

26-TOURISM-HOSPITALITY

The **tourism sector**, with turnover of approximately 402 million Euros in 2004, accounted for 4% of Gross Domestic Product. Tourism related paid employment was estimated at 3 900 people on average in 2005, being 5% of all paid employment. Despite its small contribution to wealth creation, tourism is an industry with strong potential for employment creation and investment, and is therefore an important sector for the development and diversification of the New Caledonian economy. Furthermore, the territory possesses significant attributes to attract an international clientele : well preserved landscapes and natural environment, multicultural wealth, significant hotel capacity. Various promotional activities are undertaken by the provinces, who are responsible for the development of tourism, by way of their **promotions organisations**.

The increase in the number of **visitors** over the last ten years is due to **cruise ship passengers**, whilst the number of **tourists** has stagnated around the 100 000 mark and has not taken off. It was in this context of stagnation that the tourism conference was set up, with the first edition organised to take stock of the sector in late 2004, followed by the 2nd conference in late 2005 to present the plan of action. The tourism development concerted plan has a target of 180 000 foreign tourists by 2015. The plan incorporates three phases, based around the development of **promotions**, **airline services** and **hospitality infrastructure**.

Tourism development assistance from the public sector is broad and varies in relation to the nature of activities and geographic location. Of note is the direct financial assistance of the provinces through their own development programmes, or their Public/Private joint venture companies, the State funded development contracts, and the New Caledonian infrastructure fund. Public sector assistance to the industry is also evident through fiscal measures, tax exemption legislation, preferential import regimes, and funding for employment.

► **Tourism sector.** A broad and varied industry, the tourism sector is difficult to define. Alongside tourism activities described as traditional (hospitality, food and beverage), it encompasses a multitude of services such as underwater diving, car rentals, and souvenir shops. Tourism businesses are therefore those that satisfy the needs of tourists, or businesses whose activities are largely related to the tourism phenomena. These include : hotels, other forms of accommodation, cafes, restaurants, travel agencies, other tourist activities, tourist transport.

► **Promotions organisations.** These are the three provincial Economic interest groups : Nouvelle Calédonie Tourisme Point Sud, Tourisme Province Nord, and Destination îles Loyauté, which, from now on, shall be co-ordinated at a territory-wide scale.

► **Visitor.** According to the recommendations of the World Tourism Organisation, the term "visitor" describes any person travelling to a place other than that of his/her usual environment for less than 12 months and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited. Accordingly, there are two groups of international visitors :

- **tourists** (visitors staying at least one night in public or private accommodation in the country visited) ;
- **same-day visitors** (visitors who either arrive and depart on the same day, or stay aboard their means of transport for long periods, such as cruise-ship passengers).

► **Airline services.** See 25.3.

► **Hospitality infrastructure.** See 26.2.

SOURCES

[1] Institut de la Statistique et des Études Économiques (ISEE), Comptes satellites du tourisme.

[2] Institut de la Statistique et des Études Économiques (ISEE), Enquête passagers.

[3] Police Aux Frontières (PAF), statistiques relatives aux arrivées de paquebots et de croisiéristes en Nouvelle-Calédonie.

CCI, *Le tourisme et les loisirs, Le mémento des investisseurs en Nouvelle-Calédonie*, avril 2006.

Organisation Mondiale du Tourisme : www.omt.org

SEE ALSO

Institut de la Statistique et des Études Économiques (ISEE), *Point Économique et Bilan Économique et Social*. Nouvelle-Calédonie Tourisme Point Sud, *L'écho du tourisme*.

Institut de la Statistique et des Études Économiques (ISEE) : www.isee.nc

Province Sud : www.province-sud.nc

Province Nord : www.province-nord.nc

Tourisme Province Nord : www.tourismeprovincenord.nc

Nouvelle-Calédonie Tourisme Point Sud : www.nouvellecaledonietourisme-sud.com

Destination îles Loyauté : www.iles-loyaute.com

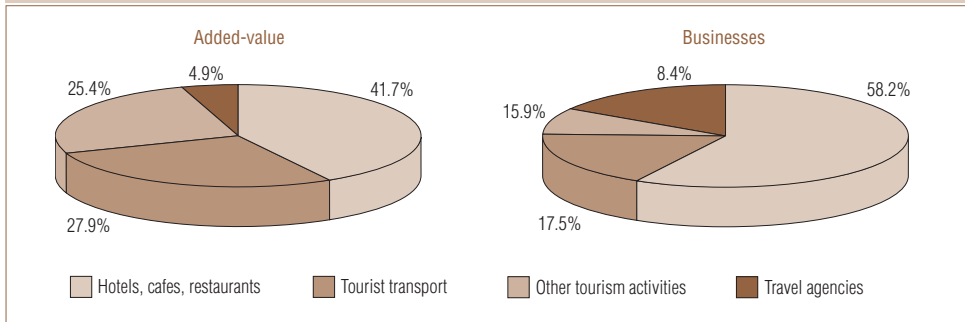
Major statistics for tourism businesses* [1]

