

International Travel & Tourism

January to September 2004

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INTERNATIONAL TRAVEL & TOURISM

January to September 2004

1. Passenger Traffic

1.1 Total Passenger Traffic

Passenger traffic for the period January to September 2004 totalled 1,336,206 made up of 665,940 arrivals and 670,266 departures. Compared to the same period of 2003, these figures represent increases of 2.4% in arrivals and 1.3% in departures. Movements by sea accounted for 2.3% of both arrivals and departures. Table 1 shows monthly details of passenger traffic.

1.2 Excursionists

Total arrivals by air included 8,519 "excursionists", i.e. visitors arriving and leaving on the same day. Of these excursionists, 2,386 (28.0%) came from Reunion Island while 1,625 (19.1%) came 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 nine months of 2004.

1.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad went up by 13.1% from 120,180 in 2003 to 135,873 in 2004 and accounted for 20.3% of total departures. The following trends were recorded in the number of Mauritians visiting the major destinations: Hong Kong (+140.2%), Singapore (+33.9%), Australia (+31.8%), India (+31.3%), United Kingdom (+29.0%), Malagasy Republic (+19.0%), France (+9.1%), Republic of South Africa (-6.2%) and Reunion Island (-7.7%). Table 2 shows a more detailed distribution of countries visited.

1.4 Tourist Arrivals

Tourist arrivals for the first nine months edged 0.5% higher from 500,846 in 2003 to 503,294 in 2004. Further details are given in Tables 3 to 6.

Around 90% of the tourists came mainly for holidays while 4.5% were on business/conference trips, and another 3.6% were in transit (Table 4).

Arrivals from Europe, which accounted for 65.3% of total tourist arrivals, grew by 0.5% to 328,643 during the first nine months of 2004 compared to 327,041 in the same period of 2003. Arrivals from France, our leading market, representing 28% of total tourist arrivals and 42.9% of the European market, increased by 3.9% to reach 140,936. A growth of 7.9% was noted in arrivals from Italy. On the other hand, decline was recorded in arrivals from the other major generating countries: United Kingdom (-2.6%) and Germany (-6.5%). Trends among the other European countries were as follows: Austria (+13.3%), Netherlands (+2.9%), Sweden (-5.8%), Spain (-11.4%), Switzerland (-15.6%) and Belgium (-18.9%).

For the period January to September 2004, arrivals from Africa, with a share of 25.1% of total tourist arrivals, decreased by 1.4% to 126,167. Arrivals from Reunion Island, the major generating country of the region, were down by 2.7%, while those from the Republic of South Africa were up by 15.4%. Changes in arrivals from other African countries were as follows: Zimbabwe (+9.0%), Kenya (+7.8%), Malagasy Republic (-23.4%), Seychelles (-32.1%) and Comoros (-34.6%).

Tourist arrivals from the Asian market grew by 2.5% during the reference period and constituted 6.6% of total tourist arrivals. Arrivals from India, our major source on this continent, fell by 9.1% to reach 17,786. Among the other Asian countries, the following trends were noted: People's Republic of China (+66.3%), Hong Kong (+49.0%), Singapore (+36.9%), Malaysia (+35.8%), Japan (+32.0%), and United Arab Emirates (-28.1%),

Arrivals from Oceania increased by 20.2% mainly due to an expansion of 22.1% in the Australian market.

Arrivals from the continent of America grew by 5.3%, being the net result of increases of 33.9% from Canada and 4.3% from "other American Countries" and a drop of 5.1% from USA.

2. Tourist Nights

The number of nights spent by tourists during the period January to September 2004 is estimated at around 5.0 million, representing a marginal increase of 0.5% over the same period of 2003 (Table 6).

3. Hotel Statistics

At the end of September 2004, there was a total of 98 registered hotels in operation. Owing to renovation, three hotels were not operational. The total room capacity for these registered hotels in operation was 10,008 with 20,115 bed places (Table 7). The room occupancy rate for all hotels for the first nine months of 2004 averaged 60% while the bed occupancy rate was 53% (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 7,485 with 14,973 bedplaces, representing 74.8% of total room capacity and 74.4% of total bedplaces. The average room occupancy rate for these hotels for the first nine months of 2004 was of the order of 64%, while bed occupancy rate averaged 56% (Table 8).

4. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the period January to September of 2004 were of the order of Rs 16,847 million, up by 27.2% when compared to Rs 13,242 million for the corresponding period of 2003.

5. Employment

According to the Survey of Employment and Earnings, direct employment in travel and tourism establishments employing 10 persons or more, stood at 22,613 at the end of March 2004, that is 3.4% higher than last year. Of this number, 74.5% or 16,853 were engaged in hotels (Table 9).

