

INTERNATIONAL TRAVEL & TOURISM

1st Semester 2009

Introduction

This issue of the Economic and Social Indicators presents data on International Travel and Tourism and hotel statistics for the first semester of 2009. 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 2009 totalled 1,135,134, made up of 552,670 arrivals and 582,464 departures. Compared to the same period of year 2008, these figures represent decreases of 7.9% in arrivals and 6.6% in departures. Movements by sea accounted for 6.2% of arrivals and 5.9% of departures. Further details on monthly figures are given in Table 1.

2.2 Excursionists

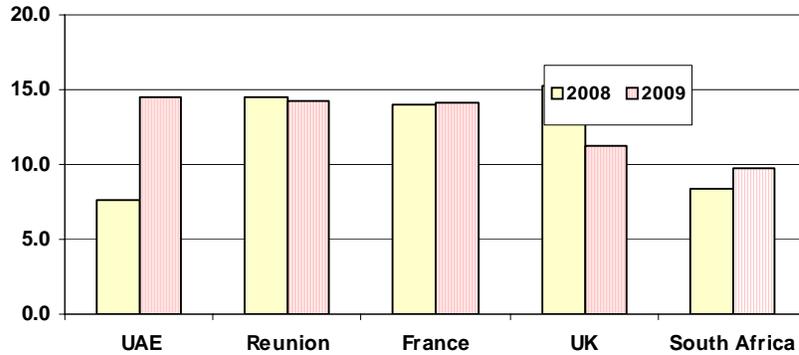
Total arrivals by air included 6,375 "excursionists", i.e. visitors arriving and leaving on the same day. Of these excursionists, 2,497 (39.2%) came from Reunion Island and 1,921 (30.1%), from France. Total arrivals by sea included 28,784 "cruise excursionists" (18,951 passengers and 9,833 crews) aboard 22 cruise ships, which visited our port during the first half of 2009.

2.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad went down by 16.7% to 89,170 compared to 107,070 for the first semester of 2008 (Table 2). The following changes were observed in the number of Mauritian departures by major country of disembarkation: United Arab Emirates (+58.9%), Republic of South Africa (-2.7%), France (-15.8%), Reunion Island (-17.6%), Seychelles (-20.6%), Singapore (-21.8%), Australia (-25.5%), India (-25.9%), Hong Kong (-26.5%), Malagasy Republic (-32.2%) and United Kingdom (-38.7%).

Figure 1 shows the percentage distribution of Mauritian departures by major country of disembarkation for the period January to June of 2008 and 2009.

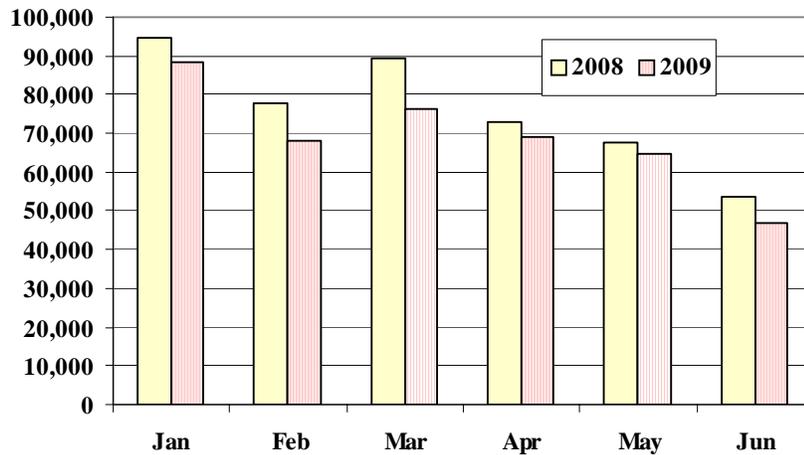
Figure 1 - Percentage distribution of Mauritian departures by major country of disembarkation, January - June of 2008 and 2009



2.4 Tourist Arrivals

Tourist arrivals for the first semester of 2009 fell by 9.3% to reach 413,504 compared to 455,758 for the same period of 2008. Figure 2 shows monthly tourist arrivals for January to June of 2008 and 2009. Further details on tourist arrivals are given in Tables 3 to 6.