	1997	1998	1999	2000	2001	2002	2003 p	2004 p
Number of businesses	863	921	947	991	1 037	1 025	1 046	1 095
Average number of employees	2 780	2 836	2 963	3 187	3 338	3 316	3 384	3 664
Turnover	262 822	271 076	288 213	321 717	327 901	326 543	360 893	401 737
Added value	113 884	115 745	127 778	133 552	127 669	123 856	153 622	178 528
Percentage of GDP	3.6	3.6	3.7	3.6	3.5	3.2	3.5	3.9

* Companies based in New Caledonia and belonging to the market sector.

Units : number, thousand Euros, %

Distribution of added-value and tourism businesses by activity in 2004 [1]



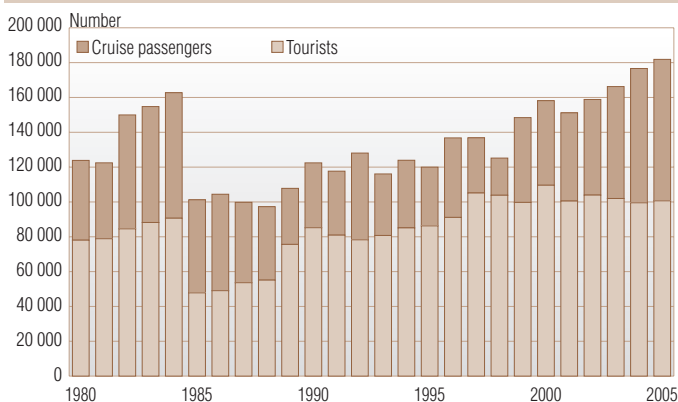
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Tourism related total paid employment by activity [1]

	1990	1995	2000	2001	2002	2003	2004 p	2005 p
Accommodation	696	1 024	1 263	1 317	1 224	1 254	1 267	1 366
Restaurants	748	811	832	857	852	811	976	1 074
Bars	44	54	26	27	38	34	26	33
Tourist maritime transport	44	35	54	54	48	49	48	32
Tourist air transport	547	524	597	613	625	633	650	658
Tourist land transport	23	17	51	57	68	73	80	80
Tourist rental transport	35	57	37	40	48	51	53	60
Travel agencies	147	183	195	213	223	232	251	251
Other recreation activities	7	26	335	355	383	361	389	406
Duty free	nc	nc	131	nc	nc	nc	nc	nc
Total	2 291	2 731	3 521	3 534	3 509	3 498	3 742	3 960

Unit : number

Visitor arrivals [2 and 3]



26-TOURISM-HOSPITALITY

Hospitality infrastructure, like **airline services**, is one of the essential elements for the development of tourism in New Caledonia. Since the beginning of the 1990s, significant financial means, from both public and private actors, have been dedicated to the development and improvement of New Caledonian hotel capacity. It has been a significant challenge given the need to broaden the supply of accommodation to include top of the range hotels, to make New Caledonia a more attractive destination to wealthier clientele that had until now been lacking, and to position the destination in a competitive market.

Accordingly, new hotels, such as the Méridien de Nouméa (5-star), have been built in recent years, while existing infrastructure has been upgraded (Surf Novotel, Nouvata Park Royal). Each of the Loyalty islands now has a hotel (Paradis d'Ouvéa, Nengone village and Drehu village).

Alongside recognised hotel accommodation, rural and tribal guest house accommodation has developed throughout the territory. Generally found in Melanesian communities, these small enterprises offer stays with locals, with traditional accommodation and family style dining, promoting contact with a region's people and their environment.

At the end of 2005, New Caledonia had 106 **tourist establishments**, from the Melanesian guest house to the 5-star **rated hotels**. These include 3 hotels in the 5-star category, all located in the Southern province and built in the last 15 years. This infrastructure provides a total 2 245 **accommodation units**, or nearly 10% more than ten years ago, and 50% more than 20 years ago.

79% of all accommodation units were located in the Southern province, 15% in the Northern province and 6% in the Loyalty islands province.

