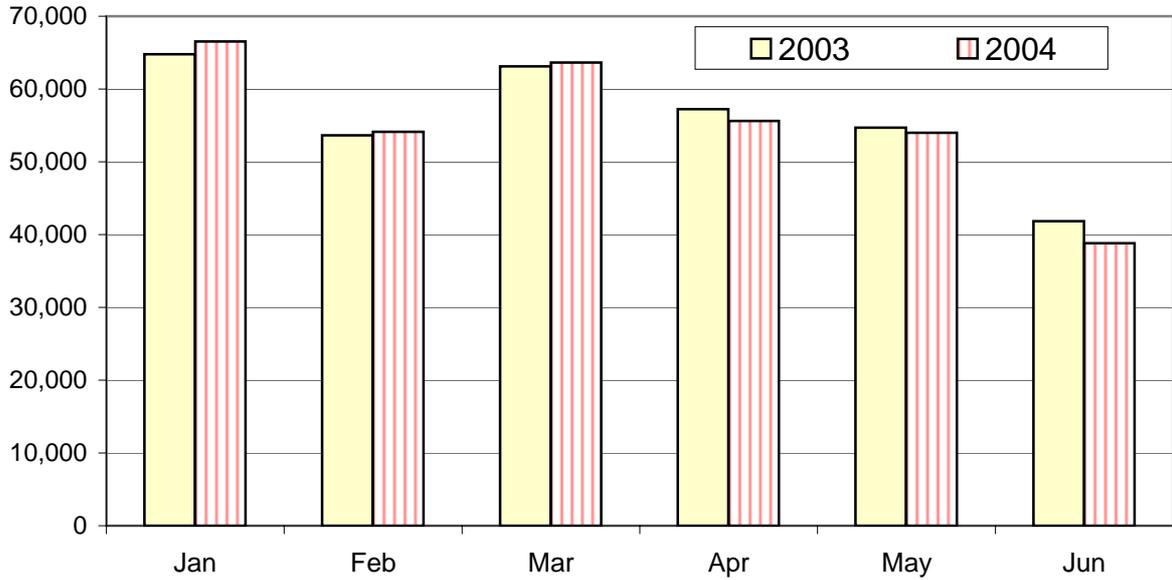
Purpose of visit	Jan - June 2003	Jan - June 2004	% Change
Holiday	302,717	301,460	-0.4
Business	12,518	12,489	-0.2
Transit	11,928	11,453	-4.0
Conference	3,007	2,378	-20.9
Sports	476	749	57.4
Other & Not Stated	4,660	4,148	-11.0
Total	335,306	332,677	-0.8

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

Country of residence	1st semester 2003	2004 ¹							1st semester	% Change S1 2003 to S1 2004
		Jan	Feb	Mar	Apr	May	Jun			
EUROPE	224,045	40,479	41,712	42,569	38,624	35,133	24,310	222,827	-0.5	
Austria	4,671	993	994	733	860	471	333	4,384	-6.1	
Belgium	4,737	785	660	607	735	607	488	3,882	-18.0	
France	97,130	20,597	19,415	20,490	16,900	15,023	8,161	100,586	3.6	
Germany	27,888	4,265	4,424	4,726	4,741	4,193	2,519	24,868	-10.8	
Italy	19,529	4,161	4,300	5,137	3,124	2,624	2,266	21,612	10.7	
Netherlands	1,996	243	356	252	366	414	324	1,955	-2.1	
Spain	4,228	268	386	527	727	765	893	3,566	-15.7	
Sweden	2,525	543	808	488	239	178	141	2,397	-5.1	
Switzerland	8,192	1,325	1,383	1,161	1,453	866	672	6,860	-16.3	
United Kingdom	40,449	4,409	5,908	6,090	7,465	8,322	7,047	39,241	-3.0	
CIS ²	2,331	856	301	313	524	320	123	2,437	4.5	
Other European	10,369	2,034	2,777	2,045	1,490	1,350	1,343	11,039	6.5	
AFRICA	81,092	21,786	7,891	16,607	11,945	12,524	8,201	78,954	-2.6	
Comoros	571	66	64	69	70	91	95	455	-20.3	
Kenya	734	55	69	282	157	106	96	765	4.2	
Malagasy Rep.	5,090	764	877	853	702	632	368	4,196	-17.6	
Reunion	44,755	15,708	2,672	9,564	4,729	7,255	2,592	42,520	-5.0	
Seychelles	5,749	499	574	606	615	606	564	3,464	-39.7	
S/ Africa Rep. of	19,928	4,237	3,186	4,400	4,873	3,135	4,163	23,994	20.4	
Zimbabwe	856	130	127	258	340	195	39	1,089	27.2	
Other African	3,409	327	322	575	459	504	284	2,471	-27.5	
ASIA	21,973	3,235	3,260	2,968	3,357	4,598	4,518	21,936	-0.2	
Hong Kong SAR ³	306	103	77	62	98	57	81	478	56.2	
India	13,884	1,363	1,899	1,650	1,847	3,019	2,713	12,491	-10.0	
Japan	709	163	79	194	174	141	66	817	15.2	
Malaysia	617	219	87	97	102	232	152	889	44.1	
P. Rep. of China	1,500	532	357	341	373	403	393	2,399	59.9	
Singapore	856	163	130	182	122	166	390	1,153	34.7	
United Arab Emirates	1,143	149	142	51	189	111	141	783	-31.5	
Other Asian	2,958	543	489	391	452	469	582	2,926	-1.1	
OCEANIA	4,345	430	507	863	966	1,002	1,053	4,821	11.0	
Australia	4,029	390	490	838	892	932	982	4,524	12.3	
Other Oceanian	316	40	17	25	74	70	71	297	-6.0	
AMERICA	3,710	588	717	603	679	689	711	3,987	7.5	
USA	1,985	274	393	320	355	363	376	2,081	4.8	
Canada	806	147	128	173	182	170	230	1,030	27.8	
Other American	919	167	196	110	142	156	105	876	-4.7	
OTHER & N.STATED	141	25	17	21	28	28	33	152	7.8	
All Countries	335,306	66,543	54,104	63,631	55,599	53,974	38,826	332,677	-0.8	