Figure 2 - Monthly Tourist Arrivals, January - June of 2008 and 2009



Around 94% of the tourists came for holidays while 3.2% were on business/conference trips and another 1.0% was in transit (Table 4).

Arrivals from Europe, which accounted for 67.4% of total tourist arrivals, went down by 6.9% to reach 278,621 during the first semester of 2009 against 299,233 in the corresponding period of 2008. Arrivals from France, our leading market representing 31.6% of total tourist arrivals and 46.9% of the European market, rose by 2.0% to attain 130,708 during this period. However, decreases were noted in arrivals from the other major generating countries: United Kingdom (-6.9%), Italy (-14.3%) and Germany (-19.1%). Among the remaining European countries, decreases were also noted: Spain (-2.9%), Netherlands (-5.6%), Commonwealth of Independent States (CIS) (-8.6%), Switzerland (-10.8%), Belgium (-11.1%), Austria (-13.0%) and Sweden (-32.1%).

During the first semester of 2009, arrivals from Africa, with a share of 22.3% of total tourist arrivals, contracted by 10.0% to 92,273. Arrivals from Reunion Island rose by 8.0% to 48,833 while those from Republic of South Africa went down by 22.4%. Declines in arrivals from other African countries were as follows: Comoros (-19.9%), Malagasy Republic (-21.1%), Kenya (-35.0%), Zimbabwe (-37.2%) and Seychelles (-37.5%).

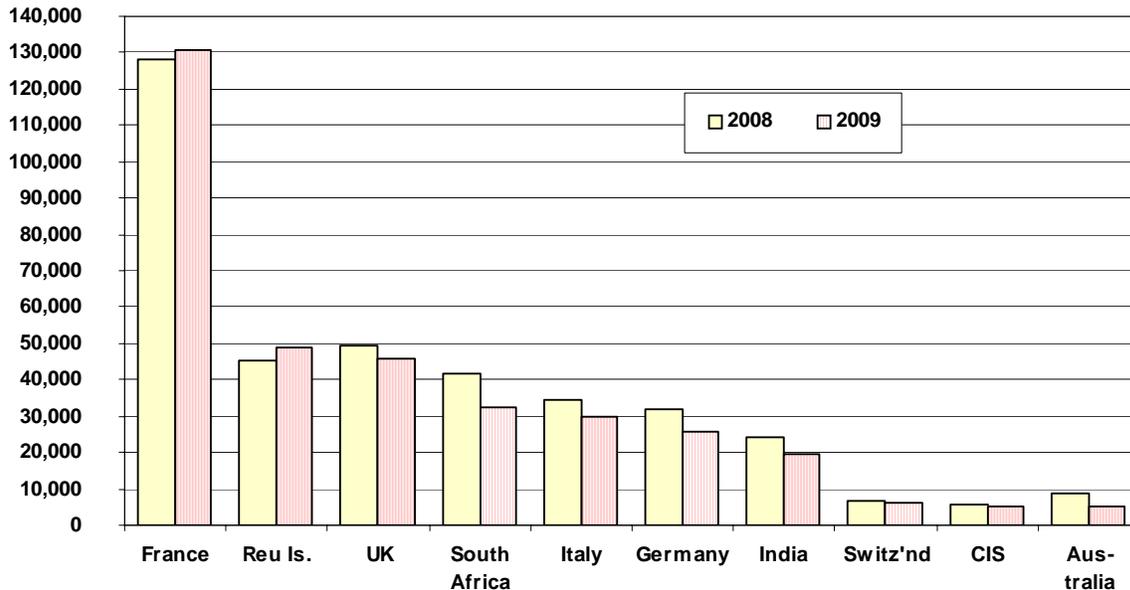
For the reference period, tourist arrivals from the Asian market, which represented 7.2% of total tourist arrivals, went down by 18.8% to reach 28,859. Arrivals from India, our major source on this continent, contracted by 19.8% to reach 19,598. Decreases in arrivals from other Asian countries were as follows: People's Republic of China (-10.0%), United Arab Emirates (-17.1%), Japan (-18.9%), Singapore (-23.4%), Malaysia (-26.0%) and Hong Kong (-35.2%).