6. Forecast Year 2004

Based on the information obtained from the major stakeholders of the tourist industry and latest figures available, there are indications that tourist arrivals for the year 2004 will be around 710,000, i.e 1.1% higher than the figure of 702,018 registered in the preceding year. According to the Bank of Mauritius, tourism receipts for the year 2004 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	84,223	68,707
August	73,431	84,849	76,492	88,513	77,716	88,594
September	65,381	65,607	66,150	65,894	69,018	70,521
<i>3rd Quarter</i>	<u>214,598</u>	<u>212,859</u>	<u>220,396</u>	<u>217,192</u>	<u>230,957</u>	<u>227,822</u>
<i>Jan. to Sep.</i>	635,975	651,303	650,517	661,682	665,940	670,266
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 - September of 2003 and 2004**

Country of disembarkation	Jan - Sep 2003	Jan - Sep 2004	% Change
EUROPE	47,850	54,382	13.7
Belgium	941	196	-79.2
France	20,551	22,423	9.1
Germany	2,635	2,681	1.7
Italy	2,583	2,743	6.2
Switzerland	1,841	1,616	-12.2
United Kingdom	18,992	24,504	29.0
Other European	307	219	-28.7
AFRICA	42,870	41,134	-4.0
Kenya	941	1,338	42.2
Malagasy Republic	3,499	4,163	19.0
Reunion	25,203	23,267	-7.7
Seychelles	2,369	2,161	-8.8
S. Africa, Rep. of	10,412	9,770	-6.2
Zimbabwe	421	359	-14.7
Other African	25	76	204.0
ASIA	25,060	35,053	39.9
Hong Kong SAR ¹	2,357	5,662	140.2
India	10,087	13,242	31.3
Malaysia	828	2,011	142.9
Singapore	4,178	5,595	33.9
Saudi Arabia	783	1,770	126.1
Other Asian ²	6,827	6,773	-0.8
OCEANIA	3,689	4,860	31.7
Australia	3,688	4,860	31.8
Other Oceanian	1	0	-100.0
AMERICA	56	65	16.1
U.S.A	14	9	-35.7
Canada	41	56	36.6
Other American	1	0	-100.0
NOT STATED	655	379	-42.1
All Countries	120,180	135,873	13.1

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>
<i>1st Semester</i>	<i>322,707</i>	<i>335,306</i>	<i>332,677</i>
July	56,709	58,403	62,173
August	53,395	56,844	55,342
September	49,774	50,293	53,102
<u>3rd Quarter</u>	<u>159,878</u>	<u>165,540</u>	<u>170,617</u>
<i>Jan. to Sep.</i>	<i>482,585</i>	<i>500,846</i>	<i>503,294</i>
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>	
<i>2nd Semester</i>	<i>358,941</i>	<i>366,712</i>	
Whole Year	681,648	702,018	

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

Purpose of visit	Jan - Sep 2003	Jan - Sep 2004	% Change
Holiday	452,083	454,797	0.6
Business	18,549	18,694	0.8
Transit	16,938	18,194	7.4
Conference	4,390	4,195	-4.4
Sports	2,043	1,001	-51.0
Other & Not Stated	6,843	6,413	-6.3
Total	500,846	503,294	0.5

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

Country of residence	Jan - Sep 2003	2004 ¹										% Change Jan-Sep 2003 to Jan-Sep 2004
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Jan - Sep	
EUROPE	327,041	40,479	41,712	42,569	38,624	35,133	24,310	35,798	34,117	35,901	328,643	0.5
Austria	6,185	993	994	733	860	471	333	775	811	1,040	7,010	13.3
Belgium	7,144	785	660	607	735	607	488	717	480	712	5,791	-18.9
France	135,707	20,597	19,415	20,490	16,900	15,023	8,161	15,699	13,854	10,797	140,936	3.9
Germany	38,693	4,265	4,424	4,726	4,741	4,193	2,519	2,923	3,705	4,684	36,180	-6.5
Italy	28,708	4,161	4,300	5,137	3,124	2,624	2,266	2,002	3,977	3,380	30,971	7.9
Netherlands	3,342	243	356	252	366	414	324	653	276	555	3,439	2.9
Spain	7,151	268	386	527	727	765	893	671	1,096	1,001	6,334	-11.4
Sweden	3,006	543	808	488	239	178	141	131	115	188	2,831	-5.8
Switzerland	11,684	1,325	1,383	1,161	1,453	866	672	1,044	485	1,470	9,859	-15.6
United Kingdom	67,701	4,409	5,908	6,090	7,465	8,322	7,047	9,279	7,621	9,805	65,946	-2.6
CIS	2,790	856	301	313	524	320	123	169	222	243	3,071	10.1
Other European	14,930	2,034	2,777	2,045	1,490	1,350	1,343	1,735	1,475	2,026	16,275	9.0
AFRICA	127,952	21,786	7,891	16,607	11,945	12,524	8,201	19,963	15,606	11,644	126,167	-1.4
Comoros	1,087	66	64	69	70	91	95	89	50	117	711	-34.6
Kenya	1,096	55	69	282	157	106	96	135	138	144	1,182	7.8
Malagasy Rep.	8,108	764	877	853	702	632	368	667	812	532	6,207	-23.4
Reunion	70,413	15,708	2,672	9,564	4,729	7,255	2,592	13,842	8,462	3,674	68,498	-2.7
Seychelles	7,920	499	574	606	615	606	564	617	614	686	5,381	-32.1
S. Africa, Rep. of	32,813	4,237	3,186	4,400	4,873	3,135	4,163	3,973	4,041	5,864	37,872	15.4
Zimbabwe	1,593	130	127	258	340	195	39	75	415	157	1,736	9.0
Other African	4,922	327	322	575	459	504	284	565	1,074	470	4,580	-6.9

