

INTERNATIONAL TRAVEL & TOURISM
1st Quarter 2005

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INTERNATIONAL TRAVEL & TOURISM

1st Quarter 2005

1. Passenger Traffic

1.1 Total Passenger Traffic

Passenger traffic for the first quarter of 2005 totalled 515,240, made up of 250,512 arrivals and 264,728 departures. Compared to the same period of year 2004, these figures represent increases of 5.3% in arrivals and 6.6% in departures. Movements by sea accounted for 3.6% of both arrivals and departures. Further details on monthly trends are given in Table 1.

1.2 Excursionists

Total arrivals by air included 2,351 "excursionists", i.e. visitors arriving and leaving on the same day. Of these excursionists, 884 (37.6%) came from Reunion Island and 552 (23.5%), from France. Total arrivals by sea included 4,898 "cruise excursionists" (2,737 passengers and 2,161 crews) aboard 9 cruise ships, which visited our port during the first three months of 2005.

1.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad went up by 4.4% to stand at 42,337 against 40,558 for the first quarter of 2004. The following changes were observed in the number of Mauritians visiting the major destinations: Hong Kong (+80.6%), Malagasy Republic (+52.1%), United Kingdom (+22.6%), Singapore (+18.9%), Australia (+13.1%), India (+5.8%), France (+5.8%), Republic of South Africa (-1.8%), Reunion Island (-8.6%) and Saudi Arabia (-20.0%). Table 2 shows a more detailed distribution of countries visited.

1.4 Tourist Arrivals

Tourist arrivals grew by 7.1% from 184,278 in the first quarter of 2004 to 197,351 in the first quarter of 2005. Further details on tourist arrivals are given in Tables 3 to 6.

Around 91% of the tourists came mainly for holidays while 4.2% were on business/conference trips and another 3.6% were in transit (Table 4).

Arrivals from Europe, which accounted for 68% of total tourist arrivals, went up by 7.5% to 134,151 during the first quarter of 2005 against 124,760 in the same quarter of 2004. Arrivals from France, our leading market representing 32% of total tourist arrivals and 47% of the European market, rose by 4.1% to attain 62,983 during this period. As far as the other major generating countries were concerned, growths were noted in arrivals from United Kingdom (+16.1%) and Germany (+8.6%) while arrivals from Italy fell by 7.5%. Among the other European countries, the following trend was observed: Spain (+65.1%), CIS (+25.5%), Austria (+17.8%), Netherlands (+16.2%), Switzerland (+2.8%), Belgium (-0.5%) and Sweden (-9.5%).

During the first quarter of 2005, arrivals from Africa, with a share of 24% of total tourist arrivals, grew by 2.6% to 47,497. Increases were noted in arrivals from the major markets of the region: Republic of South Africa by 9.3% and Reunion Island by 2.9%. Changes in arrivals from other African countries were as follows: Comoros (+14.6%), Seychelles (-2.2%), Zimbabwe (-3.1%), Malagasy Republic (-24.8%) and Kenya (-31.8%).

Tourist arrivals from the Asian market rose by 12.2% for the period under review and constituted 5% of total tourist arrivals. Arrivals from India, our major source on this continent, expanded by 20.5% to reach 5,920. The performance of other Asian countries was as follows: People's Republic of China (+25.8%), Japan (+19.7%), Malaysia (-16.4%), Hong Kong (-22.7%), United Arab Emirates (-24.3%) and Singapore (-35.2%).

Arrivals from Oceania were up by 45.1%, reaching 2,612 mainly as a result of an increase of 37.4% in arrivals from Australia.

Arrivals from the continent of America increased by 25.3% to reach 2,390, being the combined effect of increases from USA (+26.1%), Canada (+9.4%) and "Other American" countries (+38.5%).

2. Tourist Nights

Total tourist nights spent in the country during the first three months of 2005 is estimated at 1.95 million, representing an increase of 7.2% over the same period of the preceding year.