Arrivals from Oceania decreased by 40.9% from 9,225 to 5,451 due to declines in arrivals of 41.9% from Australia and 21.8% from the other Oceanian countries.

Arrivals from the continent of America shrunk by 8.3% as a result of a decrease of 9.4% from U.S.A, 23.5% from "Other American" countries offset by an increase of 11.0% in arrivals from Canada.

Tourist arrivals from top ten markets for the period January to June of 2008 and 2009 are given in Figure 3.

**Figure 3 - Tourist Arrivals from Top Ten Markets,
January - June of 2008 and 2009**



3. Tourist nights

Total tourist nights spent in the country during the first six months of 2009 is estimated at 3.9 million, representing a decrease of 7.1% over the same period of the preceding year (Table 6).

4. Hotel Statistics

At the end of June 2009, there was a total of 97 registered hotels in operation. Owing to renovation, ten hotels were not operational. The total room capacity for these registered hotels was 10,486 with 21,362 bedplaces (Table 7). For the first semester of 2009, the room occupancy rate for all hotels averaged 59% while the bed occupancy rate was 52% compared to 71% and 63% respectively during the corresponding period of 2008 (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 42 (43% of all registered hotels). These hotels had a room capacity of 7,972 with 16,252 bedplaces, representing 76% of both total room capacity and total bedplaces. The average room occupancy rate for these hotels for the first six months of 2009 was 59% and bed occupancy rate averaged 52% compared to 72% and 65% respectively for the first half of 2008 (Table 8).

5. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first semester of 2009 amounted to Rs 18,249 million, i.e. a decrease of 17.7% compared to Rs 22,170 million for the same period of 2008 (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 26,922 at the end of March 2009 showing a decrease of 6.4% over the figure of 28,764 for March 2008. Of this number, 76.3% or 20,531 were engaged in hotels (Table 9).

7. Forecast Year 2009

Based on information gathered from the main stakeholders of the sector and a decrease of 9.3% observed in tourist arrivals during the first semester of 2009, the initial forecast of 835,000 tourist arrivals (-10.3%) for the year 2009 is maintained.

According to the Bank of Mauritius, tourism receipts for the year 2009 will be around Rs 38.2 billion (-7.3%) compared to Rs 41.2 billion a year earlier.

Central Statistics Office

Ministry of Finance and Economic Empowerment

Port Louis

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Contact person:

Mr. M. Lan Pin Wing
Senior Statistical Officer
Ministry of Tourism, Leisure and
External Communications
3rd Floor, Victoria House
Port Louis
Tel: 211-9042
Fax: 210-3901
Email: mlan-pin-wing@mail.gov.mu

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

Table 1:- Passenger Traffic ¹ by month, 2007 - 2009

Month	2007		2008		2009 ²	
	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures
January	114,503	133,861	125,228	144,490	117,415	138,314
February	86,655	86,343	98,424	99,897	90,042	90,246
March	99,841	103,396	115,987	122,014	99,673	103,146
<u>1st Quarter</u>	<u>300,999</u>	<u>323,600</u>	<u>339,639</u>	<u>366,401</u>	<u>307,130</u>	<u>331,706</u>
April	92,982	94,269	96,210	97,364	91,269	91,483
May	83,963	86,831	87,375	96,647	83,609	89,204
June	74,534	69,782	76,627	63,360	70,662	70,071
<u>2nd Quarter</u>	<u>251,479</u>	<u>250,882</u>	<u>260,212</u>	<u>257,371</u>	<u>245,540</u>	<u>250,758</u>
<i>1st Semester</i>	<i>552,478</i>	<i>574,482</i>	<i>599,851</i>	<i>623,772</i>	<i>552,670</i>	<i>582,464</i>
July	106,670	90,663	112,508	91,931		
August	96,148	105,680	98,044	113,039		
September	85,315	87,007	84,194	83,868		
<u>3rd Quarter</u>	<u>288,133</u>	<u>283,350</u>	<u>294,746</u>	<u>288,838</u>		
<i>Jan. to Sep.</i>	<i>840,611</i>	<i>857,832</i>	<i>894,597</i>	<i>912,610</i>		
October	101,362	101,361	104,069	101,959		
November	99,885	102,522	98,663	93,176		
December	135,373	114,415	129,099	99,004		
<u>4th Quarter</u>	<u>336,620</u>	<u>318,298</u>	<u>331,831</u>	<u>294,139</u>		
<i>2nd Semester</i>	<i>624,753</i>	<i>601,648</i>	<i>626,577</i>	<i>582,977</i>		
Whole Year	1,177,231	1,176,130	1,226,428	1,206,749		

