

INTERNATIONAL TRAVEL & TOURISM

1st Semester 2008

Introduction

This issue of the Economic and Social Indicators presents data on International Travel and Tourism and hotel statistics. A brief on the compilation of these statistics is given at Annex I while Annex II contains a glossary of terms used.

2. Passenger Traffic

2.1 Total Passenger Traffic

Passenger traffic for the first semester of 2008 totaled 1,223,623, made up of 599,851 arrivals and 623,772 departures. Compared to the same period of year 2007, these figures represent increases of 8.6% in arrivals and departures. Movements by sea accounted for 4.1% of arrivals and 3.9% of departures. Further details on monthly figures are given in Table 1.

2.2 Excursionists

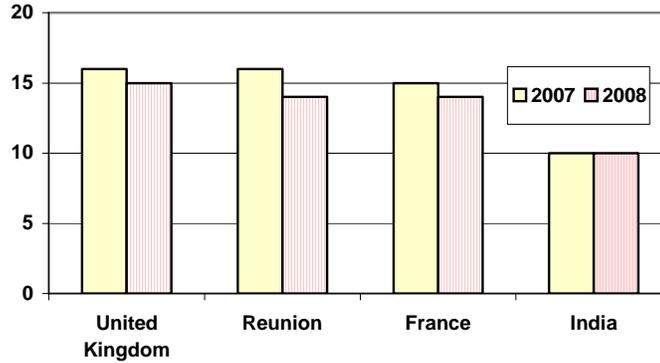
Total arrivals by air included 9,084 “excursionists”, i.e. visitors arriving and leaving on the same day. Of these excursionists, 2,533 (27.9%) came from Reunion Island and 2,043 (22.5%), from France. Total arrivals by sea included 17,017 “cruise excursionists” (10,930 passengers and 6,087 crews) aboard 18 cruise ships, which visited our port during the first six months of 2008.

2.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad went up by 16.3% to 107,070 compared to 92,061 for the first semester of 2007 (Table 2). The following changes were observed in the number of Mauritians visiting the major destinations: United Kingdom (+7.7%), Reunion Island (+6.3%), France (+11.6%), India (+7.3%), Republic of South Africa (+24.4%), United Arab Emirates (+27.8%), Australia (+42.3%), Hong Kong (+12.9%), Singapore (+27.9%), Malagasy Republic (+16.1%) and Seychelles (+24.1%).

Figure 1 shows the percentage distribution of Mauritian departures by major destination for the period January to June of 2007 and 2008.

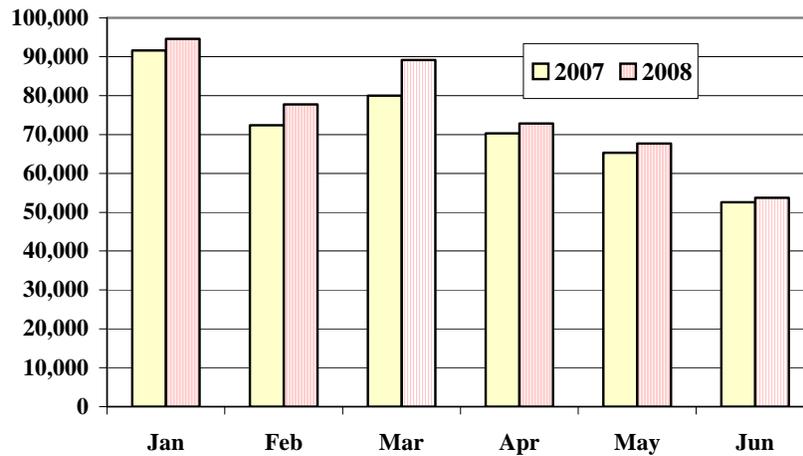
Figure 1 - Percentage distribution of Mauritian departures by major destination, January - June of 2007 and 2008



2.4 Tourist Arrivals

Tourist arrivals for the first semester of 2008 increased by 5.5% to attain 455,758 compared to 432,113 for the same period of 2007. Figure 2 shows monthly tourist arrivals for January to June of 2007 and 2008. Further details on tourist arrivals are given in Tables 3 to 6.