3. Hotel Statistics

At the end of March 2005, there was a total of 100 registered hotels in operation. Owing to renovation, four hotels were not operational. The total room capacity for these registered hotels was 10,571 with 21,239 bedplaces (Table 7). The room occupancy rate for all hotels for the first quarter of 2005 averaged 68% while the bed occupancy rate was 61% (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 42 (42% of all registered hotels). These "Large" hotels had a room capacity of 7,982 with 16,029 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 2005 was 72% while bed occupancy rate averaged 64% (Table 8).

4. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first quarter of 2005 were of the order of Rs 7,076 million, i.e. an increase of 9.1% compared to Rs 6,487 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 22,613 at the end of March 2004, that is 3.4% more than the previous year. Of this number, 74.5% or 16,853 were engaged in hotels (Table 9).

6. Forecast Year 2005

Figures for the first three months of the year indicate that tourist arrivals for the year 2005 would fall short of the targeted estimate of the 775,000 made earlier in January. However, following the recent budgetary measures for making the island a duty-free destination, the number of tourist arrivals is maintained at 775,000 (+7.8%). According to the Bank of Mauritius, tourism receipts for the year 2005 will be around Rs 26,300 million (+12.2%).

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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, 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		
May	68,044	71,992	69,183	71,206		
June	57,261	55,374	54,924	56,167		
<u>2nd Quarter</u>	<u>196,100</u>	<u>193,194</u>	<u>197,008</u>	<u>194,155</u>		
<i>1st Semester</i>	<i>430,121</i>	<i>444,490</i>	<i>434,983</i>	<i>442,444</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		

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
1st Quarter of 2004 and 2005**

Country of disembarkation	1st Quarter 2004	1st Quarter 2005	% Change
EUROPE	13,166	14,321	8.8
Belgium	147	11	-92.5
France	5,176	5,477	5.8
Germany	655	461	-29.6
Italy	757	819	8.2
Switzerland	508	314	-38.2
United Kingdom	5,875	7,200	22.6
Other European	48	39	-18.8
AFRICA	13,393	12,937	-3.4
Kenya	348	-	-100.0
Malagasy Republic	1,305	1,985	52.1
Reunion	7,453	6,810	-8.6
Seychelles	691	646	-6.5
S. Africa, Rep. of	3,439	3,378	-1.8
Zimbabwe	94	111	18.1
Other African	63	7	-88.9
ASIA	11,933	12,763	7.0
Hong Kong SAR ¹	1,135	2,050	80.6
India	4,424	4,680	5.8
Malaysia	934	113	-87.9
Singapore	1,500	1,783	18.9
Saudi Arabia	1,768	1,415	-20.0
Other Asian ²	2,172	2,722	25.3
OCEANIA	1,976	2,237	13.2
Australia	1,976	2,235	13.1
Other Oceanian	-	2	-
AMERICA	11	30	172.7
U.S.A	1	4	300.0
Canada	10	26	160.0
Other American	-	-	-
NOT STATED	79	49	-38.0
All Countries	40,558	42,337	4.4

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	
May	54,710	53,974	
June	41,841	38,826	
<u>2nd Quarter</u>	<u>153,768</u>	<u>148,399</u>	
1st Semester	335,306	332,677	
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,
1st Quarter of 2004 and 2005**

Purpose of visit	1st Quarter 2004	1st Quarter 2005	% Change
Holiday	167,872	179,511	6.9
Business	6,015	6,003	-0.2
Transit	6,886	7,010	1.8
Conference	891	2,225	149.7
Sports	309	505	63.4
Other & Not Stated	2,305	2,097	-9.0
Total	184,278	197,351	7.1

