

INTERNATIONAL TRAVEL & TOURISM

1st Quarter 2011

Introduction

This issue of the Economic and Social Indicators presents data on International Travel and Tourism and hotel statistics for the first quarter of 2011. 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 quarter of 2011 totalled 721,703, made up of 345,626 arrivals and 376,077 departures. Compared to the same period of 2010, these figures represent increases of 3.1% in arrivals and 2.8% in departures. Total passenger arrivals included 319,708 (92.5%) by air and 25,918 (7.5%) by sea, while total passenger departures consisted of 350,088 (93.1%) by air and 25,989 (6.9%) by sea. Total arrivals by sea included 23,140 "cruise travellers" (around 11,290 tourists, 4,440 excursionists, 270 Mauritian residents and 7,140 crews) aboard 13 cruise ships, which visited our port during the first quarter of 2011.

2.2 Excursionists

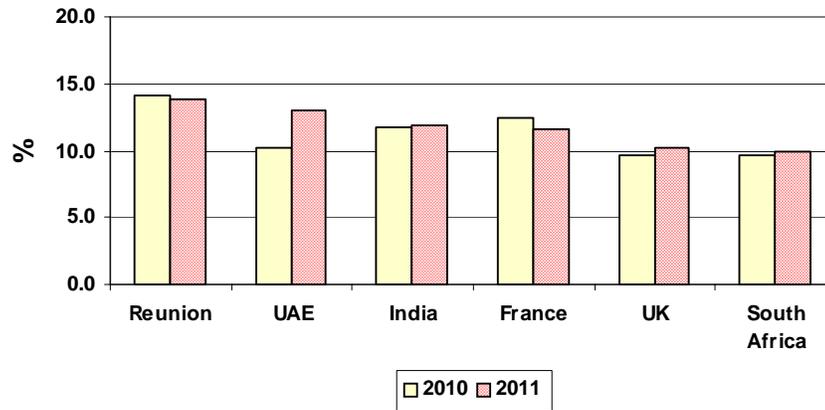
Total excursionists, i.e. visitors arriving and leaving on the same day, numbered 6,789, of which 3,156 (46.5%) arrived by air and 3,633 (53.5%) by sea. Excursionists arriving by air included 1,017 (32.2%) from France and 863 (27.3%) from Reunion Island. Excursionists by sea were mainly from: Australia (1,322 or 36.4%), United Kingdom (1,097 or 30.2%) and United States of America (828 or 22.8%).

2.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad increased by 4.4% to 51,744 from 49,560 for the first three months of 2010 and accounted for 13.8% of total departures (Table 2). The following changes were observed in the number of Mauritian departures by major country of disembarkation: United Arab Emirates (+34.1%), Australia (+17.1%), Singapore (+11.0%), United Kingdom (+9.0%), Republic of South Africa (+8.0%), Malagasy Republic (+5.6%), India (+5.0%), Reunion Island (+2.0%), France (-2.9%), Hong Kong (-14.1%) and Seychelles (-42.8%).

Figure 1 shows the percentage distribution of Mauritian departures by major country of disembarkation for the period January to March of 2010 and 2011.

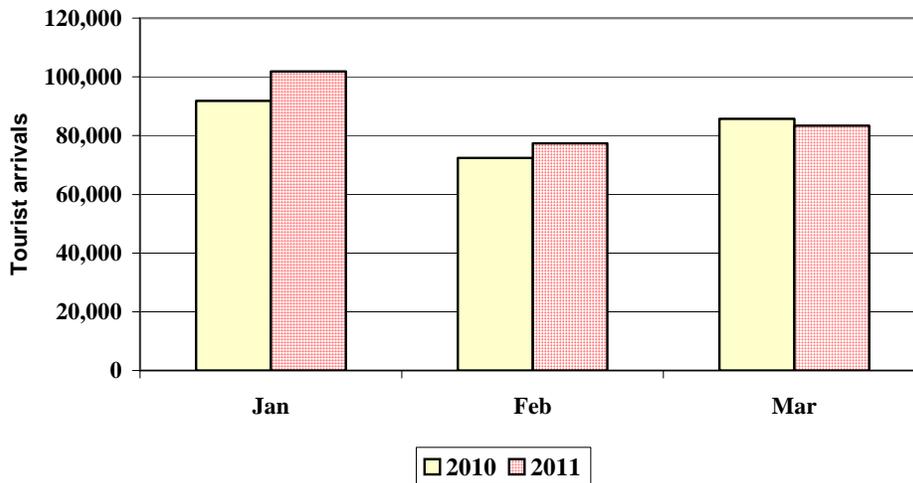
Figure 1 - Percentage distribution of Mauritian departures by major country of disembarkation, January - March of 2010 and 2011