Figure 2 - Monthly Tourist Arrivals, January - June of 2007 and 2008



Around 88.1% of the tourists came for holidays while 4.2% were on business/conference trips and another 4.6% were in transit (Table 4).

Arrivals from Europe, which accounted for 65.7% of total tourist arrivals, went up by 4.3% to reach 299,233 during the first semester of 2008 against 286,929 in the corresponding period of 2007. Arrivals from France, our leading market representing 28.1% of total tourist arrivals and 42.8% of the European market, rose by 14.9% to attain 128,152 during this period. Arrivals from the United Kingdom increased by 9.2% whilst those from Germany and Italy fell by 8.4% and 10.7% respectively. Among the remaining European countries, the following changes in arrivals were observed: Commonwealth of Independent States (CIS) (+19.7%), Belgium (+17.2%), Netherlands (-1.3%), Spain (-4.0%), Switzerland (-8.6%), Sweden (-18.8%) and Austria (-23.5%).

During the first six months of 2008, arrivals from Africa, with a share of 22.5% of total tourist arrivals, increased by 5.2% to 102,496. Arrivals from Republic of South Africa and Reunion Island, the two major markets of the region, rose by 10.3% and 0.4% respectively. Changes in arrivals from other African countries were as follows: Malagasy Republic (+21.9%), Kenya (+11.1%), Zimbabwe (+7.9%), Comoros (+6.8%) and Seychelles (-15.7%).

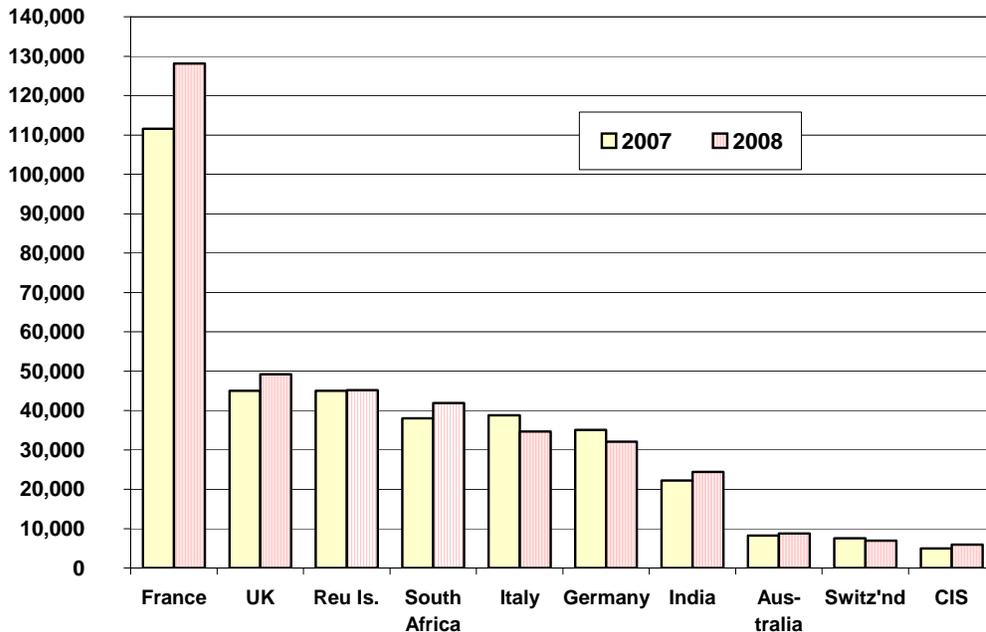
For the period under review, tourist arrivals from the Asian market, which represented 8.1% of total tourist arrivals, went up by 8.6% to attain 36,793. Arrivals from India, our major source on this continent, grew by 9.9% to reach 24,430. The performance of other Asian countries was as follows: United Arab Emirates (+44.3%), People's Republic of China (+8.6%), Japan (-3.6%), Hong Kong (-7.3%), Singapore (-18.6%) and Malaysia (-28.7%).