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

Country of residence	1st Quarter 2004	2005 ¹				% Change Q1 2004 to Q1 2005
		Jan	Feb	Mar	1st Quarter	
EUROPE	124,760	46,047	42,889	45,215	134,151	7.5
Austria	2,720	1,161	1,111	932	3,204	17.8
Belgium	2,052	674	534	834	2,042	-0.5
France	60,502	22,470	20,050	20,463	62,983	4.1
Germany	13,415	4,857	4,267	5,447	14,571	8.6
Italy	13,598	4,844	3,840	3,892	12,576	-7.5
Netherlands	851	279	335	375	989	16.2
Spain	1,181	476	753	721	1,950	65.1
Sweden	1,839	547	648	470	1,665	-9.5
Switzerland	3,869	1,417	1,329	1,230	3,976	2.8
United Kingdom	16,407	5,212	6,000	7,841	19,053	16.1
CIS	1,470	1,022	396	427	1,845	25.5
Other European	6,856	3,088	3,626	2,583	9,297	35.6
AFRICA	46,284	21,563	8,089	17,845	47,497	2.6
Comoros	199	98	56	74	228	14.6
Kenya	406	77	97	103	277	-31.8
Malagasy Rep.	2,494	615	699	562	1,876	-24.8
Reunion	27,944	15,872	3,072	9,817	28,761	2.9
Seychelles	1,679	527	517	598	1,642	-2.2
S. Africa, Rep. of	11,823	3,841	3,095	5,982	12,918	9.3
Zimbabwe	515	138	139	222	499	-3.1
Other African	1,224	395	414	487	1,296	5.9
ASIA	9,463	3,276	4,092	3,250	10,618	12.2
Hong Kong SAR ²	242	39	90	58	187	-22.7
India	4,912	1,756	2,282	1,882	5,920	20.5
Japan	436	140	243	139	522	19.7
Malaysia	403	80	124	133	337	-16.4
P. Rep. of China	1,230	439	696	412	1,547	25.8
Singapore	475	73	106	129	308	-35.2
United Arab Emirates	342	110	53	96	259	-24.3
Other Asian	1,423	639	498	401	1,538	8.1
OCEANIA	1,800	1,052	651	909	2,612	45.1
Australia	1,718	860	622	878	2,360	37.4
Other Oceanian	82	192	29	31	252	207.3
AMERICA	1,908	1,083	622	685	2,390	25.3
USA	987	510	306	429	1,245	26.1
Canada	448	165	171	154	490	9.4
Other American	473	408	145	102	655	38.5
OTHER & N.STATED	63	32	24	27	83	31.7
All Countries	184,278	73,053	56,367	67,931	197,351	7.1