More large scale hotel developments should still see the light of day in New Caledonia, like the complex currently under construction at the former site of the South Pacific Community at Anse Vata, with some 160 serviced apartments.

► **Airline services.** See 25.3.

► **Tourist establishments.** Any infrastructure providing accommodation for tourists : hotels (with or without star rating), motels, rural and tribal guest houses and homestay accommodation. Not included are Nouméa youth hostel, camping grounds or tourist oriented furnished apartments, rented by private owners and real estate companies.

► **Rated hotels.** Hotels receive a rating of 1 to 4 stars depending on the levels of comfort and service. The ratings come under provincial authority ; criteria can therefore differ from one province to the next.

► **Accommodation unit.** This term covers hotel rooms, bungalows, studio-apartments and even traditional buses.

SOURCES

[1] GIE Nouvelle-Calédonie Tourisme Point Sud, données sur la capacité hôtelière en province Sud.

[2] GIE Tourisme en province Nord, données sur la capacité hôtelière en province Nord.

[3] Destination îles Loyauté, données sur la capacité hôtelière en province des îles Loyauté.

Institut de la Statistique et des Études Économiques (ISEE), Bilan touristique 2005.

SEE ALSO

Institut de la Statistique et des Études Économiques (ISEE), *Point Économique et Bilan Économique et Social*.

Nouvelle-Calédonie Tourisme Point Sud, *L'écho du tourisme*.

Institut de la Statistique et des Études Économiques (ISEE) : www.isee.nc

Province Sud : www.province-sud.nc

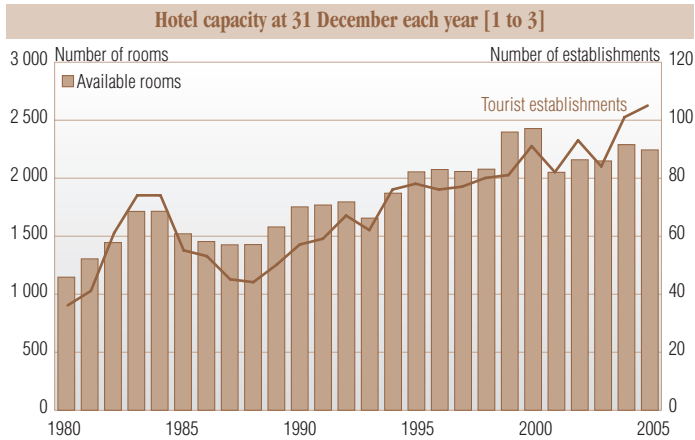
Province Nord : www.province-nord.nc

Tourisme Province Nord : www.tourismeprovincenord.nc

Nouvelle-Calédonie Tourisme Point Sud : www.nouvellecaledonietourisme-sud.com

Destination îles Loyauté : www.iles-loyaute.com

26.2 HOSPITALITY INFRASTRUCTURE



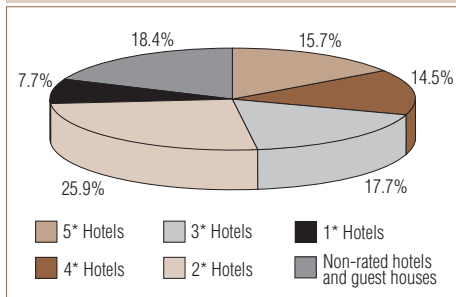
Hotel capacity by province and rating* at end 2005 [1 to 3]

	Number of establishments				Number of rooms			
	Southern province	Northern province	Loyalty islands province	New Caledonia	Southern province	Northern province	Loyalty islands province	New Caledonia
5* Hotels	3	-	-	3	353	-	-	353
4* Hotels	3	-	1	4	311	-	15	326
3* Hotels	5	2	-	7	302	96	-	398
2* Hotels	11	3	3	17	474	67	41	582
1* Hotels	5	2	2	9	135	18	19	172
Non-rated hotels and guest houses	19	27	20	66	194	153	67	414
Total (a)	46	34	26	106	1 769	334	142	2 245

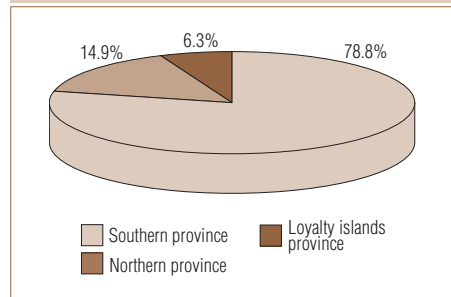
* With ratings being of provincial responsibility, criteria may differ from one province to the next.
 (a) Hotels providing accommodation with different ratings are accounted for twice.

