## INTERNATIONAL TRAVEL & TOURISM

## 1<sup>st</sup> Quarter 2013

#### Introduction

This issue of the Economic and Social Indicators presents data on International Travel and Tourism and hotel statistics for the first quarter of 2013. 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 2013 totalled 715,257, made up of 345,211 arrivals and 370,046 departures. Compared to the same period of 2012, arrivals remained almost at the same level whilst departures decreased by 0.9%. Total passenger arrivals included 330,392 (95.7%) arrivals by air and 14,819 (4.3%) by sea, while total passenger departures consisted of 354,252 (95.7%) departures by air and 15,794 (4.3%) by sea. Total arrivals by sea included 12,600 "cruise travellers" (5,920 tourists, 2,830 excursionists, 15 Mauritian residents and 3,835 crews) aboard 9 cruise ships, which visited our port during the first quarter of 2013.

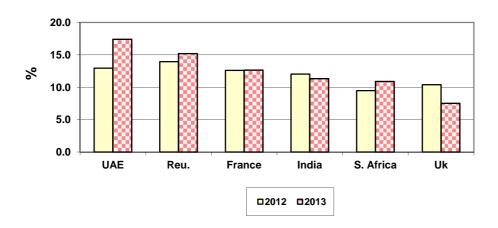
#### 2.2 Excursionists

Total excursionists, i.e. visitors arriving and leaving on the same day, numbered 7,394, of whom 3,029 (41.0%) arrived by air and 4,365 (59.0%) by sea. Out of the excursionists arriving by air 1,179 (38.9%) came from Reunion Island and 502 (16.6%) from France. Excursionists by sea were mainly from: Republic of South Africa (1,625 or 37.2%), Japan (881 or 20.2%), United States of America (850 or 19.5%) and United Kingdom (390 or 8.9%).

#### 2.3 Mauritian Residents

The number of Mauritian residents travelling abroad increased by 7.7% from 53,431 during the first quarter of 2012 to 57,532, in the first quarter of 2013. This accounted for 15.5% of total departures (Table 2). The main countries of disembarkation (which may not necessarily be the country of final destination when the passengers are in transit) were: United Arab Emirates (10,015 or 17.4%), Reunion Island (8,743 or 15.2%), France (7,280 or 12.7%), India (6,518 or 11.3%), Republic of South Africa (6,267 or 10.9%) and United Kingdom (4,326 or 7.5%) as shown in Figure 1.

Figure 1 - Percentage distribution of Mauritian departures by major country of disembarkation, January - March of 2012 and 2013



## 2.4 Tourist Arrivals

Tourist arrivals for the first quarter of 2013 stood at 265,838, representing an increase of 1.5% compared to 261,995 in the corresponding quarter of 2012. Figure 2 shows monthly tourist arrivals for the period January to March of 2012 and 2013. Further details on tourist arrivals are given in Tables 3 to 6.

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Figure 2 - Monthly Tourist Arrivals, January - March of 2012 and 2013

The distribution of tourist arrivals by main purpose of visit (Table 4) shows that around 94% of

the tourists came for holidays, 3.5% were on business/conference trips and another 2.5% were in transit.

Tourist arrivals from Europe, which accounted for 59.7% of all tourist arrivals, decreased by 7.5% from 171,669 in the first quarter of 2012 to 158,722 in the first quarter of 2013. Arrivals from France, the leading market which represents 29.4% of total tourist arrivals and 49.2% of the European market, dropped by 12.8% to 78,120. The following performances in tourist arrivals were recorded for the other major tourist generating countries of Europe: United Kingdom (+17.7%), Germany (+14.1%) and Italy (-30.0%). Among the remaining European countries, the following changes were noted: Luxemburg (+101.4%), Denmark (+62.4%), Switzerland (+19.1%), Belgium (+11.1%), Sweden (+8.5%), Czech Republic (+2.9%), Netherlands (-6.9%), Austria (-9.0%), Norway (-11.7%), Russian Federation (-30.3%) and Spain (-35.5%).

Tourist arrivals from Africa, with a share of 26.2% of total tourist arrivals, expanded by 16.0% from 59,955 to 69,553. Arrivals from Reunion Island rose by 21.9% to 41,742 and those from Republic of South Africa were up by 4.4% to 19,736. The following changes in arrivals were registered among the other African countries: Kenya (+45.7%), Comoros (+27.0%), Malagasy Republic (+19.9%), Seychelles (-19.2%) and Zimbabwe (-29.4%).