¹ Excluding inter islands traffic² Provisional

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
January - June of 2008 and 2009**

Country of disembarkation	Jan - June 2008	Jan - June 2009	% Change
EUROPE	36,456	26,217	-28.1
France	14,962	12,602	-15.8
Germany	1,583	1,119	-29.3
Italy	2,117	1,890	-10.7
Switzerland	1,222	617	-49.5
United Kingdom	16,302	9,985	-38.7
Other European	270	4	-98.5
AFRICA	33,762	28,219	-16.4
Malagasy Republic	4,617	3,131	-32.2
Reunion	15,514	12,782	-17.6
Seychelles	3,724	2,958	-20.6
S. Africa, Rep. of	9,023	8,779	-2.7
Zimbabwe	-	-	-
Other African	884	569	-35.6
ASIA	30,026	29,723	-1.0
Hong Kong SAR ¹	5,820	4,277	-26.5
India	10,309	7,641	-25.9
Malaysia	859	1,038	20.8
Singapore	4,831	3,778	-21.8
Saudi Arabia	9	1	-88.9
United Arab Emirates	8,163	12,969	58.9
Other Asian	35	19	-45.7
OCEANIA	6,603	4,921	-25.5
Australia	6,603	4,921	-25.5
Other Oceanian	-	-	-
AMERICA	14	5	-64.3
U.S.A	5	-	-100.0
Canada	9	2	-77.8
Other American	-	3	-
NOT STATED	209	85	-59.3
All Countries	107,070	89,170	-16.7

¹ Special Administrative Region of China

Table 3:- Tourist arrivals by month, 2007 - 2009

Month	Number		
	2007	2008	2009
January	91,628	94,579	88,591 ¹
February	72,338	77,763	67,892 ¹
March	79,965	89,152	76,425 ¹
<u>1st Quarter</u>	<u>243,931</u>	<u>261,494</u>	<u>232,908 ¹</u>
April	70,297	72,837	68,969 ²
May	65,301	67,705	64,761 ²
June	52,584	53,722	46,866 ²
<u>2nd Quarter</u>	<u>188,182</u>	<u>194,264</u>	<u>180,596 ²</u>
1st Semester	432,113	455,758	413,504 ²
July	77,225	81,169	
August	69,941	71,605	
September	65,542	65,632	
<u>3rd Quarter</u>	<u>212,708</u>	<u>218,406</u>	
Jan. to Sep.	644,821	674,164	
October	81,244	83,524	
November	77,236	75,380	
December	103,670	97,388	
<u>4th Quarter</u>	<u>262,150</u>	<u>256,292</u>	
2nd Semester	474,858	474,698	
Whole Year	906,971	930,456	

¹ Revised² Provisional**Table 4 :- Tourist arrivals by main purpose of visit,
January - June of 2008 and 2009**

Purpose of visit	Jan - June 2008	Jan - June 2009 ¹	% Change
Holiday	401,701	387,272	-3.6
Business	16,603	12,210	-26.5
Transit	20,978	4,032	-80.8
Conference	2,541	1,113	-56.2
Sports	672	745	10.9
Other & Not Stated	13,263	8,132	-38.7
Total	455,758	413,504	-9.3

¹ Provisional

Table 5 : - Tourist Arrivals by Country of Residence, January - June of 2008 and 2009