¹ Provisional² Commonwealth of Independent States (Ex Soviet Union Countries)³ Special Administrative Region of China

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



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

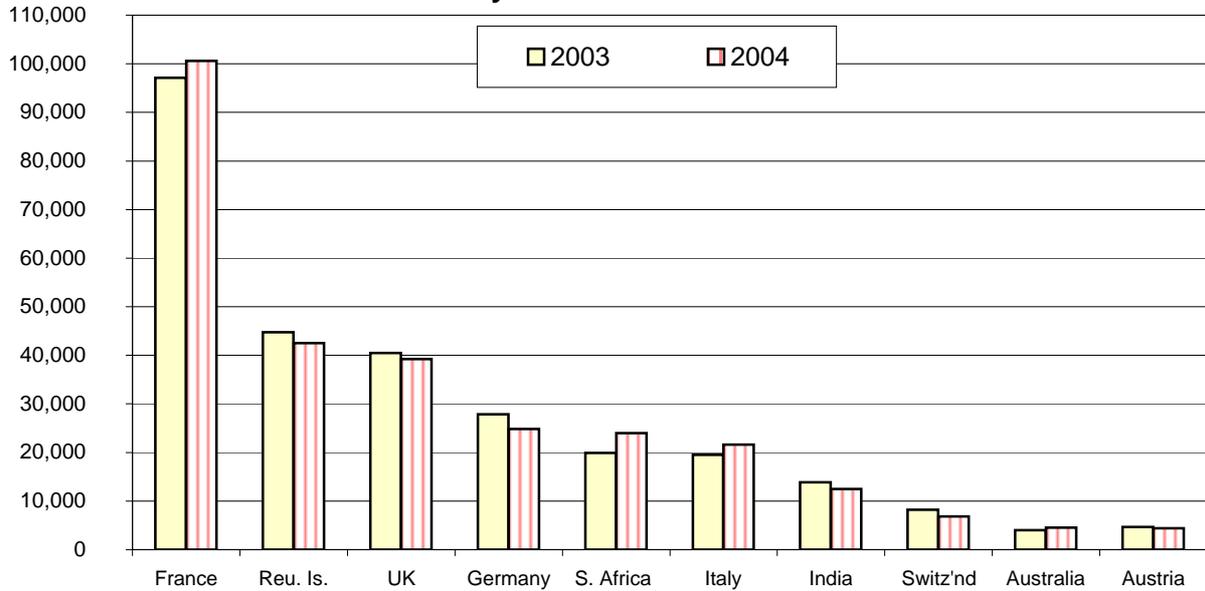


Table 6 :- Selected Tourism Statistics, 2001 - 2004

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
2004 ²	1st Qr.	184,278	1,815	6,598
	2nd Qr.	148,399	1,474	5,477
	1st Semester	332,677	3,289	12,075

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
	2nd Qr.	89	8,136
	3rd Qr.	92	8,317
	4th Qr.	95	9,623
2003	1st Qr.	96	9,638
	2nd Qr.	94	9,574
	3rd Qr.	96	9,425
	4th Qr.	97	9,647
2004 ¹	1st Qr.	94	9,563
	2nd Qr.	97 ²	9,944

¹ Provisional² Excluding four 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	63	56	68	61	67	59	67	59
May	67	59	62	55	59	52	73	65	64	56	62	55
June	50	45	49	43	47	41	53	47	50	44	48	43
<i>2nd Quarter</i>	<u>60</u>	<u>54</u>	<u>58</u>	<u>51</u>	<u>56</u>	<u>50</u>	<u>65</u>	<u>58</u>	<u>60</u>	<u>53</u>	<u>59</u>	<u>52</u>
<i>1st Semester</i>	66	59	62	54	61	54	71	64	64	57	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, 2000 - 2004

Year	2000 ¹	2001	2002	2003	2004 ²
Establishments					
Restaurants	1,256	1,269	1,252	1,719	1,600
Hotels	13,239	15,023	15,890	16,497	16,900
Travel and Tourism	3,316	3,652	3,974	4,045	4,100
Total	17,811	19,944	21,116	22,261	22,600

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)