Unit : number

Available rooms by hotel rating at end 2005 [1 to 3]



Available rooms by province at end 2005 [1 to 3]



Major developments in New Caledonia's hotel capacity since 1990

- 1991 Poe Beach Resort opens in Bourail
- 1992 Malabou Beach opens in Poum, and Club Méditerranée in Hienghène
- 1993 Upgrade and extension of Keundu Beach resort and Nouvata Park Royal in Nouméa
 Upgrade of Vallon Dore hotel in Mont-Dore
- 1994 Hotel Casey opens in Prony bay
- 1995 Méridien de Nouméa and Kou Bugny on isle of Pines open
- 1996 Drehu village opens on Lifou, and Nengone village on Maré
- 1997 Île Ouen hotel reopens under the name Crusoe
- 1998 Nouvata Park Royal II in Nouméa, and Méridien Île des Pins
- 1999 Surf Novotel reopens after extension work, Mocambo reopens
 Paradis d'Ouvéa opens, Pacifique opens in Nouméa (extension of Nouvata Park Royal)
- 2000 Crusoe hotel closes on Ouen island
- 2001 Closure of Club Med, which had opened in Nouméa in 1979
- 2002 Casa del Sole hotel opens in Nouméa
 Ouré lodge opens on the isle of Pines
- 2004 Coral Palms (formerly Escapade Resort) opens on Maître islet, and the former Caledonia Hotel, closed since 2001 for renovations, reopens as Hotel New Caledonia
 Casy hotel closes
- 2005 Ramada Plaza opens in Nouméa, Quality Rivland opens in Païta, and Evasion 130 opens in Sarraméa
 Surf Novotel Nouméa closes.

26-TOURISM-HOSPITALITY

According to the World Tourism Organisation, Oceania accounts for barely 1% of world tourism. Furthermore, in the region, New Caledonia is subject to strong competition from neighbouring destinations such as Hawaii, Guam, and Fiji, who respectively welcomed 7.353 million, 1.228 million, and 545 000 tourists in 2005.

At around the 80 000 **tourists** a year since 1980, tourist numbers in New Caledonia dropped abruptly in 1985, a year marked by significant political upheaval that affected the territory until 1988. From 1992 tourist numbers rose consistently, then suffered the impact of the Asian crises in 1998 and 1999, and a subsequent fall in numbers. Renewed growth followed, reaching a record 109 587 tourists in 2000, only to contract again, and stagnate around the 100 000 mark.

Results from the **passenger survey** illustrate the characteristics of tourists who visit New Caledonia. Accordingly, on average over a five-year period, New Caledonia's largest market was Japan (28.5%), closely followed by Metropolitan France (27.6%), then Australia some distance further back (17.1%), New Zealand (6.5%) and other countries (20.4%).

The average length of stay for tourists was 16 days : 6 days for Japanese, 8 and 9 days respectively for New Zealanders and Australians, while Metropolitan French stayed the longest, with 31 days.

Another characteristic of tourists is their relatively young age : in the 2001-2005 period, slightly more than half were under 40 years old. The main reason for travel for more than half of all trips was holidays (56%), with just over 10% to visit family (12%) or on business (11%). The most common socio-economic categories for tourists were "Employees" (30%), "Management, higher intellectual professions" (16%) and "intermediate professions" (11%).

► **Tourist.** See 26.1.

► **Passenger survey.** *The survey, implemented in 2001, was developed by ISEE with a view to widening the distribution of tourism-related statistics, subsequent to the suppression of Border Police arrival cards for European nationals (Ravel decree dated June 24, 1999) ; this information had been the source for statistics published by ISEE up until 2000. Since then, an optional and anonymous questionnaire, included on the phytosanitary form, has been distributed to airline passengers arriving at Tontouta.*

SOURCES

[1] Institut de la Statistique et des Études Économiques (ISEE), Enquête passagers.

[2] PATA, Quaterly Statistical reports.

Organisation Mondiale du Tourisme : www.omt.org

SEE ALSO

Institut de la Statistique et des Études Économiques (ISEE), *Point Économique et Bilan Économique et Social*.

