

INTERNATIONAL TRAVEL & TOURISM

1st Semester 2005

1. Passenger Traffic

1.1 Total Passenger Traffic

Passenger traffic for the first semester of 2005 totalled 926,443 made up of 456,412 arrivals and 470,031 departures. Compared to the corresponding period of year 2004, these figures represent increases of 4.9% in arrivals and 6.2% in departures. Movements by sea accounted for 2.8% of arrivals and 3.2% of departures. Further details on monthly trends are given in Table 1.

1.2 Excursionists

Total arrivals by air included 4,399 “excursionists”, i.e. visitors arriving and leaving on the same day. Of these excursionists, 1,427 (32.4%) came from Reunion Island and 1,116 (25.4%), from France. Total arrivals by sea included 6,042 “cruise excursionists” (3,416 passengers and 2,626 crews) aboard 10 cruise ships, which visited our port during the first six months of 2005.

1.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad went up by 4.1% to stand at 83,534 compared to 80,226 for the first half of 2004. The following changes were observed in the number of Mauritians visiting the major destinations: Malagasy Republic (+44.4%), Hong Kong (+44.3%), Seychelles (+28.3%), Singapore (+25.4%), India (+9.0%), United Kingdom (+8.3%), France (+6.0%), Australia (-0.2%), Republic of South Africa (-0.3%), Reunion Island (-4.1%) and Saudi Arabia (-20.0%). Table 2 shows a more detailed distribution of countries visited.

1.4 Tourist Arrivals

Tourist arrivals grew by 5.0% from 332,677 in the first semester of 2004 to 349,311 in the corresponding period of 2005. Further details on tourist arrivals are given in Tables 3 to 6.

Around 90% of the tourists came mainly for holidays while 4.4% were on business/conference trips and another 3.5% were in transit (Table 4).

Arrivals from Europe, which accounted for 66% of total tourist arrivals, went up by 3.8% to 231,272 during the first semester of 2005 against 222,827 in the corresponding period of 2004. Arrivals from France, our leading market representing 30% of total tourist arrivals and 45% of the European market, rose by 3.8% to attain 104,394 during this period. Growths were also noted in arrivals from the other major generating countries: United Kingdom (+2.8%) and Germany (+5.1%). On the other hand a decline of 5.8% was recorded in arrivals from Italy. Among the other European countries, the following trend was observed: CIS (+17.2%), Austria (+16.5%), Spain (+10.2%), Netherlands (+6.4%), Belgium (+0.1%), Switzerland (-5.1%) and Sweden (-12.4%).

For the period under review, arrivals from Africa, with a share of 24% of total tourist arrivals, registered an increase of 5.4% to 83,239. With regards to performance of the major markets of the region, arrivals from the Republic of South Africa went up by 7.0% and those from Reunion Island by 6.0%. Changes in arrivals from other African countries were as follows: Seychelles (+22.8%), Comoros (+16.9%), Zimbabwe (-1.8%), Malagasy Republic (-16.5%) and Kenya (-28.0%).

Tourist arrivals from the Asian market, which constituted 7% of total, were up by 10.9% to reach 24,332. Arrivals from India, our major source on this continent, expanded by 22.1% to attain 15,253. The performance of other Asian countries was as follows: People's Republic of China (+13.9%), Japan (-5.3%), United Arab Emirates (-10.3%), Malaysia (-20.9%), Singapore (-23.7%) and Hong Kong (-40.8%).

Arrivals from Oceania rose by 20.6% to 5,815, due mainly to an increase of 18.7% in arrivals from Australia.

Arrivals from the continent of America increased by 9.5% to reach 4,367. This was mainly attributed to increases of 15.1% from USA and 14.5% from the other American countries, partly offset by a fall of 6.0% in arrivals from Canada.

2. Tourist Nights

Total tourist nights spent in the country during the first six months of 2005 is estimated at 3.5 million, up by 5.0% over the same period of the preceding year (Table 6).

3. Hotel Statistics

At the end of June 2005, there was a total of 97 registered hotels in operation. Owing to renovation six hotels were not operational. The total room capacity for these registered hotels was 10,224 with 20,545 bed places (Table 7). The room occupancy rate for all hotels for the first semester of 2005 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 41 (42% of all registered hotels). These "Large" hotels had a room capacity of 7,735 with 15,535 bedplaces, representing 75.7% of total room capacity and 75.6% of total bedplaces. The average room occupancy rate for these hotels for the first half of 2005 was of the order of 62% 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 first semester of 2005 were of the order of Rs 12,584 million, i.e. an excess of 5.4% compared to Rs 11,935 million for the same period of 2004 (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 25,100 at the end of March 2005, that is 11% higher than the previous year. Of this number, 76% or 19,000 were engaged in hotels (Table 9).