2.4 Tourist Arrivals

Tourist arrivals for the first quarter of 2011 stood at 262,626, representing an increase of 5.1% compared to 249,971 in the corresponding quarter of 2010. Figure 2 shows monthly tourist arrivals for the period January to March of 2010 and 2011. Further details on tourist arrivals are given in Tables 3 to 6.

Figure 2 - Monthly Tourist Arrivals, January - March of 2010 and 2011



Around 94% of the tourists came for holidays while 3.7% were on business/conference trips and another 0.8% were in transit (Table 4).

Tourist arrivals from Europe, which accounted for 67.2% of total tourist arrivals, increased by 2.3% to reach 176,460 during the first quarter of 2011 against 172,528 in the corresponding quarter of 2010. Arrivals from France, the leading market representing 35.1% of total tourist arrivals and 52.2% of the European market, rose by 8.3% to attain 92,097 during this quarter. The following decreases in tourist arrivals were recorded for the other major generating countries of Europe: Germany (-2.0 %), United Kingdom (-13.8%) and Italy (-15.3%). As regards the remaining European countries, the following changes were noted: Russian Federation (+120.1%), Switzerland (+37.8%), Belgium (+15.5%), Netherlands (+4.1%), Sweden (-1.9%), Austria (-2.9%) and Spain (-3.6%).

During the first quarter of 2011, tourist arrivals from Africa, with a share of 23.2% of total tourist arrivals, expanded by 7.5% to 61,054. Arrivals from Reunion Island increased by 9.9% to 36,707 and those from Republic of South Africa by 0.5% to 17,684. The following increases in arrivals were registered for the other African countries: Comoros (+49.7%), Kenya (+27.0%), Zimbabwe (+22.6%), Malagasy Republic (+12.9%) and Seychelles (+2.2%).

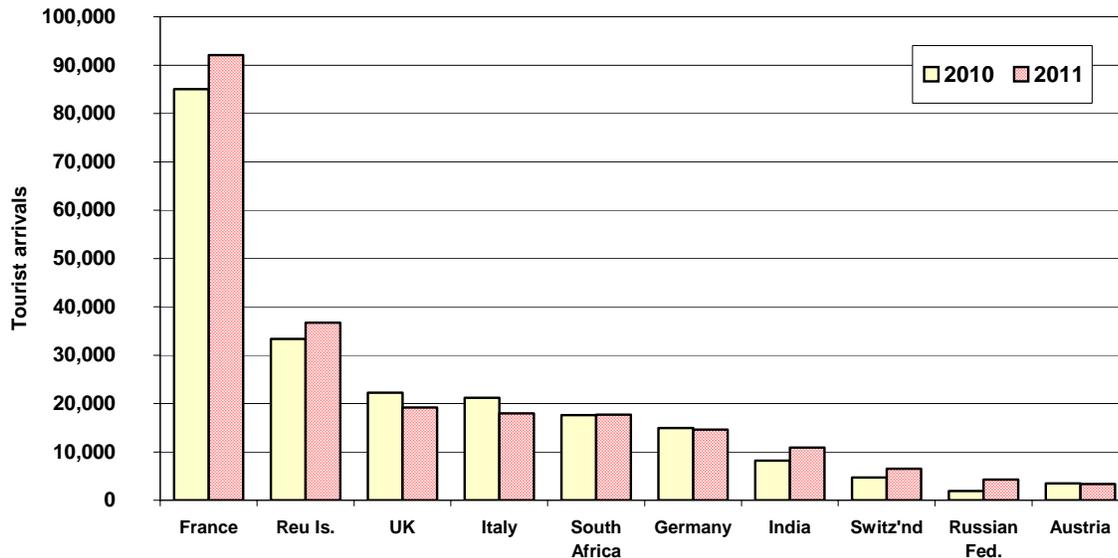
For the quarter under review, tourist arrivals from the Asian market, which represented 7.0% of total tourist arrivals, went up by 29.2% to reach 18,406. Arrivals from India, the major source on this continent, grew by 33.4% to 10,904. The performance in arrivals from other Asian countries was as follows: Malaysia (+34.4%), People's Republic of China (+30.1%), Singapore (+26.6%), Hong Kong (+18.2%), United Arab Emirates (13.6%) and Japan (-19.8%).