For the quarter under review, tourist arrivals from the Asian market, which represented 11.3% of total tourist arrivals, went up by 36.5% to reach 29,997. Arrivals from India, the major source on this continent, grew by 16.3% to 13,402. The performance of other Asian countries was as follows: United Arab Emirates (+205.6%), Hong Kong (+106.4%), Malaysia (+76.1%), People's Republic of China (+67.3%), Singapore (+25.6%) and Japan (+16.0%).

Tourist arrivals from Oceania increased by 1.5% from 3,126 to 3,172 due to an increase in arrivals of 3.1% from Australia and a decrease of 24.2% from the other Oceanian countries.

Tourist arrivals from the continent of America went down by 19.0% from 5,094 in the first quarter of 2012 to 4,128 in the corresponding quarter of 2013 as a result of the following changes: Brazil (-14.3%), Canada (-10.8%), USA (-42.7%) and other American (+45.8%).

Tourist arrivals from top ten markets for the period January to March of 2012 and 2013 are given in Figure 3.

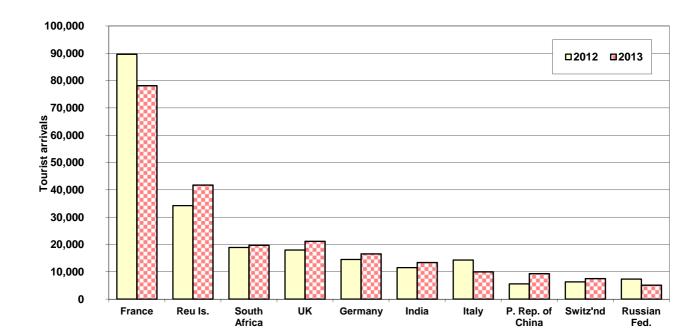


Figure 3 - Tourist Arrivals from Top Ten Markets, January - March of 2012 and 2013

## 3. Tourist Nights

Total tourist nights spent in the country during the first three months of 2013 is estimated at nearly 3 million, representing an increase of 1.4 % over that of the same period of 2012 (Table 6).

## 4. Hotel Statistics

At the end of March 2013, there were 118 registered hotels of which 117 were in operation and 1 was under renovation. The total room capacity for the 117 registered hotels in operation was 12,676 with 25,887 bedplaces (Table 7). For the first quarter of 2013, the room occupancy rate for all hotels averaged 65% and bed occupancy rate averaged 57%, compared to 69% and 61% respectively for the corresponding quarter of 2012 (Table 8).

"Large" hotels, i.e. well-established beach hotels with more than 80 rooms, numbered 52 (44% of all registered hotels in operation). These hotels had a room capacity of 9,460 with 19,395 bedplaces, representing 75% of both total room capacity and total bedplaces respectively. The average room occupancy rate for these hotels for the first three months of 2013 was 68% and bed occupancy rate averaged 59% compared to 70% and 62% respectively for the first quarter of 2012 (Table 8).

## **5. Gross Tourism Receipts**

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

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2013 were Rs 12,064 million, i.e. a decrease of 12.4% compared to Rs 13,768 million for the same period of 2012 (Table 6).

## 6. Employment

According to the Survey of Employment and Earnings conducted by Statistics Mauritius, direct employment in hotels, restaurants and travel and tourism establishments employing 10 or more persons stood at 28,027 at the end of March 2012 which is slightly lower than the figure of 28,133 for March 2011. Of this number, 21,628 or 77.2 % were engaged in hotels (Table 9).

## 7. Forecast Year 2013

Based on data available on tourist arrivals and information gathered from stakeholders, the initial forecast of 1,000,000 tourist arrivals for the year 2013 is being reviewed downwards to 990,000 tourists. Compared to 965,441 tourist arrivals in 2012, this represents an increase of 2.5%.

According to the Bank of Mauritius, tourism receipts for the year 2013 will be around Rs 46,100 million (+3.9 %) compared to Rs 44,378 million in 2012.