Country of residence	1st semester 2008	2009 ¹							% Change Jan-Jun 2008 to Jan-Jun 2009
		Jan	Feb	Mar	Apr	May	Jun	1st semester ⁴	
EUROPE	299,233	56,774	53,062	53,152	46,488	40,548	28,597	278,621	-6.9
Austria	5,001	1,279	1,056	607	771	419	219	4,351	-13.0
Belgium	5,153	747	681	668	935	927	623	4,581	-11.1
France	128,152	26,688	23,732	26,228	22,438	19,377	12,245	130,708	2.0
Germany	32,086	5,780	4,675	4,321	4,528	4,024	2,616	25,944	-19.1
Italy	34,661	7,042	5,999	6,017	3,947	3,432	3,274	29,711	-14.3
Netherlands	2,788	335	310	483	660	495	350	2,633	-5.6
Spain	4,201	587	618	619	633	721	901	4,079	-2.9
Sweden	4,393	933	1,027	534	238	127	122	2,981	-32.1
Switzerland	6,891	1,384	1,228	1,001	1,319	749	469	6,150	-10.8
United Kingdom	49,170	6,212	8,865	8,486	8,053	8,082	6,070	45,768	-6.9
CIS ²	5,898	1,850	688	1,210	719	576	345	5,388	-8.6
Other European	20,839	3,937	4,183	2,978	2,247	1,619	1,363	16,327	-21.7
AFRICA	102,496	25,304	8,271	16,817	15,304	16,322	10,255	92,273	-10.0
Comoros	332	29	38	37	32	83	47	266	-19.9
Kenya	860	82	89	110	87	101	90	559	-35.0
Malagasy Rep.	4,701	619	650	645	730	594	473	3,711	-21.1
Reunion	45,200	17,272	3,050	10,069	4,812	9,977	3,653	48,833	8.0
Seychelles	4,855	419	467	561	663	384	540	3,034	-37.5
S. Africa, Rep. of	41,919	6,351	3,616	4,934	8,011	4,554	5,071	32,537	-22.4
Zimbabwe	876	88	50	89	190	69	64	550	-37.2
Other African	3,753	444	311	372	779	560	317	2,783	-25.8
ASIA	36,793	4,015	4,027	4,352	4,810	6,307	6,348	29,859	-18.8
Hong Kong SAR ³	318	40	46	30	17	27	46	206	-35.2
India	24,430	2,044	2,238	2,487	3,062	4,959	4,808	19,598	-19.8
Japan	715	112	118	112	86	79	73	580	-18.9
Malaysia	688	94	78	84	78	71	104	509	-26.0
P. Rep. of China	4,073	907	795	676	545	352	391	3,666	-10.0
Singapore	817	75	65	65	139	115	167	626	-23.4
United Arab Emirates	1,237	206	130	134	176	157	222	1,025	-17.1
Other Asian	4,515	537	557	764	707	547	537	3,649	-19.2
OCEANIA	9,225	1,230	770	881	1,151	775	644	5,451	-40.9
Australia	8,757	1,166	727	794	1,092	711	595	5,085	-41.9
Other Oceanian	468	64	43	87	59	64	49	366	-21.8
AMERICA	7,494	1,218	1,731	1,165	1,151	737	871	6,873	-8.3
USA	4,121	546	1,180	610	628	378	391	3,733	-9.4
Canada	1,623	319	289	336	296	199	362	1,801	11.0
Other American	1,750	353	262	219	227	160	118	1,339	-23.5
OTHER & NOT STATED	517	50	31	58	65	72	151	427	-17.4
All Countries	455,758	88,591	67,892	76,425	68,969	64,761	46,866	413,504	-9.3

¹ Provisional² Commonwealth of Independent States (Ex Soviet Union Countries)³ Special Administrative Region of China⁴ Estimates based on nationality

Table 6 :- Tourist arrivals, nights and receipts, 2006 - 2009

Year		Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
	2006	788,276	7,761	31,942
	2007	906,971	8,987	40,687
	2008	930,456	9,218 ³	41,213
2007	1st Qr.	243,931	2,297	10,791
	2nd Qr.	188,182	1,666	8,961
	1st Semester	432,113	3,963	19,752
	3rd Qr.	212,708	2,031	8,652
	4th Qr.	262,150	2,993	12,283
	2nd Semester	474,858	5,024	20,935
2008	1st Qr.	261,494	2,491 ³	11,951
	2nd Qr.	194,264	1,709 ³	10,219
	1st Semester	455,758	4,200 ³	22,170
	3rd Qr.	218,406	2,249 ³	8,631
	4th Qr.	256,292	2,769 ³	10,412
	2nd Semester	474,698	5,018 ³	19,043
2009 ²	1st Qr.	232,908	2,275	10,265
	2nd Qr.	180,596	1,625	7,984
	1st Semester	413,504	3,900	18,249

