

INTERNATIONAL TRAVEL & TOURISM

1st Semester 2006

1. Passenger Traffic

1.1 Total Passenger Traffic

Passenger traffic for the first semester of 2006 totalled 949,979 made up of 464,175 arrivals and 485,804 departures. Compared to the corresponding period of year 2005, these figures represent increases of 1.7% in arrivals and 3.4% in departures. Movements by sea accounted for 2.9% of arrivals and 2.8% of departures. Further details on monthly trends are given in Table 1.

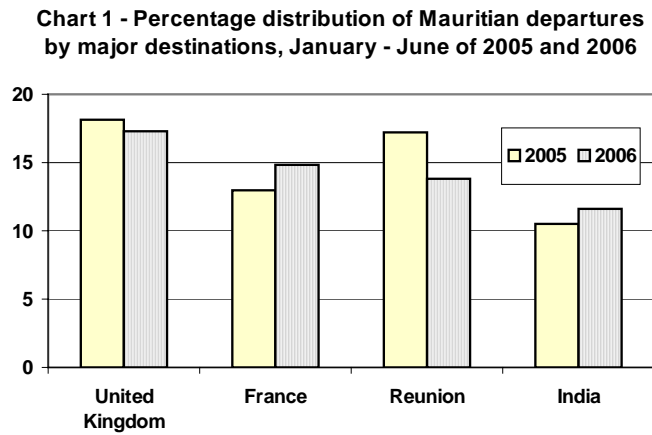
1.2 Excursionists

Total arrivals by air included 4,571 “excursionists”, i.e. visitors arriving and leaving on the same day. Of these excursionists, 1,392 (30.5%) came from Reunion Island and 1,103 (24.1%), from France. Total arrivals by sea included 8,261 “cruise excursionists” (4,953 passengers and 3,308 crews) aboard 15 cruise ships, which visited our port during the first six months of 2006.

1.3 Mauritian Residents

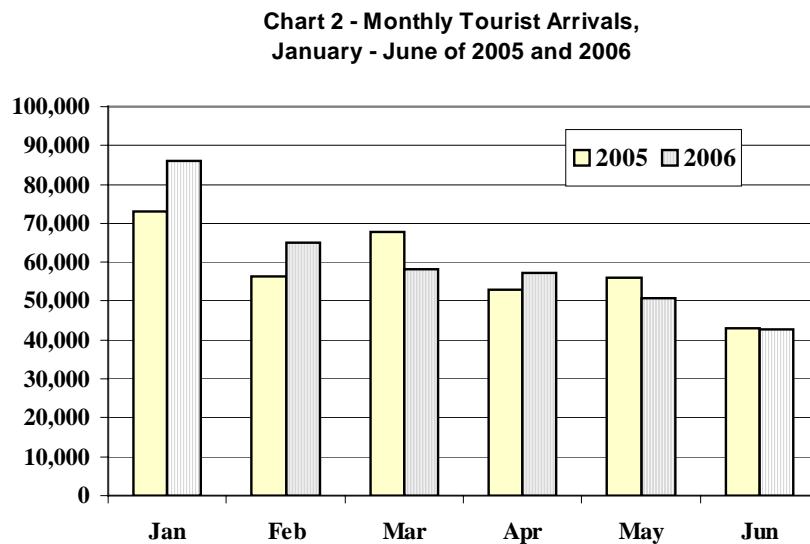
During the period under review, the number of Mauritian residents travelling abroad fell by 3.1% to stand at 80,949 compared to 83,534 for the first half of 2005. The following changes were observed in the number of Mauritians visiting the major destinations: Seychelles (+39.6%), Australia (+11.3%), France (+10.9%), India (+7.7%), Singapore (+3.4%), Hong Kong (+3.2), Italy (+1.6), Malagasy Republic (-1.8%), Republic of South Africa (-4.2%), United Arab Emirates (-6.1%), United Kingdom (-7.0%), Reunion Island (-22.0%) and Saudi Arabia (-96.4%).

Chart 1 shows the percentage distribution of Mauritian departures by major destinations for the period January to June 2005 and 2006.



1.4 Tourist Arrivals

Tourist arrivals grew by 3.1% from 349,311 in the first semester of 2005 to 360,137 in the corresponding period of 2006. Chart 2 shows monthly tourist arrivals for January to June 2005 and 2006. Further details on tourist arrivals are given in Tables 3 to 6.



