INTERNATIONAL TRAVEL & TOURISM

1st Semester 2010

Introduction

This issue of the Economic and Social Indicators presents data on International Travel and Tourism and hotel statistics for the first semester of 2010. 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 2010 totalled 1,222,333, made up of 591,153 arrivals and 631,180 departures. Compared to the same period of 2009, these figures represent increases of 7.0% in arrivals and 8.4% in departures (Table 1). Total arrivals included 557,097 (94.2%) by air and 34,056 (5.8%) by sea, while total departures consisted of 558,933 (93.3%) by air and 42,247 (6.7%) by sea. Total arrivals by sea included 28,250 "cruise travellers" (around 11,175 tourists, 7,060 excursionists, 515 Mauritian residents and 9,500 crews) aboard 17 cruise ships, which visited our port during the first semester of 2010.

2.2 Excursionists (Same day visitors)

Total excursionists numbered 13,330, of which 6,136 arrived by air and 7,194 by sea. Excursionists arriving by air included 1,938 (31.6%) from France and 2,302 (37.5%), from Reunion Island. Excursionists by sea were mainly from: United Kingdom (2,940 or 40.9%), Australia (1,233 or 17.1%) and United States of America (1,061 or 14.7%).

2.3 Mauritian Residents

During the period under review, the number of Mauritian residents travelling abroad went up by 8.3% to 96,555 compared to 89,170 for the first semester of 2009 and accounted for 15.3% of total departures (Table 2). The following changes were observed in the number of Mauritian departures by major country of disembarkation: Hong Kong (+53.2%), India (+35.8%), Malagasy Republic (+19.9%), Republic of South Africa (+15.6%), Seychelles (+12.9%), Reunion Island (+8.5%), Singapore (+8.4%), United Kingdom (+6.8%), France (+0.2%), Australia (-20.0%) and United Arab Emirates (-20.1%).

Figure 1 shows the percentage distribution of Mauritian departures by six major countries of disembarkation for the period January to June of 2009 and 2010.

20.0 15.0 8° 10.0 5.0

UK

Figure 1 - Percentage distribution of Mauritian departures by six major countries of disembarkation, January - June of 2009 and 2010

2.4 Tourist Arrivals

Reunion

France

Tourist arrivals for the first semester of 2010 increased by 6.2% to reach 439,150 compared to 413,504 in the corresponding period of 2009. Figure 2 shows monthly tourist arrivals for the period January to June of 2009 and 2010. Further details on tourist arrivals are given in Tables 3 to 6.

2009 2010

India

UAE

South Africa

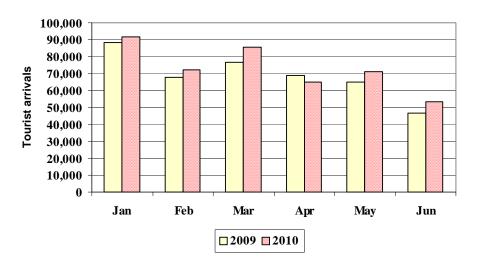


Figure 2 - Monthly Tourist Arrivals, January - June of 2009 and 2010

Around 93% of the tourists came for holidays while 4.0% were on business/conference trips and another 0.6% was in transit (Table 4).

Arrivals from Europe, which accounted for 65.2% of total tourist arrivals, increased by 2.8% to reach 286,418 during the first semester of 2010 against 278,621 in the corresponding semester of 2009. Arrivals from France, our leading market representing 32.3% of total tourist arrivals and 49.6% of the European market, grew by 8.7% to attain 142,030 during the first semester. The performance in arrivals for the other major generating countries of Europe was as follows: Italy (+1.6%), Germany (-3.3%) and United Kingdom (-5.2%). As regards the remaining European countries, the following changes were recorded in arrivals: Switzerland (+24.1%), Austria (+10.3%), Belgium (-5.2%), Commonwealth of Independent States (CIS) (-6.2%), Netherlands (-19.0%), Spain (-26.0%) and Sweden (-26.4%).

During the first semester of 2010, arrivals from Africa, with a share of 23.8% of total tourist arrivals, expanded by 13.2% to 104,415. Arrivals from Republic of South Africa went up by 16.9% to 38,021 and those from Reunion Island by 9.1% to 53,282. For the other African countries, the following changes in arrivals were registered: Seychelles (+38.9%), Comoros (+31.2%), Kenya (+17.5%), Malagasy Republic (+17.2%) and Zimbabwe (-10.7%).