¹ Provisional

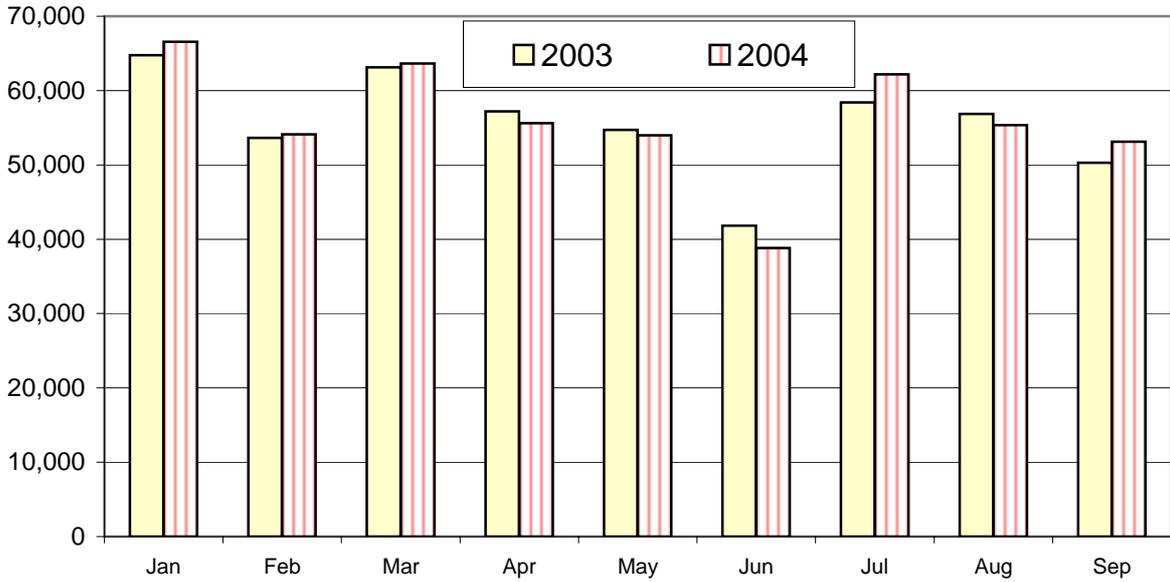
Table 5 (contd.) : - Tourist Arrivals by Country of Residence, January - September of 2003 and 2004

Country of residence	Jan - Sep 2003	2004 ¹										% Change Jan-Sep 2003 to Jan-Sep 2004
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Jan - Sep	
ASIA	32,558	3,235	3,260	2,968	3,357	4,598	4,518	4,224	3,850	3,347	33,357	2.5
Hong Kong SAR ²	467	103	77	62	98	57	81	108	79	31	696	49.0
India	19,577	1,363	1,899	1,650	1,847	3,019	2,713	2,044	1,594	1,657	17,786	-9.1
Japan	1,000	163	79	194	174	141	66	112	210	181	1,320	32.0
Malaysia	1,002	219	87	97	102	232	152	147	171	154	1,361	35.8
P. Rep. of China	2,314	532	357	341	373	403	393	464	533	453	3,849	66.3
Singapore	1,208	163	130	182	122	166	390	169	144	188	1,654	36.9
United Arab Emirates	2,036	149	142	51	189	111	141	283	279	118	1,463	-28.1
Other Asian	4,954	543	489	391	452	469	582	897	840	565	5,228	5.5
OCEANIA	7,252	430	507	863	966	1,002	1,053	1,181	1,139	1,574	8,715	20.2
Australia	6,709	390	490	838	892	932	982	1,086	1,077	1,507	8,194	22.1
Other Oceanian	543	40	17	25	74	70	71	95	62	67	521	-4.1
AMERICA	5,823	588	717	603	679	689	711	965	575	604	6,131	5.3
USA	3,307	274	393	320	355	363	376	410	329	319	3,139	-5.1
Canada	1,243	147	128	173	182	170	230	349	159	126	1,664	33.9
Other American	1,273	167	196	110	142	156	105	206	87	159	1,328	4.3
OTHER & N.STATED	220	25	17	21	28	28	33	42	55	32	281	27.7
All Countries	500,846	66,543	54,104	63,631	55,599	53,974	38,826	62,173	55,342	53,102	503,294	0.5