Arrivals from Oceania increased by 6.6% from 8,653 to 9,225 due to increases in arrivals of 6.3% from Australia and 12.0% from the other Oceanian countries.

Arrivals from the continent of America rose by 52.3% to 7,494 as a result of an increase of 53.7% from U.S.A, 41.7% from Canada and 60.1% from countries classified in "Other American" countries.

Tourist arrivals from top ten markets for the period January to June of 2007 and 2008 are given in Figure 3.

**Figure 3 - Tourist Arrivals from Top Ten Markets,
January - June of 2007 and 2008**



3. Tourist Nights

Total tourist nights spent in the country during the first six months of 2008 is estimated at 4.3 million, representing an increase of 8.5% over the corresponding period of the preceding year (Table 6).

4. Hotel Statistics

At the end of June 2008, there were a total of 94 registered hotels in operation. Owing to renovation, eight hotels were not operational. The total room capacity for these registered hotels was 10,503 with 21,063 bedplaces (Table 7). For the first semester of 2008, the room occupancy rate for all hotels averaged 71% while the bed occupancy rate was 63% (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 41 (44% of all registered hotels). These hotels had a room capacity of 8,065 with 16,158 bedplaces, representing 77% of both total room capacity and total bedplaces. The average room occupancy rate for these hotels for the first half of 2008 was 72% and bed occupancy rate averaged 65% compared to 79% and 71% respectively a year ago (Table 8).

5. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first semester of 2008 amounted to Rs 22,170 million, i.e. an increase of 12.2% compared to Rs 19,752 million for the same period of 2007 (Table 6).

6. Employment

According to the Survey of Employment and Earnings, direct employment in hotels, restaurants and travel and tourism establishments employing 10 persons or more stood at 28,129 at the end of March 2008 showing an increase of 6.9% over the figure of 26,322 for the March 2007. Of this number, 76.2% or 21,439 were engaged in hotels (Table 9).

7. Forecast Year 2008

Based on data available on tourist arrivals for the first six months of 2008 and information gathered from the main stakeholders, the forecast of tourist arrivals for the year 2008 is estimated to be between 965,000 and 975,000.

According to the Bank of Mauritius, tourism receipts for the year 2008 will be around Rs 45,925 million (+12.9%) compared to Rs 40,687 million in 2007.

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- I BRIEF ON COMPILATION OF PASSENGER TRAFFIC STATISTICS
- II GLOSSARY OF TERMS

Table 1:- Passenger Traffic ¹ by month, 2006 - 2008

Month	2006		2007		2008	
	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures
January	108,932	124,313	114,503	133,861	125,228	144,490
February	80,202	80,796	86,655	86,343	98,424	99,897
March	74,574	83,160	99,841	103,396	115,987	122,014
<u>1st Quarter</u>	<u>263,708</u>	<u>288,269</u>	<u>300,999</u>	<u>323,600</u>	<u>339,639</u>	<u>366,401</u>
April	74,092	72,052	92,982	94,269	96,210	97,364
May	65,979	69,023	83,963	86,831	87,375	96,647
June	60,396	56,460	74,534	69,782	76,627	63,360
<u>2nd Quarter</u>	<u>200,467</u>	<u>197,535</u>	<u>251,479</u>	<u>250,882</u>	<u>260,212</u>	<u>257,371</u>
1st Semester	464,175	485,804	552,478	574,482	599,851	623,772
July	90,862	76,408	106,670	90,663		
August	86,128	94,927	96,148	105,680		
September	73,157	75,222	85,315	87,007		
<u>3rd Quarter</u>	<u>250,147</u>	<u>246,557</u>	<u>288,133</u>	<u>283,350</u>		
Jan. to Sep.	714,322	732,361	840,611	857,832		
October	91,891	85,930	101,362	101,361		
November	89,668	88,779	99,885	102,522		
December	120,983	97,636	135,373	114,415		
<u>4th Quarter</u>	<u>302,542</u>	<u>272,345</u>	<u>336,620</u>	<u>318,298</u>		
2nd Semester	552,689	518,902	624,753	601,648		
Whole Year	1,016,864	1,004,706	1,177,231	1,176,130		