6. Forecast Year 2005

Based on the moderate increase registered during the first six months of the year, tourist arrivals is now estimated at around 755,000, lower than the optimistic forecast of 775,000 made earlier on the basis of budgetary measures to make the island a duty free destination. The Bank of Mauritius has in the light of recent trends revised its forecast of tourism receipts for 2005 from Rs 26,273 million to Rs 26,426 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 ¹ by month, 2003 - 2005

Month	2003		2004		2005	
	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures
January	82,764	101,301	86,669	106,951	93,809	110,249
February	66,756	62,720	69,256	63,267	71,350	69,084
March	84,501	87,275	82,050	78,071	85,353	85,395
<u>1st Quarter</u>	<u>234,021</u>	<u>251,296</u>	<u>237,975</u>	<u>248,289</u>	<u>250,512</u>	<u>264,728</u>
April	70,795	65,828	72,901	66,782	71,302	73,753
May	68,044	71,992	69,183	71,206	73,111	75,814
June	57,261	55,374	54,924	56,167	61,487	55,736
<u>2nd Quarter</u>	<u>196,100</u>	<u>193,194</u>	<u>197,008</u>	<u>194,155</u>	<u>205,900</u>	<u>205,303</u>
<i>1st Semester</i>	<i>430,121</i>	<i>444,490</i>	<i>434,983</i>	<i>442,444</i>	<i>456,412</i>	<i>470,031</i>
July	77,754	62,785	84,223	68,707		
August	76,492	88,513	77,716	88,594		
September	66,150	65,894	69,018	70,521		
<u>3rd Quarter</u>	<u>220,396</u>	<u>217,192</u>	<u>230,957</u>	<u>227,822</u>		
<i>Jan. to Sep.</i>	<i>650,517</i>	<i>661,682</i>	<i>665,940</i>	<i>670,266</i>		
October	80,491	75,517	87,848	81,795		
November	77,614	70,212	83,404	83,236		
December	96,368	76,779	102,523	83,163		
<u>4th Quarter</u>	<u>254,473</u>	<u>222,508</u>	<u>273,775</u>	<u>248,194</u>		
<i>2nd Semester</i>	<i>474,869</i>	<i>439,700</i>	<i>504,732</i>	<i>476,016</i>		
Whole Year	904,990	884,190	939,715	918,460		

¹ Excluding inter islands traffic

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
January - June 2004 and 2005**

Country of disembarkation	Jan - June 2004	Jan - June 2005	% Change
EUROPE	27,855	28,834	3.5
Belgium	180	14	-92.2
France	10,221	10,835	6.0
Germany	1,314	903	-31.3
Italy	1,270	1,328	4.6
Switzerland	846	568	-32.9
United Kingdom	13,951	15,102	8.3
Other European	73	84	15.1
AFRICA	26,881	27,099	0.8
Kenya	763	14	-98.2
Malagasy Republic	2,687	3,880	44.4
Reunion	14,957	14,345	-4.1
Seychelles	1,503	1,928	28.3
S. Africa, Rep. of	6,726	6,705	-0.3
Zimbabwe	179	202	12.8
Other African	66	25	-62.1
ASIA	21,856	24,071	10.1
Hong Kong SAR ¹	3,032	4,376	44.3
India	8,017	8,736	9.0
Malaysia	1,596	465	-70.9
Singapore	3,049	3,822	25.4
Saudi Arabia	1,768	1,415	-20.0
Other Asian ²	4,394	5,257	19.6
OCEANIA	3,391	3,386	-0.1
Australia	3,391	3,384	-0.2
Other Oceanian	0	2	-
AMERICA	17	43	152.9
U.S.A	3	5	66.7
Canada	14	37	164.3
Other American	0	1	-
NOT STATED	226	101	-55.3
All Countries	80,226	83,534	4.1

