

ANNUAL REPORT  
2017-2018

**AHRIM**

ASSOCIATION DES  
HOTELIERS ET  
RESTAURATEURS  
ILE MAURICE





# 2018: International Year of the Reef



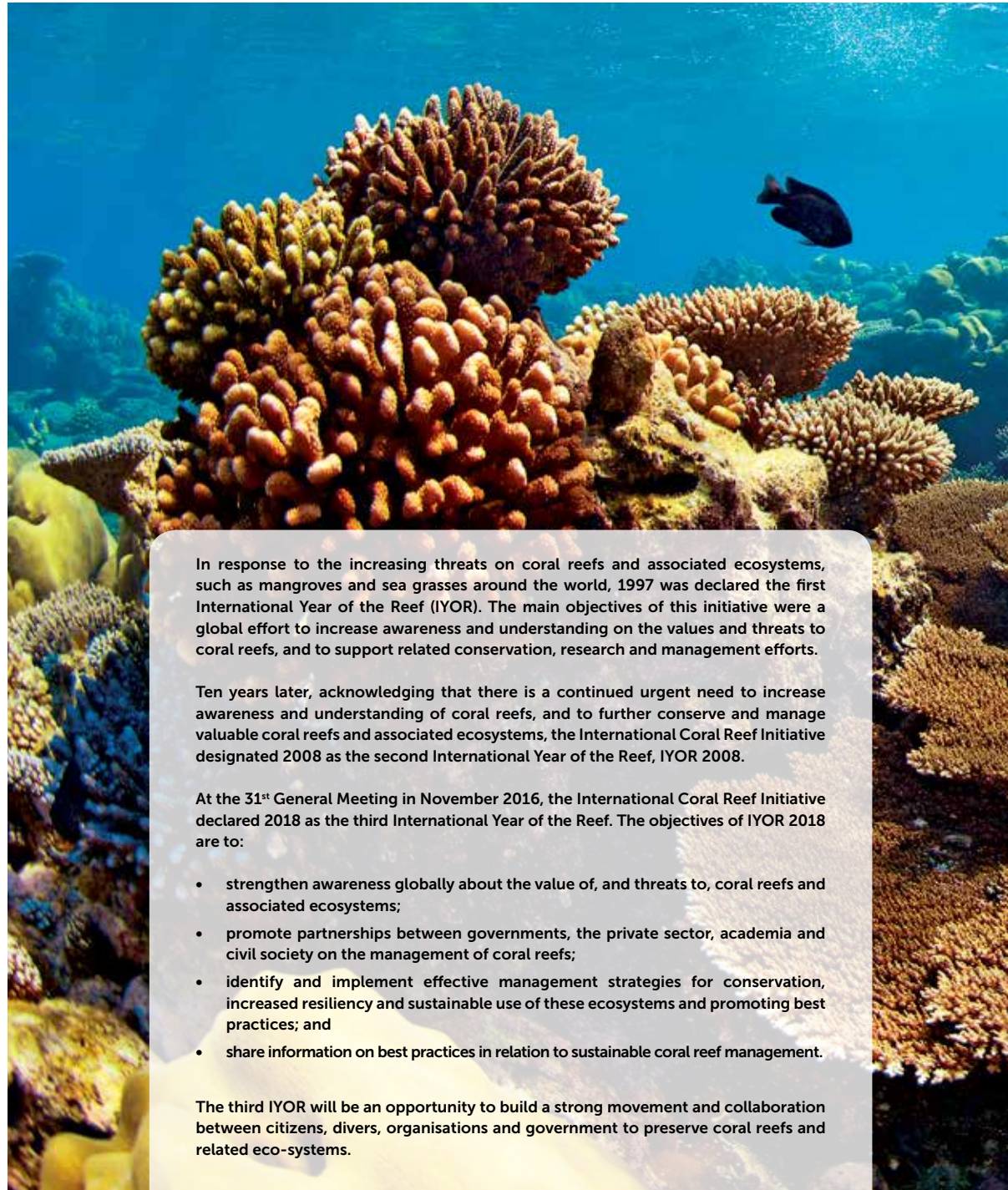
In response to the increasing threats on coral reefs and associated ecosystems, such as mangroves and sea grasses around the world, 1997 was declared the first International Year of the Reef (IYOR). The main objectives of this initiative were a global effort to increase awareness and understanding on the values and threats to coral reefs, and to support related conservation, research and management efforts.

Ten years later, acknowledging that there is a continued urgent need to increase awareness and understanding of coral reefs, and to further conserve and manage valuable coral reefs and associated ecosystems, the International Coral Reef Initiative designated 2008 as the second International Year of the Reef, IYOR 2008.

At the 31<sup>st</sup> General Meeting in November 2016, the International Coral Reef Initiative declared 2018 as the third International Year of the Reef. The objectives of IYOR 2018 are to:

- strengthen awareness globally about the value of, and threats to, coral reefs and associated ecosystems;
- promote partnerships between governments, the private sector, academia and civil society on the management of coral reefs;
- identify and implement effective management strategies for conservation, increased resiliency and sustainable use of these ecosystems and promoting best practices; and
- share information on best practices in relation to sustainable coral reef management.

The third IYOR will be an opportunity to build a strong movement and collaboration between citizens, divers, organisations and government to preserve coral reefs and related eco-systems.





# Notice of meeting



Notice is hereby given that the 45<sup>th</sup> Annual General Meeting of the "Association des Hôteliers et Restaurateurs - Ile Maurice" (AHRIM) will be held on Wednesday 27 June 2018 at 16h00 at Lux\* Grand Gaube, Grand Gaube, Mauritius.

## AGENDA

1. Approval of Minutes of Proceedings of the 44<sup>th</sup> Annual General Meeting held on 22 June 2017
2. Report of the President
3. Approval of the Statement of Accounts for the year ended 31 March 2018
4. Approval of the Budget for the year ending 31 March 2019
5. Appointment of the Auditor for the year ending 31 March 2019
6. Election of Council members
7. A.O.B.

By Order of the Council

**Jocelyn Kwok**  
Secretary

This 14 May 2018







# Table of contents

<b>NOTICE OF MEETING</b>	<b>1</b>
<b>TABLE OF CONTENTS</b>	<b>2</b>
<b>AHRIM PAST PRESIDENTS</b>	<b>6</b>
<b>AN INSIGHT INTO WORLD TOURISM</b>	<b>7</b>
International Tourist Arrivals	7
Global Economic Prospects	8
<b>INDUSTRY PERFORMANCE IN MAURITIUS, 2017 – 2018</b>	<b>12</b>
<b>Tourism as an Inclusive and Sustainable Economic Growth Engine</b>	<b>12</b>
Tourist Arrivals	13
Air Lift	15
<b>Tourism as a Motor for Social Inclusion, Employment and Poverty Reduction</b>	<b>19</b>
Employment	19
Taxes and Levies	19
Accommodation Facilities	19
Other Tourism-Related Operators	20
Debt	20
Investment	20
<b>The Hotel Sector as a Major Investor in Resource Efficiency and Environment Protection</b>	<b>21</b>
<b>Mauritius and Directly Competing Locations</b>	<b>22</b>
<b>Challenges Ahead</b>	<b>22</b>
<b>Conclusion</b>	<b>23</b>
<b>AHRIM'S YEAR IN REVIEW</b>	<b>26</b>
<b>Main Projects / Files</b>	<b>26</b>
Budget Speech 2017 - 2018	26
National Budget 2018 - 2019	26
Assises du Tourisme	27
Labour Chapter	27
National Minimum Wage	27
National Tripartite Committee	27
<b>AHRIM Initiatives</b>	<b>28</b>
AHRIM Check In Magazine	28
OPERA - Orientation Programme for Education and Recruitment by AHRIM	28
HR Indicators 2018	28
AHRIM Initiative under NSDP	28
Placement of Persons with Hearing and Speech Impairment in Hotels	28
Reward to the Best Students 2017 - 2018	29
AHRIM Quality Charter for Tourist Residences and Guest Houses	29
AHRIM Restaurant Members B2B Meet	29







<b>Projects in Partnership</b>	<b>29</b>
Spirit of Chamarel	29
Mahebourg 360	29
Video Clips Around the Airport Piano	29
<b>Regular and On-going Activities</b>	<b>30</b>
Participation in International Fairs	30
La Messe du Tourisme	30
La Fête du Pain	30
Festival International Kreol (FIK)	31
Le Petit Futé 2018	31
<b>Other Projects / Cases</b>	<b>32</b>
Programme National d'Efficacité Energétique (PNEE)	32
AHRIM's Actions v/s a Major Aquaculture Project	32
Taxis Based at Hotels	33
Hotel Star Rating	33
Security issues	33
<b>MEMBERS' CORNER</b>	<b>34</b>
<b>OVERVIEW OF AHRIM</b>	<b>38</b>
<b>Organisation and Structure</b>	<b>38</b>
List of AHRIM Members, 2017 - 2018 (as at March)	38
Executive Council, 2017 - 2018	41
AHRIM's Commissions	42
Our Office	42
<b>2017/2018 STATISTICAL BRIEF ON MAURITIUS TOURISM</b>	<b>46</b>











# BEACH EROSION



Mauritius is famous for its beautiful beaches, central to its tourism and a pillar to the island's marine ecosystem. Unfortunately, Mauritius' coastline is naturally eroding and further impacted by the effects of climate change. Stormy rainfalls, flash floods and cyclones bring significant changes to the island's beaches in a matter of days; waves move huge sections of sand from the visible parts of the beach onto the lagoon bed. This loss of sand can be dramatic even though tides may slowly redeposit some back. Fortunately, there are sustainable ways to protect our beaches from past and future erosion. Profiling each beach and understanding the changes can lead to adequate remedies to erosion, with the engagement of all stakeholders.





## PAST PRESIDENTS

Year	Name
1973	Mr. Peter Goldsmith
1974	Mr. Peter Goldsmith
1975	Mr. Claude Mallac
1976	Mr. Claude Mallac
1977	Mr. Bernard De Rosnay
1978	Mr. Claude Mallac
1979	Mr. Claude Mallac
1980	Mr. Herbert Couacaud
1981	Mr. Eddie Goldsmith
1982	Mr. Paul Jones
1983	Mr. Eddie Goldsmith
1984	Mr. Jean Patrice Clozier
1985	Mr. Jean Patrice Clozier
1986	Mr. Paul Jones
1987	Mr. Paul Jones
1988	Mr. Jens Grossner
1989	Mr. Jens Grossner
1990	Mr. Jacky Pitot
1991	Mr. Jens Grossner
1992 /1993	Mr. Norbert Angerer
1993/1994	Mr. Karl Braunecker
1994/1995	Mr. Karl Braunecker
1995/1996	Mr. Karl Braunecker
1996/1997	Mr. Arnaud Martin
1997/1998	Mr. Patrice Hardy
1998/1999	Mr. Patrice Hardy
1999/2000	Mr. Jean Marc Lagesse
2000/2001	Mr. Christopher T. Najbicz
2001/2002	Mr. Christopher T. Najbicz
2002/2003	Mr. Jean Jacques Vallet
2003/2004	Mr. Jean Jacques Vallet
2004/2005	Mr. Arnaud Martin
2005/2006	Mr. Patrice Hardy
2006/2007	Mr. Jean Michel Pitot
2007/2008	Mr. Jean Michel Pitot
2008/2009	Mr. Tommy Wong
2009/2010	Mr. Tommy Wong
2010/2011	Mr. Jean Jacques Vallet
2011/2012	Mr. Jean Jacques Vallet
2012/2013	Mr. François Eynaud
2013/2014	Mr. François Eynaud
2014/2015	Mr. Gregory de Clerck
2015/2016	Mr. Gregory de Clerck
2016/2017	Mr. Jean Louis Pismont
2017/2018	Mr. Jean Louis Pismont





# An Insight into World Tourism

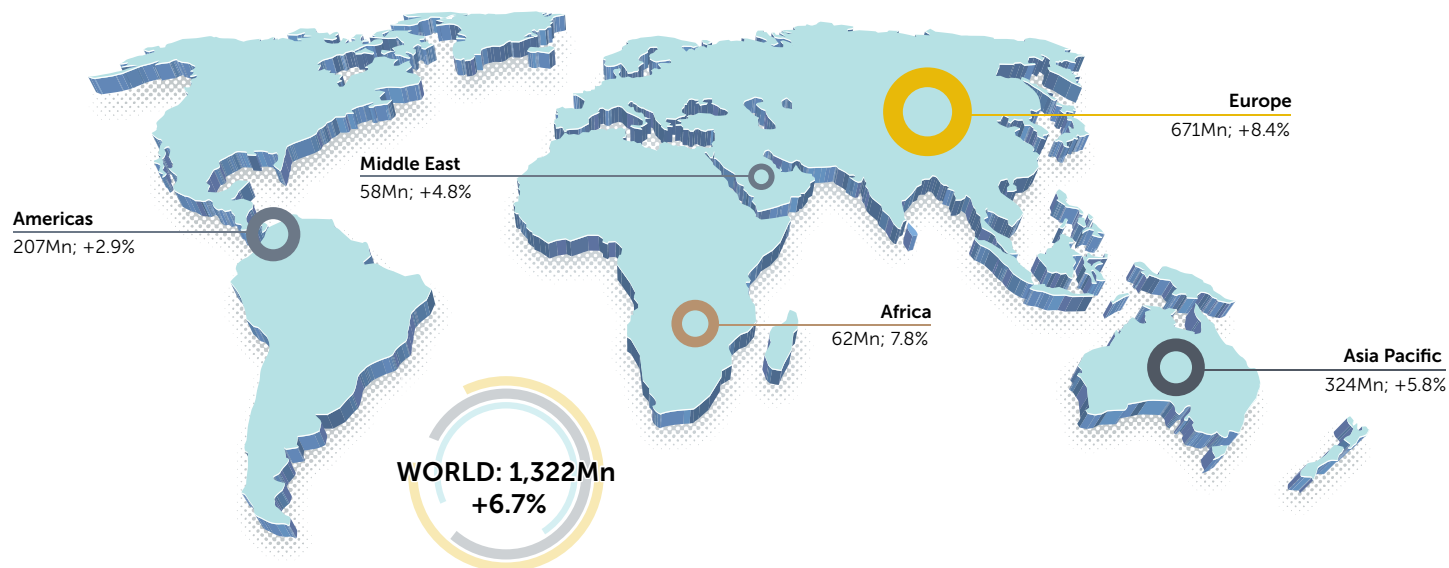


## International Tourist Arrivals

International tourist arrivals grew by a robust 6.7% in 2017, tantamount to the eighth consecutive year of strong growth since the 2009 financial crisis year. This growth is the strongest result in seven years and is well above the consistent trend of four percent observed since 2010. Also, for the seventh consecutive year, the Travel & Tourism sector has outperformed the global economy - the sector was the fastest growing broad economic sector globally, showing stronger growth than all sectors including Manufacturing (4.2%), Retail and Wholesale (3.4%), Agriculture, Forestry and Fisheries (2.6%) and Financial Services (2.5%).

Continued growth and sturdy recovery were key characteristics of many destinations in 2017. The United Nations World Tourism Organisation (UNWTO) estimated that total arrivals reached 1,322 million with Europe leading both in absolute numbers and in terms of growth. This large and mature region recorded an astonishing 8.4% growth, an all-time record upswing, followed by Africa (7.8%) with the latter consolidating its 2016 rebound. The growth in Asia and the Pacific (5.8%) and Middle East (4.8%) is also commendable while the Americas registered the lowest growth (2.9%).

**Figure 1: International tourist arrivals and growth, 2017**



Source: United Nations World Tourism Organisation, January 2018

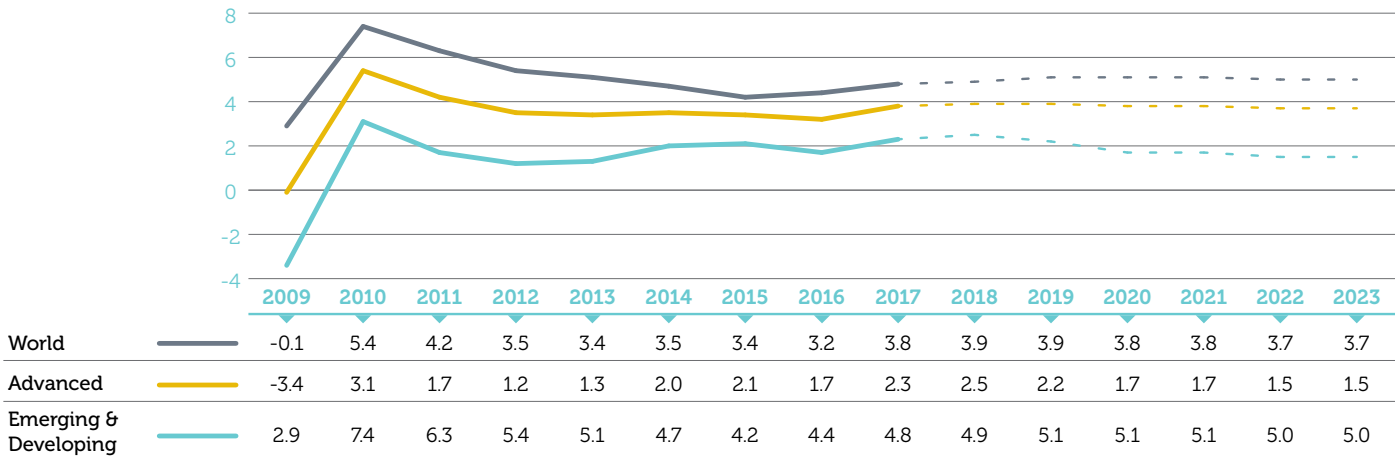
Based on the annual average growth trends forecast by the UNWTO for the 10 years between 2010 and 2020, the resilient growth trajectory hovering between 3.0% and 4.0%, is expected to continue.



# An Insight into World Tourism

## Global Economic Prospects

The remarkable growth in international tourist arrivals in 2017 was bolstered by the world economic growth and the solid demand for travel from many traditional and emerging source countries. The growth momentum observed since semester two of 2016 especially in advanced economies has improved GDP growth in this region in 2017 (+2.3% according to the IMF). The Emerging and Developing countries also grew at an increasing rate and reached 4.8% in 2017. The rebound in these two country groupings is reflected in the 0.6 pp increase in world GDP growth that reached 3.8% in 2017, after two years of consecutive decreasing growth.



Source: IMF

The world economy has entered 2018 with plenty of momentum as positive economic performance is expected to continue along the year. This upturn in the global economy paves the way to increasing demand and will continue to shape the growth in international tourist arrivals.

## GDP growth forecast in selected source markets for Mauritius

Country	2018	2019	2020	2021	2022	2023
France	2.1	2.0	1.8	1.7	1.6	1.6
United Kingdom	1.6	1.5	1.5	1.6	1.6	1.6
Germany	2.5	2.0	1.5	1.4	1.3	1.2
South Africa	1.5	1.7	1.8	1.8	1.8	1.8
India	7.4	7.8	7.9	8.1	8.1	8.2
China	6.6	6.4	6.3	6.0	5.7	5.5
Switzerland	2.3	2.0	1.9	1.7	1.7	1.7
Italy	1.5	1.1	0.9	0.8	0.8	0.8
Australia	3.0	3.1	2.9	2.7	2.6	2.6

Source: IMF



# An Insight into World Tourism

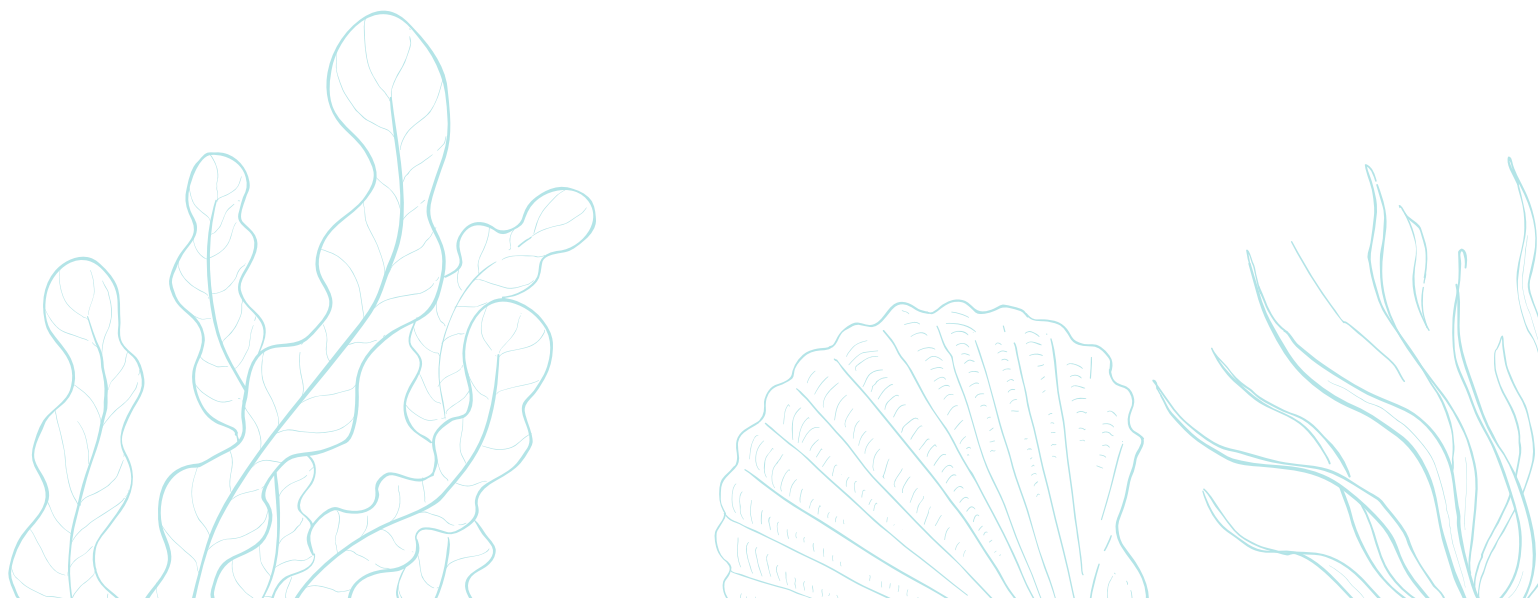


The Eurozone economic upswing is expected to continue into 2018, supporting continued travel growth. While cost increases will deter some travel within the region, the stronger euro will contribute to make long-haul outbound travel more affordable. It is expected that with low unemployment and with wage gains supporting private consumption, travelling by Germans will continue to grow in 2018. Weaker exchange rates in the UK does not seem to have hampered the appeal for international travel as many destinations have reported double-digit increases in arrivals from this market in 2017. However, as travel abroad is expected to become even more expensive for British travellers due to some lagged effects of exchange rate movements, a slowdown in travel growth is anticipated for 2018.


While the strength of the manufacturing PMI, the Purchasing Managers Index (an indicator of the economic health of the manufacturing sector) bodes well for global trade, other timely trade indicators, particularly from Asia, seem to be less positive. However, arrivals growth from China is expected to remain strong and roughly consistent with the average growth over the past two years (though slower than the exceptional growth recorded in 2017). This is despite the more moderate economic growth in China, and its rising costs. Furthermore, the growing middle class in China will continue to drive outbound travel growth this year.

The relatively long period of uninterrupted world GDP growth and concerns that a financial market slowdown could eventually impinge on growth have been questioned by some experts. However, others are of the view that economic expansions do simply not die of old age and growth will continue albeit, more moderately. As such, overall, economic uncertainty has diminished although various geopolitical risks remain.

Recently, swelling numbers of tourists have been driving tourism-phobia sentiments. Anti-tourist attitude is rife in some touristic cities where locals are frustrated with the overcrowding effects, increases in prices and traffic jams triggered during peak tourism seasons. Experts around the world however believe that growth is not the enemy and it is how a destination manages its growth that counts.







# PLASTIC POLLU- TION

Plastic pollution is the most dangerous threat to the island's fauna and flora; it degrades very slowly and pollutes for years. Examples where trashed plastic killed marine ecosystems are abundant. Acting with more resolve on bottled water and plastic straws for example is bringing major results that need to be sustained through better public education and sensitisation of users – locals and foreign guests alike.









# Industry Performance

## IN MAURITIUS, 2017 – 2018



**“TRAVEL & TOURISM CREATES JOBS, DRIVES ECONOMIC GROWTH AND HELPS BUILD BETTER SOCIETIES”**

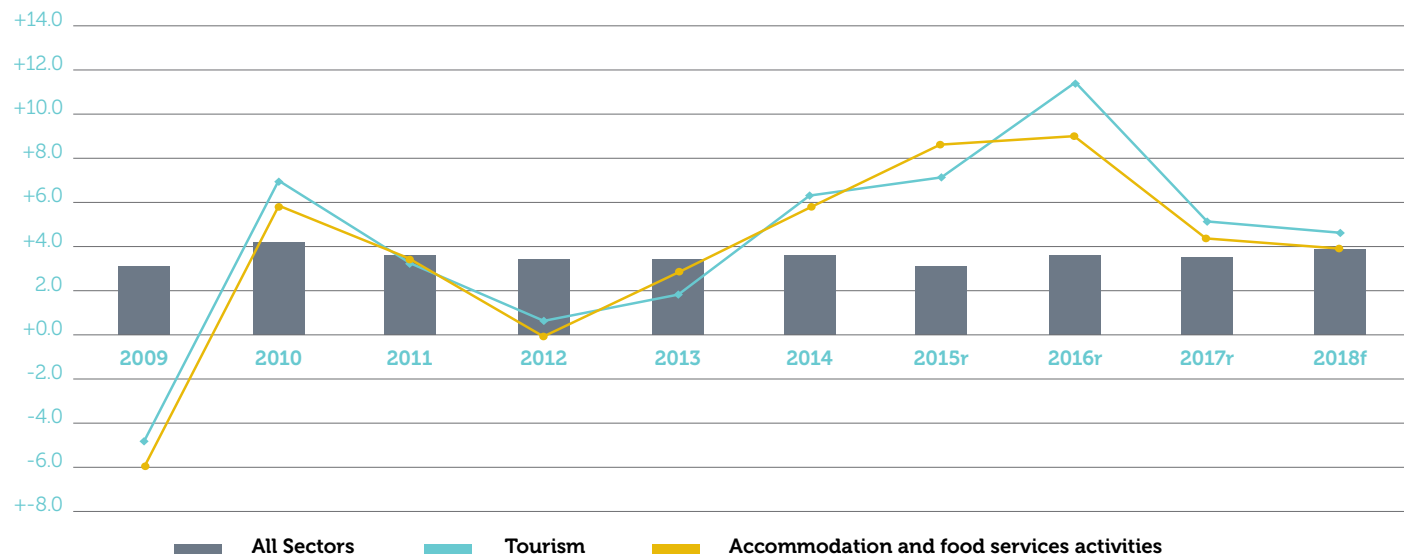
Gloria Guevara, World Travel & Tourism Council President & CEO

The tourism sector is an important generator of GDP and jobs around the world including in Mauritius. The key challenge for the country will be to ensure that the growth of the sector is sustainable and inclusive. As such, the growth has to be well planned, well managed and includes partnerships between not only the public and private sectors but also across the whole community.

### Tourism as an Inclusive and Sustainable Economic Growth Engine

The contribution of the tourism sector to the economy of the island is largely shaped by the number of tourist arrivals. Since 2014, the growth in the contribution of the Tourism sector (covering the components of “Accommodation and food service activities”, “Transport”, “Recreational and leisure” and “Manufacturing”, attributable to tourism) and ‘Accommodation and food services activities’ sector in the economy has out-performed the national average - with a peak of 11.5% and 9.2% respectively in 2017 compared to 3.6% for the national average. For 2018, it is expected that growth in the sector will be more moderate (4.1% in the ‘Accommodation and food services activities’ sector and 4.7% in the Tourism sector) but will remain above the national average projected at 3.9%.

**Figure 3: Real growth, Accommodation and food service activities and Tourism<sup>1</sup> sector v/s national average, 2008 – 2017<sup>f</sup>**



1: Tourism covers the components of “Accommodation and food service activities”, “Transport”, “Recreational and leisure” and “Manufacturing”, attributable to tourism

Source: Statistics Mauritius



# Industry Performance

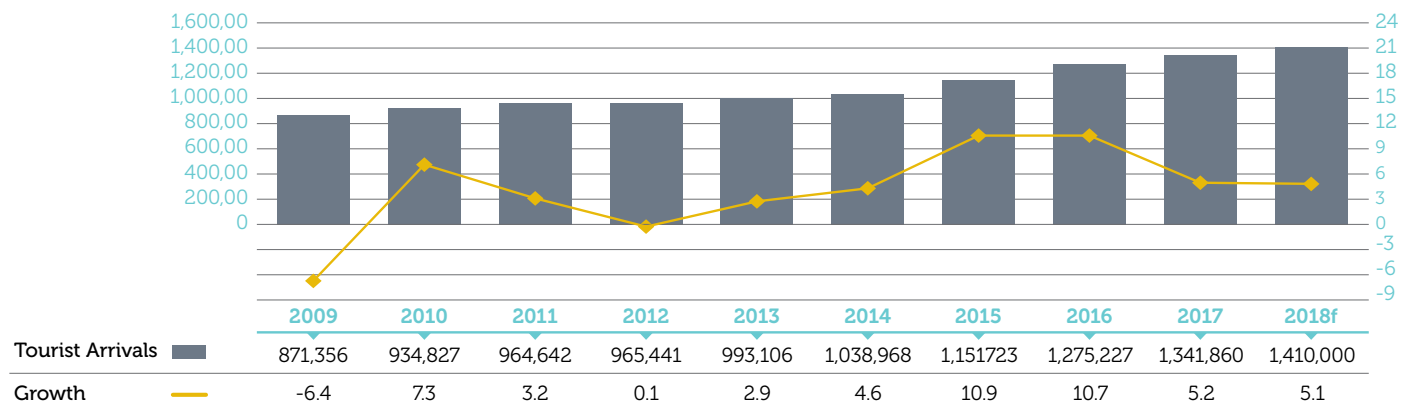
## IN MAURITIUS, 2017 – 2018



### Tourist arrivals

Tourist arrivals saw double-digit growth in 2015 and 2016, well above world growth rates. Growth in 2017 was satisfying at 5.2% and Statistics Mauritius, in its March 2018 issue on indicators for tourism, is forecasting some 1,410,000 tourist arrivals, or a growth of 5.1% for the year 2018 compared to 2017.