Statistics Mauritius Ministry of Finance and Economic Development Port Louis

20 May 2013

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## ANNEX

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

Table 1:- Passenger Traffic <sup>1</sup> by month, 2011 - 2013

Month	20	11	20	)12	20	13 <sup>2</sup>
Month	Arrivals	Departures	Arrivals	Departures	Arrivals	Departures
January	133,081	156,319	132,789	154,685	124,571	149,067
February	103,237	102,527	105,802	106,969	103,021	103,726
March	109,308	117,231	106,939	111,605	117,619	117,253
1st Quarter	345,626	376,077	345,530	373,259	345,211	370,046
April	106,615	103,457	109,760	110,366		
May	90,193	98,535	92,684	100,829		
June	81,113	80,054	77,955	75,456		
2nd Quarter	277,921	282,046	280,399	286,651		
1st Semester	623,547	658,123	625,929	659,910		
July	110,611	98,700	105,542	94,119		
August	96,238	103,142	93,502	102,936		
September	88,382	87,962	89,426	90,724		
3rd Quarter	295,231	289,804	288,470	287,779		
Jan. to Sep.	918,778	947,927	914,399	947,689		
October	114,833	111,676	113,613	106,643		
November	113,864	110,704	110,477	110,296		
December	146,912	122,832	148,355	121,463		
4th Quarter	375,609	345,212	372,445	338,402		
2nd Semester	670,840	635,016	660,915	626,181		
Whole Year	1,294,387	1,293,139	1,286,844	1,286,091		

Excluding inter islands traffic
 Provisional

Table 2 : - Departure of Mauritian residents by country of disembarkation <sup>1</sup>, 1st Quarter of 2012 and 2013

Country of disembarkation	2012	2013	% Change
EUROPE	14,763	12,547	-15.0
France	6,732	7,280	8.1
Germany	848	460	-45.8
Italy	1,143	425	-62.8
Switzerland	482	55	-88.6
United Kingdom	5,548	4,326	-22.0
Other European	10	1	-90.0
AFRICA	16,134	19,508	20.9
Malagasy Republic	2,069	2,633	27.3
Reunion	7,455	8,743	17.3
Seychelles	891	980	10.0
S. Africa, Rep. of	5,065	6,267	23.7
Zimbabwe	-	-	-
Other African	654	885	35.3
ASIA	19,226	22,841	18.8
P. Rep. of China	624	634	1.6
Hong Kong SAR <sup>2</sup>	2,260	2,043	-9.6
India	6,431	6,518	1.4
Indonesia	-	135	-
Malaysia	724	1,482	104.7
Singapore	2,267	2,011	-11.3
Saudi Arabia	-	-	-
United Arab Emirates	6,919	10,015	44.7
Other Asian	1	3	200.0
OCEANIA	3,303	2,624	-20.6
Australia	3,303	2,624	-20.6
Other Oceanian	-	-	-
AMERICA	-	-	_
NOT STATED	5	12	140.0
All Countries	53,431	57,532	7.7

<sup>&</sup>lt;sup>1</sup> Country of disembarkation may either be the country of final destination or the transit country

<sup>&</sup>lt;sup>2</sup> Special Administrative Region of China

Table 3:- Tourist arrivals by month, 2011 - 2013

	Month	Number					
I'	violitii	2011	2012	2013 1			
January		101,887	98,837	92,894			
February		77,390	79,331	81,185			
March		83,349	83,827	91,759			
	1st Quarter	<u>262,626</u>	<u>261,995</u>	<u>265,838</u>			
April		79,173	79,137				
May		68,214	71,396				
June		54,591	54,625				
	2nd Quarter	<u>201,978</u>	205,158				
	1st Semester	464,604	467,153				
July		78,034	76,166				
August		66,865	65,896				
September		64,880	66,369				
	3rd Quarter	<u>209,779</u>	<u>208,431</u>				
	Jan. to Sep.	674,383	675,584				
October		90,616	89,994				
November		87,348	84,398				
December		112,295	115,465				
	4th Quarter	<u>290,259</u>	<u>289,857</u>				
	2nd Semester	500,038	498,288				
Wh	nole Year	964,642	965,441				

<sup>&</sup>lt;sup>1</sup> Provisional

Table 4:- Tourist arrivals by main purpose of visit, 1st Quarter of 2012 and 2013

Purpose of visit	2012	2013 1	% Change
Holiday	244,441	249,513	2.1
Business	9,576	8,586	-10.3
Transit	6,755	6,574	-2.7
Conference	563	651	15.6
Sports	246	143	-41.9
Other & Not Stated	414	371	-10.4
Total	261,995	265,838	1.5

