**Introduction**

This report presents the main results of the survey of Inbound Tourism for the year 2023 and is compared to the year 2018. It is to be noted that this survey was not conducted as from 2020 to 2022 due to the COVID-19 pandemic.

The primary objective of the survey is to gather information on tourists visiting Mauritius, mainly on their spending pattern, purpose and frequency of visits, place of stay and rating of the Mauritian destination. During the survey, data was collected from departing tourists at Sir Seewoosagur Ramgoolam International Airport.

Table 1 below shows the distribution of respondents by country of residence compared to that of tourist departures during year 2023.

The questionnaire is given at Annex.

**Table 1: Distribution of parties and tourists by country of residence, Year 2023**



1. **Main findings, 2018 and 2023**



**1.1 Tourists travelling on package tour**

In 2023, 49.1% of tourists travelled on package tour compared to 63.3% in 2018. In 2023, package tour was more popular among tourists from Italy (71.4%), India (62.4%), Switzerland (61.3%), Republic of South Africa (58.9%) and Germany (57.5%). Tourists making their own travel arrangement were mainly from Reunion Island (69.2%) and Australia (64.7%) (Table 2).

In 2023, among the tourists staying in hotels, 62.3% of them were on package tour compared to 79.2% in 2018 (Table 5c).

**1.2 Tourists travelling on non-package tour stayed longer than those travelling on package tour**

In 2023, the average length of stay for tourists arriving on package tour was 9.4 nights lower than the figure of 13.2 nights for those travelling on non-package tour. A similar trend was observed for the year 2018. In 2023, American tourists stayed longer with an average of 14.5 nights compared to the other regions: Oceania (13.9 nights), Asia (12.4 nights), Europe (11.8 nights) and Africa (9.0 nights) (Table 3).

In 2023, the average length of stay of tourists staying in non-hotel accommodations is longer (16.5 nights) compared to those staying in hotels (9.8 nights) (Table 5c).

**1.3 Tourists visited Mauritius mainly to spend holidays**

In 2023, 92.3% of tourists visited Mauritius mainly for holidays, higher than the figure of 79.3% in 2018.

The proportion of tourists visiting Mauritius for honeymoon in 2023 stood at 2.4%, lower than the figure of 13.1% registered in 2018. The share of tourists coming on business declined from 2.7% in 2018 to 0.9% in 2023 while the share for those visiting friends and relatives increased to 3.1% compared to 1.4% in 2018 (Table 4).

**1.4 Nearly eight out of 10 tourists preferred to stay in hotels than in non-hotel accommodations**

In 2023, 77.0% of tourists preferred to stay in hotels rather than in non-hotel accommodations compared to 78.2% of tourists who stayed in hotels in 2018. Among the non-hotel accommodations, tourists preferred to stay in tourist residence. In 2023, 12.8% of tourists stayed in tourist residence compared to 10.8% in 2018 (Table 5a).

In 2023, among those staying in hotels, 95.4% came for holidays, 3.1% were honeymooners and some 0.8% came on business trips (Table 5c).

**1.5 Average expenditure per tourist increased**

In 2023, the average expenditure per tourist amounted to Rs 68,800, that is around Rs 22,300 higher compared to Rs 46,500 in 2018. On average, a European tourist spent Rs 74,500 in 2023 compared to Rs 48,700 in 2018. Tourists from France, our leading market spent an average of Rs 66,700 per person, higher compared to Rs 46,200 in 2018 (Table 6).

Average expenditure for those staying in hotels was Rs 75,600 in 2023, compared to Rs 49,400 in 2018. Those staying in non-hotel accommodations spent on average Rs 46,100 in 2023 compared to Rs 36,100 in 2018 (Table 5c).

The average expenditure per tourist per night for 2023 amounted to Rs 6,100 higher than the figure of Rs 4,500 in 2018 (Table 6).

In 2023, tourists travelling on package tour spent Rs 7,000 per night on average, higher when compared to an average of Rs 5,400 per night for those travelling on non-package tour. The same trend was observed for 2023 (Table 7).