¹ Source: Bank of Mauritius² Provisional³ Revised**Table 7:- Hotels, rooms and bedplaces, 2006 - 2009**

Year	Number as at end of period			
	Hotels	Rooms	Bedplaces	
2006	98	10,666	21,403	
2007	97	10,857	21,788	
2008	102	11,488	23,095	
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	1st Qr.	96	10,796	21,649
	2nd Qr.	94	10,503	21,063
	3rd Qr.	99	10,933	21,939
	4th Qr.	102	11,488	23,095
2009 ¹	1st Qr.	102	11,444	23,148
	2nd Qr.	97 ²	10,486	21,362

¹ Provisional² Excluding ten hotels not operational because of renovation works

Table 8 :- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2007 - 2009

Month	All Hotels						"Large" Hotels					
	2007		2008		2009 ¹		2007		2008		2009 ¹	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	86	77	82	73	69	62	89	79	82	74	69	62
February	82	73	78	70	60	53	86	77	80	72	60	54
March	77	69	77	69	59	52	81	72	78	70	59	53
<i>1st Quarter</i>	<u>82</u>	<u>73</u>	<u>79</u>	<u>71</u>	<u>63</u>	<u>56</u>	<u>85</u>	<u>76</u>	<u>80</u>	<u>72</u>	<u>63</u>	<u>57</u>
April	75	67	72	65	59	53	80	72	75	67	61	54
May	71	64	66	60	58	52	74	67	68	61	59	52
June	59	53	49	43	45	39	62	56	49	44	44	39
<i>2nd Quarter</i>	<u>69</u>	<u>61</u>	<u>62</u>	<u>56</u>	<u>54</u>	<u>48</u>	<u>73</u>	<u>65</u>	<u>64</u>	<u>57</u>	<u>55</u>	<u>49</u>
<i>1st Semester</i>	75	67	71	63	59	52	79	71	72	65	59	52
July	71	63	61	55			74	67	62	56		
August	74	67	65	58			77	70	67	60		
September	75	67	65	58			78	70	68	61		
<i>3rd Quarter</i>	<u>73</u>	<u>66</u>	<u>64</u>	<u>57</u>			<u>77</u>	<u>69</u>	<u>66</u>	<u>59</u>		
<i>Jan. to Sep.</i>	75	67	68	61			78	70	70	63		
October	78	70	71	64			81	72	73	65		
November	83	74	69	62			85	77	71	63		
December	80	72	69	62			80	72	70	63		
<i>4th Quarter</i>	<u>81</u>	<u>73</u>	<u>71</u>	<u>63</u>			<u>83</u>	<u>74</u>	<u>72</u>	<u>64</u>		
<i>2nd Semester</i>	77	69	67	60			78	70	68	61		
Whole Year	76	68	68	61			78	70	70	62		

¹ Provisional

Table 9 :- Employment in the tourist industry as at end of March, 2005 - 2009

Year	2005	2006	2007¹	2008¹	2009²
Establishments					
Restaurants	1,809	1,805	2,023	2,262	2,309
Hotels	19,226	19,536	20,233	22,314	20,531
Travel and Tourism	4,342	4,457	4,296	4,188	4,082
Total	25,377	25,798	26,552	28,764	26,922

¹ Revised

² Provisional

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

Figure 1 - Percentage distribution of Mauritian departures
by major country of disembarkation,
January - June of 2008 and 2009