<sup>&</sup>lt;sup>1</sup> Provisional

Table 5: - Tourist Arrivals by Country of Residence, January - March of 2012 and 2013

Country of	1st Quarter		20	13 <sup>1</sup>		% Change
residence	2012	Jan	Feb	Mar	1st Quarter	Q1 2012 to Q1 2013
EUROPE	171,669	51,529	52,839	54,354	158,722	-7.5
Austria	3,173	898	1,106	885	2,889	-9.0
Belgium	2,498	1,021	762	992	2,775	11.1
France	89,626	25,478	26,550	26,092	78,120	-12.8
Germany	14,518	5,525	5,216	5,824	16,565	14.1
Italy	14,306	3,699	3,467	2,844	10,010	-30.0
Netherlands	831	270	261	243	774	-6.9
Spain	2,354	257	318	944	1,519	-35.5
Sweden	1,348	521	539	403	1,463	8.5
Switzerland	6,301	2,198	2,728	2,576	7,502	19.1
United Kingdom	17,975	5,664	6,445	9,041	21,150	17.7
CIS <sup>2</sup>	8,526	3,233	1,570	1,613	6,416	-24.7
of which:	0,520	0,200	1,0 / 0	1,010	3,110	,
Russian Federation	7,337	2,707	1,177	1,229	5,113	-30.3
Czech Republic	1,970	594	893	541	2,028	2.9
Denmark	790	259	596	428	1,283	62.4
Luxemburg	145	52	66	174	292	101.4
Norway	1,195	209	451	395	1,055	-11.7
Other European	6,113	1,651	1,871	1,359	4,881	-20.2
AFRICA	59,955	30,678	13,171	25,704	69,553	16.0
Comoros	204	101	73	85	259	27.0
Kenya	394	186	169	219	574	45.7
Malagasy Rep.	2,881	1,145	1,051	1,259	3,455	19.9
Reunion	34,229	22,431	5,353	13,958	41,742	21.9
Seychelles	1,475	432	312	448	1,192	-19.2
S. Africa, Rep. of	18,911	5,760	5,331	8,645	19,736	4.4
Zimbabwe	293	42	66	99	207	-29.4
Other African	1,568	581	816	991	2,388	52.3
ASIA	21,977	7,914	12,880	9,203	29,997	36.5
Hong Kong SAR <sup>3</sup>	187	58	156	172	386	106.4
India	11,524	4,289	5,362	3,751	13,402	16.3
Japan	374	180	145	109	434	16.0
Korea Republic	540	171	157	230	558	3.3
Malaysia	309	66	254	224	544	76.1
P. Rep. of China	5,573	1,682	5,229	2,412	9,323	67.3
Singapore	332	124	130	163	417	25.6
United Arab Emirates	552	432	550	705	1,687	205.6
Other Asian	2,586	912	897	1,437	3,246	25.5
OCEANIA	3,126	1,136	860	1,176	3,172	1.5
Australia	2,936	1,084	811	1,133	3,028	3.1
Other Oceanian	190	52	49	43	144	-24.2
AMERICA	5,094	1,528	1,362	1,238	4,128	-19.0
USA	2,299	368	412	537	1,317	-42.7
Canada	1,112	346	341	305	992	-10.8
Brazil	1,056	385	318	202	905	-14.3
Other American	627	429	291	194	914	45.8
OTHER & N.STATED	174	109	73	84	266	52.9
All Countries	261,995	92,894	81,185	91,759	265,838	1.5

<sup>&</sup>lt;sup>1</sup> Provisional

<sup>&</sup>lt;sup>2</sup> Commonwealth of Independent States (Ex Soviet Union Countries)