For the semester under review, tourist arrivals from the Asian market, which represented 8.2% of total tourist arrivals, went up by 21.2% to reach 36,182. Arrivals from India, our major source on this continent, rose by 26.4% to 24,764. The following increases in arrivals from the other Asian countries were noted: Singapore (+35.6%), Malaysia (+19.6%), Japan (+12.8%), People's Republic of China (+7.7%), United Arab Emirates (+7.7%) and Hong Kong (+1.5%).

Arrivals from Oceania went down by 12.8% from 5,451 to 4,752 mainly due to a decline in arrivals of 13.8% from Australia.

Arrivals from the continent of America were up by 1.0% being the net result of an increase of 18.1% from "Other American" countries and decreases of 8.4% and 0.6% in arrivals from Canada and U.S.A respectively.

Tourist arrivals from top ten markets for the period January to June of 2009 and 2010 are given in Figure 3.

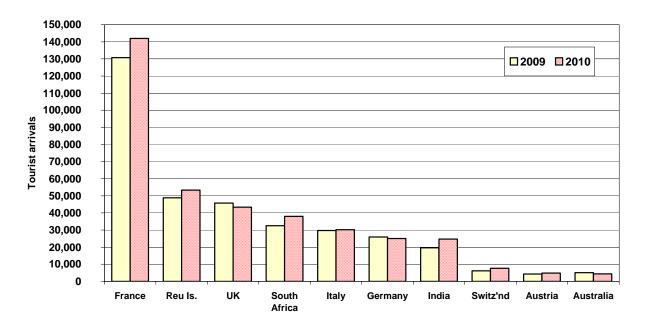


Figure 3 - Tourist Arrivals from Top Ten Markets, January - June of 2009 and 2010

3. Tourist Nights

Total tourist nights spent in the country during the first six months of 2010 is estimated at 4.1 million, representing an increase of 5.1% over the same period of 2009 (Table 6).

4. Hotel Statistics

At the end of June 2010, there was a total of 104 registered hotels in operation. Owing to renovation works, seven hotels were not operational. The total room capacity for these registered hotels was 11,362 with 23,168 bedplaces (Table 7). For the first semester of 2010, the room occupancy rate for all hotels averaged 64% compared to 59% in the corresponding semester of 2009 while the bed occupancy rate was 56% against 52% for the first semester of 2009 (Table 8).

"Large" hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 45 (43% of all registered hotels in operation). These hotels had a room capacity of 8,477 with 17,328 bedplaces, representing 75% of both total room capacity and total bedplaces respectively. The average room occupancy rate for these hotels for the first semester of 2010 was 64% and bed occupancy rate averaged 56% compared to 59% and 52% respectively for the first six months of 2009 (Table 8).

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5. Gross Tourism Receipts

Data from the Bank of Mauritius indicate that gross tourism receipts for the first semester of

2010 were Rs 19,809 million, i.e. an increase of 8.5% compared to Rs 18,249 million for the same

period of 2009 (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 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 2010

Based on data available on tourist arrivals and information gathered from the main

stakeholders, the forecast of 915,000 tourist arrivals for the year 2010 is maintained, representing an

increase of 5.0% over the figure of 871,356 in 2009.

According to the Bank of Mauritius, tourism receipts for the year 2010 will be around

Rs 37,935 million (+6.3 %) compared to Rs 35,693 million in 2009.

Central Statistics Office

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- I BRIEF ON COMPILATION OF PASSENGER TRAFFIC STATISTICS
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Table 1:- Passenger Traffic 1 by month, 2008 - 2010