Around 89% of the tourists came mainly for holidays while 5.0% were on business/conference trips and another 3.8% were in transit (Table 4).

Arrivals from Europe, which accounted for 64% of total tourist arrivals, increased slightly by 0.2% to 231,748 during the first semester of 2006 against 231,272 in the corresponding period of 2005. Arrivals from France, our leading market representing 23% of total tourist arrivals and 36% of the European market, fell by 19.4% to attain 84,174 during this period. Growths were however noted in arrivals from the other major generating countries: Italy (+69.7%), the United Kingdom (+6.0%) and Germany (+2.7%). Among the other European countries, the following trend was observed: CIS (+32.2%), Austria (+9.1%), Sweden (+3.6%), Switzerland (-0.3%), Netherlands (-1.4%), Spain (-3.3%) and Belgium (-6.9%).

For the period under review, arrivals from Africa, with a share of 24% of total tourist arrivals, registered an increase of 2.7% to 85,457. With regards to performance of the major markets of the region, arrivals from the Republic of South Africa went up by 26.0% whilst those from Reunion Island fell by 9.6%. Changes in arrivals from other African countries were as follows: Kenya (+37.4%), Seychelles (+15.3%), Malagasy Republic (-12.2%), Comoros (-22.6%) and Zimbabwe (-30.8%).

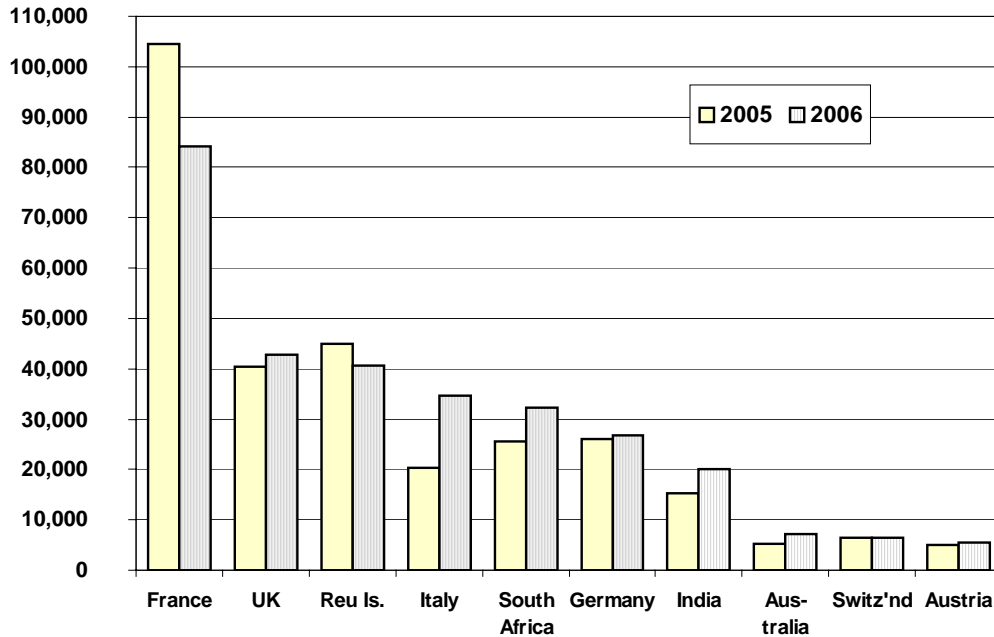
Tourist arrivals from the Asian market, which constituted 8% of total, were up by 24.5% to reach 30,294. Arrivals from India, our major source on this continent, expanded by 31.2% to attain 20,009. The performance of other Asian countries was as follows: Malaysia (+53.3%), Singapore (+6.5%), Japan (+0.1%), People's Republic of China (-5.5%), United Arab Emirates (-7.8%), and Hong Kong (-14.8%).

Arrivals from Oceania rose by 30.5% to 7,590, due mainly to an increase of 32.0% in arrivals from Australia.

Arrivals from the continent of America increased by 6.6% to reach 4,655. This was mainly attributed to increases in arrivals of 7.1% from USA, 3.8% from Canada and 8.1% from other American countries.

Tourist arrivals from top ten markets for the period January to June 2005 and 2006 are given in Chart 3.