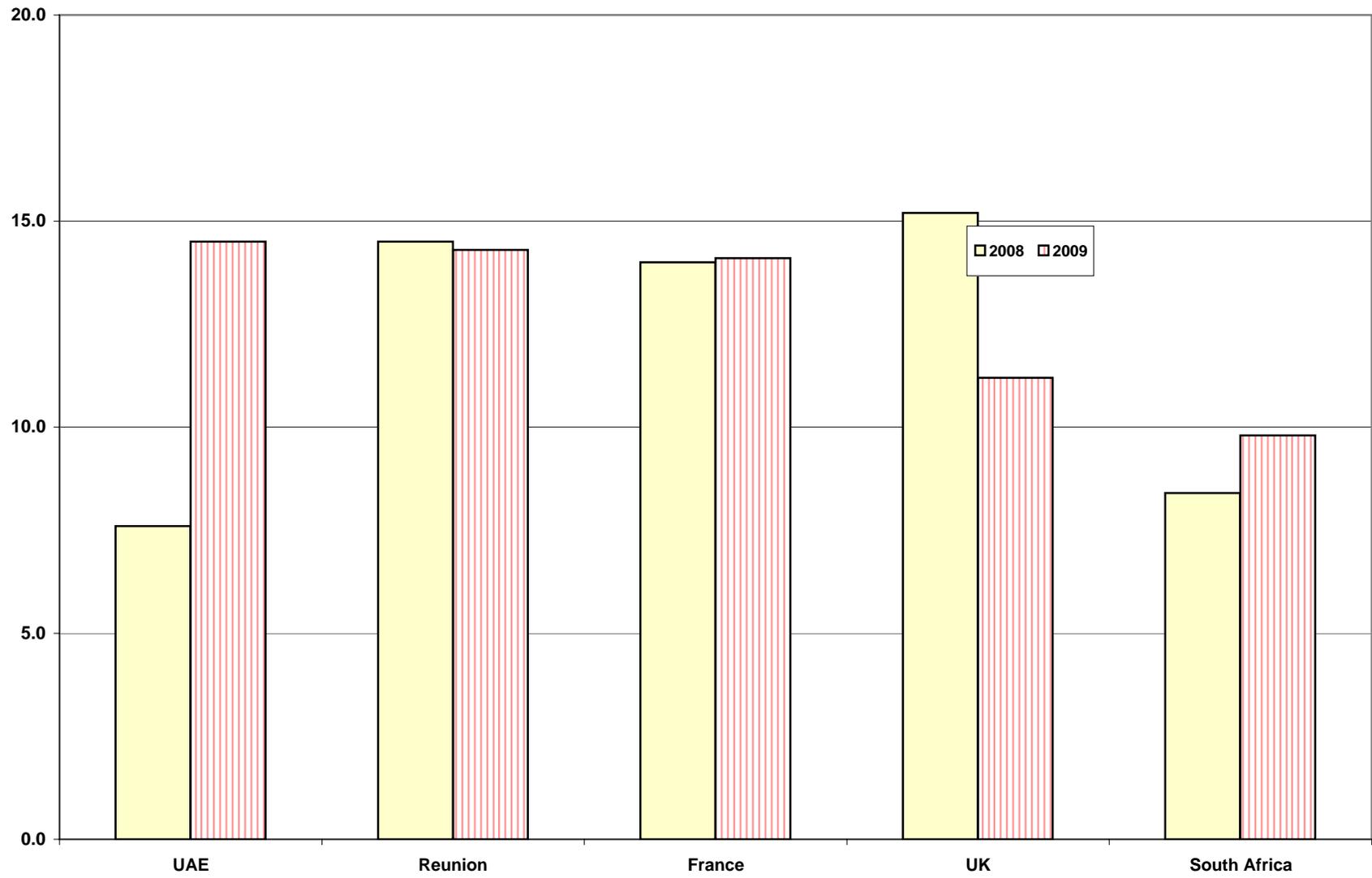
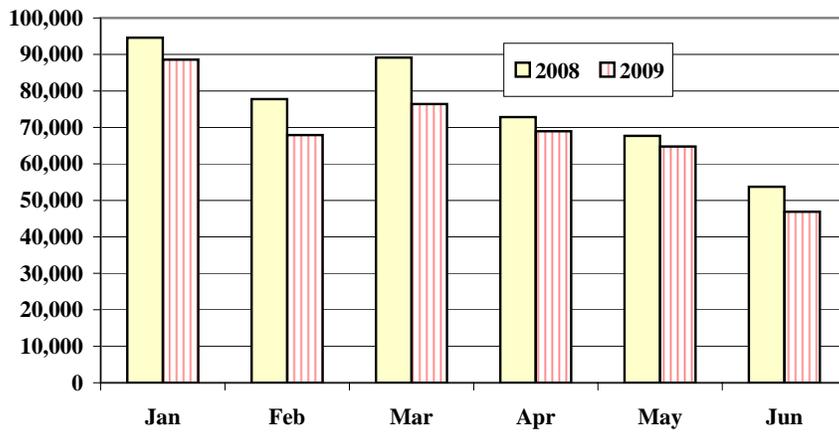