Tourist arrivals from Oceania went up by 39.7% from 2,129 to 2,974 due to increases in arrivals of 43.0 % from Australia and 1.8% from the other Oceanian countries.

Tourist arrivals from the continent of America decreased by 13.8% being the net result of an increase of 9.4% from Canada and decreases of 29.4% and 1.8% in arrivals from U.S.A and Other American countries respectively.

Tourist arrivals from top ten markets for the period January to March of 2010 and 2011 are given in Figure 3.

Figure 3 - Tourist Arrivals from Top Ten Markets, January - March of 2010 and 2011



3. Tourist Nights

Total tourist nights spent in the country during the first three months of 2011 is estimated at 3.0 million, representing an increase of 1.9% over the same period of 2010 (Table 6).

4. Hotel Statistics

At the end of March 2011, there was a total of 115 registered hotels of which 112 were in operation and three were not operating due to renovation works. The total room capacity for these registered hotels in operation was 12,082 with 24,664 bedplaces (Table 7). For the first quarter of 2011, the room occupancy rate for all hotels averaged 69% compared to 67% in the corresponding quarter of 2010 while the bed occupancy rate was 61% against 59% for the first quarter of 2010 (Table 8).

“Large” hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 50 (45% of all registered hotels in operation). These hotels had a room capacity of 9,070 with 18,567 bedplaces, representing 75% of both total room capacity and total bedplaces. The average room occupancy rate for these hotels for the first three months of 2011 was 71% and bed occupancy rate averaged 62% compared to 69% and 61% respectively for the first quarter of 2010 (Table 8).

5. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first quarter of 2011 were Rs 11,949 million, i.e. an increase of 8.4% compared to Rs 11,021 million for the same period of 2010 (Table 6).

6. Employment

According to the Survey of Employment and Earnings conducted by the Central Statistics Office, direct employment in hotels, restaurants and travel and tourism establishments employing 10 persons or more stood at 27,161 at the end of March 2010, showing an increase of 0.6% over the figure of 27,002 for March 2009. Of this number, 20,847 or 76.8 % were engaged in hotels (Table 9).

7. Forecast Year 2011

Based on data available on tourist arrivals and information gathered from stakeholders, the forecast of 980,000 tourist arrivals for the year 2011 is maintained, representing an increase of 4.8% over the figure of 934,827 in 2010.

According to the Bank of Mauritius, tourism receipts for the year 2011 will be around Rs 42,500 million (+7.7 %) compared to Rs 39,456 million in 2010.