**Chart 3 - Tourist Arrivals from Top Ten Markets,
January - June of 2005 and 2006**



2. Tourist Nights

Total tourist nights spent in the country during the first six months of 2006 is estimated at 3.6 million, up by 0.3% over the same period of the preceding year (Table 6).

3. Hotel Statistics

At the end of June 2006, there was a total of 95 registered hotels in operation. Owing to renovation 6 hotels were not operational. The total room capacity for these registered hotels was 10,278 with 20,564 bed places (Table 7). The room occupancy rate for all hotels for the first semester of 2006 averaged 62% while the bed occupancy rate was 55% (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 40 (42% of all registered hotels in operation). These "Large" hotels had a room capacity of 7,726 with 15,417 bedplaces, representing 75.2% of total room capacity and 75.0% of total bedplaces. The average room occupancy rate for these hotels for the first half of 2006 was 65% while bed occupancy rate averaged 59% (Table 8).

4. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first semester of 2006 were of the order of Rs 15,451 million, i.e. an increase of 22.8% compared to Rs 12,584 million for the same period of 2005 (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 25,798 at the end of March 2006, that is 1.7% higher than the previous year. Of this number, 76% or 19,500 were engaged in hotels (Table 9).

6. Forecast Year 2006

Based on the number of tourist arrivals during the first six months of the year (two-digit increases in January and February attributable to measures taken with respect to air access and marketing, followed by falls due to the spread of the “Chikungunya” disease), the optimistic forecast of 825,000 tourist arrivals made earlier in March 2006 has been revised downwards to 810,000.

According to the Bank of Mauritius tourism receipts for 2006 will be around Rs 29,130 million (+13.3%) compared to Rs 25,704 million in 2005.

Central Statistics Office

Ministry of Finance and Economic Development

Port Louis

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Contact person:

Mrs. R.Moraby
Statistician
Ministry of Tourism, Leisure and
External Communications
Ken Lee Tower
Port Louis
Tel: 210-9832
Fax: 210-3901
Email: rmoraby@mail.gov.mu

DEFINITION AND 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. Occupancy rate

The room/bed occupancy rate is the ratio of room/bed nights rented to the total number of room/bed nights available.

$$= \frac{\text{Total number of room/bed nights rented}}{\text{Total number of room/bed nights available}} \times 100$$

7. CIS

CIS denotes the Commonwealth of Independent States. It consists of the States of the former Soviet Union.

Table 1:- Passenger Traffic ¹ by month, 2004 - 2006

Month	2004		2005		2006	
	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures
January	86,669	106,951	93,809	110,249	108,932	124,313
February	69,256	63,267	71,350	69,084	80,202	80,796
March	82,050	78,071	85,353	85,395	74,574	83,160
<u>1st Quarter</u>	<u>237,975</u>	<u>248,289</u>	<u>250,512</u>	<u>264,728</u>	<u>263,708</u>	<u>288,269</u>
April	72,901	66,782	71,302	73,753	74,092	72,052
May	69,183	71,206	73,111	75,814	65,979	69,023
June	54,924	56,167	61,487	55,736	60,396	56,460
<u>2nd Quarter</u>	<u>197,008</u>	<u>194,155</u>	<u>205,900</u>	<u>205,303</u>	<u>200,467</u>	<u>197,535</u>
<i>1st Semester</i>	<i>434,983</i>	<i>442,444</i>	<i>456,412</i>	<i>470,031</i>	<i>464,175</i>	<i>485,804</i>
July	84,223	68,707	88,752	73,586		
August	77,716	88,594	83,314	94,535		
September	69,018	70,521	70,784	74,767		
<u>3rd Quarter</u>	<u>230,957</u>	<u>227,822</u>	<u>242,850</u>	<u>242,888</u>		
<i>Jan. to Sep.</i>	<i>665,940</i>	<i>670,266</i>	<i>699,262</i>	<i>712,919</i>		
October	87,848	81,795	87,365	84,467		
November	83,404	83,236	88,491	85,783		
December	102,523	83,163	114,795	92,963		
<u>4th Quarter</u>	<u>273,775</u>	<u>248,194</u>	<u>290,651</u>	<u>263,213</u>		
<i>2nd Semester</i>	<i>504,732</i>	<i>476,016</i>	<i>533,501</i>	<i>506,101</i>		
Whole Year	939,715	918,460	989,913	976,132		