Figure 4: Trend in tourist arrivals and growth in Mauritius, 2009 – 2018<sup>f</sup>

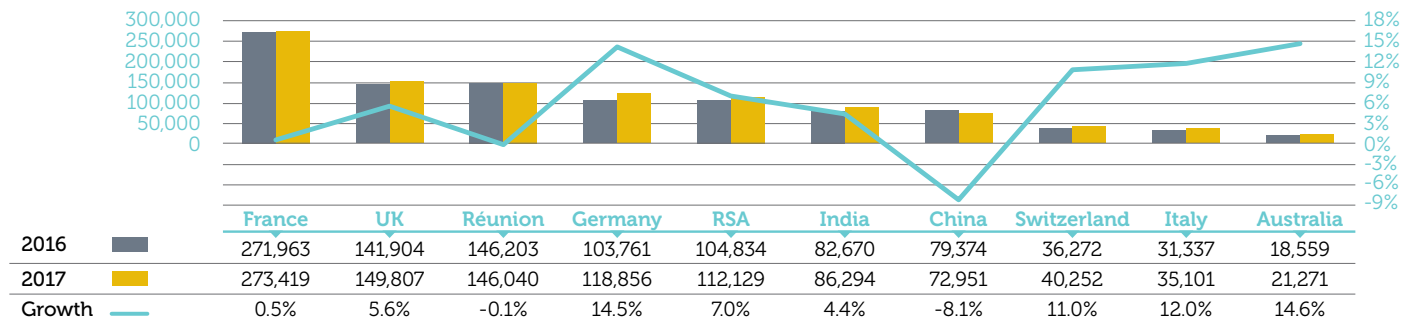


Source: Statistics Mauritius

Among our top 10 source markets in 2017, China significantly, and Réunion very marginally, were the only ones to have registered negative growth (-8.1% and -0.1% respectively). Germany, Switzerland, Italy and Australia all recorded solid growths of 14.5%, 11.0%, 12.0% and 14.6% respectively. In fact, in 2017, Germany recorded double-digit growth rates for the third consecutive year. 2017 was also the second year of positive growth for Italy after eight long years of negative growth.

UK, South Africa and India achieved healthy growth rates of 5.6%, 7.0% and 4.4% respectively whilst France posted a modest 0.5% growth.

Figure 5: Tourist arrivals from main and emerging markets and growth, 2016 – 2017



Source: Statistics Mauritius



# Industry Performance

## IN MAURITIUS, 2017 – 2018

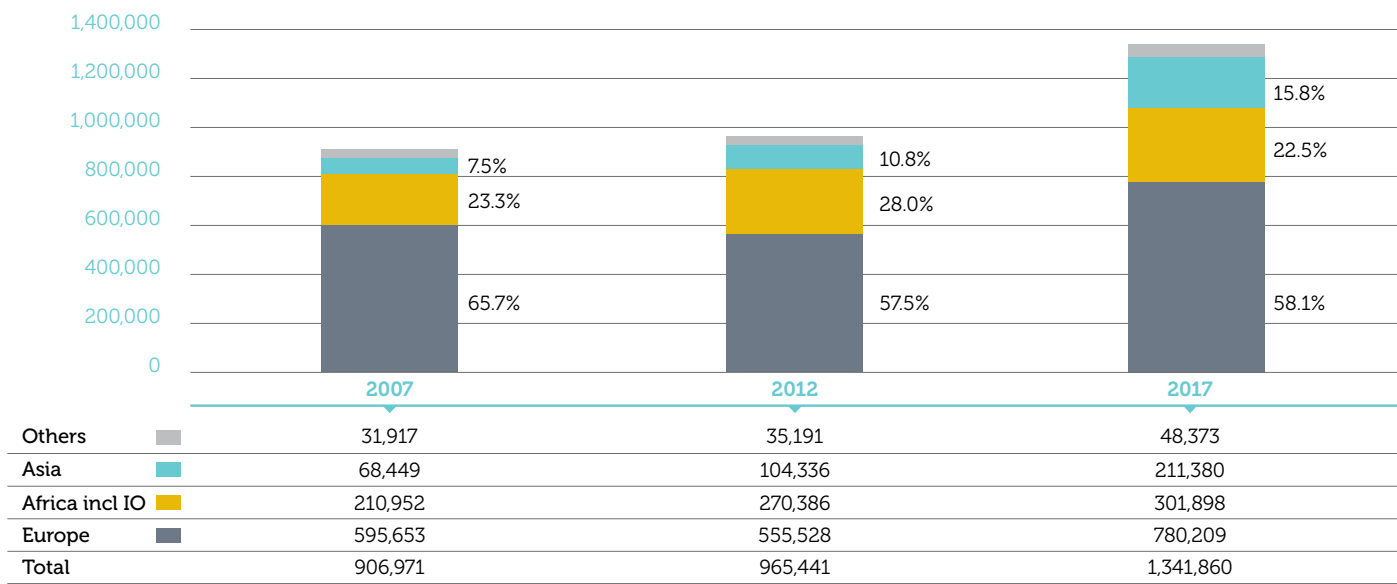


Overall, from 2016 to 2017, the share of arrivals from our top 10 markets as a percentage of total arrivals dropped from 79.7% to 78.7%. France that used to account for around a third of all arrivals, now hovers around 20%.

For the third consecutive year, Netherlands and Poland, two emerging markets, registered double-digit growth (+44.4%, +45.5% & +31.6%, and, +50.1%, +90.0% and +11.8% respectively). Year on year growth between 2016 and 2017 was robust for other emerging markets like the Czech Republic and the UAE (+23.4% for both). After four years of negative growth, 2017 was a turning point for Russia with a colossal 23.4% positive growth in 2017.

These strong performances are the direct result of successful diversification within a wider Europe and supported by new air routes and additional special flights during the peak season. As such, overall growth was mostly driven by arrivals from Europe (+6.2% y.o.y) and the comparative share of European markets increased from 57.6% to 58.1%.

Figure 6: Tourist arrivals by region, 2007, 2012 & 2017



Source: Statistics Mauritius

As regards the diversification strategy pursued by Mauritius outside Europe, figures achieved over the long run are noteworthy. In a continuous growth mode, the share of Asian markets has increased from 7.5% to 15.8% over the last 10 years, whilst in number terms, arrivals increased by a massive 208.8% from 68,449 in 2007 to 211,380 last year.

Looking into the first quarter of 2018 compared to the same period in 2017, total tourist arrivals have increased by 4.9%. With later Easter holiday dates in 2018, the total arrivals over the first four months of the year display an increase of 2.3% compared to last year.

The Chinese market, after drops of over 11% in 2016, and of 8.6% in 2017, continues its downward trend in 2018; arrivals have dropped by 17.3% during the first quarter of the year. Additional collaborative work and intelligence is required to better understand this key source market, namely its arrangements within the trade and distribution, as well as consumer e-transactions.



# Industry Performance

## IN MAURITIUS, 2017 – 2018

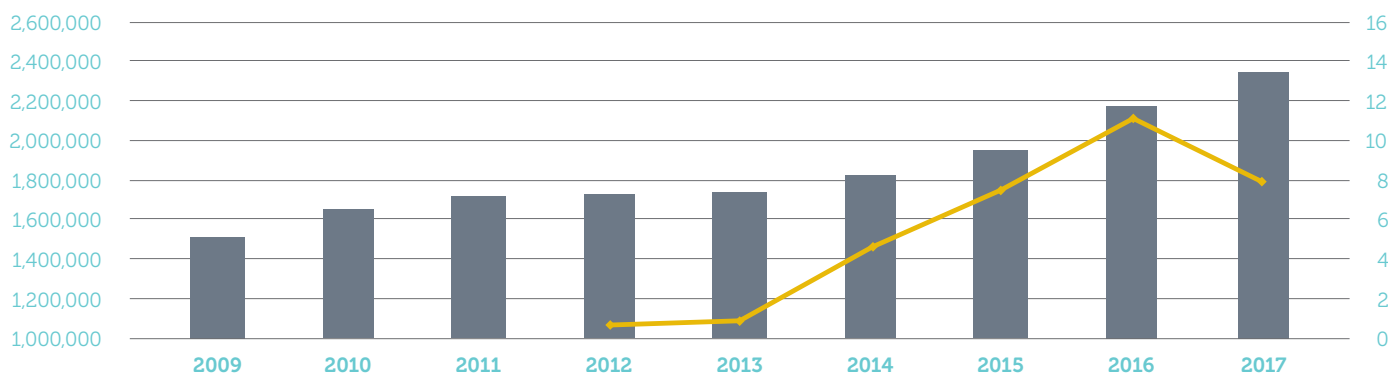


### Air lift

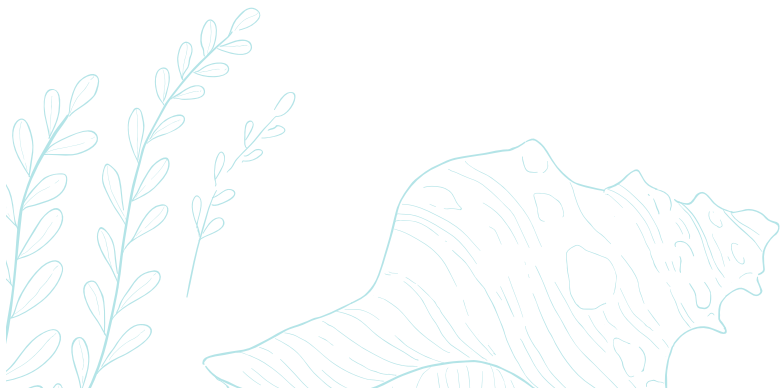
Air travel is an integral component of the tourism sector and air lift into Mauritius, a long-haul destination, is indissociable from the development of the local tourism industry.

The number of seats available from various destinations to Mauritius continued to report robust increases (+7.9% in 2017) in line with the increase in tourist arrivals. Since 2014, healthy growths were posted in air lift progress with the arrival of new airlines and increase in existing flights.

Figure 7: Number of air seats and growth, 2009 - 2017



Note: 2008 to 2010 figures are based on scheduled flights published by the External Communications Division for the summer (March to October) and winter (November to April) seasons. As from 2011, the figures relate to the total number of seats available on airplanes landing in Mauritius over each calendar year  
Sources: Mauritius Tourism Promotion Agency and External Communications Division





# Industry Performance

## IN MAURITIUS, 2017 – 2018



The difference in the number of seats by countries serviced and airlines present in Mauritius can be summarised as follows:

**Table 1: Number of seats by originating country of flights, 2016 & 2017 and airlines )**

Originating country	Number of seats			Remarks
	2016	2017	Change	
France	325,700	323,478	-2,222	
U.K	117,678	128,364	10,686	5 weekly flights (from three) since November 2017 by British Airways. Fourth weekly flight on London by Air Mauritius during April 2017 and as from July 2017. 8 additional special flights by Thompson from Manchester and four by Thomas Cook from London Gatwick.
Germany	84,166	104,890	20,724	Increased from 1 weekly flight to 2 by Eurowings (started operation since May 2016) during 8 months in 2017
Austria	8,292	15,845	7,553	Additional flights by Austrian Airlines during the peak season
Denmark	2,114	2,115	1	
Sweden	4,231	4,302	71	
Finland	1,504	2,446	942	
Spain	5,150	5,110	-40	
Poland	5,775	7,491	1,716	More special fights by TUI and Polish Airline
Netherlands	0	7,866	7,866	New: KLM since 30 October 2017
Italy	15,570	14,560	-1,010	
Switzerland	7,889	21,473	13,584	Edelweiss operated 2 weekly flights during the winter season 2016/17 and 2017/18
Romania	301	0	-301	
South Africa	223,245	251,163	27,918	3 direct flights on Durban since 9 August 2017 by Air Mauritius and 1 additional flight per week on Cape Town and CPT via Durban. SAA: 1 additional flight per week
Reunion	439,681	467,798	28,117	Double daily flight on St-Pierre since April 2017 by Air Mauritius
Seychelles	58,940	64,470	5,530	
Madagascar	83,184	86,260	3,076	+2 flights per week by Air Mauritius
Mayotte	163	0	-163	
Kenya	13,268	11,904	-1,364	
Tanzania	4,620	6,864	2,244	Air Mauritius: Started as from May 2016
Mozambique	4,488	4,092	-396	Air Mauritius: From May 2016 to August 2017
Zambia	164	0	-164	
Dubai	402,959	406,800	3,841	Bi-class configuration instead of the 3 class one since Q4 of 2017 by Emirates
Saudi Arabia	0	14,006	14,006	New: Saudi Airlines since 14 September 2017
Turkey	52,992	63,606	10,614	5 weekly flights per week since August 2017 by Turkish
Iran	596	894	298	
Australia	33,084	40,972	7,888	Air Mauritius: Third flight weekly on Perth from July 2017 to January 2018
China	102,628	97,725	-4,903	Air Mauritius: Twice weekly (instead of trice) on Shanghai from March to October 2017. Beijing: July 2017 to 17 November 2017; cancelled thereafter
Malaysia/Singapore	58,022	59,792	1,770	Air Mauritius: Fourth weekly flight during specific period in 2017
India	113,089	126,858	13,769	Air Mauritius: 2 weekly flights (from 1) on Chennai/Bangalore since November 2016
<b>Grand total</b>	<b>2,169,493</b>	<b>2,341,144</b>	<b>171,651</b>	

Sources: MTPA, ATOL, Air Mauritius and External Communication Division



# Industry Performance

## IN MAURITIUS, 2017 – 2018



**Table 2: Number of seats by airlines, 2016 & 2017**

Airline	Number of seats			Remarks
	2016	2017	Change	
Air Asia	13,572	13,572	0	From 04 October 2016 to March 2017
Air Austral	209,140	224,405	15,265	
Air France	125,805	126,360	555	
Air Madagascar	11,180	11,310	130	
Air Mauritius	910,831	960,689	49,858	
Air Seychelles	58,940	64,470	5,530	
Austrian Airlines	8,292	15,845	7,553	Additional flights during the peak season
B.A /Comair	7,864	8,529	665	
British Airways	46,345	51,727	5,382	2 additional flights per week since November 2017
Condor	58,830	57,240	-1,590	
Corsair	78,594	75,527	-3,067	
Edelweiss	7,889	19,423	11,534	Increase in the number of flights - peak season only
Emirates Airlines	402,959	406,800	3,841	Change from tri to bi class configuration in one of the twice daily flight
Eurowings	11,405	29,670	18,265	As from May 2016
Evelop	5,150	5,110	-40	Operates from June to October
KLM	0	7,866	7,866	As from 31 October 2017
Livingston	164	0	-164	
Lufthansa	13,931	17,980	4,049	Peak season only
Mahan Air	596	894	298	
Meridiana fly	15,570	14,560	-1,010	
Polish Airlines	0	2,170	2,170	Special flights in March 2018
South African Airways	98,667	115,152	16,485	+ 1 flight per week on Johannesburg
Saudi Airlines	0	14,006	14,006	As from 14 September 2017
Tarom	301	0	-301	
Thomas Cook	0	2,304	2,304	Special flights in November and December 2017
Thomson	24,099	26,608	2,509	Peak season only from Denmark, Sweden and Finland
Titan Airways	602	0	-602	
TUI	5,775	5,321	-454	
Turkish Airlines	52,992	63,606	10,614	Two additional flights per week from August 2017
<b>Total</b>	<b>2,169,493</b>	<b>2,341,144</b>	<b>171,651</b>	

Sources: MTPA, ATOL, Air Mauritius and External Communication Division



# Industry Performance

## IN MAURITIUS, 2017 – 2018



During 2017, Mauritius has welcomed two new important players, namely Saudi Airlines as from 14 September and KLM Royal Dutch (in collaboration with Air Mauritius) from 31 October. On 19 November 2017, the national airline added a new route, Geneva, Switzerland in its portfolio for the peak season.

Authorisations for special flights by Thomson Airways, Thomas Cook Airlines and TUI were also granted during the peak season from Denmark, Sweden and Poland. Airlines already servicing Mauritius also operated special flights in addition to their scheduled flights (e.g. Emirates, Air Mauritius, etc.).

Furthermore, the following additional/new flights have started/been announced for 2018:

- Third flight on Hong Kong in July 2018;
- Sixth flight on India from April to June 2018;
- A fifth flight on the Singapore-Kuala Lumpur leg by end of the year 2018; and,
- A third flight on Shanghai from July to October 2018.

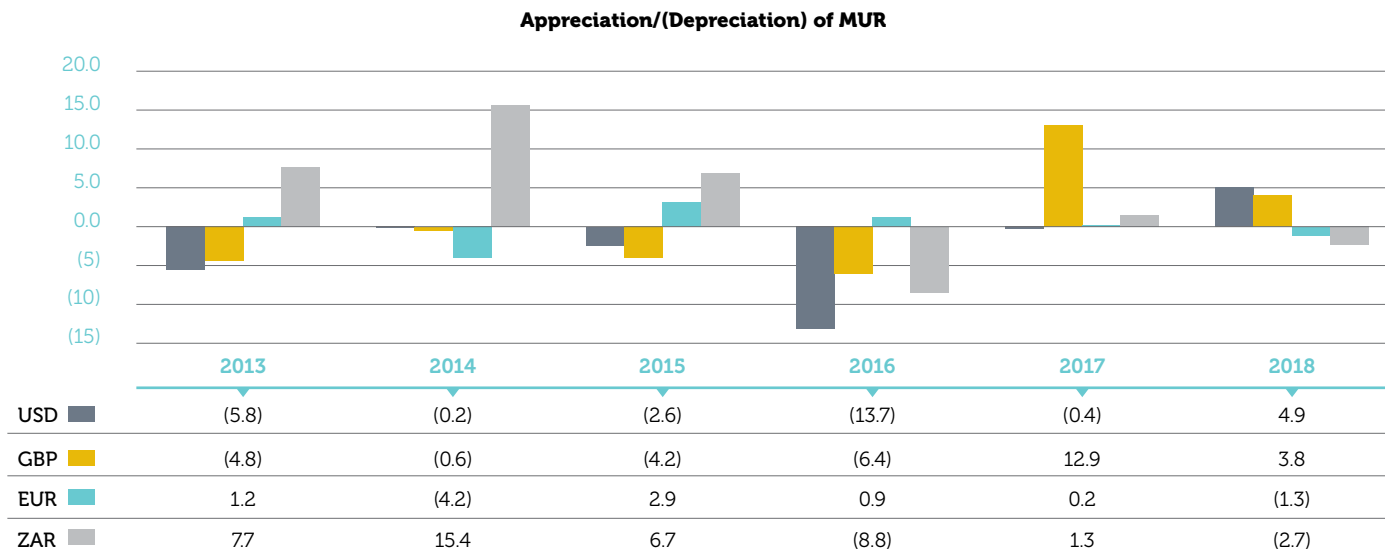
For the first four months of 2018 year-on-year, an increase in both the number of seats (+2.9%) and passengers (+2.8%) were noted. The average load factor during that period thus marginally dropped from 73.7% in 2017 to 73.6% in 2018.

It should be highlighted that the average load factor of airlines has oscillated between 73.9% and 77.0% between 2011 and 2016. In 2017, the load factor was estimated at 75.1%.

### Rate of exchange

Since around the last quarter of 2012, a reversal of trend was experienced with the Rupee finally conceding against the Euro and against the GBP. As the Euro represents some 50% of our revenue denominations, its value needs close monitoring.

**Figure 8: Appreciation/depreciation of the Rupee against selected currencies 2012 – 2017 (Average for 12 months ended March)**



Source: Bank of Mauritius

On average, for the year ending March 2018, the MUR against its major trading currencies was mostly stable except for the US dollar which has somehow strengthened while the GBP has continued to depreciate, albeit at a decreasing rate, in the aftermath of Brexit announcement.



# Industry Performance

## IN MAURITIUS, 2017 – 2018



### Tourism as a Motor for Social Inclusion, Employment and Poverty Reduction

#### Employment

It is estimated that one in five of all new jobs created globally in 2017 are attributable to Travel & Tourism and that direct, indirect and induced impact accounted for 1 in 10 jobs around the world. Altogether, Travel & Tourism supports more than 400 million jobs globally.

It is undeniable that the hotel industry is a major creator of jobs and career opportunities for the young people of this country and indeed many families, and often whole communities, are dependent on this industry for their welfare and continued social development. Total direct employment in the sector (based on the results of the Continuous Multi-Purpose Household Survey) is estimated at 45,600 in 2017 or 8.4% of total employment. According to the Tourism Satellite Accounts of 2010, direct employment in the Accommodation and Food Services Activities was estimated at 30,400 and 22,990 in other economic sectors. Using the same proportion, in 2017, direct employment in the tourism sector can be estimated at around 80,000.

Based on the survey of large establishments only (with 10 or more employees), 30,974 people were employed in hotel, restaurant, and travel & tourism activities at end of March 2017. Hotels accounted for 78% of this total, representing over 24,100 employees. This survey also revealed that expatriates in the sector totalled 388 at end of March 2017 compared to 407 at the same date in 2016. Employment of expatriates in the Tourism sector represented some 17% of total expatriates employed in the Services sector. The Census of Economic Activities on Small Establishments undertaken in 2013 revealed that some 2,600 persons worked in small tourist accommodation facilities (less than 10 employees).

#### Taxes and levies

For the FY 2016/2017, some Rs 1,690 Mn was collected as passenger fee on air tickets and Rs 115 Mn as Tourist Enterprise License (TEL) fees compared to Rs 1,230 Mn and Rs 110 Mn respectively for the previous financial year. For the FY 2017/2018, it is expected that some Rs 1,810 Mn will be collected as passenger fee while TEL fee revenue will remain constant.

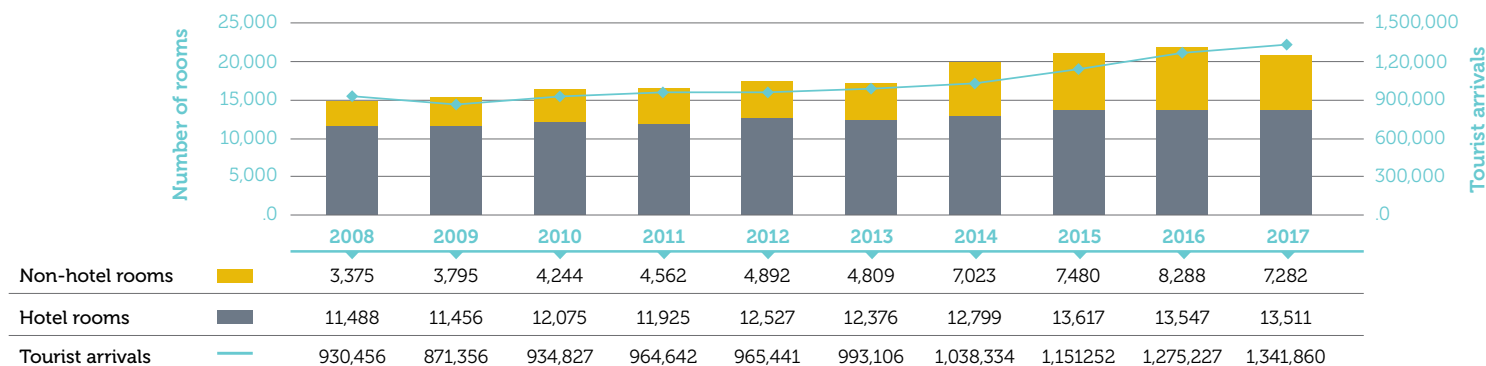
Total Environment Protection Fee collected amounted to Rs 380 Mn in 2016/17 and the forecasted figure for 2017/2018 is Rs 405 Mn. It is interesting to note that the Accommodation sector is a predominant contributor to the EPF with a share of close to 85%.

VAT collected in by the Accommodation and Food Services Activities is estimated at Rs 4,300 Mn for 2017 and Rs 4,516 Mn for 2018.

#### Accommodation facilities

At end of December 2017, there were 111 operational hotels, 236 guest houses and 723 tourist residences that were employing a total of 27,600 Mauritians. Over the last decade, tourist arrivals increased by 4.9% on average each year while hotel accommodation grew by 2.0% and non-hotel accommodation grew by a staggering 12.9% each year on average.

**Figure 9: Accommodation and tourist arrivals, 2008 – 2017**



Sources: Statistics Mauritius and Tourism Authority



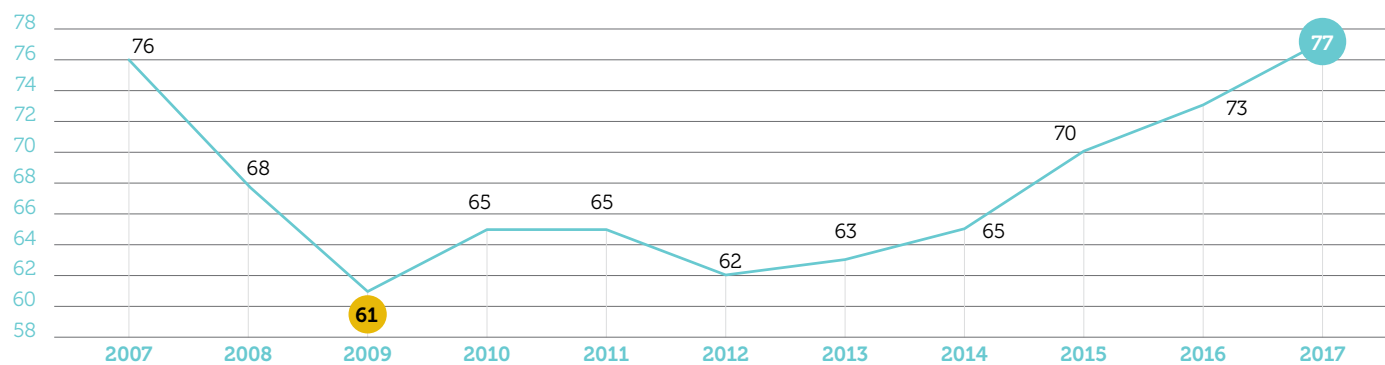
# Industry Performance

## IN MAURITIUS, 2017 – 2018



The policy decision of the authorities to temporarily freeze the opening of new hotels in 2015 and 2016, has indeed offered some respite to the hotel accommodation sector. After six consecutive years where the average hotel room occupancy rate remained confined within the 61% to 65% bracket, it reached 70% in 2015 and 73% in 2016 and a new peak was reached in 2017 with 77%. It should also be noted that the freezing measure was abandoned at end of June 2016, i.e. six months earlier than its originally scheduled lapse date.

**Figure 10: Hotel average room occupancy rate, 2007 – 2017**



Source: Statistics Mauritius

### Other tourism-related operators

Over 2,034 entities (whose license was valid as at 31 March 2018) were registered with the Tourism Authorities of which 742 restaurants (excluding hotel restaurants), 487 hawkers operating on beaches facing hotels, 330 tour operator services, 143 travel agencies, 63 providers of scuba diving activities and 60 boat house operators.

### Debt

The different restructuring plans implemented to reduce the burden of debt has contributed to contain the level of indebtedness in the sector. The level of debt at end of December 2017 in fact increased marginally by 1.4% year-on-year and reached Rs 43.6 Bn. It represented a share of 14.1 % of total debt in the private sector for which a 8.0% increase year-on-year was observed. The current debt situation did not impede on the numerous hotel renovation projects that were implemented during 2017.

### Investment

There is general consensus that hotels have significantly contributed to shape the reputation of the destination. While investment and re-investment in accommodation infrastructure is relatively more costly than in other economic sectors, most hoteliers have massively invested to keep their offering up to the expectations of their increasingly demanding guests.

After the peak reached in 2009, local investment as measured through the Gross Fixed Capital Formation indicator (GFCF) (net increase in physical assets) in the Accommodation and Food Services Activities sector has continuously dropped and reached Rs 4.3 Bn in 2016, which represented around one-third of the 2009 figure. Delayed renovation plans due to financial constraints and lack of operational profits faced in the wake of the 2009 crisis have contributed to this slump. With recovery underway and the incentive of rebate in rental lease, several hotels have implemented renovation plans during 2017 reflected with the massive 54.5% increase in GFCF that reached Rs 6.7 Bn. In 2018, GFCF is expected to reach Rs 6.1 Bn.

Gross direct investment flows from abroad reached Rs 386 Mn in 2017. It is expected to increase with some new hotel projects in the pipeline.