<sup>&</sup>lt;sup>3</sup> Special Administrative Region of China

Table 6:- Tourist arrivals, nights and receipts, 2010 - 2013

,	Year	Tourist arrivals (Number)	Tourist nights (000)	Tourism receipts <sup>1</sup> (Rs million)
	2010	934,827	9,554	39,456
	2011	964,642	9,608	42,717
	2012	965,441	9,735	44,378
2010	1st Qr.	249,971	2,970	11,021
	2nd Qr.	189,179	1,800	8,788
	1st Semester	439,150	4,770	19,809
	3rd Qr.	207,506	2,287	8,358
	4th Qr.	288,171	2,497	11,289
	2nd Semester	495,677	4,784	19,647
2011	1st Qr.	262,626	2,997	11,949
	2nd Qr.	201,978	1,844	9,355
	1st Semester	464,604	4,841	21,304
	3rd Qr.	209,779	2,268	8,845
	4th Qr.	290,259	2,499	12,568
	2nd Semester	500,038	4,767	21,413
2012	1st Qr.	261,995	2,950	13,768
	2nd Qr.	205,158	2,010	9,780
	1st Semester	467,153	4,960	23,548
	3rd Qr.	208,431	2,300	8,406
	4th Qr.	289,857	2,475	12,424
	2nd Semester	498,288	4,775	20,830
2013 1	1st Qr.	265,838	2,990	12,064

<sup>&</sup>lt;sup>1</sup> Source: Bank of Mauritius

Table 7:- Hotels, rooms and bedplaces, 2010 - 2013

V	ear –	Number as at end of period				
1	cai –	Hotels	Rooms	Bedplaces		
	2010	112	12,075	24,698		
	2011	109	11,925	24,698		
	2012	117	12,527	25,496		
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		
2011	1st Qr.	112	12,082	24,664		
	2nd Qr.	111	11,999	24,493		
	3rd Qr.	109	11,816	24,018		
	4th Qr.	109	11,925	24,242		
2012	1st Qr.	110	12,027	24,446		
	2nd Qr.	107	11,822	24,089		
	3rd Qr.	105	11,715	23,899		
	4th Qr.	117	12,527	25,496		
2013 1	1st Qr.	117	12,676	25,887		

<sup>&</sup>lt;sup>1</sup> Provisional

<sup>&</sup>lt;sup>2</sup> Provisional

<sup>&</sup>lt;sup>2</sup> Excluding one hotel not operational because of renovation works

Table 8:- Monthly Occupancy Rates (%) for All Hotels and "Large" Hotels, 2011 - 2013

			All H	lotels					''Large'	' Hotels		
Month	20	11	20	12	201	13 <sup>1</sup>	20	2011		12	2013 1	
	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed	Room	Bed
January	75	66	74	65	67	59	76	67	76	67	69	61
February	68	60	67	59	66	57	70	61	69	60	67	59
March	64	57	65	57	63	56	66	58	66	58	66	58
1st Quarter	<u>69</u>	<u>61</u>	<u>69</u>	<u>61</u>	<u>65</u>	<u>57</u>	<u>71</u>	<u>62</u>	<u>70</u>	<u>62</u>	<u>68</u>	<u>59</u>
April	64	57	62	55			68	60	66	58		
May	55	49	59	52			57	50	61	54		
June	44	38	45	39			45	39	46	41		
2nd Quarter	<u>55</u>	<u>48</u>	<u>55</u>	<u>49</u>			<u>57</u>	<u>50</u>	<u>58</u>	<u>51</u>		
1st Semester	65	57	62	55			64	<i>56</i>	64	<i>56</i>		
July	53	47	52	45			54	48	53	47		
August	57	51	56	50			60	53	60	52		
September	64	57	60	53			66	58	62	54		
3rd Quarter	<u>58</u>	<u>51</u>	<u>56</u>	<u>49</u>			<u>60</u>	<u>53</u>	<u>58</u>	<u>51</u>		
Jan. to Sep.	<i>63</i>	55	60	53			63	55	62	55		
October	68	60	67	59			70	61	70	62		
November	74	66	69	61			76	67	71	63		
December	73	64	71	63			74	65	74	65		
4th Quarter	<u>72</u>	<u>64</u>	<u>69</u>	<u>61</u>			<u>73</u>	<u>64</u>	<u>72</u>	<u>63</u>		
2nd Semester	64	57	63	55			65	58	65	57		
Whole Year	65	57	62	55			65	57	65	57		

<sup>&</sup>lt;sup>1</sup> Provisional

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Table 9:- Employment in the tourist industry as at end of March, 2008 - 2012

Year Establishments	2008	2009	2010	2011	2012
Restaurants	2,251	2,431	2,464	2,409	2,511
Hotels	22,314	20,478	20,847	21,672	21,628
Travel and Tourism	4,188	4,093	3,850	4,052	3,888
Total	28,753	27,002	27,161	28,133	28,027

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 Statistics Mauritius 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 Statistics Mauritius 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.

= <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.