¹ Excluding inter islands traffic

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
January - June of 2007 and 2008**

Country of disembarkation	Jan - June 2007	Jan - June 2008	% Change
EUROPE	32,297	36,456	12.9
France	13,404	14,962	11.6
Germany	1,011	1,583	56.6
Italy	1,492	2,117	41.9
Switzerland	1,173	1,222	4.2
United Kingdom	15,131	16,302	7.7
Other European	86	270	214.0
AFRICA	29,555	33,762	14.2
Malagasy Republic	3,976	4,617	16.1
Reunion	14,600	15,514	6.3
Seychelles	3,000	3,724	24.1
S. Africa, Rep. of	7,256	9,023	24.4
Zimbabwe	-	-	-
Other African	723	884	22.3
ASIA	25,379	30,026	18.3
Hong Kong SAR ¹	5,155	5,820	12.9
India	9,606	10,309	7.3
Malaysia	385	859	123.1
Singapore	3,778	4,831	27.9
Saudi Arabia	-	9	-
United Arab Emirates	6,389	8,163	27.8
Other Asian	66	35	-47.0
OCEANIA	4,640	6,603	42.3
Australia	4,640	6,603	42.3
Other Oceanian	-	-	-
AMERICA	23	14	-39.1
U.S.A	9	5	-44.4
Canada	12	9	-25.0
Other American	2	-	-100.0
NOT STATED	167	209	25.1
All Countries	92,061	107,070	16.3

¹ Special Administrative Region of China

Table 3:- Tourist arrivals by month, 2006 - 2008

Month	Number		
	2006	2007	2008 ¹
January	86,218	91,628	94,579
February	64,894	72,338	77,763
March	58,136	79,965	89,152
<i>1st Quarter</i>	<u>209,248</u>	<u>243,931</u>	<u>261,494</u>
April	57,361	70,297	72,837
May	50,773	65,301	67,705
June	42,755	52,584	53,722
<i>2nd Quarter</i>	<u>150,889</u>	<u>188,182</u>	<u>194,264</u>
<i>1st Semester</i>	360,137	432,113	455,758
July	65,540	77,225	
August	64,307	69,941	
September	56,138	65,542	
<i>3rd Quarter</i>	<u>185,985</u>	<u>212,708</u>	
<i>Jan. to Sep.</i>	546,122	644,821	
October	75,451	81,244	
November	70,394	77,236	
December	96,309	103,670	
<i>4th Quarter</i>	<u>242,154</u>	<u>262,150</u>	
<i>2nd Semester</i>	428,139	474,858	
Whole Year	788,276	906,971	

¹ Provisional**Table 4 :- Tourist arrivals by main purpose of visit,
January - June of 2007 and 2008**

Purpose of visit	Jan - June 2007	Jan - June 2008	% Change
Holiday	391,417	401,701	2.6
Business	15,455	16,603	7.4
Transit	16,199	20,978	29.5
Conference	2,242	2,541	13.3
Sports	393	672	71.0
Other & Not Stated	6,407	13,263	107.0
Total	432,113	455,758	5.5

Table 5 : - Tourist Arrivals by Country of Residence, January - June of 2007 and 2008