# Industry Performance

IN MAURITIUS, 2017 – 2018



## The Hotel Sector as a Major Investor in Resource Efficiency and Environment Protection

Sustainable and responsible travel has grown over the past several years — both in terms of awareness and products marketed in the various markets. Recent shifts in the hospitality industry responding to trends in luxury took green travel from niche to necessary and the recent opening of eco-luxury resorts around the world is fuelling a growing trend in sustainable luxury travel.

Our environment is indeed one of our major assets and latest observations point towards a severe degradation of our coastal zones as well as increasing threats due to climate change. It is imperative that authorities and operators as well as communities address these upcoming issues and as such, mitigation and correction works, when required, need to be properly processed, assessed and jointly approved in a timely manner. It is to date still unclear for hoteliers, incidentally the ones who will bear the cost of required works for hotel-front beaches, on how best to deal with such national issues.

Hoteliers are well aware that they need to protect the environment, a capital value of our product. In fact, the Hospitality sector in Mauritius, especially hotels, have increasingly implemented green/sustainable initiatives, projects, programmes and certifications to both respond to demand and to the need to protect the environment. Indeed, over and above mandatory requirements, hotels have implemented various private projects/initiatives on a voluntary basis to reduce their environmental footprint. A succinct survey among our members has shown that beyond the legal and regulatory obligations, more than 50 hotels have reported some form of voluntary commitment towards environment-friendly practices. Half of them are already officially certified by independent bodies and labels such as Green Globe, Travelife, EarthCheck and Green Key. The others are either engaged into an independent certification process, or have their own internal green programmes and commitments, duly reported in their corporate communication to stakeholders.

The high proportion of participants in the National Energy Efficiency Programme (NEEP) coming from the hotel sector further demonstrate the commitment of hoteliers towards sustainable practices.

Hoteliers are contributing their fair share to the advancement of sustainable development in the country and while Government is implementing green initiatives albeit in a piecemeal approach, a more holistic strategy for the country as a whole is warranted. Furthermore, the clean dimension of the country has considerably weakened over recent years and littering has become a major issue, in spite of stricter laws and controls. Also, green jobs linked to waste collection and recycling, energy efficiency, renewable energy or even community empowerment are vested with SMEs essentially. These are regularly faced with vulnerable situations linked to health and safety issues, job value, and poor economics between collection, grouping and selling of recyclable waste for example.

It is high time to revisit the green taxation system for the whole country in order to make the whole island and all the different stakeholders, from the consumers to the producers and manufacturers, through the authorities and the communities, adopt convergent behaviours in line with national undisputed policies.



# Industry Performance

## IN MAURITIUS, 2017 – 2018



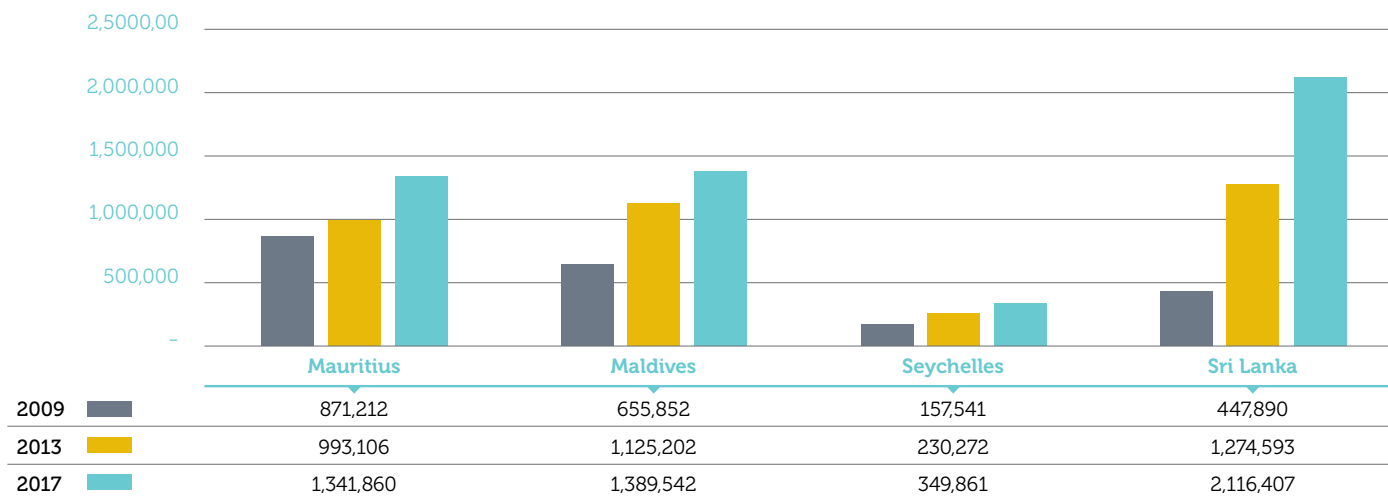
### MAURITIUS AND DIRECTLY COMPETING LOCATIONS

Sri Lanka sees itself way above with double-digit growth rates attained consistently since 2010 save for last year and tourist arrivals more than trebling in seven years. The one-million arrival mark which was attained in 2012, has more than doubled four years later.

After a slowdown in tourist arrival growth observed recently in Maldives, there was a rebound in 2017 though arrivals from China have been slowly and consistently dropping over the last three years. Overall though, in terms of growth in arrivals only, Maldives, Seychelles and Sri Lanka have all performed better than Mauritius since 2010 with some few exceptions. Between 2008 and 2017, the compound increase in tourist arrivals was 4.9% in Mauritius, compared to 11.5% for Maldives, 13.3% for Seychelles and an astronomical 42.5% for Sri Lanka.

In 2017, only Seychelles posted double-digit year-on-year growth rates (15.4%) in front of Maldives (8.0%), Mauritius (5.2%) and Sri Lanka (3.2%).

Figure 11: Tourist arrivals in Mauritius, Maldives, Seychelles and Sri Lanka, 2009, 2013 & 2017



Sources: Statistics Mauritius, Ministry of Tourism (Maldives), National Bureau of Statistics (Seychelles) and Sri Lanka Tourism Development Authority

For the first four months of 2018, cumulated tourist arrivals in Mauritius, Maldives and Sri Lanka increased significantly by 7.5%, 7.0% and 6.1% respectively compared to the same period last year. It is noteworthy that during this same period, the growth for Seychelles stood at a massive 22.0%.

### CHALLENGES AHEAD

After two consecutive years of double-digit growth in 2015 and 2016, well above worldwide average rates, growth in 2017 was more moderate, with a satisfying 5.2%. Furthermore, industry recovery, well underway after five years of stagnant growth immediately after the 2009 crisis-year, may slow down if external factors such as economic and political turbulences or mounting oil prices were to shape decreased demand for long-haul Mauritius. Hotel renovation and refurbishment projects that have successfully picked up over the last two years, as well as controlling industry indebtedness, do have to face this potential threat.



# Industry Performance

## IN MAURITIUS, 2017 – 2018

Several challenges thus persist and the industry will have to deal with them in the following months.

- Brexit, geopolitical risks, and mounting oil prices are all external factors that could negatively impact on holiday travel and therefore, Mauritius as a prime, and long haul, destination.
- Unit revenue as measured by tourist spend per tourist night is not remarkable. Tourist spend outside accommodation is growing very slowly. While the destination is strongly perceived as a sea, sand and sun destination, our offering is considerably more varied than some neighbouring or direct competitors. Still tourist expenditure outside accommodation remains on the low side.
- The seasonality factor remains an important issue in spite of significant progress in arrivals in off-peak months during the last few years. Tourist arrivals in December is generally twice the number in June and as such, the accommodation capacity in peak months can result in impeded growth over a calendar year period while between June and August, hotel room occupancy hovers only around 57% on average.
- Our performance on the most rapidly-growing market in recent years, China, has been regressing since 2016. The exit of China Southern in November 2015 and that of Air Asia in March 2017 have contributed to this drop while the extra flights of Air Mauritius on this market have not brought the expected results so far. This resulted in the suspension of the Beijing and Guangzhou routes by Air Mauritius. Additional work and intelligence is required for this market. The different stakeholders, both public and private, have to collaborate to find the best strategy to better tap this huge fast-growing source market. Air Mauritius's new service from Wuhan in 2018 will be closely monitored.

### CONCLUSION

As a country, we cannot afford not to match international practices and standards for safe and efficient destinations. Any uplift to the product will immediately benefit the whole population and one can think of basic features of ambitious tourist destinations such as:

- Strong and highly visible environment protection policies and practices
- Abundant communication by the authorities; public education, sensitisation and awareness-building
- Technology and apps, strong law enforcement, modern payment systems and other convenience tools
- Security and safety, road signage, CCTV surveillance and street lighting
- Public transport and pedestrian routes properly signalled and displayed
- Retail pricing and mandatory price displays; shopping with confidence, free from counterfeit

The latest Survey of Incoming Tourism conducted by Statistics Mauritius confirm that the product is effectively losing ground on some of the above aspects and guest experience, mostly outside accommodation, needs immediate attention, in a bid to recapture our vision for Mauritius tourism.

The attractiveness of Mauritius though still strong will be more and more challenged by competing destinations such as the Seychelles and Maldives, incidentally closer to our main markets and therefore, more accessible in respect of airfares. It will be more than ever crucial for the country to invest massively in an effort to improve both the physical attractiveness of Mauritius and the appropriate education and communication strategies around the product. Mauritius is an all-year round prime destination and this promise needs self-support. Coastal erosion affected by climate change as well as ocean pollution control are dossiers that need urgent priority attention from all authorities and industry and local community stakeholders.

It is also urgent to better regulate operators in the sector and enforce ethical practices at all levels. National initiatives do not always converge and end results remain below par; local fully integrated initiatives will have to be encouraged and local communities empowered. Basic performance like cleanliness, aesthetic and freshness will have to be constantly sought after and tourist areas and attractions need special attention. A proper scoping of our tourism offerings is required; issues on beaches, public areas, trade malpractices, taxis, canvasseurs, hawkers, pleasure crafts, etc., need to be tackled with greater resolve and more appropriate means, including the increased use of technology, by the competent authorities.

While the continued progress in the arrival figures is noted, the stagnation of unit tourist night spend is viewed with concern and clearly points to untapped potential for growth of tourist spend outside accommodation, including attractions, shopping and cultural experiences among others. It is also imperative to improve the mobility of visitors around the island.









# ISLAND REFORES- TATION



Restoring forest coverage is key to a sustainable environment and is now a global concern. This restoring effort has many advantages: it reduces the concentration of CO<sub>2</sub> in the atmosphere, protects species, reverses damages caused by erosion... Mauritius is now engaging more forcefully into reforestation programmes led by both the public and the private sectors.





## INTERNATIONAL CONFERENCE ON DIGITALISATION AND SUSTAINABLE TOURISM

This international conference held on 23 and 24 May 2018 was organised by the Ministry of Tourism at Le Méridien Hotel in the context of the 50<sup>th</sup> anniversary of the Independence of the Republic of Mauritius. AHRIM was one among the partners of the Ministry in this Conference which attracted 400 participants, including 17 guest speakers from international organisations and neighbouring countries.

During the Gala Evening of the Conference, four Tourism Awards 2018 were presented to reward employees and entities in the following categories: Employee - Long Standing Service Award (Male and Female), Sustainable Tourism Award, E-Innovator Tourism Award and Best Tourist Guide Award.

### MAIN PROJECTS/FILES

#### Budget Speech 2017 - 2018

On 8 June 2017, the Prime Minister and Minister of Finance made his budget speech that was later translated in the Finance (Miscellaneous Provisions) Act 2017. The main measures of concern to the industry included:

- Possibility for hotels to host gaming machines within their premises;
- Voucher of Rs 200 on a minimum purchase of Rs 1,000 of Mauritian handicraft products;
- Improvement of IHS - Residence permit for investment above USD 500,000; Multi-Entry Visa for a maximum of 180 days per year for a consecutive period of 5 years renewable for investment below USD 500, 000; Exemption of the Tax on Transfer of Leasehold Rights in State Lands extended to re-sale; Removal of the clause relating to right or interest on the State land on which the hotel is located;
- Exemption of the land conversion tax extended to golf courses of 9 holes; and,
- Double deduction of expenditure relating to the acquisition and setting up of a water desalination plant.

#### National Budget 2018 - 2019

Early May 2018, AHRIM submitted its Budgetary Proposals articulated around three main lines of action.

The first one is focused on reinforcing our product and enhancing its market competitiveness as Mauritius cannot afford not to match international practices and standards of safe and efficient destinations. In addition, it is a fact that tourists from emerging markets and new tourists from all markets, namely the millennials, have greater expectations regarding their holiday destinations. Mauritius does fall short of these in many respects, and poor assistance to individual and independent mobility is a major hindrance onto their Mauritius experience. Emphasis was also laid on the promotion of sustainable tourism and prompting the destination to go digital.

The second priority addresses the human capital challenges facing the industry. The hotel industry is a major creator of jobs and career opportunities for the young people of this country and indeed many families, and often whole communities, are dependent on this industry for their welfare and continued social development. However, the industry has been facing an acute shortage of skills for some time now. While the national hotel school and other training institutions have been struggling to keep pace with demands for trained manpower, the industry has also had to compete for qualified workers, with other sectors, such as the BPO sector and recruiters from abroad, mainly the cruise industry. AHRIM has proposed potential solutions to tackle this ongoing skilled labour shortage issue.



# AHRIM's Year

## IN REVIEW



The third and last focus area related to unlocking the engagement potential of the hotel sector by revisiting the green taxation policy for the country and further improving the accommodation offering through re-investment. AHRIM is proposing that a more holistic approach to green taxation for the country as a whole be adopted, with the whole population getting involved in this national project. In the meantime, AHRIM has proposed that EPF be adjusted as a transitory measure by charging year end chargeable income for a larger list of operators from other "environment impacting" economic sectors and allowing hotels to manage part of their respective contribution on environment-related projects beneficial to their local areas and communities under specific conditions. Measures to boost re-investment to further improve the hotel offering include the reduction in rental charges when a hotel closes for renovation measure to be made permanent, and more pertinent reductions in lease charges for land under severe restriction, among others.

### **Assises du Tourisme**

The Assises du Tourisme held at the Hennessy Park Hotel in Ebène early June 2017 was meant to chart a roadmap for the Tourism sector and to enlist the commitment of all stakeholders to Government's vision of offering a unique tourism experience in a safe and secure destination. Around 250 stakeholders from the public and private sectors were present.

The Assises had the following broad themes: Accessibility to the destination; Visibility – branding, market and niche segments, cultural diplomacy, cultural tourism, social media, market diversification and penetration; Attractiveness – Ground transportation, safety and security; Cleanliness, business facilitation; Human Resource Development and Product Development; and Sustainable tourism development.

### **Labour Chapter**

#### ***National minimum wage***

The National Minimum Wage came into force on 1 January 2018, after the promulgation of the National Minimum Wage Regulations 2017 (GN 1 of 2018) in December last year. By virtue of the Regulations, the national minimum wage of every worker, other than a part-time worker, has been fixed at Rs 8,140 a month plus the additional remuneration of Rs 360 payable under the Additional Remuneration and Other Allowances (2018) Act 2017. As such, as from January 2018, all full-time workers, except those employed in an export enterprise governed by the Export Enterprise (Remuneration Order) Regulations 1984, are entitled to a minimum wage of Rs 8,500 per month. The computation of the minimum wage for part-time workers working less than 100 hours a month or above 100 hours but less than 195 hours a month, is also provided in the National Minimum Wage Regulations 2017.

Relevant adjustments required in the Catering and Tourist Industry Remuneration Order would be made in due course as issues of pay relativity have not been discussed yet by the social partners.

#### ***National Tripartite Committee***

A tripartite exchange was held as usual in order to look into wage compensation for the year 2018. AHRIM actively participated in the discussions, in collaboration with Business Mauritius. Final recommendations by Government on the rate of compensation were as follows:

Full-time Employees:	Rs 360 across the board
Part-time Employees	
Up to Rs 10,000:	3.6% rounded up to the next rupee
Above Rs 10,000:	Rs 360

The whole remuneration and tripartite set up is today multi-layered with industry-specific remuneration orders, a national minimum wage, the annual compensation protocol and ongoing collective bargaining. It is advisable to revisit this complex, non operative, and self-imposed dialogue framework.





### AHRIM INITIATIVES

#### AHRIM Check In Magazine

In a view to give more visibility to the sector and important issues deemed important by the industry, AHRIM launched, in November 2017, Check In, a biannual magazine. The first edition of Check In was produced in 400 print copies and was distributed to members and both public and private stakeholders. An online version of Check In was also posted onto the AHRIM website. Feedback received was extremely positive and the number of hits on AHRIM's website portal surged impressively.

The second issue is under preparation and is planned for mid-July.

#### OPERA – Orientation Programme for Education and Recruitment by AHRIM

OPERA was officially launched during the week of 4<sup>th</sup> December 2017 and some 60 students registered onto the programme, following which hotel visits and a half-day orientation seminar were organised for them. This initiative is AHRIM's response to the difficulties facing the hospitality industry to attract and retain young people and the absence of proper Career Guidance across most of our Educational Institutions. The objective of OPERA is to create awareness, raise interest and guide school leavers to career opportunities in the hospitality industry. It will also aim at capturing school leavers earlier, engaging into an active conversation with educational institutions, and displaying the real industry world (establishments, leaders, early successes...).

A Facebook page was also created to better engage with the youth. The page is regularly populated with profiles of young employees working in the hotel sector and vacancies available among member hotels.

#### HR indicators 2018

The annual HR Indicator Survey was launched in April 2018 after receiving the approval of the members of the Human Resource Commission of AHRIM. This year, the survey form was further simplified in order to facilitate the collection of data. The outcome of the survey scheduled in June 2018, will be categorised on the basis of hotel rating and number of rooms to enable more relevant comparisons. As usual, the findings will be circulated only among participating members.

#### AHRIM initiative under NSDP

For the year 2017, AHRIM Training Centre trained 60 school leavers under the National Skills Development Programme (NSDP), a fully sponsored training programme by the Government implemented through the HRDC. The trainees were coached to take positions of waiter and valet and they were all offered employment opportunities in hotel members of AHRIM. The experience was further renewed and 42 unemployed youth were enrolled in February 2018, to pursue training as F&B Attendant and Housekeeping Attendant. The training programmes which have a duration of 3 months will be completed by end May 2018. A new intake is scheduled for July 2018.

#### Placement of persons with hearing and speech impairment in hotels

Back in November 2016, AHRIM successfully collaborated with the Training and Employment of Disabled Persons Board (TEDPB – operating under the aegis of the Ministry of Social Security, National Solidarity and Reform Institutions) for the placement 13 young persons with hearing and speech impairment in our hotel member establishments. 11 of the 13 MITD-trained younger persons secured placements at hotels following which 2 were offered permanent jobs. The remaining beneficiaries of the programme dropped out for personal reasons and before the termination of their respective 6-month placement period.

The relative success of this initiative encouraged AHRIM to go forward with a second batch in August 2017 when the TEDPB proposed a list of 25 young persons who have successfully completed a housekeeping course (Essentials of Housekeeping Operations - 72 hours) at the MITD. A common interview session whereby all pre-selected candidates and all the participating hotels, namely Constance Belle Mare Plage, Dinarobin Beachcomber, Four Seasons Resort Mauritius at Anahita, Hennessy Park Hotel, Heritage The Villas, Hilton Mauritius Resort & Spa, Labourdonnais Waterfront Hotel, Le Prince Maurice, Maradiva Villas Resort & Spa, Maritim Resort and Spa Mauritius, Merville Beach Hotel, Paradis Beachcomber, Sofitel L'Impérial Resort and Spa, The Address Boutique Hotel, Trimetys Hotels and Zilwa Attitude was organised a month later. Out of the 21 applicants who attended the interview, 15 were selected for a placement. 6 of them eventually turned down the placement offer. As at date, only 2 are still on the training programme while the rest have dropped.





## **Reward to the best students 2017 – 2018**

Last year, AHRIM rewarded two students for their outstanding performances. Ms Hena Booluck, BSc (Hons) Tourism and Hospitality Management from the University of Technology of Mauritius and Mr Alexandre Luc Jean Maurice Frederic, Higher National Diploma in Hospitality Management from the EHS GD, were each rewarded with a trophy plus a cash prize.

## **AHRIM Quality Charter for tourist residences and guest houses**

As announced last year, with the view of improving overall offerings of Tourist Residences and Guest Houses, AHRIM came forward with a Quality Charter based on a scoring scheme.

As at date, on-site visits have been completed and main chapters of the Quality Charter developed (including scoring methodology). The next steps include the presentation of different chapters to our SMH members and validation by the Standardisation Committee. From there, the Quality Charter will be officially launched.

## **AHRIM Restaurant members B2B Meeting**

On 10 October 2017, AHRIM organized a B2B meeting for its restaurant members. It was for the business community, a rare opportunity to meet, within an afternoon and in a single location (Flying Dodo Restaurant, Bagatelle), a selection of independent restaurants, all members of the Association. Participating AHRIM Restaurant members included Casela Nature & Leisure Park, Flying Dodo Brewing Co Ltd, Great Delight Restaurant, Ile des Deux Cocos, Indra Restaurant, L'Aventure du Sucre, La Clef des Champs, La Demeure St Antoine, La Potinière Restaurant (Ebène and Curepipe), La Vanille Nature Park, Le Courtyard Restaurant, Le Gourmet Emporium, Le Jardin de Beau Vallon, Saint Aubin Loisirs Ltée (Le Bois Cheri Restaurant, Le Domaine des Aubineaux and Le St Aubin Restaurant).

Some 100 persons attended the meeting during which members present showcased their offers/proposals for corporate events, business meets and other food opportunities.

## **PROJECTS UNDERTAKEN IN PARTNERSHIP WITH OTHER INSTITUTIONS**

### **Spirit of Chamarel**

This project initiated by local operators, has as main objective to promote a Chamarel experience that will involve all the inhabitants and stakeholders in Chamarel. As this project will contribute to deepen the destination's offering, the Council of AHRIM has positively considered providing support to this initiative which is ongoing.

### **Mahebourg 360**

AHRIM is pushing forward the Mahebourg 360 project which promises to deliver a spellbinding 360° view and approach. This is in line with visitor demand and adequate activities. Practices and outputs, once implemented, will clearly indicate ownership, unity of purpose and collectively approved, concerted, ways forward for the city.

The proposed project, now awaiting funding, will follow the mandatory process of a city transformation, with local inhabitants' interests at heart – all with a common vision resulting into convergent objectives and intended outcomes.

### **Video clips around the airport piano**

In October 2016, AHRIM officially handed over to ATOL a grand piano for public use in the departure hall of the international airport. On the occasion of the Fête de la Musique in June 2017, AHRIM, in collaboration with the MTPA and ATOL organised a two-evening piano recital lead by Mauritian pianist, Olivier David and the Clarisse Sisters.

Following this recital, short video clips were produced and uploaded on social media and the websites of the participating organisations.





## REGULAR AND ONGOING ACTIVITIES

### Participation in international fairs

Unlike previous years, the MTPA is no longer providing tables free of charge to the Small & Medium Members of the Association. Instead, a new policy was put in place to assist small operators and a yearly budget is provided to different associations representing them. During the year under review, AHRIM used the funds allocated to finance tables free of charge in the three main fairs. The following SMH members participated:

- IFTM TOP RESA, Paris Porte de Versailles, 26 to 27 September 2017: Aanari Hotel & Spa, Seapoint Boutique Hotel and 20 Degrés Sud Hotel – Relais & Châteaux
- World Travel Market, London, 6 to 8 November 2017: Aanari Hotel & Spa and Seapoint Boutique Hotel
- ITB, Berlin, 7 to 11 March 2018: Aanari Hotel & Spa, Seapoint Boutique Hotel and Memoris

With the financial assistance of MTPA on a cost-sharing basis, the AHRIM Small and Medium Hotels Members Directory was published and largely distributed during the WTM 2017 and ITB 2018 Tourism Trade Fairs.

### La Messe du Tourisme

Last year's official celebrations of the World Tourism Day took place in Qatar. The 2017 theme was structured around two sessions, focused on 'Tourism as a driver of economic growth' and 'Tourism and the Planet: committed to a Greener Future'. In line with the celebrations held on 27 September 2017 in Qatar, "La Messe du Tourisme" was held in Beau Bassin, at Le Thabor and some 1,500 persons attended. The whole tourism industry was represented and more than 1,000 employees attended this special mass which was co-celebrated by Cardinal Maurice E. Piat, GOSK.

### La Fête du Pain

"La Fête du Pain" is a yearly event organised by Les Moulins de la Concorde since 1995. The 2018 edition was held on 18 and 19 May 2018 and was themed Nou Leritaz – Nou Lavenir. Once again under the patronage of AHRIM, several participant bakers and chefs from hotels all over the island took pride in crafting bread at their artisan best.

On Friday 18 May, 18 teams from hotel members partook in the bread making contest. The sandwich making competition held on same day attracted some 12 participants. This year, another contest was added, namely, Le Panier Gourmand. It was held on Saturday 19 May and 12 hotel members participated.

The prize giving ceremony is planned in June 2018.

The winners for last year's 2017 edition were:

Pancake making contest		
First place	Second place	Third place
Sarajane Duval	Natacha Fangamar	Ariane Tossé
Marie Claire Laguette	Jocelyn Veerayen	Priscilla Doolaub

Sandwich making contest		
First place	Second place	Third place
Le Labourdonnais Waterfront Hotel	Constance Belle Mare Plage	Heritage Awali Golf & Spa
Balakrishna Govindan	Fortuno Emmanuel	Dushan Totah





## Bread master pieces contest

First place	Second place	Third place
Lux* Grand Gaube Hotel	Maradiva Villas Resort & Spa	Sofitel Mauritius L'imperial Resort & Spa
Ganowree Bachan	Avinash Cahunnac	Ezekel Rene
Suraj Surjoo Chandradev Kumar	Kevin Rungin	Vicky Gangoosirdar

## Cake decoration contest

First place	Second place	Third place
Sugar Beach Resort	La Pirogue Resort & Spa Mauritius	Shandrani Beachcomber Resort & Spa
Ahness Amavasee	Sukanto Barman	Sooryadev Venkiah

Prizes that rewarded the winners included hotel stays and dinners offered by the following hotel members: Coin de Mire Attitude, Constance Belle Mare Plage, Dinarobin Beachcomber Golf Resort and Spa, Hennessy Park Hotel, Hilton Mauritius Resort & Spa, Lux\* Grand Gaube Mauritius, Labourdonnais Waterfront Hotel, Le Suffren Hotel & Marina, Lux\* Le Morne Mauritius, Mauricia Beachcomber Resort and Spa, Merville Beach, Paradis Beachcomber Golf Resort and Spa, Shangri La's Le Touessrok Resort and Spa, Sofitel L'Impérial Mauritius Resort and Spa, The Address Boutique Hotel and Victoria Beachcomber Resort and Spa.

## Festival International Kreol (FIK)

AHRIM hotel members have greatly contributed to the success of this year's edition that was held from 17 to 26 November 2017. They actively promoted their FIK-themed events onto their social networks, to which the general public had massively responded. Handicraft making, glass painting and wood carving were some of the FIK related events organised. The innovation this time was the organisation of four regional music shows in Mon Choisy Public Beach, Flacq Centre, Bambous Stadium and Esplanade of City Council of Port Louis

## Le Petit Futé 2018

Our subscription to the Petit Futé website and guide was renewed. In the 2018 guide, two-page advertisements served well its use of laying emphasis on the different offerings by our small and medium tourist accommodation providers.







## WORLD TOURISM DAY LUNCHES

The MTPA solicited the support of AHRIM members for the celebration of events around the World Tourism Day in 2017. A first event was held on the Flic en Flac public beach on 24 September and the second at Belle Mare Tourist Village on 1 October. On both occasions, the hotels on the respective coast catered for some 1,000 guests invited by the authorities, mainly from social and non-governmental organisations.

The participating member hotels were:

**West coast:** Aanari Hotel & Spa, Hilton Mauritius Resort & Spa, La Pirogue Hotel Resort & Spa, Maradiva Villas Resort & Spa, Pearle Beach Resort & Spa, Sands Suites Resort Spa, Sofitel Mauritius L'Impérial Resort & Spa, and Sugar Beach Golf & Spa Resort.

**East coast:** Ambre Resort & Spa, Constance Belle Mare Plage, Constance Prince Maurice, Emeraude Beach Attitude, Friday Attitude, La Palmeraie Boutique Hotel, Long Beach Golf & Spa Resort, Lux\* Belle Mare, Shangri-La's Le Touessrok Resort & Spa Mauritius, Solana Beach Resort, The Residence Mauritius, Tropical Attitude, and Veranda Palmar Beach Hotel.

## OTHER PROJECTS / CASES

### Programme National d'Efficacité Énergétique (PNEE)

PNEE is a joint public-private initiative represented by Business Mauritius and the Ministry of Energy and Public Utilities. It has the technical and financial support of the Agence Française de Développement and the European Union. The main objective of the programme is to help reduce the energy consumption of local companies in the following sectors: textile, hotel and large retail outlets/shopping malls.

For the first phase, 16 hotels participated and 7 hotels enrolled in the second phase that was further programmed given the additional demand for such projects. Ten hotels are also enlisted in the PNEE project relating more specifically to the cooling system and solar water heating system. Altogether, around 36% of projects under the PNEE programme are coming from the hotel sector showcasing the involvement of hoteliers in the reduction of their carbon footprint.