¹ Excluding inter islands traffic

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
January - June 2005 and 2006**

Country of disembarkation	Jan - June 2005	Jan - June 2006	% Change
EUROPE	28,834	29,392	1.9
France	10,835	12,018	10.9
Germany	903	977	8.2
Italy	1,328	1,349	1.6
Switzerland	568	950	67.3
United Kingdom	15,102	14,043	-7.0
Other European	98	55	-43.9
AFRICA	27,099	24,558	-9.4
Malagasy Republic	3,880	3,809	-1.8
Reunion	14,345	11,187	-22.0
Seychelles	1,928	2,692	39.6
S. Africa, Rep. of	6,705	6,423	-4.2
Zimbabwe	202	81	-59.9
Other African	39	366	838.5
ASIA	24,071	23,078	-4.1
Hong Kong SAR ¹	4,376	4,514	3.2
India	8,736	9,413	7.7
Malaysia	465	283	-39.1
Singapore	3,822	3,952	3.4
Saudi Arabia	1,415	51	-96.4
United Arab Emirates	5,178	4,861	-6.1
Other Asian ²	79	4	-94.9
OCEANIA	3,386	3,767	11.3
Australia	3,384	3,767	11.3
Other Oceanian	2	0	-100.0
AMERICA	43	17	-60.5
U.S.A	5	9	80.0
Canada	37	8	-78.4
Other American	1	0	-100.0
NOT STATED	101	137	35.6
All Countries	83,534	80,949	-3.1

¹ Special Administrative Region of China

Table 3:- Tourist arrivals by month, 2004 - 2006

Month	Number		
	2004	2005	2006 ¹
January	66,543	73,053	86,218
February	54,104	56,367	64,894
March	63,631	67,931	58,136
<u>1st Quarter</u>	<u>184,278</u>	<u>197,351</u>	<u>209,248</u>
April	55,599	52,971	57,361
May	53,974	55,995	50,773
June	38,826	42,994	42,755
<u>2nd Quarter</u>	<u>148,399</u>	<u>151,960</u>	<u>150,889</u>
<i>1st Semester</i>	<i>332,677</i>	<i>349,311</i>	<i>360,137</i>
July	62,173	65,462	
August	55,342	60,746	
September	53,102	53,233	
<u>3rd Quarter</u>	<u>170,617</u>	<u>179,441</u>	
<i>Jan. to Sep.</i>	<i>503,294</i>	<i>528,752</i>	
October	70,793	70,999	
November	66,960	70,793	
December	77,814	90,519	
<u>4th Quarter</u>	<u>215,567</u>	<u>232,311</u>	
<i>2nd Semester</i>	<i>386,184</i>	<i>411,752</i>	
Whole Year	718,861	761,063	

¹ Provisional**Table 4 :- Tourist arrivals by main purpose of visit,
January - June 2005 and 2006**

Purpose of visit	Jan - June 2005	Jan - June 2006	% Change
Holiday	315,930	322,298	2.0
Business	12,255	14,548	18.7
Transit	12,224	13,834	13.2
Conference	3,005	3,423	13.9
Sports	680	763	12.2
Other & Not Stated	5,217	5,271	1.0
Total	349,311	360,137	3.1

Table 5 : - Tourist Arrivals by Country of Residence, January - June of 2005 and 2006