Institut de la Statistique et des Études Économiques (ISEE) : www.isee.nc

26.3 TOURIST MOVEMENTS

Tourist arrivals by country of residence [1]

	Japan	France (Metropolitan)	Australia	New Zealand	Other	Total
1980 (a)	14 939	17 804	21 588	6 719	16 990	78 040
1985 (a)	17 448	13 391	5 168	3 007	8 790	47 804
1990	28 350	13 761	17 067	10 373	15 662	85 213
1995	25 066	24 707	15 325	7 168	13 990	86 256
2000	31 051	30 702	18 012	9 576	20 246	109 587
2001	27 954	25 202	19 200	8 048	20 111	100 515
2002	27 202	29 964	19 216	5 935	21 616	103 933
2003	28 490	29 440	15 957	6 030	22 066	101 983
2004	29 229	27 358	16 212	6 368	20 348	99 515
2005	31 486	27 727	16 062	6 328	19 048	100 651

(a) In 1980 and 1985, visitors are classified by nationality.

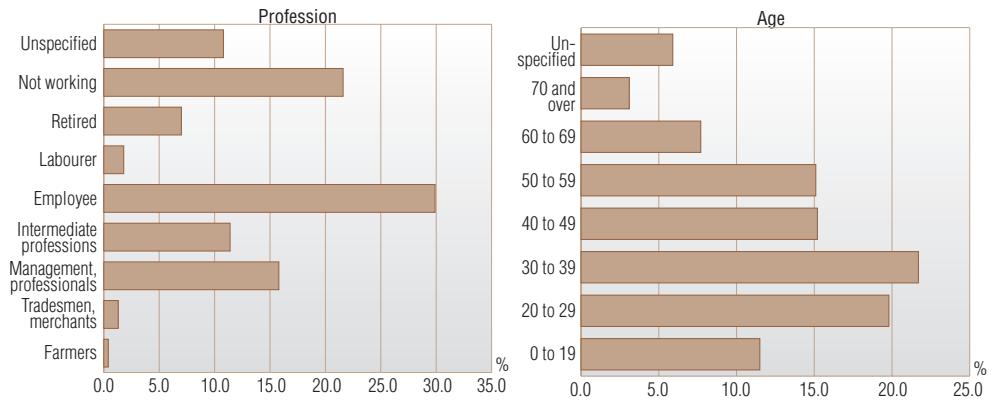
Unit : number

Tourists' length of stay by country of residence [1]

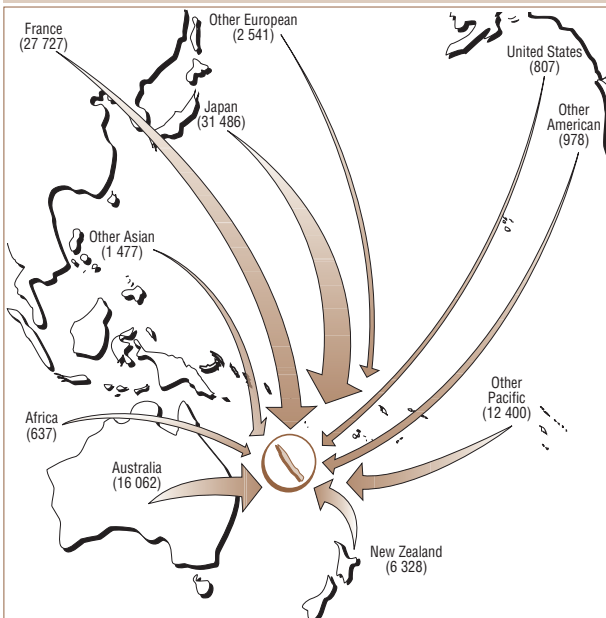
	France (Metropolitan)	Japan	New Zealand	Australia	All
1990	36	7	10	10	14
1995	36	7	9	9	18
2000	34	7	9	9	16
2001	27	6	8	8	14
2002	31	6	9	9	16
2003	29	6	9	9	16
2004	32	5	8	8	16
2005	33	5	8	9	17

Unit : day

Characteristics of tourists (average 2001-2005) [1]



Tourist arrivals by country of residence in 2005 [1]



Tourist arrivals in Pacific countries in 2005 [2]

Hawaii	7 353
Australia	5 497
New Zealand	2 383
Guam	1 228
Fiji	545
Northern Marianas	507
French Polynesia	208
Vanuatu	126
Samoa	102
New Caledonia	101
Cook Islands	88
Palau	81
Papua New Guinea	69
Tonga	25
Marshall islands	7
Kiribati	3

Unit : thousands

26-TOURISM-HOSPITALITY

According to the tourism satellite accounts, **non-resident tourist spending** in New Caledonian businesses amounted to 154 million Euros in 2005. This spending varies from year to year, but generally follows a rising curve.