M. A	20	008	20	009	2010 ²			
Month	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures		
January	125,228	144,490	117,415	138,314	119,807	145,268		
February	98,424	99,897	90,042	90,246	91,943	92,398		
March	115,987	122,014	99,673	103,146	123,358	128,101		
1st Quarter	339,639	366,401	307,130	331,706	335,108	365,767		
April	96,210	97,364	91,269	91,483	87,878	94,542		
May	87,375	96,647	83,609	89,204	91,329	95,350		
June	76,627	63,360	70,662	70,071	76,838	75,521		
2nd Quarter	260,212	257,371	245,540	250,758	256,045	265,413		
1st Semester	599,851	623,772	552,670	582,464	591,153	631,180		
July	112,508	91,931	98,683	84,366				
August	98,044	113,039	89,460	102,778				
September	84,194	83,868	78,928	78,452				
3rd Quarter	294,746	288,838	267,071	265,596				
Jan. to Sep.	894,597	912,610	819,741	848,060				
October	104,069	101,959	100,677	98,938				
November	98,663	93,176	101,626	98,919				
December	129,099	99,004	134,535	107,652				
4th Quarter	331,831	294,139	336,838	305,509				
2nd Semester	626,577	582,977	603,909	571,105				
Whole Year	1,226,428	1,206,749	1,156,579	1,153,569				

¹ Excluding inter islands traffic

² Provisional

 $\hbox{ Table 2: - Departure of Mauritian residents by country of disembarkation,} \\ \hbox{ January - June of 2009 and 2010}$

Country of disembarkation	Jan - June 2009	Jan - June 2010	% Change
EUROPE	26,217	27,906	6.4
France	12,602	12,624	0.2
Germany	1,119	1,250	11.7
Italy	1,890	2,509	32.8
Switzerland	617	855	38.6
United Kingdom	9,985	10,668	6.8
Other European	4	0	-100.0
AFRICA	28,219	31,777	12.6
Malagasy Republic	3,131	3,753	19.9
Reunion	12,782	13,869	8.5
Seychelles	2,958	3,339	12.9
S. Africa, Rep. of	8,779	10,147	15.6
Zimbabwe	-	-	-
Other African	569	669	17.6
ASIA	29,723	32,761	10.2
Hong Kong SAR ¹	4,277	6,552	53.2
India	7,641	10,376	35.8
Malaysia	1,038	1,374	32.4
Singapore	3,778	4,096	8.4
Saudi Arabia	1	0	-100.0
United Arab Emirates	12,969	10,356	-20.1
Other Asian	19	7	-63.2
OCEANIA	4,921	3,936	-20.0
Australia	4,921	3,936	-20.0
Other Oceanian	-	-	-
AMERICA	5	18	260.0
U.S.A	-	-	-
Canada	2	0	-100.0
Other American	3	18	500.0
NOT STATED	85	157	84.7
All Countries	89,170	96,555	8.3

¹ Special Administrative Region of China

Table 3:- Tourist arrivals by month, 2008 - 2010

М	41-	Number						
IVI	onth	2008	2009	2010 1				
January		94,579	88,591	91,857				
February		77,763	67,892	72,366				
March		89,152	76,425	85,748				
	1st Quarter	<u>261,494</u>	<u>232,908</u>	<u>249,971</u>				
April		72,837	68,969	64,797				
May		67,705	64,761	71,055				
June		53,722	46,866	53,327				
	2nd Quarter	<u>194,264</u>	<u>180,596</u>	<u>189,179</u>				
	1st Semester	455,758	413,504	439,150				
July		81,169	71,872					
August		71,605	63,365					
September		65,632	60,144					
	3rd Quarter	<u>218,406</u>	<u>195,381</u>					
	Jan. to Sep.	674,164	608,885					
October		83,524	80,197					
November		75,380	78,544					
December		97,388	103,730					
	4th Quarter	<u>256,292</u>	<u>262,471</u>					
	2nd Semester	474,698	457,852					
Who	le Year	930,456	871,356					

¹ Provisional

Table 4:- Tourist arrivals by main purpose of visit, January - June of 2009 and 2010

Purpose of visit	Jan - June 2009	Jan - June 2010 ¹	% Change
Holiday	387,272	406,311	4.9
Business	12,210	16,213	32.8
Transit	4,032	2,760	-31.5
Conference	1,113	1,411	26.8
Sports	745	994	33.4
Other & Not Stated	8,132	11,461	40.9
Total	413,504	439,150	6.2

¹ Provisional

Table 5: - Tourist Arrivals by Country of Residence, January - June of 2009 and 2010