A tourist staying in hotels spent on average Rs 7,700 per night in 2023 which was more than double the amount spent by a tourist staying in non-hotel accommodations (Rs 2,800 per night). Corresponding figures for 2018 were Rs 5,500 for hotels and Rs 2,300 for non-hotel accommodations (Table 5c).

1. **Tourist perception on level of satisfaction**

**2.1 Rating of level of security**

Some 96.0% of tourists perceived the level of security as excellent in hotels and similar rating by 89.1% for non-hotel accommodations (Tables 9 and 10).

Some 90.3% of tourists rated the level of security of taxi service as excellent compared to 0.1% rating it as poor (Table 11).

The level of security on beaches was rated as excellent by around 88.8% of tourists against some 0.1% rating it as poor (Table 12).

The survey showed that 83.5% of tourists rated the level of security in public places as excellent while around nine out of 10 tourists rated excellent the level of security on ‘tourist sites’, on ‘cultural/heritage sites’ and ‘nature-based sites’ (Tables 13-16).

Overall, the level of security in the Island of Mauritius was perceived as excellent by around 89.6% of tourists (Table 17).

**2.2 Rating of state of environment**

As regards to the state of environment, 94.0% of tourists rated hotels as excellent and similar rating by 83.1% for non-hotel accommodations (Tables 18 and 19).

The state of environment on beaches, public places and tourist sites was rated as excellent by 76.5%, 67.4% and 79.7% of tourists respectively (Tables 20-22).

Around eight out of 10 tourists rated the state of environment of both cultural/heritage sites and nature-based sites as excellent (Tables 23 and 24).

Overall, 76.8% of tourists rated the state of environment in Mauritius as excellent, followed by 20.5% as good, 2.3% as satisfactory and 0.4% rated it as poor/very poor (Table 25).

**2.3 Rating of customer service at airport**

The customer service at the airport was rated as excellent by 86.8% of tourists, followed by 12.5% as good, 0.6% as satisfactory and 0.2% as poor/very poor (Table 26).

**2.4 Overall appreciation of Mauritius as a holiday destination**

Some 84.7% of tourists provided an excellent overall appreciation of Mauritius as a holiday destination (Table 28).

**Figure 1: Tourist arrivals from main generating countries, 2018 and 2023**



 *Source: Passport & Immigration Office*

**Figure 2: Average length of stay (in nights) by purpose of visit, 2018 and 2023**



**Figure 3: Average length of stay (in nights) by selected country of residence, 2018 and 2023**



**Figure 4: Average expenditure (Mauritian Rupees) per tourist by selected country of residence, 2018 and 2023**



**Figure 5: Distribution of tourists by group composition, 2018 and 2023**

 **Year 2018 Year 2023**



**Figure 6: Distribution of first-time tourists by influencing factor, 2018 and 2023**

 **Year 2018 Year 2023**

 

**Figure 7: Distribution of tourists by meal arrangement, 2018 and 2023**

 **Year 2018 Year 2023**



1. **Methodology**
	1. **Data collection**

Survey period

The survey was conducted during each month in 2023. Interviews were carried out in 2 time slots for each schedule (day and night) as follows:

1. day schedule: between 06.00 and 14.00; or between 08.00 and 16.00 hours;
2. night schedule: between 14.00 and 22.00; or between 16.00 and 23.00 hours.

Target population

Tourists leaving the Island of Mauritius by air.

Questionnaire design

The views of the main stakeholders, including the Ministry of Tourism, Association of Hoteliers and Restaurants in Mauritius (AHRIM) and Mauritius Tourism Promotion Agency (MTPA), were sought regarding the content of the questionnaire. The questionnaire comprises 36 questions (*see Annex*), including opinion questions on level of security, state of environment, customer service at the airport and an overall appreciation score to Mauritius as a holiday destination.

Data collection method

Data were collected on tablet PCs and face-to-face interviewing technique was used.

Response rate

Around 85% of tourists who were approached for the survey responded positively. Non-respondents who were replaced, were mostly those who did not have enough time due to their late arrival for check-in formalities and those who had language difficulties.

Fieldstaff

The fieldstaff comprised of around 5 interviewers and 3 supervisors each month.

Consistency and validation checks

The data capture application on the tablet PCs flagged errors at data collection and were corrected on the spot. In addition, supervisors monitored the interviews being carried out and advised the interviewers on remedial action to be taken, if warranted.