Country of residence	1st semester 2005	2006 ¹							1st semester	% Change Jan-June 2005 to Jan-June 2006
		Jan	Feb	Mar	Apr	May	Jun			
EUROPE	231,272	56,629	50,950	37,836	36,326	26,720	23,287	231,748	0.2	
Austria	5,108	1,311	1,615	945	761	570	369	5,571	9.1	
Belgium	3,884	744	629	545	653	490	555	3,616	-6.9	
France	104,394	26,467	20,507	12,871	9,924	8,497	5,908	84,174	-19.4	
Germany	26,131	6,043	5,387	4,405	4,747	3,309	2,946	26,837	2.7	
Italy	20,358	8,415	7,824	7,270	5,374	2,688	2,984	34,555	69.7	
Netherlands	2,081	356	404	306	284	399	303	2,052	-1.4	
Spain	3,931	332	400	549	690	753	1,076	3,800	-3.3	
Sweden	2,100	553	714	344	303	135	126	2,175	3.6	
Switzerland	6,508	1,472	1,506	822	1,388	756	544	6,488	-0.3	
United Kingdom	40,321	5,688	6,830	6,968	9,231	7,383	6,648	42,748	6.0	
CIS ²	2,857	1,296	462	681	641	457	241	3,778	32.2	
Other European	13,599	3,952	4,672	2,130	2,330	1,283	1,587	15,954	17.3	
AFRICA	83,239	23,699	8,289	14,158	14,807	14,203	10,301	85,457	2.7	
Comoros	532	45	65	65	67	109	61	412	-22.6	
Kenya	551	63	96	105	215	120	158	757	37.4	
Malagasy Rep.	3,505	481	476	532	521	603	464	3,077	-12.2	
Reunion	45,065	17,177	2,797	6,814	4,126	7,153	2,657	40,724	-9.6	
Seychelles	4,254	650	452	882	913	831	1,175	4,903	15.3	
S. Africa, Rep. of	25,662	4,973	4,023	5,366	8,015	4,571	5,389	32,337	26.0	
Zimbabwe	1,069	48	53	41	377	183	38	740	-30.8	
Other African	2,601	262	327	353	573	633	359	2,507	-3.6	
ASIA	24,332	3,798	4,094	4,150	3,993	7,511	6,748	30,294	24.5	
Hong Kong SAR ³	283	40	33	28	32	60	48	241	-14.8	
India	15,253	1,949	2,447	2,914	2,391	5,556	4,752	20,009	31.2	
Japan	774	180	126	131	150	92	96	775	0.1	
Malaysia	703	198	154	81	139	264	242	1,078	53.3	
P. Rep. of China	2,733	516	498	348	457	351	414	2,584	-5.5	
Singapore	880	125	131	80	145	157	299	937	6.5	
United Arab Emirates	702	109	46	76	115	109	192	647	-7.8	
Other Asian	3,004	681	659	492	564	922	705	4,023	33.9	
OCEANIA	5,815	1,053	726	1,248	1,300	1,615	1,648	7,590	30.5	
Australia	5,369	989	686	1,174	1,208	1,449	1,580	7,086	32.0	
Other Oceanian	446	64	40	74	92	166	68	504	13.0	
AMERICA	4,367	975	764	695	840	653	728	4,655	6.6	
USA	2,396	483	366	369	495	407	446	2,566	7.1	
Canada	968	202	140	171	198	127	167	1,005	3.8	
Other American	1,003	290	258	155	147	119	115	1,084	8.1	
OTHER & N.STATED	286	64	71	49	95	71	43	393	37.4	
All Countries	349,311	86,218	64,894	58,136	57,361	50,773	42,755	360,137	3.1	

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

Table 6 :- Selected Tourism Statistics, 2003 - 2006

Year		Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
	2003	702,018	6,952	19,415
	2004	718,861	7,119	23,448
	2005	761,063	7498 ²	25,704
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	1st Qr.	197,351	2,052 ²	7,076
	2nd Qr.	151,960	1,496 ²	5,508
	1st Semester	349,311	3,548 ²	12,584
	3rd Qr.	179,441	1,813 ²	5,428
	4th Qr.	232,311	2,137 ²	7,692
	2nd Semester	411,752	3,950 ²	13,120
2006 ³	1st Qr.	209,248	2,060	9,068
	2nd Qr.	150,889	1,500	6,383
	1st Semester	360,137	3,560	15,451

¹ Source: Bank of Mauritius² Revised³ Provisional**Table 7:- Hotels, rooms and bedplaces, 2003 - 2006**

Year	Number as at end of period			
	Hotels	Rooms	Bedplaces	
2003	97	9,647	19,727	
2004	103	10,640	21,355	
2005	99	10,497	21,072	
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	1st Qr.	100	10,571	21,239
	2nd Qr.	97	10,224	20,545
	3rd Qr.	98	10,447	20,973
	4th Qr.	99	10,497	21,072
2006 ¹	1st Qr.	99	10,629	21,341
	2nd Qr.	95 ²	10,278	20,564

¹ Provisional² Excluding 6 hotels not operational because of renovation works.