	1st				2010 1				% Change Jan-
Country of residence	semester 2009	Jan	Feb	Mar	Apr	May	Jun	1st semester ⁴	Jun 2009 to Jan-Jun 2010
EUROPE	278,621	58,639	56,010	57,879	43,774	42,117	27,999	286,418	2.8
Austria	4,351	1,232	1,290	915	624	447	290	4,798	10.3
Belgium	4,581	853	689	710	820	628	642	4,342	-5.2
France	130,708	29,914	27,909	27,216	22,400	21,841	12,750	142,030	8.7
Germany	25,944	4,361	4,534	6,039	3,773	3,999	2,373	25,079	-3.3
Italy	29,711	8,118	6,621	6,431	3,589	2,821	2,611	30,191	1.6
Netherlands	2,633	302	267	318	394	514	337	2,132	-19.0
Spain	4,079	473	403	575	333	624	609	3,017	-26.0
Sweden	2,981	707	560	441	219	127	140	2,194	-26.4
Switzerland	6,150	1,556	1,690	1,484	1,515	916	470	7,631	24.1
United Kingdom	45,768	6,291	7,155	8,805	7,478	7,712	5,962	43,403	-5.2
CIS ²	5,388	1,340	717	1,037	831	782	347	5,054	-6.2
Other European	16,327	3,492	4,175	3,908	1,798	1,706	1,468	16,547	1.3
AFRICA	92,273	26,753	9,283	20,758	14,205	18,754	14,662	104,415	13.2
Comoros	266	88	35	38	42	91	55	349	31.2
Kenya	559	92	74	101	138	183	69	657	17.5
Malagasy Rep.	3,711	662	724	770	785	731	676	4,348	17.2
Reunion	48,833	19,359	3,588	10,447	4,805	11,247	3,836	53,282	9.1
Seychelles	3,034	486	617	656	878	676	901	4,214	38.9
S. Africa, Rep. of	32,537	5,446	3,887	8,259	6,770	4,944	8,715	38,021	16.9
Zimbabwe	550	64	35	87	158	82	65	491	-10.7
Other African	2,783	556	323	400	629	800	345	3,053	9.7
ASIA	29,859	4,439	5,584	4,226	4,866	8,399	8,668	36,182	21.2
Hong Kong SAR ³	206	24	53	33	16	28	55	209	1.5
India	19,598	2,695	3,183	2,295	2,987	6,711	6,893	24,764	26.4
Japan	580	121	127	100	78	95	133	654	12.8
Malaysia	509	55	108	93	92	143	118	609	19.6
P. Rep. of China	3,666	523	1,270	607	655	424	471	3,950	7.7
Singapore	626	80	129	114	124	176	226	849	35.6
United Arab Emirates	1,025	209	127	134	191	206	237	1,104	7.7
Other Asian	3,649	732	587	850	723	616	535	4,043	10.8
OCEANIA	5,451	741	500	888	913	766	944	4,752	-12.8
Australia	5,085	692	455	811	861	679	887	4,385	-13.8
Other Oceanian	366	49	45	77	52	87	57	367	0.3
AMERICA	6,873	1,241	960	1,934	979	940	886	6,940	1.0
USA	3,733	450	399	1,333	616	444	467	3,709	-0.6
Canada	1,801	288	299	340	220	240	262	1,649	-8.4
Other American	1,339	503	262	261	143	256	157	1,582	18.1
OTHER & N.STATED	427	44	29	63	60	79	168	443	3.7
All Countries	413,504	91,857	72,366	85,748	64,797	71,055	53,327	439,150	6.2

¹ Provisional

² Commonwealth of Independent States (Ex Soviet Union Countries)

³ Special Administrative Region of China

Table 6:- Tourist arrivals, nights and receipts, 2007 - 2010

7	Year	Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts ¹ (Rs million)
	2007	906,971	8,987	40,687
	2008	930,456	9,218	41,213
	2009	871,356	8,600	35,693
2008	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	2,275	10,265
	2nd Qr.	180,596	1,625	7,984
	1st Semester	413,504	3,900	18,249
	3rd Qr.	195,381	1,950	7,436
	4th Qr.	262,471	2,750	10,008
	2nd Semester	457,852	4,700	17,444
2010 ²	1st Qr.	249,971	2,400	11,021
	2nd Qr.	189,179	1,700	8,788
	1st Semester	439,150	4,100	19,809

¹ Source: Bank of Mauritius

Table 7:- Hotels, rooms and bedplaces, 2007 - 2010

V	ear _	Num	ber as at end of po	eriod
1	cai	Hotels	Rooms	Bedplaces
	2007	97	10,857	21,788
	2008	102	11,488	23,095
	2009	102	11,456	23,235
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.		11,456	23,235
2010 1	1st Qr.	105	11,564	23,547
	2nd Qr.	104 ²	11,362	23,168