¹ Provisional² Special Administrative Region of China

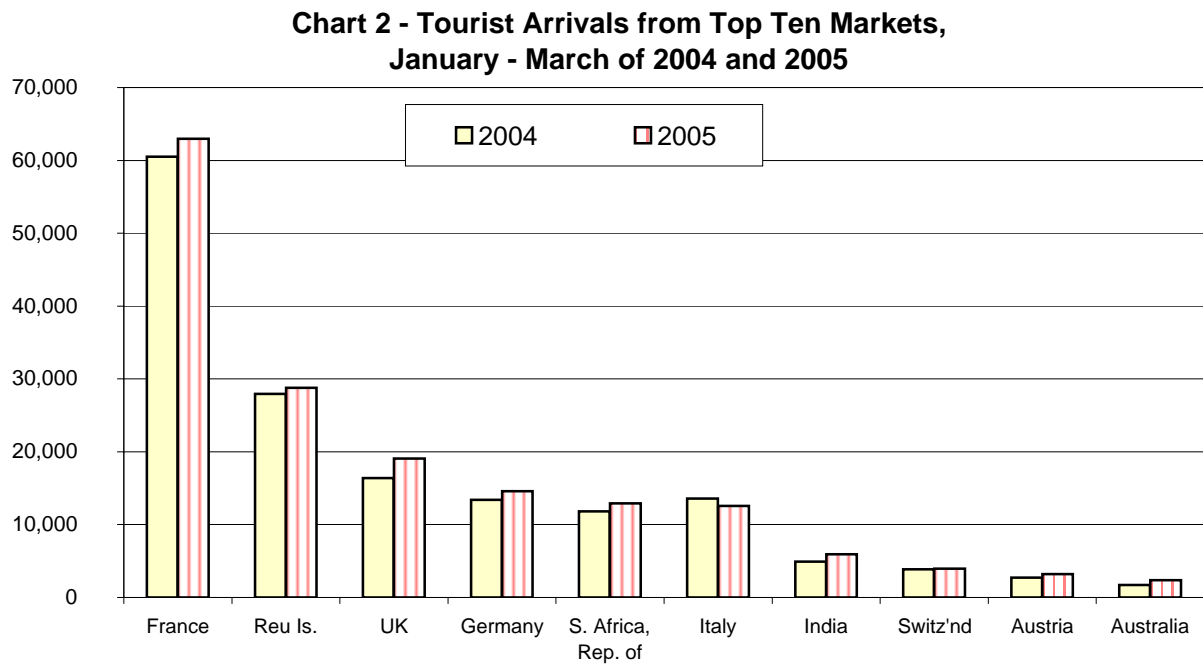
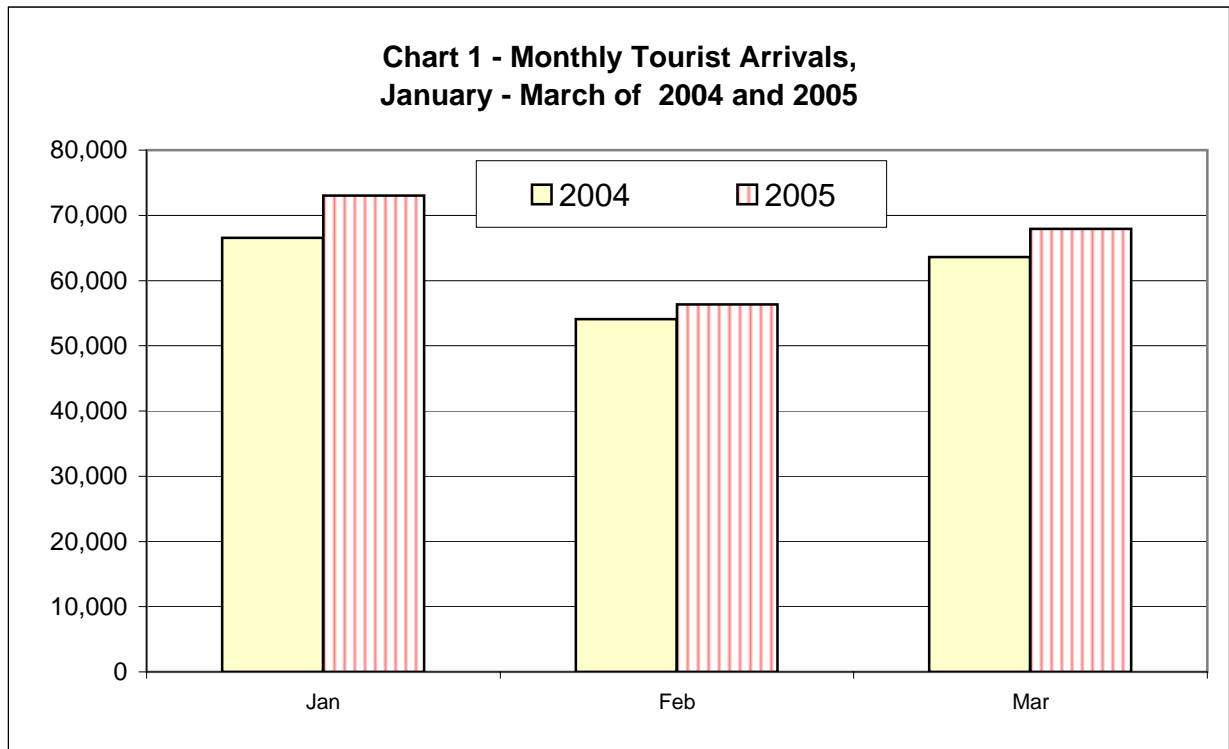


Table 6 :- Selected Tourism Statistics, 2002 - 2005

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

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 ²	10,571	21,239

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

Establishments \ Year	2000	2001	2002	2003	2004
Restaurants	1,256	1,269	1,252	1,719	1,623
Hotels	12,861	14,601	15,503	16,096	16,853
Travel and Tourism	3,316	3,652	3,974	4,045	4,137
Total	17,433	19,522	20,729	21,860	22,613

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