The structure of spending, relatively stable from year to year, shows that 29% of spending is for accommodation, 22% for international transport, 14% for dining, 12% for souvenirs, 8% for local transport, and 3% for leisure activities.

Excluding international transport, it appears that New Zealand, Japanese and Australian tourists allocate a majority of their budget to accommodation, while spending on food and beverage is mainly by Metropolitan French, Australians and other tourists. Similarly, while Metropolitan French are the main customers for local transport businesses, the Japanese remain the clientele of choice for specialist souvenir and gift shops. The average daily spend was estimated at 70.73 Euros in 2005. This average spend does not reflect the differences according to tourists' countries of residence. Accordingly, in 2005, daily spending was estimated at 191.70 Euros for Japanese, 101.80 for Australians, 64.72 for New Zealanders and a mere 44.43 for Metropolitan French.

Similarly, when taking into account the **tourists' average length of stay** (the shortest being the Japanese and the longest being Metropolitan), it appears that Metropolitan French have the highest spending per stay (1474.99 Euros), followed by the Japanese (1054.35 Euros), Australians (906.05 Euros) and lastly New Zealanders (543.66 Euros).

Non-resident tourist spending in New Caledonian businesses evolves not only with the number of tourists, but also in relation to the structure of tourist movements from each market, and inflation. Accordingly, between 1993 and 2005, when tourist numbers only increased by 25%, spending increased by 85% in current francs.

► **Non-resident tourist spending.** *This equates to spending in New Caledonian businesses. With regard to international transport, only Air Calédonie International is involved through sales to non-resident travelers; as a carrier, Air France, for example, is not considered a local company. On the other hand, given that Air Calédonie International statistics cannot be broken down by markets, analysis of non-resident spending in New Caledonia by country of residence does not include international transport.*

► **Tourists' average length of stay.** *See 26.3.*

SOURCES

[1] Institut de la Statistique et des Études Économiques (ISEE), Comptes satellites du tourisme.

Institut de la Statistique et des Études Économiques (ISEE), Enquête passagers.

Organisation Mondiale du Tourisme : www.omt.org

SEE ALSO

Institut de la Statistique et des Études Économiques (ISEE), *Point Économique et Bilan Économique et Social.*

Nouvelle-Calédonie Tourisme Point Sud, *L'écho du tourisme.*

Institut de la Statistique et des Études Économiques (ISEE) : www.isee.nc

26.4 TOURIST SPENDING

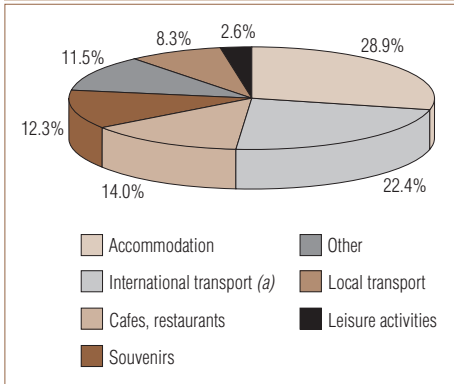
Non-resident tourist spending in New Caledonian businesses [1]

	1999	2000	2001	2002	2003	2004 p	2005 p
Local transport	10 936	12 168	10 115	12 377	11 858	12 143	12 763
Accommodation	41 716	48 193	40 182	44 657	42 428	41 556	44 448
Cafes, restaurants	19 467	22 081	19 341	22 819	21 143	21 118	21 629
Leisure activities	3 855	4 433	3 595	4 048	3 913	3 872	4 064
Souvenirs	15 964	18 168	16 651	19 182	18 352	18 310	18 997
Other	13 726	15 260	14 933	18 486	17 246	17 539	17 690
International transport (a)	12 386	22 819	25 467	23 816	32 632	35 037	34 459
Total	118 049	143 122	130 284	145 385	147 572	149 575	154 050

(a) Air Calédonie International.