* 1. **Sampling**

Sampling method

The number of interviews conducted per day was determined by making use of Probability Proportional to Size (PPS) sampling method based on the seat capacity of the airplanes which left the country in 2022. Interviews were conducted on the ‘first available’ basis i.e. tourists were approached as they entered the departure lounge after check-in formalities.

Sample size

A total of 9,827 interviews were conducted during the year 2023, covering 21,333 tourists.

Data reliability

The results published in this report are based on a sample, rather than the census of all tourists who departed during the year 2023. As with all sample surveys, the results are subject to sampling variability and therefore may differ from figures that would be obtained if all tourists had been included in the survey.

* 1. **Expenditure data**

Expenditure figures relate to expenses incurred by the tourists during their stay in the country and include items like accommodation, meals and beverages, local transportation, sightseeing, entertainment, shopping etc. However, expenses on **international fares** paid to carriers are excluded.

The method of calculating tourism expenditure by means of Airport Exit Surveys is widely used internationally, but problems arise for tourists travelling on package tour. The cost of package has to be broken down in order to obtain the proportions which accrue to hotels, tour operators etc. in Mauritius. Based on information gathered, it is assumed that 37% of the cost of the package goes to the local hoteliers. In cases where the package includes other destinations besides Mauritius, adjustments are done to determine the expenditure incurred in the country.

* 1. **Weighting methodology**

The survey results were benchmarked to data on monthly tourists departed during the year 2023, as obtained from the Passport and Immigration Office. The variables “country of residence” and “length of stay” were used in weighting the survey data. Moreover, for better estimates, weighted number of nights derived from survey data have been realigned with the actual number of tourist nights spent by departing tourists.

* 1. **Problems/Limitations**

As with all sample surveys, the Survey of Inbound Tourism is subject to weaknesses including:

* Tourists departing by sea are not covered. However, it is to be noted that tourists by sea represent around 2% of total tourist arrivals.
* Tourists in the VIP lounges are not covered; these tourists are perceived as high spenders.
1. **Concepts and Definitions**

The concepts and definitions are based on the International Recommendations for Tourism Statistics 2008 (IRTS 2008) framework prepared by United Nations World Tourism Organisation (UNWTO). The framework is consistent with other statistical frameworks such as the System of National Accounts 2008 and the Tourism Satellite Account Recommended Methodological Framework 2008.

**Unit of inquiry**

The unit of inquiry is the tourist. The latter is defined as a non-resident staying overnight in the country but less than a year, and is not involved in any gainful occupation in the country during his/her stay.

A tourist may be travelling alone or in a group.

**Inbound tourism**

Inbound tourism comprises the activities of a non-resident visitor within the country of reference.

**Inbound tourism expenditure**

Inbound tourism expenditure is the tourism expenditure of a non-resident visitor within the economy of reference.

**Party**

The travelling unit is the “party”, which usually consists of one or more members for whom individual expenditures are not available separately. Thus, for certain sections of the questionnaire, the information obtained may refer to more than one tourist.

The size of the “party” is the total number of persons present in the “party”. This has been taken into consideration when calculating average expenditure per tourist.

**Country of residence**

Tourist arrivals are compiled on the basis of the **permanent address** of the tourist, which may not be the same as his nationality.

**Main purpose of visit**

The main purpose of a trip is defined as the purpose in the absence of which the trip would not have taken place.

**Package or inclusive tour**

A package tour is defined as one in which airfare, accommodation and other items such as meals, sightseeing, car hire are included in the tour price paid before departure from the home country of the tourist. The package may include other countries besides Mauritius.

**Rating of level of satisfaction**

Respondents were asked to rate the level of satisfaction on a scale of 1 to 10 for security, environment (Question 28), customer service at the airport (Question 29) and overall appreciation of Mauritius as a holiday destination (Question 31). For ease of interpretation, the grouping of the scale used is as follows:

‘1-2’ for ‘Very Poor’, ‘3-4’ for ‘Poor’, ‘5-6’ for ‘Satisfactory’, ‘7-8’ for ‘Good’ and ‘9-10’ for ‘Excellent’.

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**27 June 2024**

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