¹ *Special Administrative Region of China*

² *Including United Arab Emirates*

Table 3:- Tourist arrivals by month, 2003 - 2005

Month	Number		
	2003	2004	2005 ¹
January	64,762	66,543	73,053
February	53,647	54,104	56,367
March	63,129	63,631	67,931
<u>1st Quarter</u>	<u>181,538</u>	<u>184,278</u>	<u>197,351</u>
April	57,217	55,599	52,971
May	54,710	53,974	55,995
June	41,841	38,826	42,994
<u>2nd Quarter</u>	<u>153,768</u>	<u>148,399</u>	<u>151,960</u>
1st Semester	335,306	332,677	349,311
July	58,403	62,173	
August	56,844	55,342	
September	50,293	53,102	
<u>3rd Quarter</u>	<u>165,540</u>	<u>170,617</u>	
Jan. to Sep.	500,846	503,294	
October	64,917	70,793	
November	61,984	66,960	
December	74,271	77,814	
<u>4th Quarter</u>	<u>201,172</u>	<u>215,567</u>	
2nd Semester	366,712	386,184	
Whole Year	702,018	718,861	

¹ Provisional**Table 4 :- Tourist arrivals by main purpose of visit,
January - June 2004 and 2005**

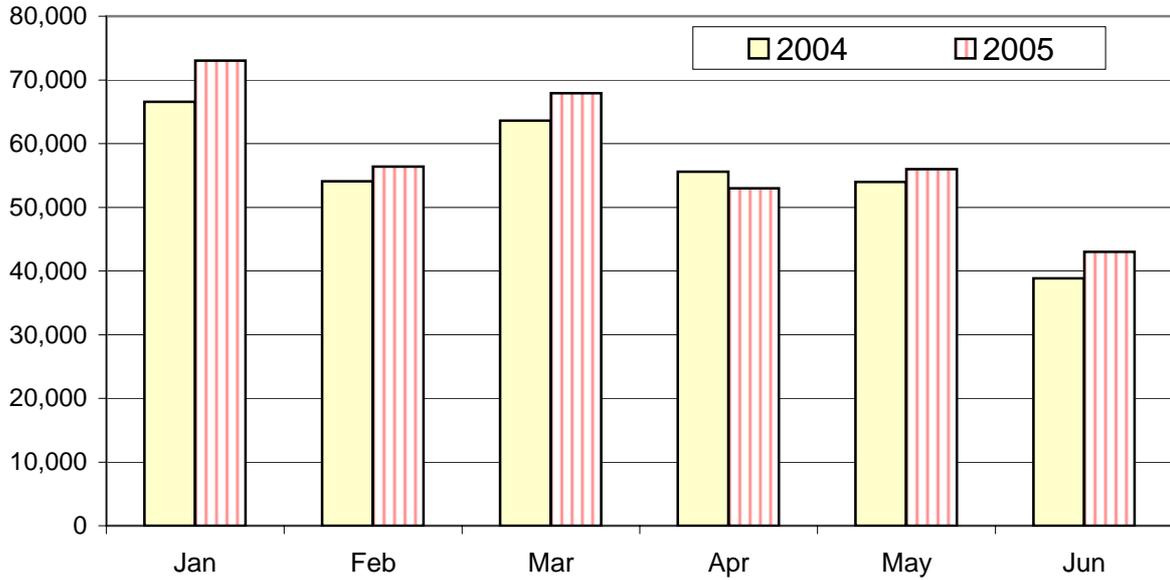
Purpose of visit	Jan - June 2004	Jan - June 2005	% Change
Holiday	301,460	315,930	4.8
Business	12,489	12,255	-1.9
Transit	11,453	12,224	6.7
Conference	2,378	3,005	26.4
Sports	749	680	-9.2
Other & Not Stated	4,148	5,217	25.8
Total	332,677	349,311	5.0

Table 5 : - Tourist Arrivals by Country of Residence, January - June of 2004 and 2005