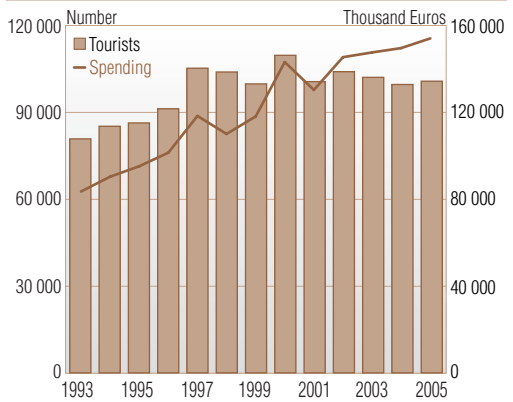
Unit : thousand Euros

Structure of tourist spending in New Caledonian companies in 2005 [1]



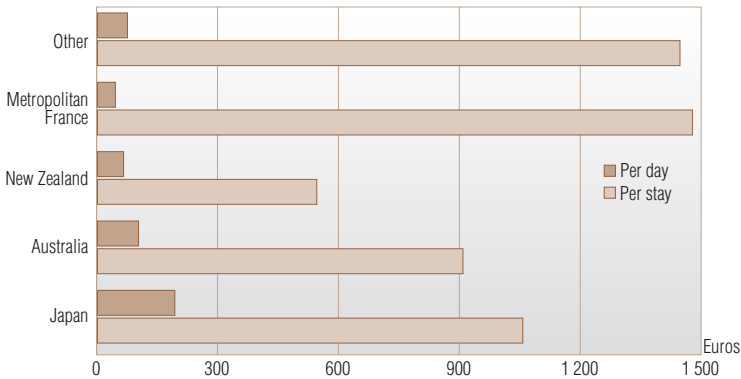
(a) Air Calédonie International.

Movements and non-resident tourist spending in New Caledonian businesses [1]



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Average tourist spending* by country of residence in 2005 [1]



* Excluding international air travel.

Average spending* by stay and by tourist according to country of residence and nature of spending in 2005 [1]

	Metropolitan France	Japan	Australia	New Zealand	Other	All
Accommodation	442.56	575.37	491.32	331.81	213.72	441.62
Cafes, restaurants	315.82	109.62	185.36	70.77	314.69	214.87
Local transport	208.49	98.75	50.62	51.44	143.56	126.81
Leisure activities	49.82	53.65	20.82	9.87	31.44	40.40
Souvenirs	190.96	185.20	104.57	39.54	311.82	188.73
Other	267.33	31.76	53.36	40.24	428.85	175.79
Total	1 474.99	1 054.35	906.05	543.66	1 444.10	1 188.21

* Excluding international air travel.

Unit : Euros

26-TOURISM-HOSPITALITY

Results from the **hotel survey** show that **international tourists** account for more than half of the customers in Nouméa's hotels. Hotel activity is also strongly dependant on **tourist movements**. By country of residence, Japanese tourists are the most frequent in hotels (25% of customers in the last 5 years, followed by Metropolitan French and Australians (13% each), then New Zealanders (4%). There has been significant development in the local clientele in Nouméa's hotels : almost 1 of every 2 clients in 2005 as opposed to less than 20% of clientele in 1990.

The **average length of stay in hotels** has been relatively stable from year to year, varying between 4 and 5 days over a 15-year period. While Metropolitan French, with 6.5 days, have the longest length of stay, the shortest stays go to the Japanese (3.2 days) and residents (3.9).

Differences between the respective contributions to **hotel activity** from the various markets are not as significant when the number of clients as well as the average length of stay are taken into account. Accordingly, the Japanese and New Caledonian clienteles are the most numerous (2 of every 3 clients), but only contribute 56% to hotel activity due to their relatively short lengths of stay. On the other hand, English-speaking and Metropolitan French, who only account for 1 in 3 clients, cover 40% of hotel nights in Nouméa.

The breakdown by hotel category shows that **hotels rated "3-star and higher"** make the biggest contribution to hotel activity (47% of **hotel nights**), followed by "1-star" (30%) and "2-star" (22%).

In 2005, almost 9 Japanese and 7 English-speaking tourists in every 10 preferred hotels rated "3-stars and higher", while Metropolitan French were evenly spread in "2-star" and "3-star and higher" hotels.

As for the New Caledonians, they frequented all categories of hotel : half (51%) stayed in "2-stars" with a quarter in each of the "1-star" (24%) and "3-stars and higher" (25%) categories.

► **Hotel survey.** Since 1982, ISEE has undertaken a monthly survey in Nouméa's hotels. In 1993, the survey was extended to all hotels in the Southern province, and in 2001, to guest houses. It is planned to extend the survey to include the Northern and Loyalty islands provinces. The survey provides monthly indicators for hotel activity : number of clients by country of residence, their average length of stay, the number of hotel nights, and hotel occupancy rates.

► **International tourists.** See 26.1.

► **Tourist movements.** See 26.3.

► **Average length of stay in hotels.** Number of days spent in a hotel in relation to the number of clients involved during the reference period.