¹ Provisional

² Provisional

² Excluding seven hotels not operational because of renovation works

Table 8:- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2008 - 2010

			All H	lotels			"Large" Hotels					
Month	2008		2009		2010 1		2008		2009		2010 1	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	82	73	69	62	72	64	82	74	69	62	74	66
February	78	70	60	53	67	58	80	72	60	54	67	60
March	77	69	59	52	64	56	78	70	59	53	65	58
1st Quarter	<u>79</u>	<u>71</u>	<u>63</u>	<u>56</u>	<u>67</u>	<u>59</u>	<u>80</u>	<u>72</u>	<u>63</u>	<u>57</u>	<u>69</u>	<u>61</u>
April	72	65	59	53	61	54	75	67	61	54	64	56
May	66	60	58	52	61	53	68	61	59	52	63	55
June	49	43	45	39	47	41	49	44	44	39	48	43
2nd Quarter	<u>62</u>	<u>56</u>	<u>54</u>	<u>48</u>	<u>56</u>	<u>50</u>	<u>64</u>	<u>57</u>	<u>55</u>	<u>49</u>	<u>58</u>	<u>51</u>
1st Semester	71	63	59	52	64	56	72	65	59	52	64	56
July	61	55	51	45			62	56	52	46		
August	65	58	59	52			67	60	61	54		
September	65	58	62	55			68	61	64	56		
3rd Quarter	<u>64</u>	<u>57</u>	<u>57</u>	<u>51</u>			<u>66</u>	<u>59</u>	<u>59</u>	<u>52</u>		
Jan. to Sep.	68	61	58	52			70	63	59	52		
October	71	64	65	58			73	65	67	59		
November	69	62	69	61			71	63	71	63		
December	69	62	70	62			70	63	73	64		
4th Quarter	<u>71</u>	<u>63</u>	<u>68</u>	<u>61</u>			<u>72</u>	<u>64</u>	<u>69</u>	<u>62</u>		
2nd Semester	67	60	63	56			68	61	64	57		
Whole Year	68	61	61	54		_	70	62	62	55	_	_

¹ Provisional

Table 8:- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2008 - 2010

			All H	lotels			"Large" Hotels					
Month	2008		2009		2010 1		2008		2009		2010 1	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	82	73	69	62	72	64	82	74	69	62	74	66
February	78	70	60	53	67	58	80	72	60	54	67	60
March	77	69	59	52	64	56	78	70	59	53	65	58
1st Quarter	<u>79</u>	<u>71</u>	<u>63</u>	<u>56</u>	<u>67</u>	<u>59</u>	<u>80</u>	<u>72</u>	<u>63</u>	<u>57</u>	<u>69</u>	<u>61</u>
April	72	65	59	53	61	54	75	67	61	54	64	56
May	66	60	58	52	61	53	68	61	59	52	63	55
June	49	43	45	39	47	41	49	44	44	39	48	43
2nd Quarter	<u>62</u>	<u>56</u>	<u>54</u>	<u>48</u>	<u>56</u>	<u>50</u>	<u>64</u>	<u>57</u>	<u>55</u>	<u>49</u>	<u>58</u>	<u>51</u>
1st Semester	71	63	59	52	64	56	72	65	59	52	64	56
July	61	55	51	45			62	56	52	46		
August	65	58	59	52			67	60	61	54		
September	65	58	62	55			68	61	64	56		
3rd Quarter	<u>64</u>	<u>57</u>	<u>57</u>	<u>51</u>			<u>66</u>	<u>59</u>	<u>59</u>	<u>52</u>		
Jan. to Sep.	68	61	58	52			70	63	59	52		
October	71	64	65	58			73	65	67	59		
November	69	62	69	61			71	63	71	63		
December	69	62	70	62			70	63	73	64		
4th Quarter	<u>71</u>	<u>63</u>	<u>68</u>	<u>61</u>			<u>72</u>	<u>64</u>	<u>69</u>	<u>62</u>		
2nd Semester	67	60	63	56			68	61	64	57		
Whole Year	68	61	61	54		_	70	62	62	55	_	_

¹ Provisional

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

ANNEX II

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.

= <u>Total number of room/bed nights rented</u> x 100 Total number of room/bed nights available

7. CIS

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