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Table 1:- Passenger Traffic ¹ by month, 2009 - 2011

Month	2009		2010		2011 ²	
	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures
January	117,415	138,314	119,807	145,268	133,081	156,319
February	90,042	90,246	91,943	92,398	103,237	102,527
March	99,673	103,146	123,358	128,101	109,308	117,231
<u>1st Quarter</u>	<u>307,130</u>	<u>331,706</u>	<u>335,108</u>	<u>365,767</u>	<u>345,626</u>	<u>376,077</u>
April	91,269	91,483	87,878	94,542		
May	83,609	89,204	91,329	95,350		
June	70,662	70,071	76,838	75,521		
<u>2nd Quarter</u>	<u>245,540</u>	<u>250,758</u>	<u>256,045</u>	<u>265,413</u>		
1st Semester	552,670	582,464	591,153	631,180		
July	98,683	84,366	107,678	93,775		
August	89,460	102,778	93,893	103,907		
September	78,928	78,452	87,109	86,564		
<u>3rd Quarter</u>	<u>267,071</u>	<u>265,596</u>	<u>288,680</u>	<u>284,246</u>		
Jan. to Sep.	819,741	848,060	879,833	915,426		
October	100,677	98,938	110,219	107,543		
November	101,626	98,919	110,118	108,784		
December	134,535	107,652	151,868	125,255		
<u>4th Quarter</u>	<u>336,838</u>	<u>305,509</u>	<u>372,205</u>	<u>341,582</u>		
2nd Semester	603,909	571,105	660,885	625,828		
Whole Year	1,156,579	1,153,569	1,252,038	1,257,008		

¹ Excluding inter islands traffic² Provisional

**Table 2 : - Departure of Mauritian residents by country of disembarkation,
1st Quarter of 2010 and 2011**

Country of disembarkation	2010	2011	% Change
EUROPE	13,546	13,738	1.4
France	6,150	5,974	-2.9
Germany	666	697	4.7
Italy	1,482	1,417	-4.4
Switzerland	434	395	-9.0
United Kingdom	4,814	5,249	9.0
Other European	0	6	-
AFRICA	16,221	16,258	0.2
Malagasy Republic	1,942	2,050	5.6
Reunion	6,992	7,135	2.0
Seychelles	2,112	1,209	-42.8
S. Africa, Rep. of	4,790	5,172	8.0
Zimbabwe	-	-	-
Other African	385	692	79.7
ASIA	16,984	18,588	9.4
Hong Kong SAR ¹	3,107	2,670	-14.1
India	5,833	6,123	5.0
Malaysia	646	424	-34.4
Singapore	2,347	2,605	11.0
Saudi Arabia	-	-	-
United Arab Emirates	5,045	6,763	34.1
Other Asian	6	3	-50.0
OCEANIA	2,678	3,135	17.1
Australia	2,678	3,135	17.1
Other Oceanian	-	-	-
AMERICA	0	4	-
U.S.A	-	-	-
Canada	0	0	-
Other American	0	4	-
NOT STATED	131	21	-84.0
All Countries	49,560	51,744	4.4

¹ Special Administrative Region of China

Table 3:- Tourist arrivals by month, 2009 - 2011

Month	Number		
	2009	2010	2011 ¹
January	88,591	91,857	101,887
February	67,892	72,366	77,390
March	76,425	85,748	83,349
<u>1st Quarter</u>	<u>232,908</u>	<u>249,971</u>	<u>262,626</u>
April	68,969	64,797	
May	64,761	71,055	
June	46,866	53,327	
<u>2nd Quarter</u>	<u>180,596</u>	<u>189,179</u>	
<i>1st Semester</i>	<i>413,504</i>	<i>439,150</i>	
July	71,872	77,009	
August	63,365	65,093	
September	60,144	65,404	
<u>3rd Quarter</u>	<u>195,381</u>	<u>207,506</u>	
<i>Jan. to Sep.</i>	<i>608,885</i>	<i>646,656</i>	
October	80,197	87,340	
November	78,544	85,982	
December	103,730	114,849	
<u>4th Quarter</u>	<u>262,471</u>	<u>288,171</u>	
<i>2nd Semester</i>	<i>457,852</i>	<i>495,677</i>	
Whole Year	871,356	934,827	

¹ Provisional**Table 4:- Tourist arrivals by main purpose of visit,
1st Quarter of 2010 and 2011**