Country of residence	1st semester 2004	2005 ¹							% Change Jan-June 2004 to Jan-June 2005
		Jan	Feb	Mar	Apr	May	Jun	1st semester	
EUROPE	222,827	46,047	42,889	45,215	36,135	35,039	25,947	231,272	3.8
Austria	4,384	1,161	1,111	932	646	877	381	5,108	16.5
Belgium	3,882	674	534	834	453	729	660	3,884	0.1
France	100,586	22,470	20,050	20,463	17,333	14,478	9,600	104,394	3.8
Germany	24,868	4,857	4,267	5,447	4,112	4,577	2,871	26,131	5.1
Italy	21,612	4,844	3,840	3,892	2,925	2,834	2,023	20,358	-5.8
Netherlands	1,955	279	335	375	331	506	255	2,081	6.4
Spain	3,566	476	753	721	475	647	859	3,931	10.2
Sweden	2,397	547	648	470	163	124	148	2,100	-12.4
Switzerland	6,860	1,417	1,329	1,230	1,342	711	479	6,508	-5.1
United Kingdom	39,241	5,212	6,000	7,841	6,686	7,745	6,837	40,321	2.8
CIS ²	2,437	1,022	396	427	422	409	181	2,857	17.2
Other European	11,039	3,088	3,626	2,583	1,247	1,402	1,653	13,599	23.2
AFRICA	78,954	21,563	8,089	17,845	12,078	14,145	9,519	83,239	5.4
Comoros	455	98	56	74	107	110	87	532	16.9
Kenya	765	77	97	103	100	95	79	551	-28.0
Malagasy Rep.	4,196	615	699	562	611	522	496	3,505	-16.5
Reunion	42,520	15,872	3,072	9,817	4,499	8,717	3,088	45,065	6.0
Seychelles	3,464	527	517	598	934	822	856	4,254	22.8
S. Africa, Rep. of	23,994	3,841	3,095	5,982	4,931	3,320	4,493	25,662	7.0
Zimbabwe	1,089	138	139	222	307	147	116	1,069	-1.8
Other African	2,471	395	414	487	589	412	304	2,601	5.3
ASIA	21,936	3,276	4,092	3,250	3,024	5,142	5,548	24,332	10.9
Hong Kong SAR ³	478	39	90	58	31	23	42	283	-40.8
India	12,491	1,756	2,282	1,882	1,904	3,815	3,614	15,253	22.1
Japan	817	140	243	139	97	78	77	774	-5.3
Malaysia	889	80	124	133	67	123	176	703	-20.9
P. Rep. of China	2,399	439	696	412	322	329	535	2,733	13.9
Singapore	1,153	73	106	129	102	205	265	880	-23.7
United Arab Emirates	783	110	53	96	81	160	202	702	-10.3
Other Asian	2,926	639	498	401	420	409	637	3,004	2.7
OCEANIA	4,821	1,052	651	909	1,005	951	1,247	5,815	20.6
Australia	4,524	860	622	878	951	888	1,170	5,369	18.7
Other Oceanian	297	192	29	31	54	63	77	446	50.2
AMERICA	3,987	1,083	622	685	634	654	689	4,367	9.5
USA	2,081	510	306	429	400	363	388	2,396	15.1
Canada	1,030	165	171	154	115	171	192	968	-6.0
Other American	876	408	145	102	119	120	109	1,003	14.5
OTHER & N.STATED	152	32	24	27	95	64	44	286	88.2
All Countries	332,677	73,053	56,367	67,931	52,971	55,995	42,994	349,311	5.0