### AHRIM's actions v/s a major aquaculture project

In June 2017, Growfish International (Mauritius) Ltd made an application for an EIA license for a large-scale aquaculture project some 1km off the shore of Bambous (2 sites) and Le Morne (2 other sites for future phases). At the request of AHRIM, a meeting was organised by the Ministry of Ocean Economy and Fisheries on 17 July with the promoters of the projects, different public stakeholders and AHRIM representatives. During the meeting, AHRIM expressed its concerns regarding such a project in a prime tourist destination and the potential impact that such a project could have on the industry and on the people of Mauritius.

A panel of experts was constituted by AHRIM for a more technical evaluation of the Growfish project. After examining the Expert report, AHRIM held the view that this project is too risky and given the shortcomings of the project document and its EIA Report, AHRIM sent its opposing comments to the EIA Committee by end September 2017.

However, during the first week of October, the EIA licence was granted to Growfish International (Mauritius) Ltd with some 24 conditions attached to it. AHRIM then decided to submit its appeal against the granting of this licence before the Environment and Land Use Appeal Tribunal (ELUAT). A first sitting was held on 9 January and the case is now ongoing.



# AHRIM's Year

## IN REVIEW



### **Taxis based at hotels**

Pending the court case and injunctions filed by the AIOM, a status quo stand is still recommended by AHRIM. This position is reinforced by the non-compliance of TA directives by some hotel taxis in their commercial manoeuvres inside hotel premises.

The Minister of Tourism, in a declaration at the National Assembly in July 2017, gave a clear indication of the uncleared issues prior to the implementation of the Government measures of 2016. AHRIM has consistently requested that the preliminary steps that may lead to a successful implementation of those same measures include the rationalisation of taxi numbers in front of each hotel, a clear representation of taxi operators for each hotel, and proactive facilitation by the competent authorities.

### **Hotel Star Rating**

Two years after its launch, this initiative is being reinforced. After the initial self-assessment exercise by hotels, the Tourism Authority has started conducting proper audits during the last quarter of 2017. A standard fee is being charged to each hotel for this exercise.

As regards the evaluation criteria in place, special flexibilities have been discussed and the Star Rating Committee has proposed new modalities on elevators, room sizes and the number of special rooms with 'for handicapped' status.

### **Security issues**

The Minister Mentor chaired a number of meetings on the issue of thefts / aggressions against tourists.

An action plan was worked out and consisted of four main pillars, namely:

1. An increase in officers under La Police du Tourisme;
2. Legislative and administrative amendments to empower the relevant officers;
3. Sensitisation campaigns; and
4. Improved security level in hotels and other tourist accommodation.

One of the recommendations of this committee was to enable the employment of foreign labour in this sector in response to labour shortage, but also in order to encourage transfer of know-how.

## CINEMA WEEK

AHRIM assisted in securing some 195 room nights for celebrities invited for the Cinema Week organised early October 2017. Hotels that offered room nights on a complimentary basis included: Paradis Beachcomber Golf Resort and Spa, Maritim Resort and Spa Mauritius, Paradise Cove Boutique Hotel, Hilton Mauritius Resort & Spa, Labourdonnais Waterfront Hotel, Constance Le Prince Maurice, Lux\* Belle Mare Mauritius, Sofitel Mauritius l'Imperial Resort & Spa and Anahita Golf & Spa Resort.





## REDUCTION OF SUBSCRIPTION FEE AND NEW FEE STRUCTURE FOR HOTEL MEMBERS

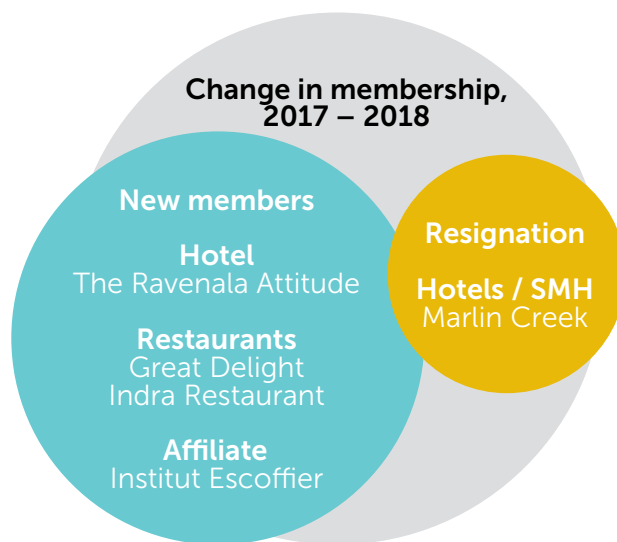
As the Secretariat was in a better financial situation since FY 2016/2017, in the last Annual General Meeting, it was agreed that a reduction in the fee per room coupled with a cap on the maximum fee charged annually could be envisaged. This reduction and new fee structure was put to vote and approved during the AGM.

As such, as from FY 2017/2018, hotel members benefited from a 5% reduction in the rate per room and the maximum number of rooms charged was capped at 200 per hotel member on the former rate.

## REVAMPING OF AHRIM RULES OF ASSOCIATION

In 2016, in a bid to adapt to the constantly changing business environment, AHRIM rules were rethought and revisited. Same were approved at a Special General Meeting held in December 2016. The necessary is being done for these new rules to be sanctioned by the Registry of Association and the process is nearing finalisation.

## CHANGE IN MEMBERSHIP



## PREFERENTIAL AIR FARES

SMH and Restaurant members participating in international fairs can benefit from preferential tariffs for their air tickets when travelling on Air Mauritius. Preferential tariffs are also granted to AHRIM members (large and small) travelling on Air France and South African Airways.











# MAHÉ- BOURG

Set in the Grand Port district and rooted between a Marine Protected Area and the Lion Mountain, Mahébourg is an authentic historical village that offers a unique natural mystic atmosphere. To further develop Mahébourg into an integrated attraction to both locals and tourists, it is important to create a self-managed village offering a voyage through historical, cultural, artisanal and food spots. Regular activities such as the Grande Régate or the Fish Festival will add up to the authenticity of Mahébourg and help create tremendous value to the Mauritian destination.









# Overview OF AHRIM



AHRIM is the main professional association of private operators in the hospitality industry in Mauritius. It is a non-profit making organisation and regroups tourist accommodation facilities (representing 77 hotels or 83% of hotel rooms and 18 tourist residences and guest houses), 21 restaurants, 6 IRS estates and Affiliate / Associate member associations of tour operators, airport management, scuba diving, chefs, and professional training.

AHRIM was established in 1973. As an organisation respectful of the proper execution of its mandate in a changing environment, it has undertaken so far three major restructuring exercises in 1996, 2005 and 2016. The rules of AHRIM were revamped and a completely new set of rules was drafted and approved in December 2016.

AHRIM's main goal is to ensure the sustainable development of the local tourism industry.

## Mandate

- To be the lead spokesperson of the private operators, by liaising with Government, Institutions and the Media, with regard to issues and matters pertaining to the tourism industry
- To represent a dynamic tourism sector and contribute positively to sustainable and quality tourism
- To promote the interests of hotels, restaurants and other service providers of the tourism industry in general
- To meet the expectations of its members as well as those of partner stakeholders

## ORGANISATION AND STRUCTURE

### List of AHRIM Members, 2017 – 18 (as at March)

HOTELS		No. of Rooms
North-West / North		
1.	Le Suffren Hotel and Marina	112
2.	Labourdonnais Waterfront Hotel	105
3.	Hotel Saint Georges	81
4.	Angsana Balaclava	55
5.	Intercontinental Mauritius Resort Balaclava Fort	210
6.	The Westin Turtle Bay Resort and Spa	190
7.	Maritim Resort and Spa	212
8.	The Ravenala Attitude	272
9.	The Oberoi Mauritius	71
10.	Victoria Beachcomber Resort and Spa	295
11.	Le Meridien Ile Maurice	265
12.	Recif Attitude Hotel	70
13.	Voile Bleue	22
14.	Veranda Pointe aux Biches Hotel	115
15.	Le Sakoa Hotel	16
16.	Trou aux Biches Beachcomber Golf Resort and Spa	333

HOTELS		No. of Rooms
North-West / North		
17.	Casuarina Resort and Spa	109
18.	Le Cardinal Exclusive Resort	13
19.	Club Med La Pointe aux Canonniers	286
20.	Canonnier Beachcomber Golf Resort and Spa	283
21.	Sea Point Boutique Hotel	23
22.	Boutique Hotel 20 Degrés Sud	36
23.	Ocean Villas	40
24.	Mauricia Beachcomber Resort and Spa	239
25.	Veranda Grand Baie Hotel & Spa	94
26.	Royal Palm Beachcomber Luxury Hotel	69
27.	Merville Beach	169
28.	Coin de Mire Attitude Hotel	122
29.	Paradise Cove Boutique Hotel	67
30.	Sensimar Lagoon Mauritius	182
31.	Zilwa Attitude	214
32.	LUX* Grand Gaube	179
33.	Veranda Paul et Virginie Hotel and Spa	81



# Overview OF AHRIM



HOTELS	No. of Rooms
<b>East</b>	
34. Radisson Blu Poste Lafayette Resort and Spa Mauritius	100
35. La Maison d'Ete	16
36. Constance Prince Maurice	89
37. Constance Belle Mare Plage	278
38. Long Beach Mauritius	255
39. Solana Beach	117
40. Emeraude Beach Attitude	61
41. Lux* Belle Mare Mauritius	186
42. Veranda Palmar Beach Hotel	77
43. Ambre Resort and Spa Mauritius	297
44. La Palmeraie Boutique Hotel	60
45. Friday Attitude	50
46. Tropical Attitude	58
47. Shangri-La's Le Touessrok Resort & Spa Mauritius	203
48. Four Seasons Resort Mauritius @ Anahita	132
<b>South East</b>	
49. Preskil Beach Resort Mauritius	175
50. Astroea Beach Hotel	16
51. Le Peninsula Bay Resort & Spa	88
52. Shandrani Beachcomber Resort and Spa	327
<b>South</b>	
53. So Sofitel Mauritius	92
54. Outrigger Mauritius Resort and Spa	181
55. Tamassa	214
56. Heritage Awali Golf and Spa Resort	161
57. Heritage Le Telfair Golf & Spa Resort	158

HOTELS	No. of Rooms
<b>West / South West</b>	
58. Riu Le Morne	218
59. The St Regis Mauritius Resort	172
60. Lux* Le Morne Mauritius	149
61. Dinarobin Beachcomber Golf Resort and Spa	175
62. Paradis Beachcomber Golf Resort and Spa	293
63. Tamarina Golf and Spa Boutique Hotel	50
64. Sands Suites Resort & Spa	91
65. Maradiva Villas Resort & Spa	65
66. Sofitel L'Impérial Resort & Spa	191
67. Hilton Mauritius Resort & Spa	193
68. Sugar Beach Resort	258
69. La Pirogue Resort and Spa Mauritius	248
70. Gold Beach Resort and Spa	31
71. Pearle Beach Resort & Spa	74
72. Aanari Hotel & Spa	50
73. Anelia Resort & Spa	150
74. Club Med La Plantation d'Albion	260
<b>Centre</b>	
75. Hennessy Park Hotel	108
76. Voila Bagatelle	118
77. Gold Crest Business Hotel	50
<b>GUEST HOUSES AND TOURIST RESIDENCES</b>	
<b>North</b>	
1. Mont Choisy Beach Villas	20
2. Mystik Life Style	25
3. Gardens Retreat	9
4. Ocean Beauty	9
5. La Demeure Saint Antoine	4



# Overview

## OF AHRIM



GUEST HOUSES AND TOURIST RESIDENCES		No. of Rooms
<b>South</b>		
6.	Les Aigrettes	12
7.	Chill Pill	8
8.	Coco Villas	9
9.	Pingouinvillas	8
10.	Le Jardin de Beau Vallon	7
11.	Auberge de Saint Aubin	3

<b>West / Centre</b>		
12.	Villa Salines	12
13.	Villa Cazalines	6
14.	The Bay	12
15.	Les Lataniers Bleus (under reconstruction)	-
16.	Lakaz Chamarel Exclusive Lodge	20
17.	Les Chalets en Champagne	3

<b>RODRIGUES</b>		
1.	Bakwa Lodge	7

<b>RESTAURANTS</b>		
<b>Port Louis</b>		
1.	Le Courtyard Restaurant	
2.	Indra Restaurant	

<b>Pamplemousses/Rivière du Rempart</b>		
3.	L'Aventure du Sucre	
4.	Rêve d'R	

<b>Flacq</b>		
5.	Restaurant Chez Manuel	
6.	Domaine de l'Etoile	

<b>Grand Port</b>		
7.	Le Jardin de Beau Vallon	
8.	Ile des Deux Cocos	

<b>RESTAURANTS</b>	
<b>Savanne / Rivière Noire</b>	
9.	Le Bois Cheri Restaurant
10.	La Vanille Nature Park
11.	Le Saint Aubin Restaurant
12.	Casela
13.	Restaurant le Chamarel
14.	Varangue sur Morne

<b>Plaines Wilhems / Moka</b>	
15.	La Nouvelle Potinière
16.	Great Delight Restaurant
17.	Restaurant La Clef des Champs
18.	Flame & Grill Barbeque & Curry House
19.	The Gourmet Emporium
20.	Eureka
21.	Flying Dodo Brewing Company

<b>IRS</b>	
1.	Le Parc de Mont Choisy
2.	Anahita Mauritius
3.	Heritage Villas Valriche
4.	La Balise Marina
5.	Tamarina Golf Estate & Beach Club
6.	Villas Club Med de la Plantation d'Albion

<b>Associate member</b>	
Association of Inbound Operators of Mauritius (AIOM)	

<b>Affiliate members</b>	
EHSGD	
Mauritian Scuba Diving Association	
AML	
Mauritius Chefs Association	
Mauritius Golf Tourism Association	
Institut Escoffier Ile Maurice	





## Executive Council, 2017 – 18

The AHRIM Executive Council comprises 20 members elected at the Annual General Meeting. Out of 15 elected and 5 co-opted members, 4 seats constitute the representatives of Small and Medium Hotels Commission, Restaurants Commission, the Association of Inbound Operators Mauritius (AIOM) and the IRS Commission.

Name	Group/Hotel	Position
Mr Jean Louis Pismont	Beachcomber Resorts & Hotels	President
Mr Jean Michel Pitot	Attitude Resorts	Vice President
Mr Tommy Wong	Sun Ltd	Treasurer
Mr Jocelyn Kwok	AHRIM	Secretary

MEMBERS		
Mr David Anderson	Sun Ltd	Member
Mr Marc Bienaimé	La Palmeraie Hotel Mauritius	Member
Mr Jacques Brune	Hilton Hotel	Member
Mr Peter Edler	Maritim Hotel	Member
Mr François Eynaud	Veranda Leisure and Hospitality	Member
Mr Désiré Elliah	LUX* Island Resorts Ltd	Member
Mr Antonio Ferreira de Sousa	Sofitel L'Impérial Resort and Spa	Member
Mr Fabio Meo	Southern Cross Hotels	Member
Mr Damon Page	Starwood Hotels & Resort	Member
Mr Franck Seguin (co-opted in Aug 2017 till Feb 2018)	Outrigger Mauritius Beach Resort	Member
Mr Rolph Schmid	Labourdonnais Waterfront Hotel	Member
Mr Jean Jacques Vallet	Constance Group of Hotels	Member
Mr Francois Venin	Beachcomber Resorts & Hotels	Member
IRS - Mr Dominic Dupont	La Balise Marina	Member
Restaurant - Mrs Jacqueline Dalais	La Clef des Champs	Member
SMH - Mr Jean Marc Lagesse	Lakaz Chamarel Exclusive Lodge	Member
AIOM – Mr Fabien Lefébure	Solis Indian Ocean	Member

During the year under review Council Meetings were held on the following dates:

- 31 May 2017
- 3 August 2017
- 14 September 2017
- 26 October 2017
- 7 December 2017
- 26 January 2018
- 28 March 2018
- 18 May 2018
- 6 June 2018



# Overview

## OF AHRIM



### AHRIM's Commissions

The Small and Medium Hotel, Restaurant and IRS members each meet as an independent commission entity. All three Presidents of these Commissions, elected by their respective members, then propose project plans and raise issues relevant to their membership to the Council.

Four Commissions making up for a broader representation of AHRIM members namely Finance, Marketing, Environment and Human Resource likewise advise the Council on issues related to their specific attributions. They also discuss important documents and papers, and submit constructive proposal plans to assist the Council in its works.

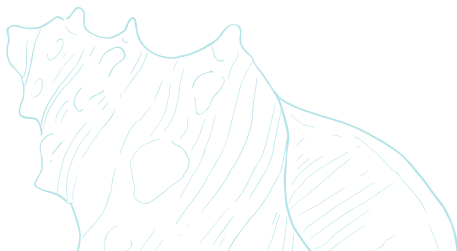
### Our Office

Within the organisational structure of AHRIM are 6 full time staff members providing a wide array of competencies. The day-to-day management of the office is under the direct supervision of the Chief Executive Officer.

Chief Executive Officer	Mr Jocelyn Kwok
Economist	Mrs Doris Man Seng - Venpin
Manager - Projects	Mr Vikash Aodhora
Liaison Officer	Mrs Danielle McIntyre
Accounts & Administrative Officer	Mrs Pamela Teeroovengadum
Communications Support Officer	Ms Shaili Neerbun (up to April 2018)
Office Attendant	Mr Manoj Matur

### Our Head Office

Address:	Suite 83, Level 2, Médine Mews, La Chaussée, Port Louis 11328, Mauritius
Tel:	(230) 208 8181
Fax:	(230) 208 8282
Email:	secretariat@ahrim.mu
Web site:	www.mauritiustourism.org
Auditors:	Kemp Chatteris
Legal Advisers:	ENSAfrica (Mauritius)





# Overview OF AHRIM



## Representation on Boards and Committees, 2017 – 2018

AHRIM was represented in the following Boards and Committees during the year under review.

### Private Sector

Business Mauritius  
Mauritius Chamber of Commerce & Industry  
Association of Inbound Operators - Mauritius

### Public Sector – Tourism

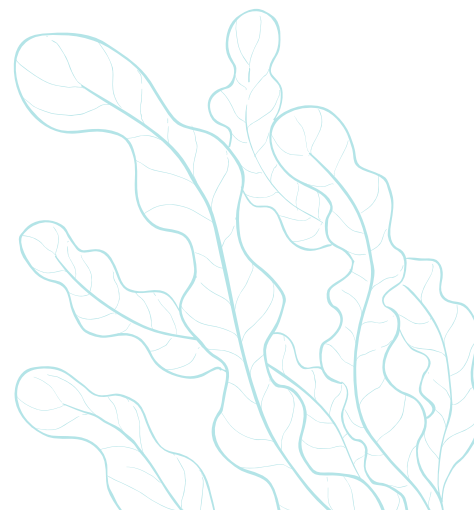
Mauritius Tourism Promotion Authority (MTPA) Board  
Star Rating Committee  
Sir Gaetan Duval Hotel School Management Committee  
Tourism Employees Welfare Fund Board  
Tourism Statistics Committee (Tourist arrivals forecast - Statistics Mauritius)

### Public Sector – General

National Tripartite Committee  
Human Resource Development Council  
Integrated Coastal Zone Management Committee – Ministry of Environment and NDU  
Mauritius Standards Bureau Advisory Committees - MSB

### Affiliations

AHRIM was affiliated with the following organisations:  
Business Mauritius  
Association of Inbound Operators – Mauritius  
Mauritius Chamber of Commerce & Industry











# 2017/2018

## Statistical Brief on Mauritius Tourism







# Table of contents

## PART A

Table A-1: Gross Value Added by Selected Industry Group at Current Basic Prices, 2014 - 2018
Table A-2: Gross Value Added of Selected Sub-sectors at Current Basic Prices, 2014 - 2018
Table A-3: Comparative Level of Employment in Selected Industry Group, 2011 - 2017 (000s)
Table A-4: Estimated Direct Employment in the Tourism-related Industries, 2010
Table A-5: Direct Employment in the Tourism Industry, 2011 - 2017
Table A-6: Employment in small establishments in the Accommodation and food service activities, 2013
Table A-7: Wage Rate Index in Selected Industry Groups, 2011 - 2017
Table A-8: Average Monthly Earnings in the Hotel and Restaurant Sector, 2011 - 2017
Table A-9: Labour, Capital and Multifactor Productivity by Selected Industry Groups, 2011 - 2016
Table A-10: Monthly Gross Tourism Earnings, 2011 - 2018 (Rs Mn)
Table A-11: Tourism Earnings and Tourist Arrivals by Quarter and Semester, 2011 - 2018
Table A-12: Distribution of Tourism Expenditure by Product and Category of Tourists, 2010
Table A-13: Tourism Share in the Output of Tourism and Other Industries, 2010 (Rs Mn)
Table A-14: Production accounts of tourism industries and other industries (at basic prices), 2010 (Rs Mn)
Table A-15: Balance of Trade of Tourism Sector, Export-oriented Enterprises and Total Economy, 2010 - 2014 (Rs Mn)

## PART B

Table B-1: Passenger Arrivals <sup>1</sup> by Type and Mode of Transport, 2007, 2012, 2017 and 2018
Table B-2: Tourist Arrivals by Mode of Transport and Growth, 2011 - 2018
Table B-3: Monthly Tourist Arrivals and Annual Growth Rate, 2011 - 2018
Table B-4: Tourist Arrivals, By Country of Residence, 2011 - 2018
Table B-5: Tourist Arrivals, By Month and Country of Residence, 2017
Table B-6: Tourist Arrivals and Share (%) by Selected Markets, 2011 - 2017
Table B-7: Tourist Arrivals by Air and by Main Port of Last Embarkation for Selected Markets, 2017
Table B-8: Tourist Arrivals by Main Purpose of Visit, 2011 - 2018
Table B-9: Tourist Arrivals by Age and Sex for Selected Markets, 2011 & 2017
Table B-10: Tourist Nights and Average Length of Stay, 2011 - 2018
Table B-11: Tourist Nights and Average Length of Stay for Selected Markets, 2012 & 2017
Table B-12: Tourist Nights and Average Length of Stay by Quarter in 2012, 2017 and 2018
Table B-13: Survey of Outbound Tourism, 2004, 2006, 2009 - 2013 & 2015-2017
Table B-14: Selected Tourism Statistics by Type of Accommodation (hotel/non-hotel), 2012 - 2013 and 2015-2017
Table B-15: Group Composition, Influencing Factor and Meal Arrangement of Tourists, 2017 (Semester 1)
Table B-16: Selected Expenditure Patterns of Tourists by Selected Country of Residence, 2017 (Semester 1)
Table B-17: Hotel & Non-Hotel Tourists, Travel Arrangements and Average Stay of Tourists by Selected Country of Residence, 2017 (Semester 1)

## PART C

Table C-1: Operational Tourist Accommodation Facilities, Air Seats Capacity and Tourist Arrivals, 2011 - 2018
Table C-2: Operational Capacity, 2011 - 2018
Table C-3: Built Hotel Capacity, 2011 - 2018
Table C-4: Room Occupancy Rate, 2011 - 2018 (%)
Table C-5: Passengers <sup>1</sup> , Seats, Load Factors and Tourist Arrivals, 2014 - 2018
Table C-6: Number of Licenses Issued by the Tourism Authority as at 31 March, 2016 - 2018
Table C-7: GFCF in the Accommodation and Food Service Activities Sector, 2011 - 2018
Table C-8: Gross Direct Investment Flows from Abroad in the Accommodation & Food Service Activities Sector, 2011 - 2017
Table C-9: Evolution in Indebtedness of the Tourism Sector, 2011 - 2017 (Rs Mn)
Table C-10: Some Direct/Indirect Taxes and Levies Paid to Government, 2011- 2018 (Rs Mn)
Table C-11: Exchange Rate of the Rupee vis-a-vis Selected Hard Currencies, 2012 - 2017
Table C-12: Real GDP Growth in Selected Source Countries, 2015 - 2019 & 2023
Table C-13: Selected Tourism-Related Indicators in Competing Island Destinations in the Region, 2013 - 2017

## PART D

Table D-1: Trend in World Tourism, 2000 - 2030
Table D-2: Forecasted Outbound Tourism from Selected Markets, 2017
Table D-3: Outbound Tourists Growth Forecasts, 2015 - 2020
Table D-4: Top 10 World Spenders, 2016 - 2017

## Disclaimer

This document has been prepared solely for the information of members of the Association of Hotels and Restaurants in Mauritius (AHRIM). In no event AHRIM will be liable for any loss or damage including without limitation, indirect or consequential loss or damage, or any loss or damage whatsoever arising from loss of data or profits arising out of, or in connection with, the use of this document.





# Glance

## The Mauritius Tourism Sector at a glance

Indicator	Unit	2017	
<b>Tourist arrivals</b>	<b>Unit - %</b>	<b>1,341,860</b>	
Air	"	1,312,295	97.8
Sea	"	29,565	2.2
<b>Top 15 source markets</b>			
1 France	Unit - %	273,419	20.4%
2 United Kingdom	"	149,807	11.2%
3 Réunion Island	"	146,040	10.9%
4 Germany	"	118,856	8.9%
5 South Africa, Rep. of	"	112,129	8.4%
6 India	"	86,294	6.4%
7 People's Rep. of China	"	72,951	5.4%
8 Switzerland	"	40,252	3.0%
9 Italy	"	35,101	2.6%
10 Australia	"	21,271	1.6%
11 Austria	"	17,596	1.3%
12 Belgium	"	16,420	1.2%
13 Sweden	"	15,516	1.2%
14 Spain	"	15,252	1.1%
15 Netherlands	"	13,269	1.0%
<b>Accommodation capacity (operational at end of period)</b>	<b>Unit</b>		
Hotels	"	111	
Hotel rooms	"	13,511	
Guest houses	"	201	
Guest house rooms	"	2,188	
Tourist residences	"	830	
Tourist residence rooms	"	5,347	
<b>Average hotel room occupancy</b>	<b>%</b>	<b>77</b>	
<b>Tourist nights (by tourists departing in 2017)</b>	<b>"</b>	<b>13,640,751</b>	
<b>Airlines present in Mauritius (scheduled flights)</b>	<b>Unit</b>	<b>20</b>	
<b>Cities with regular non-stop air connectivity with Mauritius</b>	<b>"</b>	<b>32</b>	
<b>Total employment in the tourism sector as defined<sup>1</sup> (est)</b>	<b>"</b>	<b>40,800</b>	
<b>Direct employment in large<sup>2</sup> establishments (end March)</b>	<b>"</b>	<b>30,974</b>	
Hotels	"	24,134	
Food Service	"	3,142	
Travel & Tourism (air transport services, TOs, travel agencies and car rental)	"	3,698	
<b>Gross tourism earnings<sup>3</sup> (BoM)</b>	<b>Rs Mn</b>	<b>60,262</b>	
<b>Proportion of Tourism<sup>4</sup> in Gross Value Added at current basic prices</b>	<b>%</b>	<b>7.8</b>	
of which contribution of Accommodation & Food Service Activities	"	89.7	
<b>Tourist Profile, selected indicators (Survey of Inbound Tourism)</b>		<b>2016</b>	<b>S1 2017</b>
<b>Accommodation arrangements</b>	<b>%</b>		
Hotel	"	81.5	79.2
Tourist residence	"	7.3	8.5
Guest house	"	4.8	5.3
With friends/relatives	"	5.5	5.5
Other	"	0.9	1.5
<b>Average expenditure per tourist</b>	<b>Rs</b>	<b>44,660</b>	<b>44,787</b>
<b>Average expenditure per tourist night</b>	<b>"</b>	<b>4,290</b>	<b>4,308</b>
<b>Main purpose of visit</b>			
Holiday	%	75.8	83.1
Honeymoon	"	17.4	10.2
Business	"	2.6	3.3
Other	"	4.2	3.4



# Glance

## The Mauritius Tourism Sector at a glance

Indicator	Unit	2017	
<b>Land and sea</b>		<b>Mauritius</b>	<b>Rodrigues</b>
Total land area	Km <sup>2</sup>	1,868.4	110.1
Forest area (2016)	Hectares	47,066	
Lagoon area	Km <sup>2</sup>	300	240
Offshore islets	Unit	49	18
Coastline length	Km	322	80
Length of protective coral reef	"	150	90
Public beaches	Unit	126	12
Total sea frontage of public beaches <sup>5</sup>	Km	49.9	2.92
<b>Culture and sports</b>			
Museums	Unit	12	
UNESCO World Heritage Sites	"	2	
UNESCO Intangible Cultural Heritage of Humanity	"	2	
Botanical/Endemic gardens	"	4	
Bird sanctuaries (excluding islets)	"	2	
18-hole golf courses	"	10	
Kite surf sites	"	14	
Deep sea fishing sites	"	5	
<b>Environment and biodiversity</b>			
Multilateral Environmental Agreements signed by Mauritius	Unit	36	
<i>Of which International Environmental Conventions and Protocols</i>		14	
State proclaimed protected areas (inc. islets)	"	28	4
State protected islets	"	16	2
<i>Islet National Parks</i>	"	8	
<i>Islet Nature Reserves</i>	"	7	2
<i>Islet Ancient Monument</i>	"	1	
Marine protected areas	"	25	5
<i>Marine Parks</i>	"	2	
<i>Fishing Reserves</i>	"	23	5
Nature parks, reserves and domains (excluding islets)	"	15	
Ramsar sites (2 wetlands and 1 marine park)	"	3	
<b>SSR International airport</b>			
ICAO Category 9 airport (maximum is 10)			
Awarded Best Airport in Africa by Skytrax and Airport Council International in 2014, 2015 & 2016			
Capacity: 4 Mn passengers			
1 runway (3040 x 75) and 1 emergency runway (2279 x 60)			
8 passenger bridges (including 3 to cater for A380 aircrafts)			
16 aircraft parking and 8 additional for private jets			
3 helipads			
Terminal area of 57,000 sq mt			
6 baggage claim conveyors			
32 check-in counters			

<sup>1</sup> From the report on Labour force, Employment and Unemployment based on the results of the Continuous Multi Purpose Household Survey

<sup>2</sup> Survey of Employment and Earnings in 'large' establishments employing 10 or more persons

<sup>3</sup> Revised methodology: earnings estimated by the Bank of Mauritius from banking records as well as returns submitted by Money-changers and Foreign exchange dealers.