Table 8 :- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2004 - 2006

Month	All Hotels						"Large" Hotels					
	2004		2005		2006 ¹		2004		2005		2006 ¹	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	69	61	73	66	81	72	72	64	77	69	86	77
February	64	57	65	59	76	68	68	60	70	63	81	72
March	66	58	64	57	60	54	70	62	68	61	63	56
<i>1st Quarter</i>	<u>67</u>	<u>59</u>	<u>68</u>	<u>61</u>	<u>72</u>	<u>65</u>	<u>70</u>	<u>62</u>	<u>72</u>	<u>64</u>	<u>76</u>	<u>68</u>
April	63	56	56	50	58	52	67	59	59	53	61	55
May	59	52	55	49	51	46	62	55	58	52	54	48
June	47	41	45	40	45	41	48	43	45	41	47	42
<i>2nd Quarter</i>	<u>56</u>	<u>50</u>	<u>53</u>	<u>48</u>	<u>51</u>	<u>46</u>	<u>59</u>	<u>52</u>	<u>55</u>	<u>49</u>	<u>54</u>	<u>49</u>
<i>1st Semester</i>	61	54	60	53	62	55	64	57	62	56	65	59
July	52	47	54	49			55	49	56	50		
August	58	52	64	57			62	56	67	60		
September	64	57	63	57			69	62	67	60		
<i>3rd Quarter</i>	<u>58</u>	<u>52</u>	<u>61</u>	<u>54</u>			<u>62</u>	<u>55</u>	<u>63</u>	<u>57</u>		
<i>Jan. to Sep.</i>	60	53	60	54			64	56	62	56		
October	70	63	68	61			75	67	73	65		
November	74	66	78	70			78	70	83	74		
December	68	61	74	66			72	64	78	70		
<i>4th Quarter</i>	<u>70</u>	<u>63</u>	<u>73</u>	<u>66</u>			<u>75</u>	<u>67</u>	<u>78</u>	<u>70</u>		
<i>2nd Semester</i>	64	58	67	60			68	62	71	63		
Whole Year	63	56	63	57			66	59	66	59		

¹ Provisional

Table 9 :- Employment in the tourist industry as at end of March, 2002 - 2006

Year	2002	2003	2004	2005	2006¹
Establishments					
Restaurants	1,252	1,719	1,623	1,809	1,805
Hotels	15,503	16,096	16,853	19,226	19,536
Travel and Tourism	3,974	4,045	4,137	4,342	4,457
Total	20,729	21,860	22,613	25,377	25,798

¹ Provisional

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

TECHNICAL NOTE

Sources of data

The main source of data for the compilation of passenger traffic statistics is the Passport and Immigration Office which maintains a database of all passengers entering and leaving the country. The data are extracted from the Embarkation/ Disembarkation cards filled in by all incoming and outgoing passengers. At the end of every month, passenger traffic for that particular month is downloaded and supplied to the statistics unit of the Ministry of Tourism, Leisure and External Communications within fifteen days. Additional data on cruises are supplied by the Mauritius Ports Authority.

To supplement the recurrent statistics, a Survey of Outgoing Tourists (SOT) is conducted every two years since 1984 jointly by the Central Statistics Office and the Ministry of Tourism, Leisure and External Communications. This survey covers a representative sample of tourists at departure and provides qualitative and quantitative information on tourists. Results of the survey are published in a report.

Tourism receipts

The Bank of Mauritius is responsible for the estimation of tourism receipts based on monthly statements of Inward and Outward Remittances of Commercial Banks.

Monthly Occupancy Rates

All hotels are contacted by phone at the end of every month for data on room/bed nights available and rented during the month for the calculation of room and bed occupancy rates.

Short-term projections of tourist arrivals

A Tourism Statistics Committee grouping various stakeholders of the tourism industry meet regularly under the chairmanship of the Director of the Central Statistics Office to discuss performance of the tourism sector and to provide information for short-term forecast of tourist arrivals.

Publications

The regular publications on tourism statistics are:

- Monthly tourist arrivals (by mid of each month)
- Quarterly Economic and Social Indicators on International Travel and Tourism (with a lag of seven weeks)
- Quarterly tourism statistics (Pamphlet)
- Digest of International Travel and Tourism (August)
- Handbook of statistical data on tourism (August)
- Report of the Survey of Outgoing Tourists