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

**Chart 1 - Monthly Tourist Arrivals,
January - June 2004 and 2005**



**Chart 2 - Tourist Arrivals from Top Ten Markets,
January - June 2004 and 2005**

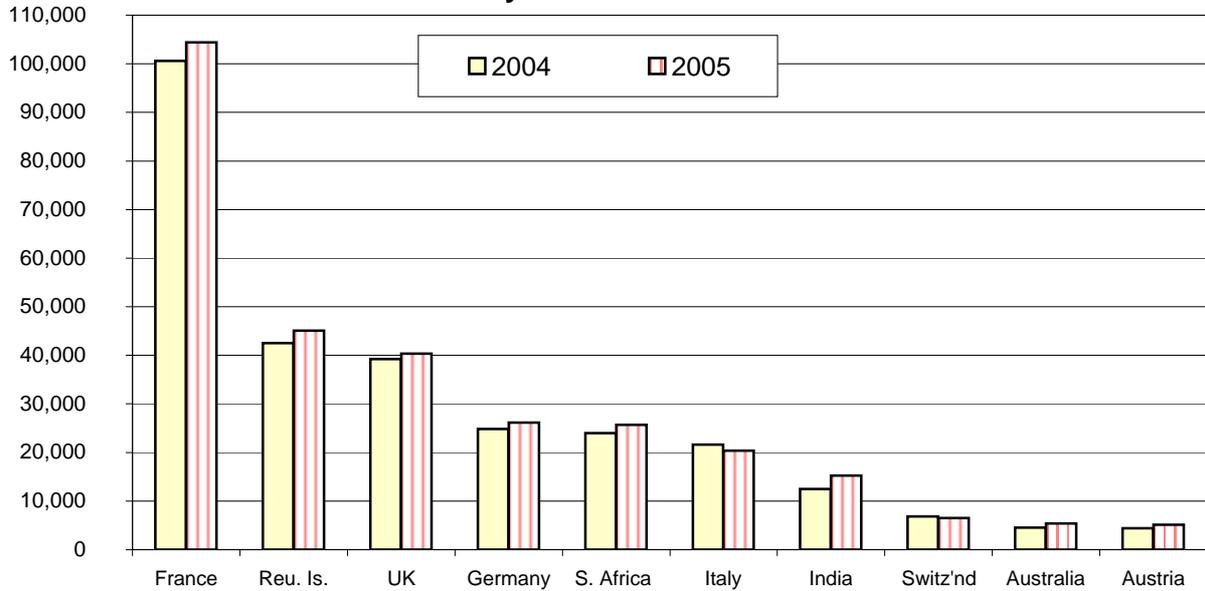


Table 6 :- Selected Tourism Statistics, 2002 - 2005

Year		Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
	2002	681,648	6,769	18,328
	2003	702,018	6,952	19,415
	2004	718,861	7,119	23,448
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	4,286
	4th Qr.	201,172	2,000	6,173
	2nd Semester	366,712	3,640	10,459
2004	1st Qr.	184,278	1,815	6,487
	2nd Qr.	148,399	1,474	5,448
	1st Semester	332,677	3,289	11,935
	3rd Qr.	170,617	1,690	4,912
	4th Qr.	215,567	2,140	6,601
	2nd Semester	386,184	3,830	11,513
2005 ²	1st Qr.	197,351	1,945	7,076
	2nd Qr.	151,960	1,510	5,508
	1st Semester	349,311	3,455	12,584

¹ Source: Bank of Mauritius² Provisional**Table 7:- Hotels, rooms and bedplaces, 2002 - 2005**

Year	Number as at end of period			
	Hotels	Rooms	Bedplaces	
2002	95	9,623	19,597	
2003	97	9,647	19,727	
2004	103	10,640	21,355	
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	1st Qr.	94	9,563	19,527
	2nd Qr.	97	9,944	20,295
	3rd Qr.	98	10,008	20,115
	4th Qr.	103	10,640	21,355
2005 ¹	1st Qr.	100	10,571	21,239
	2nd Qr.	97 ²	10,224	20,545

¹ Provisional² Excluding six hotels not operational because of renovation works.

Table 8 :- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2003 - 2005

Month	All Hotels						"Large" Hotels					
	2003		2004		2005 ¹		2003		2004		2005 ¹	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	68	59	69	61	73	66	69	61	72	64	77	69
February	66	58	64	57	65	59	69	61	68	60	70	63
March	63	56	66	58	64	57	66	58	70	62	68	61
<i>1st Quarter</i>	<u>66</u>	<u>58</u>	<u>67</u>	<u>59</u>	<u>68</u>	<u>61</u>	<u>68</u>	<u>60</u>	<u>70</u>	<u>62</u>	<u>72</u>	<u>64</u>
April	63	55	63	56	56	50	67	59	67	59	59	53
May	62	55	59	52	55	49	64	56	62	55	58	52
June	49	43	47	41	45	40	50	44	48	43	45	41
<i>2nd Quarter</i>	<u>58</u>	<u>51</u>	<u>56</u>	<u>50</u>	<u>53</u>	<u>48</u>	<u>60</u>	<u>53</u>	<u>59</u>	<u>52</u>	<u>55</u>	<u>49</u>
<i>1st Semester</i>	62	54	61	54	60	53	64	57	64	57	62	56
July	53	47	52	47			54	48	55	49		
August	61	54	58	52			64	56	62	56		
September	63	55	64	57			67	59	69	62		
<i>3rd Quarter</i>	<u>59</u>	<u>52</u>	<u>58</u>	<u>52</u>			<u>62</u>	<u>54</u>	<u>62</u>	<u>55</u>		
<i>Jan. to Sep.</i>	61	54	60	53			63	56	64	56		
October	68	60	70	63			72	64	75	67		
November	70	61	74	66			74	65	78	70		
December	68	60	68	61			70	62	72	64		
<i>4th Quarter</i>	<u>69</u>	<u>61</u>	<u>70</u>	<u>63</u>			<u>72</u>	<u>64</u>	<u>75</u>	<u>67</u>		
<i>2nd Semester</i>	64	56	64	58			67	59	68	62		
Whole Year	63	55	63	56			66	58	66	59		

¹ Provisional

Table 9 :- Employment in the tourist industry as at end of March, 2001 - 2005

Year	2001	2002	2003	2004	2005¹
Establishments					
Restaurants	1,269	1,252	1,719	1,623	1,800
Hotels	14,601	15,503	16,096	16,853	19,000
Travel and Tourism	3,652	3,974	4,045	4,137	4,300
Total	19,522	20,729	21,860	22,613	25,100

¹ Provisional

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