<sup>4</sup> Includes the components of Hotels and Restaurants, Transport, Recreational and Leisure and Manufacturing, attributable to tourism

<sup>5</sup> Excludes frontage of 2 newly proclaimed beaches in Mauritius in 2017

Sources: Statistics Mauritius, Bank of Mauritius, Ministry of Environment & Sustainable Development, Ministry of Local Government and Outer Islands, ATOL and AML



# TOURISM INDUSTRY SNAPSHOT 2017

## MAIN TOURIST INDICATORS

		Progress	National share
Tourist arrivals:	1,341,860	+5.2%	
Tourist nights:	13,640,751	+4.0%	
Gross tourism earnings:	Rs 60,262 Mn	+7.9%	
Contribution to GDP:	Rs 32,581 Mn <sup>1</sup>	+5.2%	8.0% ↑
Employment:	40,800 <sup>2</sup>	+2.0%	7.3% ↑
Investment (GFCF):	Rs 6,670 Mn	+54.5%	11.0% ↑

## TOURIST PROFILE

- Top 7 main markets (share, %)
  - 1) France (20.4%) ↓
  - 2) United Kingdom (11.2%) ↑
  - 3) Réunion (10.9 %) ↓
  - 4) Germany (8.9%) ↑
  - 5) South Africa (8.4%) ↑
  - 6) India (6.4%) ↓
  - 7) China (5.4%) ↓
- Main purpose of travel: Holidays (93.9%)
- Average length of stay: 10.3 days
- Average expenditure per tourist: Rs 44,909<sup>3</sup>
- Average expenditure per tourist night: Rs 4,418<sup>3</sup>
- Share of expenditure devoted to accommodation: 60.7%<sup>4</sup>

## ACCOMMODATION SECTOR

• Hotels		
• 112 Built hotels:	13,544 rooms	
• Average room occupancy:	77 %	
• Non-hotel accommodation		
• 830 Tourist Residences	5,347 rooms	
• 201 Guest Houses	2,188 rooms	
Total Gross Direct Investment Flows	Rs 14,228 Mn	+4.2%
- Accommodation and Food Services Activities	Rs 386 Mn	+94.0%
Rupee v/s Selected Hard Currencies <sup>5</sup>		
Euro	40.4450	(1.3)
Pound Sterling	45.8444	+3.8
US Dollar	34.6500	+4.9
South African Rand	2.6850	(2.7)
Industry indebtedness (at end Dec)	Rs 43,551 Mn	+1.4%
• Hotels	Rs 30,617 Mn	+9.3%
Taxes paid		
Estimated VAT paid	Rs 4,330 Mn	+8.0
Corporate tax (2016)	Rs 411 Mn	n/a
Environment Protection Fee (2016)	Rs 307 Mn	n/a

## SSR INTERNATIONAL AIRPORT

- A Category 9 ICAO airport
- No. of airlines (for scheduled flights): 20
- No. of cities with direct connectivity: 32
- No. of air seats: 2,341,144 (one-way)
- Average load factor: 75.1%
- 3,728,970 passengers (incoming and outgoing)
  - 3,533,515 international
  - 195,455 domestic
- 1,851,808 passenger arrivals, of which;
  - 1,312,295 tourists
  - 124,492 interliners
  - 21,680 excursionists
  - 292,179 residents
  - 101,162 crew and others

## PORT LOUIS HARBOUR

- Port of call for 3 cruise lines
- 30 cruise ship calls
- 53,705 passenger arrivals by sea, of which:
  - 49,355 cruise passengers
    - 26,124 tourists
    - 7,188 excursionists
  - 15,381 crew members
  - 7,935 excursionists (incl. cruise)

- 1: Of which 89% from the Accommodation and food services activities
- 2: Direct employment in the Accommodation and food services activities
- 3: Based on gross tourism earnings figures published by the Bank of Mauritius
- 4: Based on the Survey of Inbound Tourism for the year 2016
- 5: Average for 12 months ended March 2018

### Definitions:

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.

An excursionist, or same day visitor, is a non-resident, who entered the Mauritian territory and departed on the same day he/she arrived.

An interliner is a passenger who does not leave the Immigration zone/aircrafts/ships





**Table A-1: Gross Value Added by Selected Industry Group at Current Basic Prices, 2014 – 2018**

Selected industry group	2014	2015 <sup>i</sup>	2016 <sup>i</sup>	2017 <sup>i</sup>	2018 <sup>i</sup>
<b>GDP contribution, Rs Mn</b>					
Accommodation and food service activities	21,702	23,520	26,727	28,864	30,104
Sugar sector	3,803	3,727	4,129	3,395	3,463
Textile	16,118	16,700	15,887	15,573	16,079
Wholesale and retail trade	38,977	43,738	45,914	48,990	52,241
Financial and insurance activities	41,322	43,599	46,614	48,260	52,980
Real estate activities	21,165	21,923	22,813	23,799	24,898
<b>Total Gross Value Added (basic prices)</b>	<b>348,012</b>	<b>363,547</b>	<b>385,902</b>	<b>405,714</b>	<b>432,759</b>
<b>Share by selected industry group</b>					
Accommodation and food service activities	6.2%	6.5%	6.9%	7.1%	7.0%
Sugar sector	1.1%	1.0%	1.1%	0.8%	0.8%
Textile	4.6%	4.6%	4.1%	3.8%	3.7%
Wholesale and retail trade	11.2%	12.0%	11.9%	12.1%	12.1%
Financial and insurance activities	11.9%	12.0%	12.1%	11.9%	12.2%
Real estate activities	6.1%	6.0%	5.9%	5.9%	5.8%
<b>Real growth rates of selected industry group (% over previous year)</b>					
Accommodation and food service activities	+6.1	+8.7	+9.2	+4.6	+4.1
Sugar sector					
Sugarcane	-3.5	-3.8	+5.2	-7.9	+0.0
Sugar manufacturing	+0.8	-5.1	+6.6	+2.4	+0.0
Textile	+4.2	-2.8	-5.8	-0.7	+1.0
Wholesale and retail trade	+2.9	+2.8	+3.0	+3.1	+3.6
Financial and insurance activities	+5.5	+5.3	+5.7	+5.5	+5.5
Real estate activities	+5.3	+4.3	+4.1	+3.3	+3.4
<b>Gross Value Added at basic prices</b>	<b>+3.6</b>	<b>+3.1</b>	<b>+3.6</b>	<b>+3.5</b>	<b>+3.9</b>

Source: Statistics Mauritius



# Part A



**Table A-2: Gross Value Added of Selected Sub-sectors at Current Basic Prices, 2014 – 2018**

Selected sub-sector	2014	2015 <sup>1</sup>	2016 <sup>2</sup>	2017 <sup>3</sup>	2018 <sup>4</sup>
<b>Gross Value Added, Rs Mn</b>					
Tourism <sup>1</sup>	24,495	27,070	30,066	32,581	33,793
ICT <sup>2</sup>	19,363	21,137	21,970	22,890	24,052
Seafood <sup>3</sup>	3,440	3,561	3,702	4,038	4,220
Freeport <sup>4</sup>	2,182	2,380	2,457	2,508	2,648
Global business <sup>5</sup>	n/a	21,072	21,461	23,221	25,285
<b>Share of the selected industry group (%)</b>					
Tourism <sup>1</sup>	7.0	7.4	7.8	8.0	7.8
ICT <sup>2</sup>	5.6	5.8	5.7	5.6	5.6
Seafood <sup>3</sup>	1.0	1.0	1.0	1.0	1.0
Freeport <sup>4</sup>	0.6	0.7	0.6	0.6	0.6
Global business <sup>5</sup>	n/a	5.8	5.6	5.7	5.8
<b>Sectoral real growth rates (% over previous year)</b>					
Tourism <sup>1</sup>	+6.3	+7.2	+11.5	+5.2	+4.7
ICT <sup>2</sup>	+6.6	+7.1	+5.4	+4.4	+4.5
Seafood <sup>3</sup>	+9.8	+6.6	+3.6	+4.0	+1.6
Freeport <sup>4</sup>	+5.8	+4.7	+2.9	+3.5	+3.2
Global business <sup>5</sup>	n/a	+4.0	+4.0	+4.5	+4.7

<sup>1</sup> Covers the components of "Accommodation and food service activities", "Transport", "Recreational and leisure" and "Manufacturing", attributable to Tourism.

<sup>2</sup> Covers components of "Manufacturing", "Wholesale and retail trade", "Information & communication" and "Call centres", related to ICT.

<sup>3</sup> Covers mainly the activities of "fishing" and "fish processing"

<sup>4</sup> Covers "wholesale and retail trade" and "storage" activities of the freeport operators

<sup>5</sup> The global business sector includes activities of GBCs and main services purchased by GBCs from local enterprises (e.g. management, accounting, auditing, legal, advertising, real estate, banking, etc.).

Source: Statistics Mauritius





**Table A-3: Comparative Level of Employment in Selected Industry Group, 2011 - 2017 (000s)**

Selected industry group	2011	2012	2013	2014	2015	2016	2017 <sup>p</sup>
<b>Large establishments (i.e. employing 10 or more persons)</b>							
Agriculture, forestry and fishing	15.7	14.9	14.1	14.0	13.5	13.3	13.2
Manufacturing	76.3	75.2	75.5	75.4	74.0	72.2	72.1
Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities	4.2	4.4	4.4	4.3	4.4	4.4	4.4
Construction	15.5	15.1	14.6	12.7	12.4	12.4	12.4
Wholesale and retail trade; repair of motor vehicles and motorcycles	25.8	26.4	26.6	27.0	27.4	27.6	27.8
Transportation and storage	16.6	16.8	16.8	16.8	17.0	17.0	17.0
Accommodation and food service activities	25.3	25.4	25.4	25.7	26.0	26.8	27.1
Information and communication	9.7	10.3	10.5	10.8	11.2	11.5	11.7
Financial and insurance activities	12.0	12.3	12.6	12.9	12.9	12.9	12.9
Real estate activities	0.4	0.5	0.7	0.8	0.8	0.8	0.9
Professional, scientific and technical activities	5.0	5.8	6.1	6.2	6.4	6.9	7.2
Administrative and support service activities	15.2	15.2	15.2	16.0	15.8	15.9	16.0
<b>Total employment in large establishments</b>	<b>310.7</b>	<b>311.5</b>	<b>312.5</b>	<b>313.5</b>	<b>314.1</b>	<b>314.2</b>	<b>316.9</b>
<b>Other establishments</b>							
Agriculture, forestry and fishing	24.3	24.4	26.2	27.3	28.0	28.0	28.0
Manufacturing	23.2	23.6	26.1	26.2	27.0	26.5	25.5
Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities	1.0	1.1	1.1	1.1	1.1	1.1	1.1
Construction	27.1	27.7	28.1	28.0	27.8	27.2	27.7
Wholesale and retail trade; repair of motor vehicles and motorcycles	58.2	59.4	61.7	64.0	65.6	66.4	68.3
Transportation and storage	15.7	15.8	19.0	19.6	21.3	21.5	22.4
Accommodation and food service activities	11.1	11.6	12.8	13.3	13.9	14.0	14.5
Information and communication	5.3	5.5	5.9	5.9	5.9	5.9	5.9
Financial and insurance activities	0.2	0.3	0.5	0.6	0.6	0.6	0.6
Real estate activities	0.5	0.6	0.6	0.6	0.6	0.6	0.6
Professional, scientific and technical activities	3.5	3.7	4.5	4.8	5.1	5.2	5.4
Administrative and support service activities	8.5	8.7	9.3	9.4	9.4	9.3	9.3
<b>Total employment in other establishments</b>	<b>218.2</b>	<b>224.2</b>	<b>239.5</b>	<b>245.7</b>	<b>252.5</b>	<b>253.0</b>	<b>256.6</b>
<b>All establishments</b>							
Agriculture, forestry and fishing	40.0	39.3	40.3	41.3	41.5	41.3	41.2
Manufacturing	99.5	98.8	101.6	101.6	101.0	98.7	97.6
Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities	5.2	5.5	5.5	5.4	5.5	5.5	5.5
Construction	42.6	42.8	42.7	40.7	40.2	39.6	40.1
Wholesale and retail trade; repair of motor vehicles and motorcycles	84.0	85.8	88.3	91.0	93.0	94.0	96.1
Transportation and storage	32.3	32.6	35.8	36.4	38.3	38.5	39.4
Accommodation and food service activities	36.4	37.0	38.2	39.0	39.9	40.8	41.6
Information and communication	15.0	15.8	16.4	16.7	17.1	17.4	17.6
Financial and insurance activities	12.2	12.6	13.1	13.5	13.5	13.5	13.5
Real estate activities	0.9	1.1	1.3	1.4	1.4	1.4	1.5
Professional, scientific and technical activities	8.5	9.5	10.6	11.0	11.5	12.1	12.6
Administrative and support service activities	23.7	23.9	24.5	25.4	25.2	25.2	25.3
<b>Total employment</b>	<b>528.9</b>	<b>535.7</b>	<b>552.0</b>	<b>559.2</b>	<b>566.6</b>	<b>567.2</b>	<b>573.5</b>

Note: Figures have been revised in the light of the Census of Economic Activities 2013  
Source: Digest of Labour Statistics, Statistics Mauritius





**Table A-4: Estimated Direct Employment in the Tourism-related Industries, 2010**

Tourism-related industries	No. of persons
Accommodation services	23,800
Food and beverage-serving industry	6,600
Road passenger transport services	6,970
Air/sea passenger transport	1,830
Transport equipment rental services industry	170
Travel agencies and other reservation services industry	4,980
Sports, cultural and recreational industry	540
Retail trade of country-specific goods	5,900
Other industries	2,600
<b>Total estimated employment</b>	<b>53,390</b>

Source: Experimental Tourism Satellite Account, 2010, Statistics Mauritius

**Table A-5: Direct Employment in Large Establishments in the Tourism Industry, 2011 – 2017 (at end March)**

Type of establishment	2011	2012	2013 <sup>1</sup>	2014 <sup>1</sup>	2015 <sup>1</sup>	2016 <sup>1</sup>	2017 <sup>2</sup>
Hotels	21,815	22,210	22,432	22,593	22,630	23,669	24,134
Restaurants	2,572	2,779	3,027	3,167	3,249	3,348	3,142
Travel & Tourism	4,100	3,946	3,865	3,817	3,804	3,789	3,698
<b>Total</b>	<b>28,487</b>	<b>28,935</b>	<b>29,324</b>	<b>29,577</b>	<b>29,683</b>	<b>30,806</b>	<b>30,974</b>

1: Revised

2: Preliminary

Source: Survey of Employment and Earnings in Large Establishments (i.e. employing 10 or more persons), Statistics Mauritius

**Table A-6: Employment in Small Establishments in the Accommodation and Food Service Activities, 2013**

Type of establishment	Employment size									Total
	1	2	3	4	5	6	7	8	9	
Hotel	119	369	375	500	533	320	-	49	-	2,265
Boarding house	53	107	-	213	-	-	-	-	-	373
Restaurants (small)	182	1,067	722	1,406	879	352	410	988	-	6,006
Bars	653	747	280	-	-	-	-	-	-	1,680
Victualler, selling cooked food on and off premises	1,002	3,775	1,658	1,431	1,528	-	410	-	527	10,331
Caterer, other	744	2,287	926	1,429	32	759	234	-	300	6,712
<b>Total</b>	<b>2,753</b>	<b>8,352</b>	<b>3,961</b>	<b>4,979</b>	<b>2,972</b>	<b>1,431</b>	<b>1,054</b>	<b>1,037</b>	<b>827</b>	<b>27,367</b>

Source: Census of Economic Activities - Small Establishments, 2013, Statistics Mauritius

**Table A-7: Wage Rate Index in Selected Industry Groups, 2011 – 2016  
(Base 2011: September 2006=100) (Base 2012-2016: Q4 of 2011=100) (Base as from 2017: Q4 of 2016=100)**

Industry group	Weight	2011	2012	2013	2014	2015	2016 <sup>a</sup>	2017 <sup>b</sup>
Accommodation and food service activities	70	141.2	103.1	106.6	111.0	119.9	122.0	102.0
Wholesale & retail trade; repair of motor vehicles and motorcycles	74	137.8	102.3	111.2	114.8	120.1	125.0	104.0
Financial and insurance activities	77	129.1	100.8	108.5	115.2	120.0	128.0	104.3
Real estate, renting and business activities	54	157.6	n/a	n/a	n/a	n/a	n/a	n/a
Real estate activities	n/a	n/a	101.9	109.2	112.7	129.5	145.0	102.9
<b>All sectors</b>	<b>1,000</b>	<b>144.5</b>	<b>103.8</b>	<b>114.9</b>	<b>121.1</b>	<b>127.7</b>	<b>134.3</b>	<b>103.7</b>

Note: The wage rate index measures changes in the price of labour, i.e., changes in the average rates actually paid by employers to their employees for work during normal working hours

Source: Statistics Mauritius





**Table A-8: Average Monthly Earnings in the Hotel and Restaurant Sector, 2011 – 2017 (in large establishment, as at March)**

Year	Average monthly earnings (Rs)	Per cent change
2011	14,871	4.0
2012	15,253	2.6
2013	15,800	3.6
2014	16,836	6.6
2015	18,632	10.7
2016 <sup>r</sup>	19,253	3.3
2017 <sup>p</sup>	20,356	5.7

Source: Statistics Mauritius

**Table A-9: Labour, Capital and Multifactor Productivity by Selected Industry Groups, 2011 – 2016 (Base 2007=100)**

Industrial Sector	2011	2012	2013	2014	2015	2016 <sup>p</sup>
<b>Labour productivity</b>						
Accommodation and food service activities	91.1	89.7	89.4	92.9	98.7	105.4
Construction	113.6	109.7	100.9	96.9	93.3	94.7
Information and communication	150.7	155.8	160.8	168.0	175.4	182.6
Wholesale and retail trade	96.0	97.3	97.2	97.1	97.7	99.6
Financial and insurance activities	97.1	99.3	100.8	103.2	108.7	114.9
Real estate activities	99.7	88.1	80.0	79.6	84.5	89.1
Export oriented manufacturing enterprises	135.6	140.8	137.8	139.2	137.4	130.4
<b>Total economy</b>	<b>112.7</b>	<b>115.3</b>	<b>115.7</b>	<b>118.3</b>	<b>120.3</b>	<b>124.4</b>
<b>Capital productivity</b>						
Accommodation and food service activities	73.2	70.9	71.5	75.8	82.6	90.6
Construction	72.6	63.5	55.8	48.3	44.5	45.1
Information and communication	146.6	157.9	166.8	176.4	187.0	197.6
Wholesale and retail trade	81.8	77.1	76.5	77.5	79.1	80.9
Financial and insurance activities	103.9	104.3	105.3	103.5	102.2	102.4
Real estate activities	82.6	88.5	94.5	98.7	100.9	101.9
Export oriented manufacturing enterprises	148.3	162.4	157.0	151.0	151.5	145.3
<b>Total economy</b>	<b>96.6</b>	<b>95.9</b>	<b>95.6</b>	<b>96.3</b>	<b>97.1</b>	<b>98.1</b>
<b>Multifactor productivity</b>						
Accommodation and food service activities	77.8	75.8	79.4	80.6	87.2	94.8
Construction	86.9	79.6	71.1	63.7	59.8	60.8
Information and communication	148.1	157.1	164.2	172.7	181.9	190.9
Wholesale and retail trade	85.5	82.1	81.6	82.2	83.6	85.4
Financial and insurance activities	101.4	102.5	103.7	103.4	104.1	105.8
Real estate activities	85.0	88.4	92.0	95.3	98.0	99.7
Export oriented manufacturing enterprises	140.5	149.1	145.6	143.9	142.8	135.7
<b>Total economy</b>	<b>102.4</b>	<b>102.9</b>	<b>103.1</b>	<b>104.2</b>	<b>105.3</b>	<b>107.4</b>

Note: Labour productivity is the ratio of real output to labour input; Capital productivity is the ratio of real output to stock of fixed capital used in the production process; Multifactor productivity takes into account the simultaneous influences of several factors on production, including qualitative factors such as better management, improved quality of inputs and higher quality of goods

Source: Digest of Productivity & Competitiveness Statistics 2016, Statistics Mauritius



# Part A



**Table A-10: Monthly Gross Tourism Earnings, 2011 – 2018 (Rs Mn)**

Month	2011	2012	2013	2014	2015	New methodology			
						2015	2016	2017	2018
January	4,102	5,478	4,701	4,190	4,340	4,872	5,250	6,119	6,615
February	3,660	4,102	3,501	3,769	3,534	3,918	4,912	4,713	6,060
March	4,187	4,188	3,862	3,557	3,988	4,381	4,841	5,254	5,808
April	3,361	3,778	3,898	3,886	3,671	4,091	4,382	4,830	
May	3,078	3,045	3,656	3,799	3,276	3,659	4,278	4,593	
June	2,916	2,957	2,437	3,376		3,318	3,525	3,810	
July	3,039	3,070	2,378	3,237		3,570	3,806	4,205	
August	3,033	2,832	2,327	3,363		3,654	4,322	4,329	
September	2,773	2,504	2,345	3,055		3,705	3,894	4,243	
October	3,422	3,751	3,126	3,703	n/a	4,486	4,973	5,511	
November	4,280	4,063	3,885	3,621		4,785	5,251	6,026	
December	4,866	4,610	4,441	4,748		5,751	6,433	6,629	
<b>Total</b>	<b>42,717</b>	<b>44,378</b>	<b>40,557</b>	<b>44,304</b>		<b>50,191</b>	<b>55,867</b>	<b>60,262</b>	
<b>Average Expenditure</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2015</b>	<b>2016</b>	<b>2017</b>		
<b>Based on Tourism Earnings published by the Bank of Mauritius</b>									
Per capita, Rs	44,283	45,967	40,839	42,668	43,597		43,809	44,909	
Per capita per diem <sup>2</sup> , Rs	4,499	4,418	3,799	3,932	4,165		4,259	4,418	
<b>Based on Survey of Outbound/Inbound Tourism</b>									
Per capita, Rs	39,960	40,035	42,168	n/a	43,986		44,660	44,787 (S1)	
Per capita per diem, Rs	4,322	4,221	4,647	n/a	4,154		4,290	4,308 (S1)	

<sup>1</sup>: Earnings are calculated based on monthly statements of Inward and Outward Remittances of Commercial Banks.

<sup>2</sup>: Methodology of calculating tourist nights is different for the following period: up to 2009: Tourist nights means the total number of nights spent in the country by tourists during the period under review. As from 2010: Tourist nights for year Y refer to nights spent by tourists arriving in year Y. As from 2015: Tourist nights for a reference period refer to nights spent by tourists departing in the reference period.

Sources: Bank of Mauritius and Statistics Mauritius



# Part A



**Table A-11: Tourism Earnings and Tourist Arrivals by Quarter and Semester, 2011 – 2018**

Quarter/Month	2011	2012	2013	2014	New methodology			
					2015	2016	2017	2018
Tourist earnings by quater, Rs Mn								
Quarter 1	11,949	13,768	12,064	11,516	13,172	15,003	16,086	18,483
Quarter 2	9,355	9,780	9,991	11,061	11,068	12,185	13,233	
Quarter 3	8,845	8,406	7,050	9,655	10,929	12,022	12,777	
Quarter 4	12,568	12,424	11,452	12,072	15,022	16,657	18,166	
Total	42,717	44,378	40,557	44,304	50,191	55,867	60,262	
Tourist earnings by semester, Rs Mn								
Semester 1	21,304	23,548	22,055	22,577	24,240	27,188	29,319	
Semester 2	21,413	20,830	18,502	21,727	25,951	28,679	30,943	
Total	42,717	44,378	40,557	44,304	50,191	55,867	60,262	
Tourist arrivals by quarter								
Quarter 1	262,626	261,995	265,838	263,060	291,047	327,836	339,682	356,415
Quarter 2	201,978	205,158	205,826	227,087	242,734	258,628	286,177	
Quarter 3	209,779	208,431	222,779	234,908	269,572	294,426	308,820	
Quarter 4	290,259	289,857	298,663	313,279	347,899	394,337	407,181	
Total	964,642	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	
Tourist arrivals by semester								
Semester 1	464,604	467,153	471,664	490,147	533,781	586,464	625,859	
Semester 2	500,038	498,288	521,442	548,187	617,471	688,763	716,001	
Total	964,644	965,441	993,106	1,038,334	1,151,2527	1,275,227	1,341,860	

Sources: Statistics Mauritius and Bank of Mauritius

**Table A-12: Distribution of Tourism Expenditure by Product and Category of Tourists, 2010**

Product group	Internal tourism exp, %			Outbound tourism exp, %
	Inbound	Domestic <sup>1</sup>	Total internal	
<b>Tourism Characteristics Products</b>	<b>98.1</b>	<b>99.5</b>	<b>98.3</b>	<b>96.0</b>
Accommodation <sup>2</sup> services for visitors	42.3	4.1	37.3	34.0
Food and beverage serving services	11.0	5.8	10.3	9.8
Road passenger transport services	7.9	0.6	7.0	3.0
Air and sea passenger transport services	18.9	82.0	27.2	6.0
Transport equipment rental services	1.7	0.0	1.5	0.9
Travel agencies and other reservation services	4.3	0.6	3.8	1.8
Recreational, cultural services and sporting services	2.1	0.7	1.9	2.2
Country specific tourism characteristics goods and services	9.8	5.6	9.3	38.3
<b>Other consumption products and services</b>	<b>1.9</b>	<b>0.5</b>	<b>1.7</b>	<b>4.0</b>
<b>Total tourism expenditure</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>Total tourism expenditure, Rs Mn</b>	<b>48,656</b>	<b>7,393</b>	<b>56,049</b>	<b>13,011</b>

<sup>1</sup> Comprises expenditure for a domestic trip (between Mauritius and Rodrigues) and part of an outbound tourism trip by residents

<sup>2</sup> Includes Accommodation services associated with all types of vacation home ownership

Source: Experimental Tourism Satellite Account, 2010, Statistics Mauritius



# Part A



**Table A-13: Tourism Share in the Output of Tourism and Other Industries, 2010 (Rs Mn)**

Tourism and other industries		Total output of tourism industries	Other consumption products and services	Gross output at basic prices	Imports	Taxes less subsidies on products nationally produced and imported	Domestic supply at purchasers' price	Internal tourism consumption	Tourism ratio
Tourism Industries									
Accommodation services (1)	Output	22,371		22,371		2,111	24,482		85.4
	Tourism share	18,792		18,792		2,111		20,903	
Food and beverage-serving industry	Output	8,274		8,274		586	8,860		65.4
	Tourism share	5,213		5,213		586		5,798	
Road passenger transport services	Output	13,480		13,480			13,480		29.0
	Tourism share	3,909		3,909				3,909	
Air and sea passenger transport	Output	17,855		17,855		294	18,150		84.1
	Tourism share	14,968		14,968		294		15,263	
Transport equipment rental services industry	Output	1,115		1,115			1,115		74.3
	Tourism share	829		829				829	
Travel agencies and other reservation services industry	Output	3,164		3,164			3,164		67.5
	Tourism share	2,136		2,136				2,136	
Sports, cultural and recreational industry	Output	4,905		4,905		244	5,148		20.9
	Tourism share	834		834		244		1,078	
Retail trade of country-specific goods	Output	2,595	1,816	4,411	778,413		5,189		100.0
	Tourism share	2,595	1,816	4,411	778,413			5,189	
Total tourism industries	Output	73,759	1,816	75,575		3,235	79,589		69.2
	Tourism share	49,275	1,816	51,091		3,235		55,105	
Other industries									
Other industries	Output		412,411	412,411	45,192		488,323		0.2
	Tourism share		944	944				944	

(1) Includes Accommodation services associated with all types of vacation home ownership, experimental Tourism Satellite Account, 2010.  
Source: Statistics Mauritius



# Part A



**Table A-14: Production accounts of tourism industries and other industries (at basic prices), 2010 (Rs Mn)**

Tourism and Other industries		Total output (at basic prices)	Total intermediate consumption (at purchasers price)	Total gross value added (at basic prices)	Compensation of employees	Other taxes less subsidies on production	Gross operating surplus
<b>Tourism Industries</b>							
Accommodation services (1)	Output	22,371	8,859	13,512	3,504	194	9,815
	Tourism share	18,792	7,441	11,350	2,943	163	8,244
Food and beverage-serving industry	Output	8,274	3,276	4,998	1,296	72	3,630
	Tourism share	5,213	2,064	3,149	816	45	2,287
Road passenger transport services	Output	13,480	6,032	7,447	2,398	169	4,880
	Tourism share	3,909	1,749	2,160	695	49	1,415
Air and sea passenger transport	Output	17,855	14,240	3,615	2,714	224	677
	Tourism share	14,968	11,937	3,031	2,275	188	568
Transport equipment rental services industry	Output	1,115	323	792	162	18	612
	Tourism share	829	240	589	120	13	455
Travel agencies and other reservation services industry	Output	3,164	1,833	1,331	497	11	823
	Tourism share	2,136	1,237	899	335	7	556
Sports, cultural and recreational industry	Output	4,905	1,020	3,885	1,202	51	2,633
	Tourism share	834	173	660	204	9	448
Retail trade of country-specific goods	Output	2,595	743	1,851	461	29	1,361
	Tourism share	2,595	743	1,851	461	29	1,361
<b>Total tourism industries</b>	<b>Output</b>	<b>73,759</b>	<b>36,327</b>	<b>37,432</b>	<b>12,233</b>	<b>767</b>	<b>24,432</b>
	<b>Tourism share</b>	<b>49,275</b>	<b>25,587</b>	<b>23,688</b>	<b>7,851</b>	<b>503</b>	<b>15,335</b>
<b>Other industries</b>							
Other industries	Output	414,227	186,445	227,782	89,547	1,717	136,519
	Tourism share	2,761	1,243	1,518	597	11	910
<b>Gross output at basic prices</b>	<b>Output</b>	<b>487,986</b>	<b>222,772</b>	<b>265,214</b>	<b>101,780</b>	<b>2,483</b>	<b>160,951</b>
	<b>Tourism share</b>	<b>52,036</b>	<b>26,829</b>	<b>25,206</b>	<b>8,448</b>	<b>514</b>	<b>16,244</b>

(1) Includes Accommodation services associated with all types of vacation home ownership  
Source: Experimental Tourism Satellite Account, 2010, Statistics Mauritius

**Table A-15: Balance of Trade of Tourism Sector, Export-oriented Enterprises and Total Economy, 2010 – 2014 (Rs Mn)**

Details	2010	2011	2012	2013	2014 <sup>a</sup>
<b>Total exports of goods and services</b>	<b>157,036</b>	<b>172,564</b>	<b>187,688</b>	<b>198,793</b>	<b>207,333</b>
of which: Tourism sector	48,656	52,058	53,311	48,933	52,695
Export-oriented enterprises	41,622	43,100	45,606	46,778	47,215
<b>Total imports of goods and services</b>	<b>190,777</b>	<b>214,328</b>	<b>229,399</b>	<b>243,514</b>	<b>243,862</b>
of which: Tourism sector	13,011	12,265	11,828	13,991	15,459
Export-oriented enterprises	23,007	27,025	26,665	29,340	27,473
<b>Balance of Trade (goods and services)</b>	<b>(33,741)</b>	<b>(41,764)</b>	<b>(41,711)</b>	<b>(44,721)</b>	<b>(36,529)</b>
of which: Tourism sector	35,645	39,793	41,483	34,942	37,236
Export-oriented enterprises	18,615	16,075	18,941	17,438	19,742

Source: Statistics Mauritius. Experimental Tourism Satellite Account, 2010.