Country of residence	1st semester 2007	2008 ¹							% Change Jan - Jun 2007 to Jan - Jun 2008
		Jan	Feb	Mar	Apr	May	Jun	1st semester	
EUROPE	286,929	61,657	58,261	59,736	48,536	40,294	30,749	299,233	4.3
Austria	6,537	1,139	1,494	983	599	506	280	5,001	-23.5
Belgium	4,396	857	813	1,327	579	783	794	5,153	17.2
France	111,577	28,986	24,010	23,893	21,978	17,408	11,877	128,152	14.9
Germany	35,024	5,281	5,641	6,936	4,849	5,837	3,542	32,086	-8.4
Italy	38,804	8,467	7,854	7,729	5,725	2,306	2,580	34,661	-10.7
Netherlands	2,825	456	415	374	595	587	361	2,788	-1.3
Spain	4,375	451	615	947	504	677	1,007	4,201	-4.0
Sweden	5,413	1,570	1,293	951	259	158	162	4,393	-18.8
Switzerland	7,542	1,361	1,402	1,483	1,274	836	535	6,891	-8.6
United Kingdom	45,019	5,990	8,017	10,046	9,239	8,468	7,410	49,170	9.2
CIS ²	4,929	2,183	874	1,115	650	701	375	5,898	19.7
Other European	20,488	4,916	5,833	3,952	2,285	2,027	1,826	20,839	1.7
AFRICA	97,408	25,948	9,950	20,389	16,627	16,514	13,068	102,496	5.2
Comoros	311	41	55	72	55	61	48	332	6.8
Kenya	774	70	133	138	159	203	157	860	11.1
Malagasy Rep.	3,858	719	651	959	753	839	780	4,701	21.9
Reunion	45,015	17,397	2,994	9,122	4,076	8,149	3,462	45,200	0.4
Seychelles	5,762	583	673	806	963	826	1,004	4,855	-15.7
S. Africa, Rep. of	38,015	6,530	4,855	8,594	9,356	5,661	6,923	41,919	10.3
Zimbabwe	812	89	97	163	273	123	131	876	7.9
Other African	2,861	519	492	535	992	652	563	3,753	31.2
ASIA	33,864	4,367	6,973	5,335	4,506	8,376	7,236	36,793	8.6
Hong Kong SAR ³	343	33	88	50	21	45	81	318	-7.3
India	22,229	2,736	4,316	3,219	2,672	6,378	5,109	24,430	9.9
Japan	742	109	174	106	131	97	98	715	-3.6
Malaysia	965	86	161	88	123	108	122	688	-28.7
P. Rep. of China	3,750	555	1,112	742	530	582	552	4,073	8.6
Singapore	1,004	95	140	120	103	159	200	817	-18.6
United Arab Emirates	857	190	206	174	175	208	284	1,237	44.3
Other Asian	3,974	563	776	836	751	799	790	4,515	13.6
OCEANIA	8,653	1,475	1,344	1,475	1,936	1,535	1,460	9,225	6.6
Australia	8,235	1,394	1,285	1,372	1,867	1,452	1,387	8,757	6.3
Other Oceanian	418	81	59	103	69	83	73	468	12.0
AMERICA	4,919	1,078	1,200	2,134	1,154	891	1,037	7,494	52.3
USA	2,681	396	606	1,429	666	483	541	4,121	53.7
Canada	1,145	241	280	342	221	179	360	1,623	41.7
Other American	1,093	441	314	363	267	229	136	1,750	60.1
OTHER & N.STATED	340	54	35	83	78	95	172	517	52.1
All Countries	432,113	94,579	77,763	89,152	72,837	67,705	53,722	455,758	5.5

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

Table 6 :- Tourist arrivals, nights and receipts, 2005 - 2008

Year		Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
	2005	761,063	7,498	25,704
	2006	788,276	7,761	31,942
	2007	906,971	8,987 ²	40,687
2006	1st Qr.	209,248	1,939	9,068
	2nd Qr.	150,889	1,327	6,383
	1st Semester	360,137	3,266	15,451
	3rd Qr.	185,985	1,904	6,607
	4th Qr.	242,154	2,591	9,884
	2nd Semester	428,139	4,495	16,491
2007	1st Qr.	243,931	2,297 ²	10,791
	2nd Qr.	188,182	1,666 ²	8,961
	1st Semester	432,113	3,963 ²	19,752
	3rd Qr.	212,708	2,031 ²	8,652
	4th Qr.	262,150	2,993 ²	12,283
	2nd Semester	474,858	5,024 ²	20,935
2008 ³	1st Qr.	261,494	2,550	11,951
	2nd Qr.	194,264	1,750	10,219
	1st Semester	455,758	4,300	22,170