Purpose of visit	2010	2011 ¹	% Change
Holiday	232,613	245,841	5.7
Business	8,020	8,793	9.6
Transit	1,538	2,010	30.7
Conference	674	984	46.0
Sports	567	233	-58.9
Other & Not Stated	6,559	4,765	-27.4
Total	249,971	262,626	5.1

¹ Provisional

Table 5 : - Tourist Arrivals by Country of Residence, January - March of 2010 and 2011

Country of residence	1st Quarter 2010	2011 ¹				% Change Q1 2010 to Q1 2011
		Jan	Feb	Mar	1st Quarter	
EUROPE	172,528	62,756	57,821	55,883	176,460	2.3
Austria	3,437	1,133	1,372	832	3,337	-2.9
Belgium	2,252	999	683	918	2,600	15.5
France	85,039	33,150	29,725	29,222	92,097	8.3
Germany	14,934	4,883	4,858	4,899	14,640	-2.0
Italy	21,170	7,084	5,457	5,392	17,933	-15.3
Netherlands	887	298	314	311	923	4.1
Spain	1,451	403	423	573	1,399	-3.6
Sweden	1,708	577	640	458	1,675	-1.9
Switzerland	4,730	2,244	2,239	2,034	6,517	37.8
United Kingdom	22,251	5,954	6,530	6,705	19,189	-13.8
CIS ²	3,094	2,393	1,361	1,670	5,424	75.3
<i>of which:</i>						
<i>Russian Federation</i>	<i>1,950</i>	<i>1,854</i>	<i>1,068</i>	<i>1,370</i>	<i>4,292</i>	<i>120.1</i>
Other European	11,575	3,638	4,219	2,869	10,726	-7.3
AFRICA	56,794	31,417	10,171	19,466	61,054	7.5
Comoros	161	79	62	100	241	49.7
Kenya	267	94	104	141	339	27.0
Malagasy Rep.	2,156	892	783	760	2,435	12.9
Reunion	33,394	21,625	3,782	11,300	36,707	9.9
Seychelles	1,759	721	513	563	1,797	2.2
S. Africa, Rep. of	17,592	7,351	4,477	5,856	17,684	0.5
Zimbabwe	186	89	59	80	228	22.6
Other African	1,279	566	391	666	1,623	26.9
ASIA	14,249	5,289	7,382	5,735	18,406	29.2
Hong Kong SAR ³	110	37	61	32	130	18.2
India	8,173	3,159	4,297	3,448	10,904	33.4
Japan	348	100	91	88	279	-19.8
Malaysia	256	54	199	91	344	34.4
P. Rep. of China	2,400	903	1,570	650	3,123	30.1
Singapore	323	77	221	111	409	26.6
United Arab Emirates	470	232	145	157	534	13.6
Other Asian	2,169	727	798	1,158	2,683	23.7
OCEANIA	2,129	1,242	809	923	2,974	39.7
Australia	1,958	1,173	757	870	2,800	43.0
Other Oceanian	171	69	52	53	174	1.8
AMERICA	4,135	1,127	1,171	1,265	3,563	-13.8
USA	2,182	357	543	641	1,541	-29.4
Canada	927	337	323	354	1,014	9.4
Other American	1,026	433	305	270	1,008	-1.8
OTHER & N.STATED	136	56	36	77	169	24.3
All Countries	249,971	101,887	77,390	83,349	262,626	5.1

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

Table 6:- Tourist arrivals, nights and receipts, 2008 - 2011

Year		Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
2008	2008	930,456	9,218	41,213
	2009	871,356	8,639	35,693
	2010	934,827	9,495	39,456
	1st Qr.	261,494	2,491	11,951
	2nd Qr.	194,264	1,709	10,219
	1st Semester	455,758	4,200	22,170
	3rd Qr.	218,406	2,249	8,631
	4th Qr.	256,292	2,769	10,412
	2nd Semester	474,698	5,018	19,043
	2009	1st Qr.	232,908	2,250
2nd Qr.		180,596	1,791	7,984
1st Semester		413,504	4,041	18,249
3rd Qr.		195,381	2,280	7,436
4th Qr.		262,471	2,318	10,008
2nd Semester		457,852	4,598	17,444
2010²	1st Qr.	249,971	2,943	11,021
	2nd Qr.	189,179	1,855	8,788
	1st Semester	439,150	4,798	19,809
	3rd Qr.	207,506	2,275	8,358
	4th Qr.	288,171	2,422	11,289
	2nd Semester	495,677	4,697	19,647
2011²	1st Qr.	262,626	2,960	11,949