Figure 2:- Tourist arrivals Jan - June 2008 - 2009

Month	2008	2009
Jan	94,579	88,591
Feb	77,763	67,892
Mar	89,152	76,425
Apr	72,837	68,969
May	67,705	64,761
Jun	53,722	46,866
Total	455,758	413,504

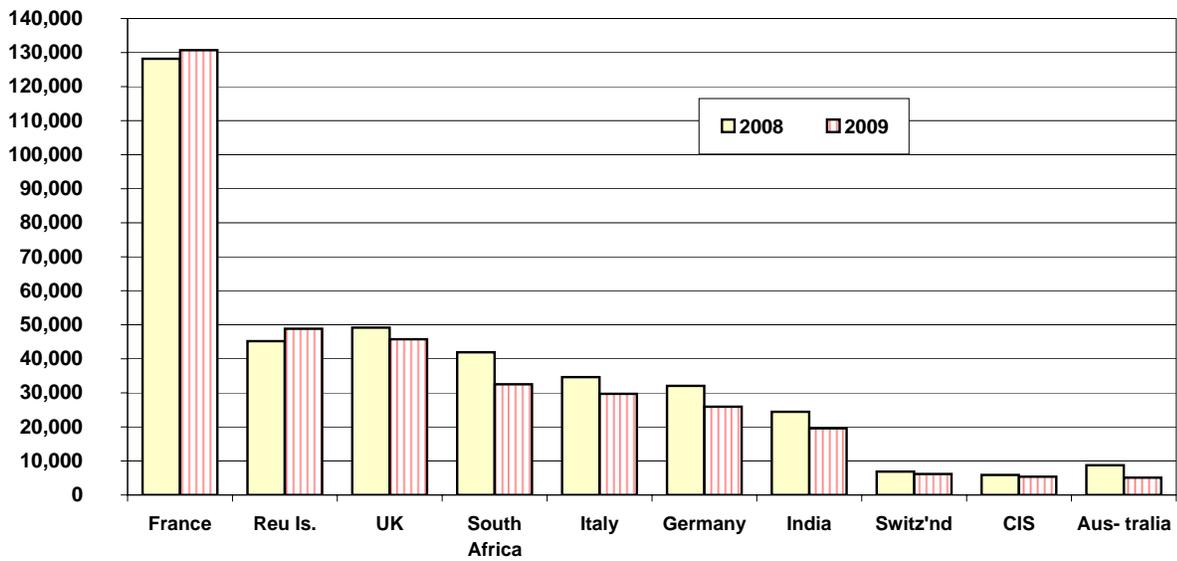
**Figure 2 - Monthly Tourist Arrivals,
January - June of 2008 and 2009**



**Figure 3 : - Tourist Arrivals from top ten markets, 2007/2008
1st Semester**

	Country of residence	2008	2009
1	France	128,152	130,708
2	Reu ls.	45,200	48,833
3	UK	49,170	45,768
4	South Africa	41,919	32,537
5	Italy	34,661	29,711
6	Germany	32,086	25,944
7	India	24,430	19,598
8	Switz'nd	6,891	6,150
9	CIS	5,898	5,388
10	Aus- tralia	8,757	5,085

**Figure 3 - Tourist Arrivals from Top Ten Markets,
January - June of 2008 and 2009**



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:

- (i) Monthly tourist arrivals (by mid of each month)
- (ii) Quarterly Economic and Social Indicators on International Travel and Tourism (with a lag of seven weeks)
- (iii) Quarterly tourism statistics (Pamphlet)
- (iv) Digest of International Travel and Tourism (August)
- (v) Handbook of statistical data on tourism (August)
- (vi) 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.