► **Rated hotels.** See 26.2.

► **Hotel night.** Is defined by the product of the average length of stay by the number of clients. It determines hotel activity.

► **Hotel occupancy rates (occupancy rate).** Ratio between the number of hotel rooms rented out and the number of available rooms.

SOURCES

[1] Institut de la Statistique et des Études Économiques (ISEE), Enquête hôtelière, résultats des hôtels de Nouméa. Institut de la Statistique et des Études Économiques (ISEE), *Bilan touristique 2005*.

SEE ALSO

Institut de la Statistique et des Études Économiques (ISEE), *Point Économique et Bilan Économique et Social*. Institut de la Statistique et des Études Économiques (ISEE) : www.isee.nc

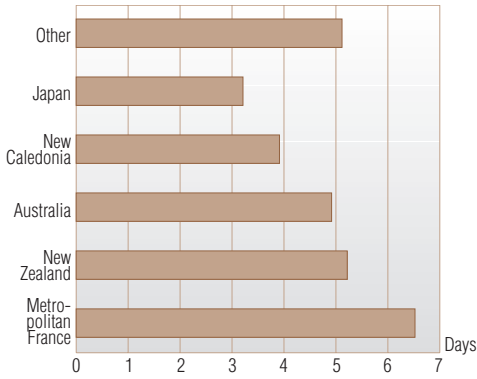
26.5 HOTEL ACTIVITY

Clientele in Nouméa's hotels by country of residence, occupancy rate and average length of stay [1]

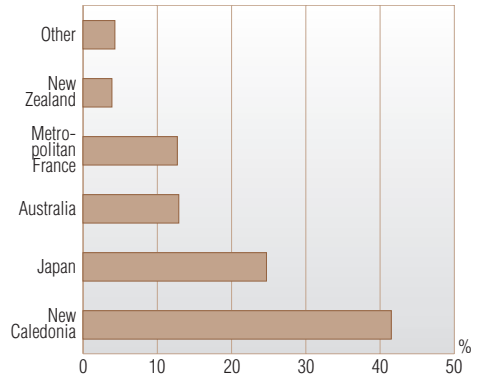
	1990	1995	2000	2001	2002	2003	2004	2005
New Caledonia	17 231	38 653	44 529	50 539	54 164	58 849	62 833	68 763
Japan	31 460	21 668	32 642	36 159	34 381	31 334	32 635	35 160
Metropolitan France	12 763	14 868	18 110	15 873	16 826	16 700	17 980	18 058
Australia	14 692	12 463	15 766	20 881	20 367	17 101	17 640	14 180
New Zealand	8 527	6 055	7 852	7 094	4 060	4 357	4 714	3 907
Other	4 737	2 539	5 694	5 735	5 896	5 465	6 072	5 981
Total	89 410	96 246	124 593	136 281	135 694	133 806	141 874	146 049
Occupancy rate	61.0	48.7	51.6	47.8	57.1	59.7	59.6	61.3
Average length of stay	4.5	5.3	4.4	4.1	4.0	4.4	4.5	4.4

Units : number, %, day

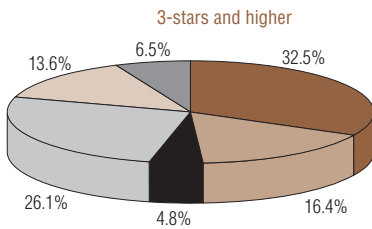
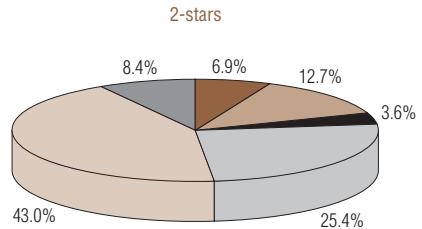
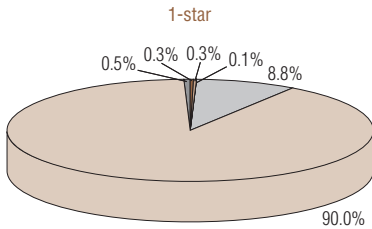
Average length of stay in Nouméa hotels by country of residence (average 2001-2005) [1]



Structure of clientele in Nouméa's hotels by country of residence (average 2001-2005) [1]



Hotel nights in Nouméa by category and country of residence (2000-2005) [1]



Japan
 Metropolitan France
 Australia
 New Caledonia
 New Zealand
 Other

Hotel nights in Nouméa by category [1]