¹ Source: Bank of Mauritius² Revised³ Provisional**Table 7:- Hotels, rooms and bedplaces, 2005 - 2008**

Year	Number as at end of period			
	Hotels	Rooms	Bedplaces	
2005	99	10,497	21,072	
2006	98	10,666	21,403	
2007	97	10,857	21,788	
2006	1st Qr.	99	10,629	21,341
	2nd Qr.	95	10,278	20,564
	3rd Qr.	94	10,108	20,281
	4th Qr.	98	10,666	21,403
2007	1st Qr.	97	10,683	21,509
	2nd Qr.	88	9,126	18,256
	3rd Qr.	93	10,201	20,454
	4th Qr.	97	10,857	21,788
2008 ¹	1st Qr.	96	10,796	21,649
	2nd Qr.	94 ²	10,503	21,063

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

Table 8 :- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2006 - 2008

Month	All Hotels						"Large" Hotels					
	2006		2007		2008 ¹		2006		2007		2008 ¹	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	81	72	86	77	82	73	86	77	89	79	82	74
February	76	68	82	73	78	70	81	72	86	77	80	72
March	60	54	77	69	77	69	63	56	81	72	78	70
<i>1st Quarter</i>	<u>72</u>	<u>65</u>	<u>82</u>	<u>73</u>	<u>79</u>	<u>71</u>	<u>76</u>	<u>68</u>	<u>85</u>	<u>76</u>	<u>80</u>	<u>72</u>
April	58	52	75	67	72	65	61	55	80	72	75	67
May	51	46	71	64	66	60	54	48	74	67	68	61
June	45	41	59	53	49	43	47	42	62	56	49	44
<i>2nd Quarter</i>	<u>51</u>	<u>46</u>	<u>69</u>	<u>61</u>	<u>62</u>	<u>56</u>	<u>54</u>	<u>49</u>	<u>73</u>	<u>65</u>	<u>64</u>	<u>57</u>
<i>1st Semester</i>	62	55	75	67	71	63	65	59	79	71	72	65
July	56	50	71	63			58	52	74	67		
August	69	62	74	67			73	66	77	70		
September	67	60	75	67			71	63	78	70		
<i>3rd Quarter</i>	<u>64</u>	<u>57</u>	<u>73</u>	<u>66</u>			<u>67</u>	<u>60</u>	<u>77</u>	<u>69</u>		
<i>Jan. to Sep.</i>	63	56	75	67			66	59	78	70		
October	73	65	78	70			76	68	81	72		
November	78	70	83	74			81	73	85	77		
December	79	71	80	72			81	73	80	72		
<i>4th Quarter</i>	<u>77</u>	<u>69</u>	<u>81</u>	<u>73</u>			<u>80</u>	<u>71</u>	<u>83</u>	<u>74</u>		
<i>2nd Semester</i>	70	63	77	69			73	66	78	70		
Whole Year	66	59	76	68			69	62	78	70		

¹ Provisional

Table 9 :- Employment in the tourist industry as at end of March, 2004 - 2008

Year	2004	2005	2006	2007	2008¹
Establishments					
Restaurants	1,623	1,809	1,805	1,793	2,047
Hotels	16,853	19,226	19,536	20,233	21,439
Travel and Tourism	4,137	4,342	4,457	4,296	4,643
Total	22,613	25,377	25,798	26,322	28,129

¹ Provisional

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

BRIEF ON COMPILATION OF PASSENGER TRAFFIC STATISTICS

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 the Survey of Outgoing Tourists 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 of the unit 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

GLOSSARY OF TERMS

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.