# Part B



Table B-1: Passenger Arrivals<sup>1</sup> by Type and Mode of Transport, 2007, 2012, 2017 and 2018

Details	2007	2012	2017	Quarter 1	
				2017	2018
Passenger arrivals by mode of transport					
Arrivals by air	1,151,332	1,247,619	1,727,316	431,257	449,985
Arrivals by sea	25,899	39,225	53,705	19,542	25,190
<b>Total</b>	<b>1,177,231</b>	<b>1,286,844</b>	<b>1,781,021</b>	<b>450,799</b>	<b>475,175</b>
Passenger arrivals by type					
Tourists	906,971	965,441	1,341,860	339,682	356,415
Excursionists <sup>2</sup>	16,877	18,663	29,615	10,171	13,246
Mauritian residents	215,774	248,050	409,546	100,946	105,514
Other (crew, foreign workers, etc.)	37,609	54,690			
<b>Total</b>	<b>1,177,231</b>	<b>1,286,844</b>	<b>1,781,021</b>	<b>450,799</b>	<b>475,175</b>
Passenger arrivals by sea and by type					
Cruise travellers	9,747	25,515	49,355	18,490	24,058
- <i>Tourists</i>	<i>n.a</i>	<i>10,168</i>	<i>26,124</i>	<i>9,444</i>	<i>11,313</i>
- <i>Excursionists</i>	<i>n.a</i>	<i>5,548</i>	<i>7,188</i>	<i>2,981</i>	<i>4,980</i>
- <i>Mauritian residents</i>	<i>n.a</i>	<i>39</i>	<i>662</i>	<i>277</i>	<i>117</i>
- <i>Crew members</i>	<i>3,522</i>	<i>9,760</i>	<i>15,381</i>	<i>5,788</i>	<i>7,648</i>
Other	16,152	13,710	4,350	1,052	1,132
<b>Total</b>	<b>25,899</b>	<b>39,225</b>	<b>53,705</b>	<b>19,542</b>	<b>25,190</b>

1 - Excluding inter island traffic between the main island of Mauritius and the other constituent islands of the Republic of Mauritius and direct transit  
2 - Visitors arriving and leaving on the same day  
Source: Statistics Mauritius

Table B-2: Tourist Arrivals by Mode of Transport and Growth 2011 – 2018

Year	Mode of transport		Total	Growth
	Air	Sea		
2011	939,595	25,047	964,642	3.2%
2012	948,511	16,930	965,441	0.1%
2013	979,822	13,284	993,106	2.9%
2014	1,034,446	3,888	1,038,334	4.6%
2015	1,131,827	19,425	1,151,252	10.9%
2016	1,246,862	28,365	1,275,227	10.8%
2017	1,312,295	29,565	1,341,860	5.2%
January - April				
2017	440,190	10,924	451,114	7.5%
2018	448,894	12,488	461,382	2.3%

Source: Statistics Mauritius





**Table B-3: Monthly Tourist Arrivals and Annual Growth Rate, 2011 – 2018**

Month	2011	2012	2013	2014	2015	2016	2017	2018
January	101,887	98,837	92,894	96,285	103,556	118,426	124,362	120,974
February	77,390	79,331	81,185	78,899	91,066	100,706	105,049	115,600
March	83,349	83,827	91,759	87,876	96,425	108,704	110,271	119,841
April	79,173	79,137	76,223	88,102	90,221	91,992	111,432	104,967
May	68,214	71,396	74,596	78,545	87,054	94,830	96,557	
June	54,591	54,625	55,007	60,440	65,459	71,806	78,188	
July	78,034	76,166	77,374	81,934	95,694	108,122	112,347	
August	66,865	65,896	73,454	78,466	89,422	94,920	100,191	
September	64,880	66,369	71,951	74,508	84,456	91,384	96,282	
October	90,616	89,994	92,520	101,323	109,014	130,421	130,070	
November	87,348	84,398	89,057	91,213	106,204	115,782	121,496	
December	112,295	115,465	117,086	120,743	132,681	148,134	155,615	
<b>Total</b>	<b>964,642</b>	<b>965,441</b>	<b>993,106</b>	<b>1,038,334</b>	<b>1,151,252</b>	<b>1,275,227</b>	<b>1,341,860</b>	
<b>January - April</b>	<b>341,799</b>	<b>341,132</b>	<b>342,061</b>	<b>351,162</b>	<b>381,268</b>	<b>419,828</b>	<b>451,114</b>	<b>461,382</b>
Month growth rate	2011	2012	2013	2014	2015	2016	2017	2018
January	10.9%	-3.0%	-6.0%	3.7%	7.6%	14.4%	5.0%	-2.7%
February	6.9%	2.5%	2.3%	-2.8%	15.4%	10.6%	4.3%	10.0%
March	-2.8%	0.6%	9.5%	-4.2%	9.7%	12.7%	1.4%	8.7%
April	22.2%	-0.0%	-3.7%	15.6%	2.4%	2.0%	21.1%	-5.8%
May	-4.0%	4.7%	4.5%	5.3%	10.8%	8.9%	1.8%	
June	2.4%	0.1%	0.7%	9.9%	8.3%	9.7%	8.9%	
July	1.3%	-2.4%	1.6%	5.9%	16.8%	13.0%	3.9%	
August	2.7%	-1.4%	11.5%	6.8%	14.0%	6.1%	5.6%	
September	-0.8%	2.3%	8.4%	3.6%	13.4%	8.2%	5.4%	
October	3.8%	-0.7%	2.8%	9.5%	7.6%	19.6%	-0.3%	
November	1.6%	-3.4%	5.5%	2.4%	16.4%	9.0%	4.9%	
December	-2.2%	2.8%	1.4%	3.1%	9.9%	11.6%	5.1%	
<b>Total</b>	<b>3.2%</b>	<b>0.1%</b>	<b>2.9%</b>	<b>4.6%</b>	<b>10.9%</b>	<b>10.8%</b>	<b>5.2%</b>	
<b>January - April</b>	<b>8.6%</b>	<b>-0.2%</b>	<b>0.3%</b>	<b>2.7%</b>	<b>8.6%</b>	<b>10.1%</b>	<b>7.5%</b>	<b>2.3%</b>

Source: Statistics Mauritius



# Part B



**Table B-4: Tourist Arrivals, By Country of Residence, 2011– 2018**

Country of Residence	2011	2012	2013	2014	2015	2016	2017	January - April	
								2017	2018
<b>EUROPE</b>	<b>590,113</b>	<b>555,528</b>	<b>547,046</b>	<b>570,684</b>	<b>631,627</b>	<b>734,506</b>	<b>780,209</b>	<b>276,412</b>	<b>292,574</b>
Austria	8,822	8,151	7,937	8,303	11,425	16,643	17,596	8,514	8,284
Belgium	12,029	10,967	11,566	11,465	14,223	15,675	16,420	4,503	4,285
France	282,469	256,929	244,752	243,655	254,323	271,963	273,419	104,607	110,783
Germany	56,331	55,186	60,530	62,212	75,237	103,761	118,856	38,007	42,788
Italy	52,747	40,009	31,205	29,553	29,185	31,337	35,101	12,174	12,109
Netherlands	5,179	4,434	4,499	4,795	6,926	10,080	13,269	3,218	4,577
Spain	9,801	9,473	8,441	8,632	10,013	15,304	15,252	2,229	2,657
Sweden	4,325	4,295	4,577	6,452	11,634	14,551	15,516	8,625	8,082
Switzerland	24,362	26,002	27,756	29,273	30,680	36,272	40,252	14,005	15,051
UK	88,182	87,648	98,017	115,239	129,754	141,904	149,807	42,168	43,025
Czech Republic	4,081	5,247	5,543	6,852	7,265	8,503	10,495	5,416	7,156
CIS	15,246	23,094	18,689	16,222	14,489	13,624	15,226	7,082	6,650
- Russian Federation	12,227	19,429	14,905	13,287	11,406	9,295	11,153	5,076	4,978
Other European	26,539	24,093	23,534	28,031	36,473	54,889	59,000	25,864	27,127
<b>AFRICA</b>	<b>250,709</b>	<b>270,386</b>	<b>277,773</b>	<b>274,164</b>	<b>284,682</b>	<b>291,890</b>	<b>301,898</b>	<b>95,154</b>	<b>92,558</b>
Comoros	969	1,076	1,147	938	758	800	886	351	325
Kenya	1,914	2,705	2,865	3,266	3,376	3,185	3,422	925	852
Malagasy Rep	11,449	13,563	13,943	13,038	12,215	11,740	12,730	3,699	3,743
Réunion Is	132,535	144,340	143,114	141,659	143,845	146,203	146,040	50,147	45,551
Seychelles	8,485	6,779	7,187	6,926	5,652	6,393	6,258	1,841	1,451
South Africa	86,232	89,058	94,208	93,075	101,943	104,834	112,129	32,080	35,136
Zimbabwe	1,495	1,568	1,526	1,735	1,892	2,047	2,553	799	623
Other African	7,630	11,297	13,783	13,527	15,001	16,688	17,880	5,312	4,877
<b>ASIA</b>	<b>91,057</b>	<b>104,336</b>	<b>132,554</b>	<b>158,330</b>	<b>197,735</b>	<b>208,233</b>	<b>211,380</b>	<b>65,506</b>	<b>61,292</b>
Hong Kong SAR	593	1,269	1,449	1,454	1,327	1,342	1,512	520	396
India	53,955	55,197	57,255	61,162	72,135	82,670	86,294	22,796	23,177
Japan	1,545	1,641	1,768	1,653	1,415	2,655	2,315	814	693
Korea Republic	1,935	2,651	2,778	3,182	3,494	6,025	6,858	2,167	1,938
Malaysia	1,989	1,967	3,174	2,969	2,557	4,628	4,352	1,783	678
China, PR	15,133	20,885	41,913	63,363	89,584	79,374	72,951	26,500	22,194
Singapore	2,461	2,078	2,112	1,849	1,779	2,840	3,230	854	747
UAE	3,780	5,403	8,161	8,000	9,049	9,614	11,866	3,229	2,973
Other Asian	9,666	13,245	13,944	14,698	16,395	19,085	22,002	6,843	8,496
<b>OCEANIA</b>	<b>16,761</b>	<b>17,863</b>	<b>19,360</b>	<b>18,663</b>	<b>19,084</b>	<b>20,071</b>	<b>22,898</b>	<b>5,985</b>	<b>6,414</b>
Australia	15,726	17,009	18,393	17,434	17,835	18,559	21,271	5,562	5,936
Other Oceania	1,035	854	967	1,229	1,249	1,512	1,627	423	478
<b>AMERICA</b>	<b>14,408</b>	<b>16,624</b>	<b>15,473</b>	<b>16,330</b>	<b>17,891</b>	<b>19,766</b>	<b>24,795</b>	<b>7,833</b>	<b>8,376</b>
USA	6,870	6,374	5,777	7,139	8,546	8,524	9,655	2,739	3,259
Canada	3,887	4,736	4,435	4,669	5,608	6,060	6,908	1,891	2,045
Brazil	n/a	3,217	2,886	2,455	1,947	2,912	4,659	1,480	1,235
Other American	3,651	2,297	2,375	2,067	1,790	2,270	3,573	1,723	1,837
<b>Other &amp; Not Stated</b>	<b>1,594</b>	<b>704</b>	<b>900</b>	<b>163</b>	<b>233</b>	<b>761</b>	<b>680</b>	<b>224</b>	<b>168</b>
<b>ALL COUNTRIES</b>	<b>964,642</b>	<b>965,441</b>	<b>993,106</b>	<b>1,038,334</b>	<b>1,151,252</b>	<b>1,275,227</b>	<b>1,341,860</b>	<b>451,114</b>	<b>461,382</b>

Source: Statistics Mauritius



# Part B



**Table B-5: Tourist Arrivals, By Month and Country of Residence, 2017**

Country of Residence	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
<b>EUROPE</b>	<b>70,434</b>	<b>72,102</b>	<b>66,340</b>	<b>67,536</b>	<b>44,763</b>	<b>34,523</b>	<b>57,026</b>	<b>54,982</b>	<b>54,373</b>	<b>81,263</b>	<b>87,319</b>	<b>89,548</b>	<b>780,209</b>
Austria	2,289	2,708	2,090	1,427	603	402	774	625	776	1,485	2,254	2,163	17,596
Belgium	886	912	1,058	1,647	870	940	2,278	1,156	1,281	1,754	1,692	1,946	16,420
Bulgaria	150	175	90	137	46	55	57	55	64	102	166	289	1,386
Czech Republic	1,236	1,805	1,497	878	388	272	413	207	481	646	1,340	1,332	10,495
Croatia	83	40	45	44	36	35	57	37	44	53	89	112	675
Denmark	1,013	1,227	869	612	170	195	625	170	289	794	410	597	6,971
Estonia	115	64	73	32	16	8	12	5	19	64	96	304	808
Finland	899	926	505	100	83	89	82	58	104	255	373	987	4,461
France	26,687	29,362	24,070	24,488	16,382	8,662	19,955	19,138	12,186	29,588	30,672	32,229	273,419
Germany	8,664	8,472	10,865	10,006	7,882	7,322	6,315	7,250	11,667	13,142	15,733	11,538	118,856
Greece	82	80	85	85	79	67	95	107	104	70	74	106	1,034
Hungary	534	505	325	187	143	77	98	52	73	224	232	379	2,829
Ireland	269	124	257	381	294	407	435	368	405	392	338	350	4,020
Italy	3,989	2,782	2,432	2,971	1,814	1,540	1,995	3,404	2,903	3,181	3,323	4,767	35,101
Latvia	67	75	65	34	17	14	37	14	131	67	81	70	672
Lithuania	171	223	93	109	37	24	44	30	79	67	65	104	1,046
Luxembourg	98	96	103	248	73	63	97	298	161	160	170	235	1,802
Netherlands	719	730	686	1,083	775	903	1,634	1,402	1,069	1,108	1,589	1,571	13,269
Norway	334	536	295	390	114	398	930	177	261	437	507	626	5,005
Poland	2,389	2,148	1,283	312	201	351	502	385	508	469	1,444	1,326	11,318
Portugal	142	245	246	342	408	298	496	640	528	317	284	308	4,254
Romania	287	250	245	157	112	187	124	151	252	172	331	423	2,691
Serbia	66	85	33	32	38	40	26	25	35	47	63	115	605
Slovakia	457	853	476	363	147	85	66	39	112	222	363	552	3,735
Slovenia	126	165	126	124	50	60	90	44	101	123	105	198	1,312
Spain	525	420	585	699	864	996	2,116	2,899	2,279	1,603	935	1,331	15,252
Sweden	3,142	2,974	2,058	451	260	376	487	174	345	1,240	1,166	2,843	15,516
Switzerland	2,811	3,250	2,823	5,121	1,608	1,109	2,879	1,115	2,837	6,147	5,563	4,989	40,252
Turkey	590	223	286	192	153	170	160	165	191	117	170	177	2,594
United Kingdom	8,791	9,135	10,987	13,255	10,181	8,811	13,237	14,061	14,009	15,796	16,392	15,152	149,807
CIS <sup>1</sup> countries	2,693	1,372	1,570	1,447	843	484	745	592	933	1,227	1,122	2,198	15,226
<i>of which: Belarus</i>	63	46	54	27	29	31	30	26	40	41	34	59	480
<i>Kazakhstan</i>	92	47	62	43	11	11	27	12	5	22	6	64	402
<i>Russian Federation</i>	1,898	993	1,136	1,049	620	340	534	415	693	970	851	1,654	11,153
<i>Ukraine</i>	596	258	279	296	170	89	130	122	167	179	206	362	2,854
<i>Other CIS</i>	44	28	39	32	13	13	24	17	28	15	25	59	337
Other European	130	140	119	182	76	83	165	139	146	194	177	231	1,782



# Part B



**Table B-5: Tourist Arrivals, By Month and Country of Residence, 2017**

Country of Residence	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
<b>AFRICA</b>	<b>31,580</b>	<b>12,808</b>	<b>24,630</b>	<b>26,136</b>	<b>26,375</b>	<b>16,690</b>	<b>31,766</b>	<b>23,588</b>	<b>20,648</b>	<b>28,181</b>	<b>17,251</b>	<b>42,245</b>	<b>301,898</b>
IOC <sup>2</sup> countries	23,778	6,541	15,271	10,448	17,669	7,629	19,081	12,643	7,703	18,373	8,257	18,521	165,914
of which: Comoros	86	73	73	119	51	41	57	55	99	80	81	71	886
Malagasy Republic	918	889	806	1,086	713	616	1,332	1,587	1,009	1,251	999	1,524	12,730
Réunion Island	22,417	5,201	14,028	8,501	16,476	6,370	17,288	10,467	6,140	16,656	6,629	15,867	146,040
Seychelles	357	378	364	742	429	602	404	534	455	386	548	1,059	6,258
Algeria	12	16	27	29	63	11	74	56	32	31	26	27	404
Angola	20	62	43	55	42	34	44	25	21	55	42	106	549
Benin	4	5	4	19	19	5	9	4	11	13	11	4	108
Botswana	56	39	65	84	70	71	145	100	54	71	79	238	1,072
Burundi	4	2	2	10	10	6	21	15	10	13	8	7	108
Cameroon	42	19	29	29	26	24	37	30	30	36	38	31	371
Congo	56	63	69	61	64	39	55	68	61	52	47	68	703
Egypt	43	30	89	45	37	45	116	64	87	50	43	79	728
Ethiopia	11	26	53	23	8	18	36	38	81	34	31	33	392
Gabon	5	24	19	14	14	1	9	19	9	11	7	17	149
Ghana	36	60	114	53	54	54	84	97	119	83	62	81	897
Ivory Coast	31	40	20	28	39	37	60	33	50	69	56	33	496
Kenya	210	227	202	286	279	252	304	409	273	267	291	422	3,422
Lesotho	12	6	19	19	18	32	11	15	18	20	23	43	236
Malawi	10	17	42	28	23	31	61	37	24	21	42	27	363
Mayotte	37	129	134	223	94	26	135	43	49	136	117	217	1,340
Morocco	39	84	65	41	49	44	113	70	59	72	58	77	771
Mozambique	94	49	96	66	52	49	94	77	60	85	68	86	876
Namibia	67	54	61	183	287	82	66	152	103	101	65	284	1,505
Niger	10	15	14	11	13	8	19	9	21	13	16	10	159
Nigeria	58	95	91	65	94	71	90	175	125	145	217	105	1,331
Rwanda	8	18	8	16	17	6	45	25	21	17	25	15	221
Senegal	21	11	9	21	17	11	45	31	45	42	26	19	298
South Africa	6,522	4,754	7,456	13,348	6,988	7,558	10,277	8,619	10,926	7,786	7,057	20,838	112,129
Sudan	6	2	55	5	3	34	7	9	25	10	14	5	175
Swaziland	32	20	54	54	23	24	70	41	50	22	24	37	451
Tanzania	38	55	90	75	27	61	66	58	71	53	55	48	697
Togo	4	3	6	4	3	5	18	5	15	7	7	7	84
Tunisia	32	46	36	127	23	26	88	49	36	47	34	33	577
Uganda	16	24	58	44	31	43	57	50	80	53	57	42	555
Zimbabwe	121	138	176	364	130	197	174	343	189	194	154	373	2,553
Zambia	46	53	78	118	47	58	102	79	79	99	73	162	994
Other African	99	81	75	140	42	98	153	100	111	100	121	150	1,270



# Part B



**Table B-5: Tourist Arrivals, By Month and Country of Residence, 2017**

Country of Residence	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
<b>ASIA</b>	<b>18,239</b>	<b>17,411</b>	<b>16,020</b>	<b>13,836</b>	<b>22,024</b>	<b>23,368</b>	<b>19,000</b>	<b>18,078</b>	<b>16,955</b>	<b>16,386</b>	<b>13,096</b>	<b>16,967</b>	<b>211,380</b>
Afghanistan	56	50	62	62	67	52	64	62	63	58	76	92	764
Bangladesh	102	57	134	68	79	62	68	36	136	120	76	219	1,157
Hong Kong SAR <sup>3</sup>	109	84	94	233	95	99	174	116	108	105	87	208	1,512
India	5,136	6,991	5,122	5,547	12,221	12,491	6,637	5,681	5,441	6,086	5,384	9,557	86,294
Indonesia	139	269	571	111	165	176	69	252	420	230	90	178	2,670
Israel	124	186	132	92	127	72	118	135	147	196	100	269	1,698
Japan	187	156	239	232	148	189	141	248	188	231	157	199	2,315
Korea Republic	462	496	552	657	589	519	278	277	705	607	1,049	667	6,858
Malaysia	436	476	627	244	421	495	207	434	234	201	247	330	4,352
Maldives	1	3	11	2	3	17	5	2	2	3	3	6	58
Nepal	40	27	24	17	17	20	42	12	59	57	14	45	374
Pakistan	78	58	83	53	120	86	134	73	107	124	70	102	1,088
People's Rep. of China	9,928	6,749	5,122	4,701	6,392	6,209	7,373	7,319	6,539	6,112	3,895	2,612	72,951
Philippines	179	369	346	130	185	190	185	255	298	247	131	227	2,742
Singapore	187	203	237	227	241	462	253	231	187	256	218	528	3,230
Sri Lanka	21	42	42	36	21	30	40	36	75	86	60	28	517
Taiwan	113	215	143	78	118	93	106	151	274	131	74	96	1,592
Thailand	36	66	59	41	56	29	90	48	37	123	49	48	682
Vietnam	39	78	105	19	21	86	40	35	48	87	60	89	707
<b>MIDDLE EAST Countries</b>	<b>850</b>	<b>822</b>	<b>2,293</b>	<b>1,252</b>	<b>877</b>	<b>1,962</b>	<b>2,932</b>	<b>2,636</b>	<b>1,860</b>	<b>1,308</b>	<b>1,247</b>	<b>1,432</b>	<b>19,471</b>
of which: Bahrain	3	6	2	22	7	11	31	30	13	10	11	25	171
Iran	4	2	449	4	13	8	13	12	48	22	16	16	607
Jordan	10	4	19	10	4	18	29	27	21	15	14	13	184
Kuwait	44	32	30	36	17	39	99	109	73	18	24	27	548
Lebanon	13	23	42	62	38	41	24	45	34	37	40	48	447
Oman	11	3	25	19	5	33	35	26	10	12	13	15	207
Qatar	25	10	18	51	23	18	22	16	12	16	9	17	237
Saudi Arabia	267	165	303	257	99	234	696	726	942	669	450	334	5,142
United Arab Emirates	470	576	1,401	782	668	1,547	1,977	1,636	703	504	666	936	11,866
Other Middle East	3	1	4	9	3	13	6	9	4	5	4	1	62
Other Asian	16	14	22	34	61	29	44	39	27	18	9	35	348
<b>OCEANIA</b>	<b>1,670</b>	<b>967</b>	<b>1,232</b>	<b>2,116</b>	<b>1,565</b>	<b>1,702</b>	<b>2,120</b>	<b>1,793</b>	<b>2,543</b>	<b>2,116</b>	<b>1,690</b>	<b>3,384</b>	<b>22,898</b>
Australia	1,567	857	1,131	2,007	1,427	1,569	1,944	1,664	2,408	1,951	1,604	3,142	21,271
New Zealand	57	55	66	62	89	87	120	93	101	108	47	167	1,052
Other Oceanian	46	55	35	47	49	46	56	36	34	57	39	75	575
<b>AMERICA</b>	<b>2,393</b>	<b>1,712</b>	<b>2,000</b>	<b>1,728</b>	<b>1,764</b>	<b>1,859</b>	<b>2,367</b>	<b>1,707</b>	<b>1,716</b>	<b>2,078</b>	<b>2,077</b>	<b>3,394</b>	<b>24,795</b>
Brazil	531	214	375	360	431	319	304	215	466	598	442	404	4,659
Canada	528	412	530	421	482	537	868	571	407	488	498	1,166	6,908
USA	797	668	676	598	638	859	846	781	659	688	858	1,587	9,655
Other American	537	418	419	349	213	144	349	140	184	304	279	237	3,573
<b>Others &amp; not stated</b>	<b>46</b>	<b>49</b>	<b>49</b>	<b>80</b>	<b>66</b>	<b>46</b>	<b>68</b>	<b>43</b>	<b>47</b>	<b>46</b>	<b>63</b>	<b>77</b>	<b>680</b>
<b>All countries</b>	<b>124,362</b>	<b>105,049</b>	<b>110,271</b>	<b>111,432</b>	<b>96,557</b>	<b>78,188</b>	<b>112,347</b>	<b>100,191</b>	<b>96,282</b>	<b>130,070</b>	<b>121,496</b>	<b>155,615</b>	<b>1,341,860</b>