¹ Source: Bank of Mauritius² Provisional**Table 7:- Hotels, rooms and bedplaces, 2008 - 2011**

Year	Number as at end of period			
	Hotels	Rooms	Bedplaces	
2008	102	11,488	23,095	
2009	102	11,456	23,235	
2010	112	12,075	24,698	
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	1st Qr.	102	11,444	23,148
	2nd Qr.	97	10,486	21,362
	3rd Qr.	100	11,102	22,530
	4th Qr.	102	11,456	23,235
2010	1st Qr.	105	11,564	23,547
	2nd Qr.	104	11,362	23,168
	3rd Qr.	104	11,383	23,296
	4th Qr.	112	12,075	24,698
2011¹	1st Qr.	112 ²	12,082	24,664

¹ Provisional² Excluding three hotels not operational because of renovation works

Table 8:- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2009 - 2011

Month	All Hotels						"Large" Hotels					
	2009		2010		2011 ¹		2009		2010		2011 ¹	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	69	62	72	64	75	66	69	62	74	66	76	67
February	60	53	67	58	68	60	60	54	67	60	70	61
March	59	52	64	56	64	57	59	53	65	58	66	58
<i>1st Quarter</i>	<u>63</u>	<u>56</u>	<u>67</u>	<u>59</u>	<u>69</u>	<u>61</u>	<u>63</u>	<u>57</u>	<u>69</u>	<u>61</u>	<u>71</u>	<u>62</u>
April	59	53	61	54			61	54	64	56		
May	58	52	61	53			59	52	63	55		
June	45	39	47	41			44	39	48	43		
<i>2nd Quarter</i>	<u>54</u>	<u>48</u>	<u>56</u>	<u>50</u>			<u>55</u>	<u>49</u>	<u>58</u>	<u>51</u>		
<i>1st Semester</i>	59	52	64	56			59	52	64	56		
July	51	45	54	47			52	46	55	48		
August	59	52	60	52			61	54	62	54		
September	62	55	65	57			64	56	67	58		
<i>3rd Quarter</i>	<u>57</u>	<u>51</u>	<u>60</u>	<u>52</u>			<u>59</u>	<u>52</u>	<u>62</u>	<u>54</u>		
<i>Jan. to Sep.</i>	58	52	63	55			59	52	63	56		
October	65	58	69	61			67	59	71	62		
November	69	61	74	65			71	63	76	67		
December	70	62	75	66			73	64	78	68		
<i>4th Quarter</i>	<u>68</u>	<u>61</u>	<u>73</u>	<u>64</u>			<u>69</u>	<u>62</u>	<u>74</u>	<u>65</u>		
<i>2nd Semester</i>	63	56	66	58			64	57	67	59		
Whole Year	61	54	65	57			62	55	66	58		

¹ Provisional

Table 9:- Employment in the tourist industry as at end of March, 2006 - 2010

Year Establishments	2006	2007	2008	2009	2010
Restaurants	1,805	2,012	2,251	2,431	2,464
Hotels	19,536	20,233	22,314	20,478	20,847
Travel and Tourism	4,457	4,296	4,188	4,093	3,850
Total	25,798	26,541	28,753	27,002	27,161

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 travellers entering and leaving the country. The data are collected from the passport of travellers, disembarkation cards filled in by non-residents and questions put to non-residents entering the country. 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 and Leisure 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 and Leisure. 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 overnight but less than a year, and who has no employer-employee relationship with a resident.

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 overnight 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 depart on the same day they arrived.

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.