¹ Provisional

² Special Administrative Region of China

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



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

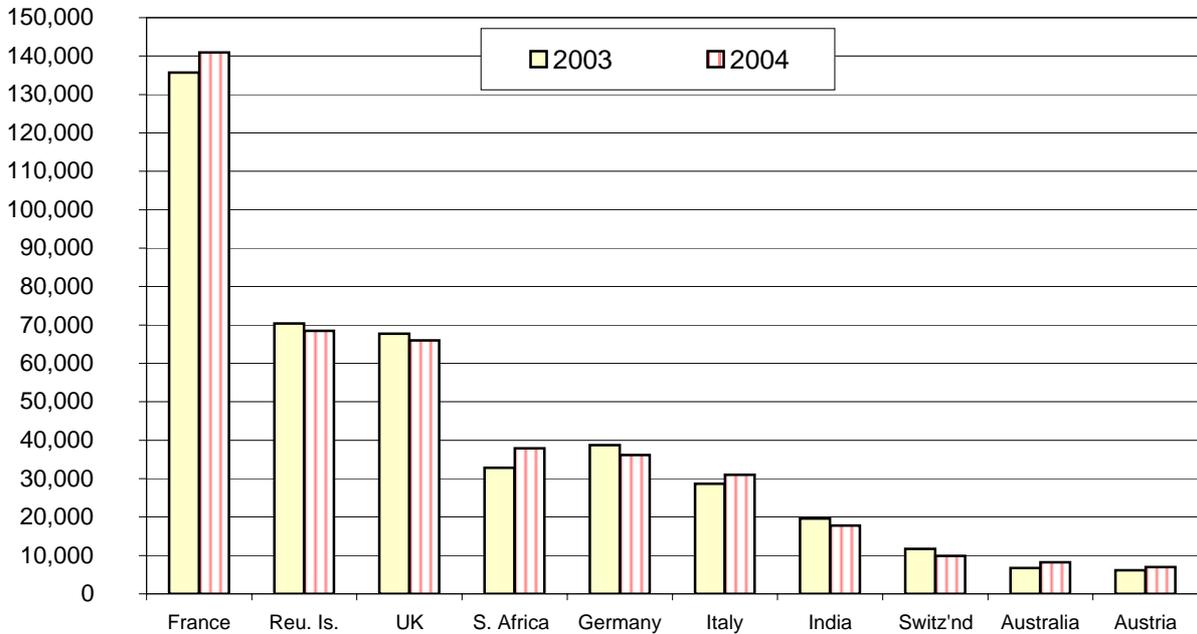


Table 6 :- Selected Tourism Statistics, 2001 - 2004

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	19,415 ²
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
2003	2nd Semester	358,941	3,570	9,040
	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	4,286 ²
2004 ³	4th Qr.	201,172	2,000	6,173 ²
	2nd Semester	366,712	3,640	10,459 ²
	1st Qr.	184,278	1,815	6,487 ²
	2nd Qr.	148,399	1,474	5,448 ²
	1st Semester	332,677	3,289	11,935 ²
	3rd Qr.	170,617	1,690	4,912

¹ Source: Bank of Mauritius² Revised³ 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
2004 ¹	1st Qr.	94	9,563	19,527
	2nd Qr.	97	9,944	20,295
	3rd Qr.	98 ²	10,008	20,115

¹ Provisional² Excluding three 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	52	47	62	56	54	48	55	49
August	63	56	61	54	58	52	69	62	64	56	62	56
September	69	62	63	55	64	57	76	68	67	59	69	62
<i>3rd Quarter</i>	<u>64</u>	<u>56</u>	<u>59</u>	<u>52</u>	<u>58</u>	<u>52</u>	<u>69</u>	<u>62</u>	<u>62</u>	<u>54</u>	<u>62</u>	<u>55</u>
<i>Jan. to Sep.</i>	65	58	61	54	60	53	71	63	63	56	64	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>	61			<u>78</u>	69	<u>72</u>	64		
<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	2001	2002	2003	2004¹
Establishments					
Restaurants	1,256	1,269	1,252	1,719	1,623
Hotels ¹	12,861	14,601	15,503	16,096	16,853
Travel and Tourism	3,316	3,652	3,974	4,045	4,137
Total¹	17,433	19,522	20,729	21,860	22,613

¹ Revised

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