(1) Commonwealth of Independence States

(2) Indian Ocean commission

(3) Special Administrative Region of China

Source: Statistics Mauritius



# Part B



**Table B-6: Tourist Arrivals and Share (%) by Selected Markets, 2011 - 2017**

Tourist arrivals by country of residence	2011	2012	2013	2014	2015	2016	2017
<b>Continent</b>							
Europe	590,113	555,528	547,046	570,684	631,627	734,506	780,209
Africa	250,709	270,386	277,773	274,164	284,682	291,890	301,898
Asia	91,057	104,336	132,554	158,330	197,735	208,233	211,380
Oceania	16,761	17,863	19,360	18,663	19,084	20,071	22,898
America	14,408	16,624	15,473	16,330	17,891	19,766	24,795
Others & Not Stated	1,594	704	900	163	233	761	680
<b>Total</b>	<b>964,642</b>	<b>965,441</b>	<b>993,106</b>	<b>1,038,334</b>	<b>1,151,252</b>	<b>1,275,227</b>	<b>1,341,860</b>
<b>Top 10 markets in 2017</b>							
France	282,469	256,929	244,752	243,655	254,323	271,963	273,419
United Kingdom	88,182	87,648	98,017	115,239	129,754	141,904	149,807
Réunion Island	132,535	144,340	143,114	141,659	143,845	146,203	146,040
Germany	56,331	55,186	60,530	62,212	75,237	103,761	118,856
South Africa	86,232	89,058	94,208	93,075	101,943	104,834	112,129
India	53,955	55,197	57,255	61,162	72,135	82,670	86,294
China	15,133	20,885	41,913	63,363	89,584	79,374	72,951
Switzerland	24,362	26,002	27,756	29,273	30,680	36,272	40,252
Italy	52,747	40,009	31,205	29,553	29,185	31,337	35,101
Australia	15,726	17,009	18,393	17,434	17,835	18,559	21,271
<b>Total Top 10</b>	<b>807,672</b>	<b>792,263</b>	<b>817,143</b>	<b>856,625</b>	<b>944,521</b>	<b>1,016,877</b>	<b>1,056,120</b>
Market share by country of residence	2011	2012	2013	2014	2015	2016	2017
<b>Continent</b>							
Europe	61.2%	57.5%	55.1%	55.0%	54.9%	57.6%	58.1%
Africa	26.0%	28.0%	28.0%	26.4%	24.7%	22.9%	22.5%
Asia	9.4%	10.8%	13.3%	15.2%	17.2%	16.3%	15.8%
Oceania	1.7%	1.9%	1.9%	1.8%	1.7%	1.6%	1.7%
America	1.5%	1.7%	1.6%	1.6%	1.6%	1.5%	1.8%
Others & Not Stated	0.2%	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
<b>Top 10 markets in 2017</b>							
France	29.3%	26.6%	24.6%	23.5%	22.1%	21.3%	20.4%
United Kingdom	9.1%	9.1%	9.9%	11.1%	11.3%	11.1%	11.2%
Réunion Island	13.7%	15.0%	14.4%	13.6%	12.5%	11.5%	10.9%
Germany	5.8%	5.7%	6.1%	6.0%	6.5%	8.1%	8.9%
South Africa	8.9%	9.2%	9.5%	9.0%	8.9%	8.2%	8.4%
India	5.6%	5.7%	5.8%	5.9%	6.3%	6.5%	6.4%
China	1.6%	2.2%	4.2%	6.1%	7.8%	6.2%	5.4%
Switzerland	2.5%	2.7%	2.8%	2.8%	2.7%	2.8%	3.0%
Italy	5.5%	4.1%	3.1%	2.8%	2.5%	2.5%	2.6%
Australia	1.6%	1.8%	1.9%	1.7%	1.5%	1.5%	1.6%
<b>Total Top 10</b>	<b>83.7%</b>	<b>82.1%</b>	<b>82.3%</b>	<b>82.5%</b>	<b>82.0%</b>	<b>79.7%</b>	<b>78.7%</b>

Source: Statistics Mauritius





Table B-7: Tourist Arrivals by Air and by Main Port of Last Embarkation for Selected Markets, 2017

Country of last embarkation		Total tourist arrivals	of which, arrivals from selected country of residence											
			France	Germany	Italy	Switzerland	UK	Turkey	Réunion	RSA	India	China	Russia	Australia
<b>EUROPE</b>		<b>454,125</b>	<b>155,546</b>	<b>72,654</b>	<b>16,974</b>	<b>21,392</b>	<b>85,522</b>	<b>2,108</b>	<b>286</b>	<b>249</b>	<b>161</b>	<b>322</b>	<b>3,361</b>	<b>790</b>
of which:	France	200,629	143,546	9,526	4,391	6,399	6,595	16	222	92	52	116	1,601	367
	Germany	76,090	5,009	55,492	673	2,017	1,379	42	11	19	8	31	161	85
	Italy	9,264	118	20	8,678	129	16	0	10	2	1	12	13	11
	Switzerland	15,656	1,377	1,079	243	10,860	323	0	7	5	0	9	207	6
	Turkey	28,647	1,915	4,336	2,030	936	899	2,037	16	20	31	87	1,058	24
	UK	85,679	2,052	460	492	436	75,743	9	15	102	64	64	85	226
<b>AFRICA</b>		<b>444,216</b>	<b>80,127</b>	<b>11,407</b>	<b>2,928</b>	<b>4,678</b>	<b>10,933</b>	<b>167</b>	<b>142,269</b>	<b>106,425</b>	<b>8,312</b>	<b>4,304</b>	<b>516</b>	<b>3,216</b>
of which:	Kenya	6,199	141	66	32	75	405	11	63	85	145	384	22	150
	Madagascar	17,885	1,085	194	103	129	334	64	179	223	460	1,022	98	287
	Réunion	232,921	69,751	4,188	358	2,431	1,405	25	141,381	1,389	820	1,294	98	426
	Seychelles	25,807	7,600	901	126	381	686	22	51	333	6,318	221	89	171
	South Africa	160,342	1,534	6,048	2,308	1,640	8,077	45	591	103,768	563	1,356	209	2,166
<b>ASIA</b>		<b>396,657</b>	<b>32,507</b>	<b>26,760</b>	<b>13,240</b>	<b>13,035</b>	<b>50,545</b>	<b>291</b>	<b>2,497</b>	<b>2,092</b>	<b>77,522</b>	<b>68,010</b>	<b>6,965</b>	<b>2,707</b>
of which:	Hong Kong	13,106	112	27	26	10	115	0	45	24	15	10,094	40	112
	India	71,885	179	71	36	22	348	1	220	1,311	66,842	66	21	126
	Malaysia	11,863	422	94	23	31	199	1	961	134	212	3,137	93	737
	China	43,774	55	6	1	1	16	0	55	29	9	42,826	18	12
	Singapore	8,857	432	58	30	29	173	1	851	160	122	289	57	587
	UAE	243,629	31,054	26,404	12,917	12,929	49,639	271	364	429	10,276	11,587	6,679	1,132
<b>OCEANIA</b>		<b>17,297</b>	<b>322</b>	<b>51</b>	<b>23</b>	<b>14</b>	<b>308</b>	<b>0</b>	<b>385</b>	<b>858</b>	<b>15</b>	<b>27</b>	<b>2</b>	<b>14,389</b>
of which:	Australia	17,297	322	51	23	14	308	0	385	858	15	27	2	14,389
<b>Total arrivals by air</b>		<b>1,312,295</b>	<b>268,502</b>	<b>110,872</b>	<b>33,165</b>	<b>39,119</b>	<b>147,308</b>	<b>2,566</b>	<b>145,437</b>	<b>109,624</b>	<b>86,010</b>	<b>72,663</b>	<b>10,844</b>	<b>21,102</b>
of which:			<b>France</b>	<b>Germany</b>	<b>Italy</b>	<b>Switzerland</b>	<b>UK</b>	<b>Turkey</b>	<b>Réunion</b>	<b>RSA</b>	<b>India</b>	<b>China</b>	<b>Russia</b>	<b>Australia</b>
	Direct from own country of residence		53.5%	50.1%	26.2%	27.8%	51.4%	79.4%	97.2%	94.7%	77.7%	58.9%	N/A	68.2%
	From UAE		11.6%	23.8%	38.9%	33.1%	33.7%	10.6%	0.3%	0.4%	11.9%	15.9%	61.6%	5.4%
	From Turkey		0.7%	3.9%	6.1%	2.4%	0.6%		0.0%	0.0%	0.0%	0.1%	9.8%	0.1%
	From France			8.6%	13.2%	16.4%	4.5%	0.6%	0.2%	0.1%	0.1%	0.2%	14.8%	1.7%
	From Réunion		26.0%	3.8%	1.1%	6.2%	1.0%	1.0%		1.3%	1.0%	1.8%	0.9%	2.0%
	From South Africa		0.6%	5.5%	7.0%	4.2%	5.5%	1.8%	0.4%		0.7%	1.9%	1.9%	10.3%

Source: Statistics Mauritius





Table B-8: Tourist Arrivals by Main Purpose of Visit, 2011 – 2018

Purpose of Visit	2011	2012	2013	2014	2015	2016	2017	2018 <sup>P</sup> (Q1)	
								Number	As a % of total
Holiday	897,786	896,977	923,247	969,524	1,077,442	1,200,047	1,260,231	334,746	93.9
Business	36,093	36,962	36,616	37,715	42,028	44,133	46,856	11,676	3.3
Transit	23,024	23,081	22,684	21,012	21,569	21,302	25,134	8,599	2.4
Conference	4,637	5,605	6,866	7,072	6,310	6,264	5,700	785	0.2
Sports	1,083	1,253	1,920	1,797	2,408	2,120	2,592	341	0.1
Other & not stated	2,019	1,563	1,773	1,848	1,495	1,361	1,347	268	0.1
<b>Total</b>	<b>964,642</b>	<b>965,441</b>	<b>993,106</b>	<b>1,038,968</b>	<b>1,151,252</b>	<b>1,275,227</b>	<b>1,341,860</b>	<b>356,415</b>	<b>100</b>

Source: Statistics Mauritius

Table B-9: Tourist Arrivals by Age and Sex for Selected Markets, 2011 & 2017

Age group (years)	Market: France							
	2011			2017 <sup>1</sup>			Share by age group	
	Male	Female	Total	Male	Female	Total	2011	2017
Under 15	22,276	21,713	43,989	18,408	18,605	37,013	15.6%	13.5%
15 - 24	9,680	12,755	22,435	8,688	11,462	20,150	7.9%	7.4%
25 - 34	18,902	26,447	45,349	20,692	23,878	44,570	16.1%	16.3%
35 - 44	27,960	26,246	54,206	22,007	22,363	44,370	19.2%	16.2%
45 - 54	27,200	25,709	52,909	25,799	26,054	51,853	18.7%	19.0%
55 - 64	21,675	20,044	41,719	21,732	21,581	43,313	14.8%	15.8%
65 & over	11,197	10,665	21,862	16,570	15,580	32,150	7.7%	11.8%
<b>Total</b>	<b>138,890</b>	<b>143,579</b>	<b>282,469</b>	<b>133,896</b>	<b>139,523</b>	<b>273,419</b>	<b>100.0%</b>	<b>100.0%</b>

Age group (years)	Market: Réunion							
	2011			2017 <sup>1</sup>			Share by age group	
	Male	Female	Total	Male	Female	Total	2011	2017
Under 15	9,191	10,165	19,356	14,102	14,149	28,251	14.6%	19.3%
15 - 24	3,993	5,968	9,961	5,899	7,666	13,565	7.5%	9.3%
25 - 34	16,035	12,338	28,373	9,947	11,990	21,937	21.4%	15.0%
35 - 44	11,500	12,263	23,763	12,239	12,565	24,804	17.9%	17.0%
45 - 54	11,186	12,009	23,195	12,871	12,758	25,629	17.5%	17.5%
55 - 64	8,919	9,371	18,290	9,496	9,779	19,275	13.8%	13.2%
65 & over	4,609	4,988	9,597	6,030	6,549	12,579	7.2%	8.6%
<b>Total</b>	<b>65,433</b>	<b>67,102</b>	<b>132,535</b>	<b>70,584</b>	<b>75,456</b>	<b>146,040</b>	<b>100.0%</b>	<b>100.0%</b>

Age group (years)	Market: UK							
	2011			2017 <sup>1</sup>			Share by age group	
	Male	Female	Total	Male	Female	Total	2011	2017
Under 15	5,212	5,209	10,421	8,692	8,446	17,138	11.8%	11.4%
15 - 24	2,697	3,540	6,237	4,463	5,859	10,322	7.1%	6.9%
25 - 34	8,103	8,701	16,804	13,259	15,600	28,859	19.1%	19.3%
35 - 44	7,861	6,888	14,749	11,516	11,173	22,689	16.7%	15.1%
45 - 54	8,741	8,361	17,102	13,834	14,366	28,200	19.4%	18.8%
55 - 64	7,465	7,079	14,544	11,809	11,860	23,669	16.5%	15.8%
65 & over	4,686	3,639	8,325	10,228	8,702	18,930	9.4%	12.6%
<b>Total</b>	<b>44,765</b>	<b>43,417</b>	<b>88,182</b>	<b>73,801</b>	<b>76,006</b>	<b>149,807</b>	<b>100.0%</b>	<b>100.0%</b>



# Part B



Table B-9: Tourist Arrivals by Age and Sex for Selected Markets, 2012 & 2017

Age group (years)	Market: Germany							
	2011			2017 <sup>1</sup>			Share by age group	
	Male	Female	Total	Male	Female	Total	2011	2017
Under 15	1,971	1,887	3,858	3,473	3,552	7,025	6.8%	5.9%
15 - 24	1,128	1,865	2,993	2,899	4,776	7,675	5.3%	6.5%
25 - 34	4,972	6,302	11,274	12,276	15,030	27,306	20.0%	23.0%
35 - 44	5,192	5,036	10,228	8,181	7,822	16,003	18.2%	13.5%
45 - 54	6,950	7,169	14,119	13,009	14,347	27,356	25.1%	23.0%
55 - 64	4,416	3,969	8,385	11,076	10,339	21,415	14.9%	18.0%
65 & over	3,055	2,419	5,474	6,726	5,350	12,076	9.7%	10.2%
Total	27,684	28,647	56,331	57,640	61,216	118,856	100.0%	100.0%

Age group (years)	Market: South Africa							
	2011			2017 <sup>1</sup>			Share by age group	
	Male	Female	Total	Male	Female	Total	2011	2017
Under 15	6,964	6,976	13,940	8,943	8,901	17,844	16.2%	15.9%
15 - 24	3,391	4,361	7,752	3,869	4,896	8,765	9.0%	7.8%
25 - 34	8,413	9,252	17,665	9,420	11,217	20,637	20.5%	18.4%
35 - 44	10,337	9,773	20,110	12,429	12,055	24,484	23.3%	21.8%
45 - 54	7,772	6,655	14,427	10,528	9,326	19,854	16.7%	17.7%
55 - 64	4,503	3,867	8,370	6,593	6,380	12,973	9.7%	11.6%
65 & over	2,045	1,923	3,968	3,842	3,730	7,572	4.6%	6.8%
Total	43,425	42,807	86,232	55,624	56,505	112,129	100.0%	100.0%

Age group (years)	All markets							
	2011			2017 <sup>1</sup>			Share by age group	
	Male	Female	Total	Male	Female	Total	2011	2017
Under 15	60,355	60,625	120,980	81,069	80,655	161,724	12.5%	12.1%
15 - 24	32,211	45,215	77,426	44,506	61,185	105,691	8.0%	7.9%
25 - 34	100,999	107,620	208,619	143,009	157,002	300,011	21.6%	22.4%
35 - 44	99,784	88,875	188,659	121,145	112,253	233,398	19.6%	17.4%
45 - 54	91,941	84,239	176,180	122,886	118,548	241,434	18.3%	18.0%
55 - 64	65,775	59,787	125,562	92,615	88,509	181,124	13.0%	13.5%
65 & over	35,625	31,591	67,216	62,437	56,041	118,478	7.0%	8.8%
Total	486,690	477,952	964,642	667,667	674,193	1,341,860	100.0%	100.0%

<sup>1</sup> Provisional  
Source: Statistics Mauritius



# Part B



**Table B-10: Tourist Nights and Average Length of Stay, 2011 – 2018**

Indicator	2011	2012	2013	2014	2015	2016	2017	2018 Q1
Tourist arrivals	964,642	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	356,415
Year on year change, %	3.2	0.1	2.9	4.6	10.9	10.8	5.2	4.9
Tourist nights (000s)	9,494	10,044	10,676	11,267	12,050	13,118	13,641	4,127
Year on year change, %	1.7	5.8	6.3	5.5	7.0	8.9	4.0	4.1
Average length of stay	10.1	10.5	10.8	10.9	10.6	10.4	10.3	10.9

1 - Tourist nights for a reference period will refer to nights spent by tourists departing in the reference period  
Source: Statistics Mauritius

**Table B-11: Tourist Nights and Average Length of Stay for Selected Markets, 2012 & 2017**

Country of residence	Tourist nights		Average length of stay (days)	
	2012	2017 <sup>1</sup>	2012	2017 <sup>1</sup>
France	2,978,517	3,180,222	11.5	11.8
United Kingdom	1,140,129	1,728,279	13.2	11.7
Germany	663,498	1,277,191	12.2	11.1
Réunion	1,042,124	989,005	7.5	6.8
South Africa	734,287	920,225	8.3	8.3
India	515,778	780,775	9.6	9.2
China	226,741	544,858	11.3	7.5
Switzerland	317,601	464,546	12.4	11.8
Italy	387,725	337,644	9.8	10.0
Australia	219,385	266,452	12.9	12.7
Belgium	148,383	208,599	13.5	12.8
Austria	97,043	190,291	12.0	11.0
Sweden	47,556	175,011	11.4	11.5
Russia	218,512	148,907	11.7	13.7
Netherlands	48,432	136,757	11.2	10.5
Spain	71,931	120,048	7.6	8.0
<b>All markets</b>	<b>10,043,683</b>	<b>13,640,751</b>	<b>10.5</b>	<b>10.3</b>

Note: "Tourist nights" for a reference period refer to nights spent by tourists departing in that reference period. "Average length of stay" refers to average number of nights spent by tourists departing in the reference period.

1 Provisional

Source: Statistics Mauritius

**Table B-12: Tourist Nights and Average Length of Stay by Quarter in 2012, 2017 and 2018**

Year	Tourist nights	Average length of stay
2012	1 <sup>st</sup> Quarter	10.4
	2 <sup>nd</sup> Quarter	
	3 <sup>rd</sup> Quarter	10.7
	4 <sup>th</sup> Quarter	
	<b>Year</b>	<b>10.5</b>
2017	1 <sup>st</sup> Quarter	10.8
	2 <sup>nd</sup> Quarter	9.9
	3 <sup>rd</sup> Quarter	11.0
	4 <sup>th</sup> Quarter	9.7
	<b>Year</b>	<b>10.3</b>
2018 <sup>1</sup>	1 <sup>st</sup> Quarter	10.9

Note: "Tourist nights" for a reference period refer to nights spent by tourists departing in that reference period. "Average length of stay" refers to average number of nights spent by tourists departing in the reference period.

1 Provisional

Source: Statistics Mauritius





**Table B-13: Survey of Outbound Tourism, 2004, 2006, 2009 – 2013 & 2015-2017**

Indicators	2004	2006	2009	2010	2011	2012	2013	2015	2016	2017 S1
<b>1. Average length of stay by travel arrangement (nights)</b>	<b>9.7</b>	<b>9.8</b>	<b>9.7</b>	<b>9.6</b>	<b>9.3</b>	<b>9.5</b>	<b>9.2</b>	<b>10.6</b>	<b>10.4</b>	<b>10.4</b>
Package	8.8	8.7	8.4	8.4	8.3	8.3	8.2	8.8	9.0	8.7
Non- package	11.9	12.8	12.2	12.4	11.7	11.9	11.4	14.0	13.2	13.1
<b>2. Average party size</b>	<b>2.1</b>	<b>2.1</b>	<b>2.2</b>	<b>2.2</b>	<b>2.2</b>	<b>2.2</b>	<b>2.2</b>	<b>2.2</b>	<b>2.1</b>	<b>2.1</b>
<b>3. Travel arrangement (%)</b>										
Package Tour	68.5	70.8	64.6	68.0	68.9	64.0	65.8	65.7	67.0	60.7
Non-package tour	31.5	29.2	35.4	32.0	31.1	36.0	34.2	34.3	33.0	39.3
<b>4. Purpose of visit (%)</b>										
Holiday	71.8	74.0	72.9	76.9	74.8	75.3	71.4	76.5	75.8	83.1
Honeymoon	16.9	14.3	14.5	12.1	13.5	12.9	17.3	15.6	17.4	10.2
Business	6.9	6.8	5.2	5.5	6.2	5.4	4.9	2.6	2.6	3.3
Visiting friends/relatives	1.9	2.6	4.9	2.6	2.8	3.3	2.5	2.1	0.9	0.9
To get married	n/a	n/a	n/a	n/a	n/a	0.1	0.5	0.5	0.4	0.1
Other	2.4	2.3	2.5	2.9	2.7	3.0	3.4	2.8	2.8	2.2
<b>5. Frequency of visit (%)</b>										
Repeat Visit	31.6	33.5	37.8	n/a	n/a	n/a	32.0	27.0	32.0	36.2
<b>6. Accommodation used (%)</b>										
Hotel	81.7	82.0	74.7	79.0	78.4	75.1	80.3	82.3	81.2	79.2
In own villas/houses/bungalow/IRS	6.2	5.6	n/a	n/a	n/a	n/a	1.0	0.6	0.6	1.1
Boarding/guest house	3.6	4.1	5.9	6.3	4.3	5.4	5.4	2.9	4.8	5.3
Tourist residence	n/a	n/a	8.5	n/a	9.8	9.7	6.5	8.3	7.3	8.5
With friends/relatives	5.7	7.5	9.7	8.1	6.7	9.2	6.2	5.5	5.5	5.5
Other	2.8	0.7	1.3	6.6	0.7	0.5	0.7	0.4	0.5	0.4
<b>7. Evaluation of visit (%)</b>										
Beyond expectation	16.3	19.3	16.9	n/a	17.0	n/a	26.0	35.0	34.0	23.4
As expected	78.6	76.5	79.4	n/a	81.0	n/a	70.0	63.0	63.0	74.1
Below expectation	5.1	4.3	3.7	n/a	3.0	n/a	3.0	3.0	3.0	2.6
Highly enjoyable	0.0	0.0	0.0	n/a	n/a	n/a	n/a	n/a	n/a	n/a
No response	0.0	0.0	0.0	n/a	n/a	n/a	2.0	n/a	0.0	0.0
<b>8. Per capita expenditure (Rs)</b>	<b>32,157</b>	<b>39,578</b>	<b>40,899</b>	<b>43,853</b>	<b>39,960</b>	<b>40,035</b>	<b>42,168</b>	<b>43,986</b>	<b>44,660</b>	<b>44,787</b>
<b>9. Per capita per diem expenditure (Rs)</b>	<b>3,307</b>	<b>4,021</b>	<b>4,229</b>	<b>4,550</b>	<b>4,322</b>	<b>4,221</b>	<b>4,647</b>	<b>4,154</b>	<b>4,290</b>	<b>4,308</b>
<b>10. Per capita per diem (Rs) by travel arrangement</b>										
Package tourists	4,098	5,011	5,487	5,768	3,671	5,397	5,644	4,904	4,923	5,005
Non-package tourists	1,940	2,265	2,538	2,736	2,711	2,760	3,321	3,244	3,410	3,595
<b>11. Distribution of total expenditure by category, %</b>										
Accommodation	52.9	54.0	57.4	52.2	60.2	58.5	58.9	60.5	60.7	60.8
Meals & Beverages	18.2	17.4	15.2	13.6	12.5	14.2	10.0	10.9	10.5	11.9
Transportation (local)	5.8	6.1	6.6	9.8	7.8	7.5	7.9	4.5	4.6	4.3
Sightseeing	3.2	3.0	4.2	5.3	5.6	4.9	5.9	6.2	7.5	6.8
Entertainment	2.6	2.8	2.8	2.6	2.2	3.3	5.0	5.2	4.5	3.8
Shopping	13.0	12.7	12.3	12.1	10.5	10.7	10.5	10.2	8.9	9.1
Other	4.2	4.0	1.5	4.4	1.1	1.0	1.7	2.5	3.3	3.4

Note: Figures in shaded cells should be treated with caution; they are subject to low reliability since they are based on fewer than 30 observations in the sample.  
Source: Survey of Outbound/Inbound Tourism, Statistics Mauritius



# Part B



**Table B-14: Selected Tourism Statistics by Type of Accommodation (hotel/non-hotel), 2012 – 2013 and 2015 – 2017**

Details	2012			2013			2015			2016			2017 S1		
	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total
Average party size	2.2	2.1	2.2	2.2	2.1	2.2	2.2	2.1	2.2	2.1	2.0	2.1	2.2	2.0	2.1
Average length of stay (nights)	8.2	13.8	9.5	8.0	14.5	9.2	9.0	18.1	10.6	9.1	16.2	10.4	8.5	17.5	10.4
<b>Travel arrangement, %</b>															
Package	83.1	10.0	64.0	80.7	5.4	65.8	79.0	4.4	65.7	80.5	8.8	67.0	74.8	7.1	60.7
Non-package	16.9	90.0	36.0	19.3	94.6	34.2	21.0	95.6	34.3	19.5	91.2	33.0	25.2	92.9	39.3
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
<b>Purpose of visit, %</b>															
Holiday	75.2	75.6	75.3	70.7	74.1	71.4	76.3	77.5	76.5	73.8	84.5	75.8	82.3	86.3	83.1
Honeymoon	16.7	1.3	12.9	21.2	1.5	17.3	18.6	1.6	15.6	20.9	2.1	17.4	12.7	0.5	10.2
Business	5.5	5.2	5.4	4.8	5.4	4.9	2.2	4.3	2.6	2.4	3.1	2.6	3.0	4.5	3.3
Visiting friends/relatives	0.2	12.4	3.3	0.3	11.8	2.5	0.2	10.9	2.1	0.0	4.8	0.9	0.1	4.4	0.9
To get married	0.1	0.1	0.1	0.5	0.3	0.5	0.4	0.6	0.5	0.5	0.1	0.4	0.1	0.0	0.1
Other	2.1	5.4	3.0	2.5	6.9	3.4	2.3	5.1	2.8	2.3	5.4	2.8	1.7	4.2	2.2
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>
<b>Average expenditure (Rs)</b>															
Per tourist	44,115	26,770	40,035	44,876	30,958	42,168	45,782	35,657	43,986	46,556	36,477	44,660	45,718	41,249	44,787
Per tourist per night	5,436	1,999	4,221	5,731	2,222	4,647	5,104	1,970	4,154	5,138	2,247	4,290	5,363	2,355	4,308

Note: Figures in shaded cells should be treated with caution; they are subject to low reliability since they are based on fewer than 30 observations in the sample.  
Source: Survey of Inbound Tourism, Statistics Mauritius

**Table B-15: Group Composition, Influencing Factor and Meal Arrangement of Tourists, 2017 (Semester 1)**

Group composition	%	Influencing factor	%	Meal arrangement	%
Couple without children	54	Friends	52	All Inclusive	39
Couple with children	18	Internet	16	Half Board	29
With friends and / or relatives	19	Publicity in newspapers, magazines, films	11	Bed only	10
Alone	7	Travel agencies	14	Bed & Breakfast	11
Other	2	Social medias	3	Full Board	6
		Others	4	Free	5

Source: Survey of Inbound Tourism, 2017 (Semester 1), Statistics Mauritius





Table B-16: Selected Expenditure Patterns of Tourists by Selected Country of Residence, 2017 (Semester 1)

Country of residence	Average expenditure, Rs		Average expenditure by travel arrangement, Rs			Expenditure by major item, %						
	Per tourist	Per tourist per night	Package	Non Package	Total	Accommodation	Meals & Beverages	Local Transport	Sightseeing	Entertainment & Recreation	Shopping	Other
Europe	48,612	4,167	4,767	3,426	4,167	64.1	11.7	4.0	6.7	3.0	7.1	3.4
of which:												
France	44,904	3,753	5,167	2,752	3,753	58.6	14.6	4.2	7.1	3.3	8.3	4.0
Germany	47,632	4,154	4,251	3,888	4,154	68.0	8.9	4.3	7.0	3.4	4.9	3.4
Italy	37,502	3,787	4,624	2,966	3,787	67.5	7.8	4.5	7.1	2.3	9.0	1.9
Russia	74,074	5,277	7,138	4,402	5,277	36.9	12.4	4.1	7.3	7.0	28.8	3.5
Switzerland	65,453	5,378	5,136	5,729	5,378	69.7	11.1	2.9	7.3	1.9	4.4	2.7
UK	50,200	4,209	4,416	3,606	4,209	71.3	8.3	3.9	5.8	2.6	5.3	2.7
Africa	31,511	3,914	4,587	3,458	3,914	51.7	12.0	5.1	5.4	5.3	15.7	4.7
of which:												
Réunion	22,551	3,281	3,903	2,898	3,281	50.4	14.0	5.8	6.8	2.6	17.3	2.9
RSA	36,213	4,386	4,904	3,666	4,386	60.3	9.1	4.7	5.3	9.3	7.9	3.4
Asia	49,454	5,543	6,515	4,598	5,543	57.3	12.5	4.5	8.8	4.9	9.9	2.1
of which:												
China	50,080	6,836	8,911	4,755	6,836	57.1	10.7	4.8	9.0	4.4	11.3	2.7
India	36,152	4,105	5,223	2,072	4,105	54.9	9.8	5.4	12.4	7.4	9.1	1.0
UAE	39,478	7,055	7,890	6,745	7,055	58.8	15.6	7.6	8.3	2.4	5.4	1.8
Oceania	46,017	3,358	4,180	3,209	3,358	56.0	14.1	3.8	4.5	5.6	11.9	4.1
of which:												
Australia	45,961	3,337	4,263	3,178	3,337	56.2	14.2	3.8	4.4	5.3	12.0	4.2
America	50,772	4,895	7,363	3,564	4,895	67.1	10.0	4.5	4.1	3.2	7.0	4.0
of which:												
USA	49,631	5,561	6,857	4,333	5,561	66.5	11.7	5.8	4.5	1.6	6.2	3.7
Total	44,787	4,308	5,005	3,595	4,308	60.8	11.9	4.3	6.8	3.8	9.1	3.4

Note: Figures in shaded cells should be treated with caution; they are subject to low reliability since they are based on fewer than 30 observations in the sample.  
Source: Survey of Inbound Tourism, 2017 (semester 1), Statistics Mauritius



# Part B



**Table B-17: Hotel & Non-Hotel Tourists, Travel Arrangements and Average Stay of Tourists by Selected Country of Residence, 2017 (Semester 1)**

Country of residence	Hotel & non-hotel tourists, %		Tourists by travel arrangement, %		Average length of stay (nights) by travel arrangement		
	Hotel	Non-hotel	Package	Non-Package	Package	Non-Package	Total
<b>Europe</b>	<b>80.3</b>	<b>19.7</b>	<b>63.3</b>	<b>36.7</b>	<b>10.2</b>	<b>14.2</b>	<b>11.7</b>
of which: France	72.2	27.8	56.5	43.5	8.8	16.1	12.0
Germany	85.6	14.4	74.6	25.4	11.3	12.0	11.5
Italy	82.2	17.8	56.5	43.5	8.7	11.5	9.9
Russia	38.1	61.9	35.1	64.9	12.8	14.7	14.0
Switzerland	81.7	18.3	59.7	40.3	12.1	12.3	12.2
UK	91.6	8.4	80.0	20.0	11.1	15.3	11.9
<b>Africa</b>	<b>71.9</b>	<b>28.1</b>	<b>52.6</b>	<b>47.4</b>	<b>6.2</b>	<b>10.1</b>	<b>8.1</b>
of which: Réunion	69.8	30.2	46.2	53.8	5.7	7.9	6.9
RSA	83.5	16.5	70.7	29.3	6.8	11.8	8.3
<b>Asia</b>	<b>86.7</b>	<b>13.3</b>	<b>69.0</b>	<b>31.0</b>	<b>6.4</b>	<b>14.6</b>	<b>8.9</b>
of which: China	88.7	11.3	69.5	30.5	5.3	12.0	7.3
India	92.7	7.3	82.5	17.5	6.9	17.9	8.8
UAE	76.8	23.2	33.7	66.3	4.5	6.2	5.6
<b>Oceania</b>	<b>65.2</b>	<b>34.8</b>	<b>23.0</b>	<b>77.0</b>	<b>9.1</b>	<b>15.1</b>	<b>13.7</b>
of which: Australia	64.4	35.6	22.1	77.9	9.1	15.1	13.8
<b>America</b>	<b>81.7</b>	<b>18.3</b>	<b>43.4</b>	<b>56.6</b>	<b>8.4</b>	<b>11.9</b>	<b>10.4</b>
of which: USA	81.7	18.3	37.8	62.2	11.5	7.4	8.9
<b>Total</b>	<b>79.2</b>	<b>20.8</b>	<b>60.7</b>	<b>39.3</b>	<b>8.7</b>	<b>13.1</b>	<b>10.4</b>

Note: Figures in shaded cells should be treated with caution; they are subject to low reliability since they are based on fewer than 30 observations in the sample.  
Source: Survey of Inbound Tourism, 2017 (semester 1), Statistics Mauritius



# Part C



**Table C-1: Operational Tourist Accommodation Facilities, Air Seats Capacity and Tourist Arrivals, 2011 – 2018**

Details	2011	2012	2013	2014	2015	2016	2017	2018 Q1
<b>Total operational rooms</b>	<b>16,487</b>	<b>17,419</b>	<b>17,185</b>	<b>19,822</b>	<b>21,097</b>	<b>21,835</b>	<b>21,046</b>	<b>20,375</b>
Hotel	11,925	12,527	12,376	12,799	13,617	13,547	13,511	13,588
Guesthouse	1,025	1,124	1,145	1,994	2,198	2,376	2,188	2,024
Tourist residence	3,537	3,768	3,664	5,029	5,282	5,912	5,347	4,763
<b>Total air seats*</b>	<b>1,712,158</b>	<b>1,723,143</b>	<b>1,738,504</b>	<b>1,817,667</b>	<b>1,952,935</b>	<b>2,169,493</b>	<b>2,341,144</b>	<b>633,711</b>
<b>Total tourist arrivals</b>	<b>964,642</b>	<b>965,441</b>	<b>993,106</b>	<b>1,038,334</b>	<b>1,151,252</b>	<b>1,275,227</b>	<b>1,341,860</b>	<b>356,415</b>

Sources: Statistics Mauritius, Mauritius Tourism Promotion Authority, ATOL and Mauritius Tourism Authority

**Table C-2: Operational Capacity, 2011 – 2018**

Year	Guesthouse		Tourist residence		Hotel		Total number of rooms
	Unit	Room	Unit	Room	Unit	Room	
2011	124	1,025	601	3,537	109	11,925	16,487
2012	135	1,124	652	3,768	117	12,527	17,419
2013	134	1,145	636	3,664	107	12,376	17,185
2014	195	1,994	814	5,029	112	12,799	19,822
2015	214	2,198	840	5,282	115	13,617	21,097
2016	231	2,376	945	5,912	111	13,547	21,835
2017	236	2,373	789	4,909	111	13,511	20,793
2018 Q1	181	2,024	723	4,763	113	13,588	20,375

Sources: Statistics Mauritius and Mauritius Tourism Authority

**Table C-3: Built Hotel Capacity, 2011 – 2018**

Year	Hotels	Rooms
2011	116	12,737
2012	118	12,720
2013	114	13,094
2014	115	13,132
2015	115	13,617
2016	113	13,605
2017	112	13,544
2018 Q1	114	13,621

Source: Statistics Mauritius



# Part C



**Table C-4: Room Occupancy Rate, 2011 - 2018 (%)**

Month	Large hotels <sup>1</sup>							
	2011	2012	2013	2014	2015	2016	2017	2018 <sup>p</sup>
January	76	76	69	74	77	81	83	78
February	70	69	67	69	79	80	82	81
March	66	66	66	65	70	78	77	78
April	68	66	63	69	71	73	80	
May	57	61	61	62	68	69	69	
June	45	46	42	47	52	56	61	
July	54	53	54	57	65	68	76	
August	60	60	62	67	70	74	79	
September	66	62	67	68	74	78	79	
October	70	70	72	75	77	84	87	
November	76	71	75	78	82	87	87	
December	74	74	74	76	81	82	82	
<b>Whole Year</b>	<b>65</b>	<b>65</b>	<b>65</b>	<b>67</b>	<b>75</b>	<b>76</b>	<b>79</b>	
Quarter	2011	2012	2013	2014	2015	2016	2017	2018 <sup>p</sup>
	71	70	68	70	75	80	80	79
Quarter 1	71	70	68	70	75	80	80	79
Quarter 2	57	58	55	59	64	66	70	
Quarter 3	60	58	61	64	70	73	78	
Quarter 4	73	72	74	76	80	84	85	
<b>Whole Year</b>	<b>65</b>	<b>65</b>	<b>65</b>	<b>67</b>	<b>75</b>	<b>76</b>	<b>79</b>	
Semester	2011	2012	2013	2014	2015	2016	2017	2018 <sup>p</sup>
	64	64	61	64	69	73	76	
Semester 1	64	64	61	64	69	73	76	
Semester 2	65	65	68	70	75	79	76	
<b>Whole Year</b>	<b>65</b>	<b>65</b>	<b>65</b>	<b>67</b>	<b>75</b>	<b>76</b>	<b>79</b>	
Month	All hotels							
	2011	2012	2013	2014	2015	2016	2017	2018 <sup>p</sup>
January	75	74	67	72	75	78	81	77
February	68	67	66	67	75	76	81	79
March	64	65	63	64	68	74	76	76
April	64	62	60	65	68	69	78	
May	55	59	58	59	66	67	68	
June	44	45	42	46	51	54	60	
July	53	52	53	54	61	65	73	
August	57	56	60	62	66	70	75	
September	64	60	65	64	70	75	77	
October	68	67	71	71	74	81	85	
November	74	69	74	76	79	85	86	
December	73	71	73	74	78	81	81	
<b>Whole Year</b>	<b>65</b>	<b>62</b>	<b>63</b>	<b>65</b>	<b>70</b>	<b>73</b>	<b>77</b>	
Quarter	2011	2012	2013	2014	2015	2016	2017	2018 <sup>p</sup>
	69	69	65	68	73	76	79	77
Quarter 1	69	69	65	68	73	76	79	77
Quarter 2	55	55	54	57	62	63	69	
Quarter 3	58	56	59	60	66	70	75	
Quarter 4	72	69	73	74	77	82	84	
<b>Whole Year</b>	<b>65</b>	<b>62</b>	<b>63</b>	<b>65</b>	<b>70</b>	<b>73</b>	<b>77</b>	
Semester	2011	2012	2013	2014	2015	2016	2017	2018 <sup>p</sup>
	65	62	60	62	67	70	74	
Semester 1	65	62	60	62	67	70	74	
Semester 2	64	63	66	67	72	76	79	
<b>Whole Year</b>	<b>65</b>	<b>62</b>	<b>63</b>	<b>65</b>	<b>70</b>	<b>73</b>	<b>77</b>	

<sup>1</sup> Large hotels are well established beach hotel of over 80 rooms

p - provisional

Source: Statistics Mauritius



# Part C



**Table C-5: Passengers<sup>1</sup>, Seats, Load Factors and Tourist Arrivals, 2014 – 2018**

Month	2014			2015			2016			2017		
	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %
January	128,778	180,708	71.3	136,430	194,292	70.2	153,192	208,529	73.5	168,679	232,948	72.4
February	98,874	132,004	74.9	112,182	145,457	77.1	122,243	160,264	76.3	129,170	176,850	73.0
March	114,540	158,264	72.4	122,830	172,402	71.2	137,045	179,973	76.1	141,719	198,445	71.4
April	112,901	141,837	79.6	117,835	153,111	77.0	123,368	160,426	76.9	144,734	184,994	78.2
May	102,080	143,322	71.2	112,159	155,344	72.2	124,164	172,491	72.0	126,423	176,341	71.7
June	86,420	121,193	71.3	90,793	131,889	68.8	100,591	149,168	67.4	105,570	160,897	65.6
July	115,692	146,784	78.8	131,300	160,807	81.7	150,362	179,644	83.7	156,714	194,669	80.5
August	113,938	148,192	76.9	128,309	163,852	78.3	135,809	178,339	76.2	142,898	192,993	74.0
September	100,643	131,542	76.5	110,754	139,555	79.4	121,764	155,198	78.5	128,048	128,048	75.8
October	128,615	162,013	79.4	138,909	171,763	80.9	159,882	194,687	82.1	162,624	205,973	79.0
November	118,037	154,222	76.5	131,085	163,709	80.1	144,995	189,070	76.7	152,225	205,254	74.2
December	156,401	197,586	79.2	171,950	200,754	85.7	192,644	241,704	79.7	199,154	242,934	82.0
Year	1,376,919	1,817,667	75.8	1,504,536	1,952,935	77.0	1,666,059	2,169,493	76.8	1,757,958	2,341,144	75.1
January-April	455,093	612,813	74.3	489,277	665,262	73.5	535,848	709,192	75.6	548,302	793,237	73.7
Quarter	2014			2015			2016			2017		
	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %
Quarter 1	342,192	470,976	72.7	371,442	512,151	72.5	412,480	548,766	75.2	439,568	608,243	72.3
Quarter 2	301,401	406,352	74.2	320,787	440,344	72.8	348,123	482,085	72.2	376,727	522,232	72.1
Quarter 3	330,273	426,518	77.4	370,363	464,214	79.8	407,935	513,181	79.5	492,605	387,736	127.0
Quarter 4	403,053	513,821	78.4	441,944	536,226	82.4	497,521	625,461	79.5	514,003	654,161	78.6
Year	1,376,919	1,817,667	75.8	1,504,536	1,952,935	77.0	1,666,059	2,169,493	76.8	1,822,903	2,172,372	83.9
Semester	2014			2015			2016			2017		
	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %
Semester 1	643,593	877,328	73.4	692,229	952,495	72.7	760,603	1,030,851	73.8	816,295	1,130,475	72.2
Semester 2	733,326	940,339	78.0	812,307	1,000,440	81.2	905,456	1,138,642	79.5	1,006,608	1,041,897	96.6
Year	1,376,919	1,817,667	75.8	1,504,536	1,952,935	77.0	1,666,059	2,169,493	76.8	1,822,903	2,172,372	83.9
Month	2018											
	Passenger			Seat			LF, %	Tourist arrival				
	No.	YoY chg		No.	YoY chg			No.	YoY chg			Prop <sup>2</sup>
January	168,718		0.0%	236,901		1.7%	71.2	120,974		-2.7%	71.7%	
February	137,108		6.1%	184,040		4.1%	74.5	115,600		10.0%	84.3%	
March	153,725		8.5%	212,770		7.2%	72.2	119,841		8.7%	78.0%	
April	141,195		-2.4%	182,637		-1.3%	77.3	104,967		-5.8%	74.3%	
Quarter 1	459,551		4.5%	633,711		4.2%	72.5	356,415		4.9%	77.6%	
January-April	600,746		2.8%	816,348		2.9%	73.6	461,382		2.3%	76.8%	

<sup>1</sup> Includes direct transfers (ie those remaining in the transit lounge at the airport but excludes crew members)

<sup>2</sup> tourist arrivals as a proportion of total passenger arrivals

Sources: Mauritius Tourism Promotion Agency and Statistics Mauritius



# Part C



**Table C-6: Number of Licenses Issued by the Tourism Authority as at 31 March 2016 – 2018**

Activity	March 2016		March 2017		March 2018	
	No.	Rooms	No.	Rooms	No.	Rooms
Hotel	119	13,710	120	13,329	108	12,495
Guest House	217	2,212	231	2,360	181	2,024
Tourist Residence	866	5,413	961	5,985	723	4,763
Restaurant	1,089		1,123		742 <sup>1</sup>	
Table d'Hôte	14		16		18	
Operating spa within hotel premises	82		82		Attached to Hotel Certificate	
Operating health and fitness centre within hotel premises	54		54			
Operating beauty parlour, including hairdressing, within hotel premises	46		46			
Operating boat house	79		82		60	
Operating golf course	9		8		9	
Hawking on beaches facing hotels	507		509		482	
Hawking in tourist sites	16		17		16	
Eco-tourism activities (nature-based tourism activities or adventure-related tourism activities, or both)	13		16		17	
Operating aquarium displaying fish or marine animals for public viewing	1		1		1	
Operating rental agency for bicycle	41		43		25	
Operating rental agency for bus, including minibus	2		2		1	
Operating rental agency for car	90		90		n/a	
Operating rental agency for jet ski	0		3		0	
Operating rental agency for kite surf	18		18		15	
Operating rental agency for windsurf	2		2		2	
Operating scuba diving centre	69		74		63	
Operating helmet diving centre	9		10		9	
Providing non-motorised water sports such as pedaloes, canoes, kayaks and laser	8		11		10	
Operating rental agency for motorcycle	37		42		34	
Operating rental agency for quad	10		10		10	
Karting	1		1		1	
Providing tour operator service	358		393		330	
Working as tourist guide, including tourist guide employed by a tour operator	21		30		27	
Operating travel agency	158		180		143	
Nightclub	0		23		9	
Private club	15		6		6	
Pub	6		6		4	
<b>TOTAL</b>	<b>3,957</b>		<b>4,210</b>		<b>3,046</b>	

<sup>1</sup> - Excludes restaurants in hotels

Source: Tourism Authority

**Table C-7: GFCF in the Accommodation and Food Service Activities Sector, 2011 – 2018**

Indicator	2011	2012	2013	2014	2015	2016 <sup>1</sup>	2017 <sup>1</sup>	2018 <sup>1</sup>
<b>GFCF in Accommodation and food service activities (Rs M)</b>	7,908	7,712	6,510	4,645	4,375	4,316	6,670	6,115
<i>As a proportion of total GFCF (%)</i>	13.3	12.8	11.0	8.4	8.5	7.7	11.0	9.8
Total private sector GFCF, (Rs Mn)	<b>59,667</b>	<b>60,175</b>	<b>59,267</b>	<b>55,048</b>	<b>51,735</b>	<b>55,797</b>	<b>60,790</b>	<b>62,212</b>
<b>Year on year growth</b>								
Accommodation and food service activities	-37.7%	-2.5%	-15.6%	-28.6%	-5.8%	-1.4%	54.5%	-8.3%
Total GFCF	6.3%	0.9%	-1.5%	-7.1%	-6.0%	7.9%	8.9%	2.3%

<sup>1</sup> - Gross Fixed Capital Formation is the net additions to the physical assets of the country in a year. These consist mainly of investment in buildings, plants, machinery and transport equipment, all valued at market prices.

Source: Statistics Mauritius





**Table C-8: Gross Direct Investment Flows from Abroad in the Accommodation & Food Service Activities Sector, 2011 – 2017**

Indicator	2011	2012	2013	2014	2015 <sup>1</sup>	2016 <sup>1</sup>	2017 <sup>1</sup>
Flows from Abroad in the Accommodation and Food Service Activities sector (Rs Mn) <sup>2</sup>	999	1,839	756	5,986	860	199	386
As a proportion of total (%)	7.7	9.0	5.5	32.4	8.9	1.5	2.7
Total Gross Direct Investment Flows (Rs Mn) <sup>2</sup>	12,894	20,373	13,766	18,497	9,677	13,648	14,228
<b>Year on year growth</b>							
Accommodation and food service activities	19.5%	84.1%	-58.9%	691.8%	-85.6%	-76.9%	94.0%
Total Flows	-7.6%	58.0%	-32.4%	34.4%	-47.7%	41.0%	4.2%

<sup>1</sup>Preliminary. Data as from 2015 would be revised in the wake of results from future FALS and are therefore not strictly comparable with prior years' data.

<sup>2</sup>Data on direct investment flows for 2011 to 2014 have been supplemented with results obtained from the Foreign Assets and Liabilities Survey (FALS). Besides equity, these data therefore also include reinvested earnings and shareholders' loans.

Source: Bank of Mauritius

**Table C-9: Evolution in Indebtedness of the Tourism Sector, 2011 – 2017 (Rs Mn)**

Indicator	Dec-11	Dec-12	Dec-13	Dec-14	Dec-15	Dec-16	Dec-17
Tourism sector debt	43,030	44,806	48,756	47,562	48,228	42,966	43,551
Growth (%)	6.6	4.1	8.8	-2.4	1.4	-10.9	1.4
Of which:							
Hotels	26,177	26,758	28,895	28,198	28,325	28,008	30,617
Growth (%)	7.7	2.2	8.0	-2.4	0.5	-1.1	9.3
Hotel management companies	12,809	14,040	15,297	14,877	15,844	11,296	9,718
Restaurants	824	850	1,058	1,020	1,050	663	632
Total private sector debt	227,044	256,025	271,248	274,647	286,172	285,484	308,284
Tourism debt as a % of total	19.0	17.5	18.0	17.3	16.9	15.1	14.1

Source: Bank of Mauritius

**Table C-10: Some Direct/Indirect Taxes and Levies Paid to Government, 2011– 2018 (Rs Mn)**

Details	2011	2012	2013 <sup>r</sup>	2014	2015 (Jan - Jun)	2015/16 <sup>r</sup>	2016/17	2017/18 <sup>e</sup>
Passenger Fee on Air Tickets <sup>1</sup>	793	1,204	1,219	1,213	730	1,230	1,690	1,810
Tourist Enterprise Licenses	81	81	85	85	40	110	115	115
Environment Protection Fee	302	145	130	159	180	403	380	405
- of which by tourist accommodation facilities	248	89	75	96	161	333	141 <sup>3</sup>	n/a
VAT paid by hotels and restaurants <sup>2</sup>	3,031	3,187	2,974	3,255	1,764 <sup>e</sup>	4,009	4,330	4,516
Corporate Tax paid by the accommodation sector	124	127	69	82	41	191	183 <sup>3</sup>	n/a
Contribution in respect of Tourism Development Projects on State Lands	19	8	17	4	5	n/a	n/a	n/a

<sup>1</sup> Exclude service charge and terminal expansion fee - paid to AML

<sup>2</sup> Estimated calendar year

<sup>3</sup> Actual amount for S2 2016

Note: change accounting year from calendar year to fiscal year (July-June) as from July 2015. Figures are therefore not comparable.

Sources: Digest of Public Finance and Mauritius Revenue Authority



# Part C



**Table C-11: Exchange Rate of the Rupee vis-a-vis Selected Hard Currencies, 2012 – 2017**

Currencies	Indicative Selling Rates Average for 12 months ended March						
	2012	2013	2014	2015	2016	2017	2018
US Dollar	29.272	30.982	31.053	31.858	36.217	36.347	34.650
Pound Sterling	46.709	48.933	49.247	51.332	54.626	47.569	45.844
Euro	40.357	39.879	41.553	40.365	39.987	39.900	40.445
Swiss franc	33.316	32.990	33.883	34.393	37.423	36.938	35.786
South African rand	3.997	3.691	3.121	2.913	2.690	2.614	2.685
Indian rupee (100)	61.896	57.565	52.016	52.651	56.007	54.725	54.009
<b>Currencies</b>	<b>Year on year appreciation/(depreciation) of the Rupee</b>						
US Dollar	6.8	(5.8)	(0.2)	(2.6)	(13.7)	(0.4)	4.9
Pound Sterling	4.2	(4.8)	(0.6)	(4.2)	(6.4)	12.9	3.8
Euro	2.6	1.2	(4.2)	2.9	0.9	0.2	(1.3)
Swiss franc	(7.3)	1.0	(2.7)	(1.5)	(8.8)	1.3	3.2
South African rand	9.4	7.7	15.4	6.7	7.7	2.8	(2.7)
Indian rupee (100)	10.7	7.0	9.6	(1.2)	(6.4)	2.3	1.3

Source: Bank of Mauritius

**Table C-12: Real GDP Growth in Selected Source Countries, 2015 – 2019 & 2023**

Region/country	2015	2016	2017	2018	2019	2023
Euro area	2.0	1.8	2.3	2.4	2.0	1.4
of which: Germany	1.5	1.9	2.5	2.5	2.0	1.2
France	1.3	1.2	1.8	2.1	2.0	1.6
Italy	0.8	0.9	1.5	1.5	1.1	0.8
UK	2.2	1.9	1.8	1.6	1.5	1.6
Switzerland	0.8	1.4	1.1	2.3	2.0	1.7
China	6.9	6.7	6.9	6.6	6.4	5.5
India	7.9	7.1	6.7	7.4	7.8	8.2
Russia	-2.8	-0.2	1.5	1.7	1.5	1.5
South Africa	1.3	0.6	1.3	1.5	1.7	1.8
<b>World</b>	<b>3.4</b>	<b>3.2</b>	<b>3.8</b>	<b>3.9</b>	<b>3.9</b>	<b>3.7</b>

Source: World Economic Outlook Database, April 2018, International Monetary Fund





**Table C-13: Selected Tourism-Related Indicators in Competing Island Destinations in the Region, 2013 – 2017**

Indicators	2013	2014	2015	2016	2017
<b>Tourist arrivals</b>					
Mauritius	993,106	1,038,334	1,151,252	1,275,227	1,341,860
Maldives	1,125,202	1,204,857	1,234,248	1,286,135	1,389,542
Seychelles	230,272	232,667	276,233	303,177	349,861
Sri Lanka	1,274,593	1,527,153	1,798,380	2,050,832	2,116,407
<b>Annual growth rate in tourist arrivals</b>					
Mauritius	2.9%	4.6%	10.9%	10.8%	5.2%
Maldives	17.4%	7.1%	2.4%	4.2%	8.0%
Seychelles	10.7%	1.0%	18.7%	9.8%	15.4%
Sri Lanka	26.7%	19.8%	17.8%	14.0%	3.2%
<b>Average bed<sup>1</sup> operational capacity</b>					
Mauritius	25,105	26,174	28,732	29,139	29,650
Maldives	22,512	22,986	23,348	24,568	27,686
Seychelles	6,489	9,083	10,284	5,061	5,576
Sri Lanka	32,284	35,976	37,720	45,509	48,008
<b>Average bed occupancy rate (%)</b>					
Mauritius	55	58	65	65	68
Maldives (in resorts only)	81	82	76	74	73
Seychelles	64	58	59	74	72
Sri Lanka (room occupancy)	72	74	75	75	73
<b>Average length of stay (nights)</b>					
Mauritius	10.8	10.9	10.6	10.4	10.3
Maldives	6.3	6.1	5.7	6.0 <sup>r</sup>	6.2
Seychelles	10.2	10.2	9.9	9.9	9.5
Sri Lanka	8.6	9.9	10.1	10.2	10.9

1 - For Mauritius: Beds in Hotels only at end Dec; For Maldives: Beds in Resorts only; For Seychelles: beds in all types of tourist accommodation facilities up to 2015; For Sri Lanka: Beds in graded establishments only  
Sources: Ministry of Tourism, Arts and Culture, Republic of Maldives; National Bureau of Statistics, Republic of Seychelles; Sri Lanka Tourism Development Authority; Statistics Mauritius.



# Part D



**Table D-1: Trend in World Tourism, 2000 – 2030**

Year	International tourist arrivals		International tourism receipts	
	Million	Growth	USD billion	Growth
2000	674	7.5%	495	3.8%
2001	675	0.1%	482	-2.6%
2002	696	3.1%	502	4.1%
2003	692	-0.6%	550	9.6%
2004	764	10.4%	652	18.5%
2005	809	5.9%	701	7.5%
2006	855	5.7%	765	9.1%
2007	912	6.7%	882	15.3%
2008	930	2.0%	968	9.8%
2009	893	-4.0%	881	-9.0%
2010	953	6.7%	961	9.1%
2011	998	4.7%	1,073	11.7%
2012	1,045	4.7%	1,110	3.4%
2013	1,093	4.6%	1,197	7.8%
2014	1,137	4.0%	1,252	4.6%
2015 r	1,189	4.6%	1,196	-4.5%
2016 r	1,235	3.9%	1,220	2.0%
2017 r	1,322	7.0%		
2020*	1,360			
2030*	1,809			

\*Forecast  
Source: UNWTO

**Table D-2: Forecasted Outbound Tourism from Selected Markets, 2017**

Selected countries	Number of outbound tourists, 000s			Annual growth in outbound tourists, %		
	Short-haul	Long-haul	Total	Short-haul	Long-haul	Total
China	44,491	45,527	90,018	-3.4	13.4	4.5
India	698	16,957	17,655	10.8	6.3	6.5
Brazil	2,678	7,259	9,937	14.8	16.7	16.2
UAE	1,549	1,735	3,284	4.1	7.2	5.7
Russia	24,359	5,746	30,105	66.9	17.1	54.3
Japan	7,973	15,212	23,185	2.3	7.5	5.6
Australia	754	16,699	17,453	2.3	9.4	9.0

Source: European Travel Commission





Table D-3: Outbound Tourists Growth Forecasts, 2015 – 2020

Region	2015'	2016'	2017 <sup>e</sup>	2018'	2019'	2020'
<b>Europe</b>	<b>2.3%</b>	<b>3.4%</b>	<b>8.1%</b>	<b>4.3%</b>	<b>3.6%</b>	<b>3.4%</b>
EU	3.9%	4.7%	6.3%	4.2%	3.4%	3.2%
Non-EU	-3.8%	-1.4%	15.2%	4.8%	4.4%	4.5%
Northern	7.6%	6.0%	4.2%	3.5%	3.4%	3.6%
Southern/Mediterranean	8.6%	4.8%	9.1%	5.9%	4.1%	3.6%
Western	0.0%	2.7%	5.6%	4.0%	3.4%	3.1%
Central/Eastern	-3.3%	1.1%	17.5%	4.3%	3.7%	3.5%
<b>Asia &amp; Pacific</b>	<b>7.5%</b>	<b>6.6%</b>	<b>6.1%</b>	<b>4.5%</b>	<b>4.9%</b>	<b>5.3%</b>
North East	8.4%	6.0%	6.5%	4.4%	5.0%	5.3%
South East	5.0%	8.1%	4.6%	4.6%	5.1%	5.4%
South	9.5%	8.8%	6.2%	5.0%	5.0%	6.0%
Oceania	3.9%	6.2%	6.3%	3.9%	3.3%	4.1%
<b>Africa</b>	<b>4.2%</b>	<b>13.7%</b>	<b>5.7%</b>	<b>6.2%</b>	<b>4.6%</b>	<b>3.8%</b>
<b>Mid East</b>	<b>1.0%</b>	<b>-6.3%</b>	<b>9.0%</b>	<b>3.9%</b>	<b>4.0%</b>	<b>4.3%</b>
<b>Americas</b>	<b>5.2%</b>	<b>4.6%</b>	<b>6.5%</b>	<b>4.3%</b>	<b>3.8%</b>	<b>3.5%</b>
North America	4.5%	3.9%	6.3%	4.4%	3.7%	3.4%
Caribbean	15.7%	9.1%	19.6%	5.7%	5.0%	5.1%
Central & South America	7.0%	6.8%	6.2%	4.1%	4.4%	3.8%
<b>World</b>	<b>4.1%</b>	<b>4.4%</b>	<b>7.2%</b>	<b>4.4%</b>	<b>4.0%</b>	<b>3.9%</b>

Source: European Travel Commission

Table D-4: Top 10 World Spenders, 2016 – 2017

Rank	Total Tourism Expenditure, USD Bn		Expenditure per capita, 2017, USD
	2016	2017	
1 China	250.1	257.7	185
2 United States	123.6	135.2	415
3 Germany	79.8	83.7	1,015
4 United Kingdom	64.8	63.4	960
5 France	40.3	41.4	640
6 Canada	28.7	32	875
7 Korea (ROK)	27.2	30.6	595
8 Australia	30.8	34.0	1,370
9 Italy	25	27.1	445
10 Russia	24	31.1	215

Source: UNWTO



# Notes



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# Notes



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