

● 2018 / 2019

ANNUAL REPORT



Notice of meeting

Notice is hereby given that the 46th Annual General Meeting of the “Association des Hôteliers et Restaurateurs - Ile Maurice” (AHRIM) will be held on Friday 28th June 2019 at 16H00 at Hennessy Park Hotel, Ebène, Mauritius.

AGENDA

1. Approval of Minutes of Proceedings of the 45th Annual General Meeting held on 27th June 2018
2. Report of the President
3. Approval of the Statement of Accounts for the year ended 31st March 2019
4. Approval of the Budget for the year ending 31st March 2020
5. Appointment of the Auditor for the year ending 31st March 2020
6. Election of Council Members
7. A.O.B.

By Order of the Council

Bertrand E. Piat
Secretary

This 04th June 2019

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PAST PRESIDENTS

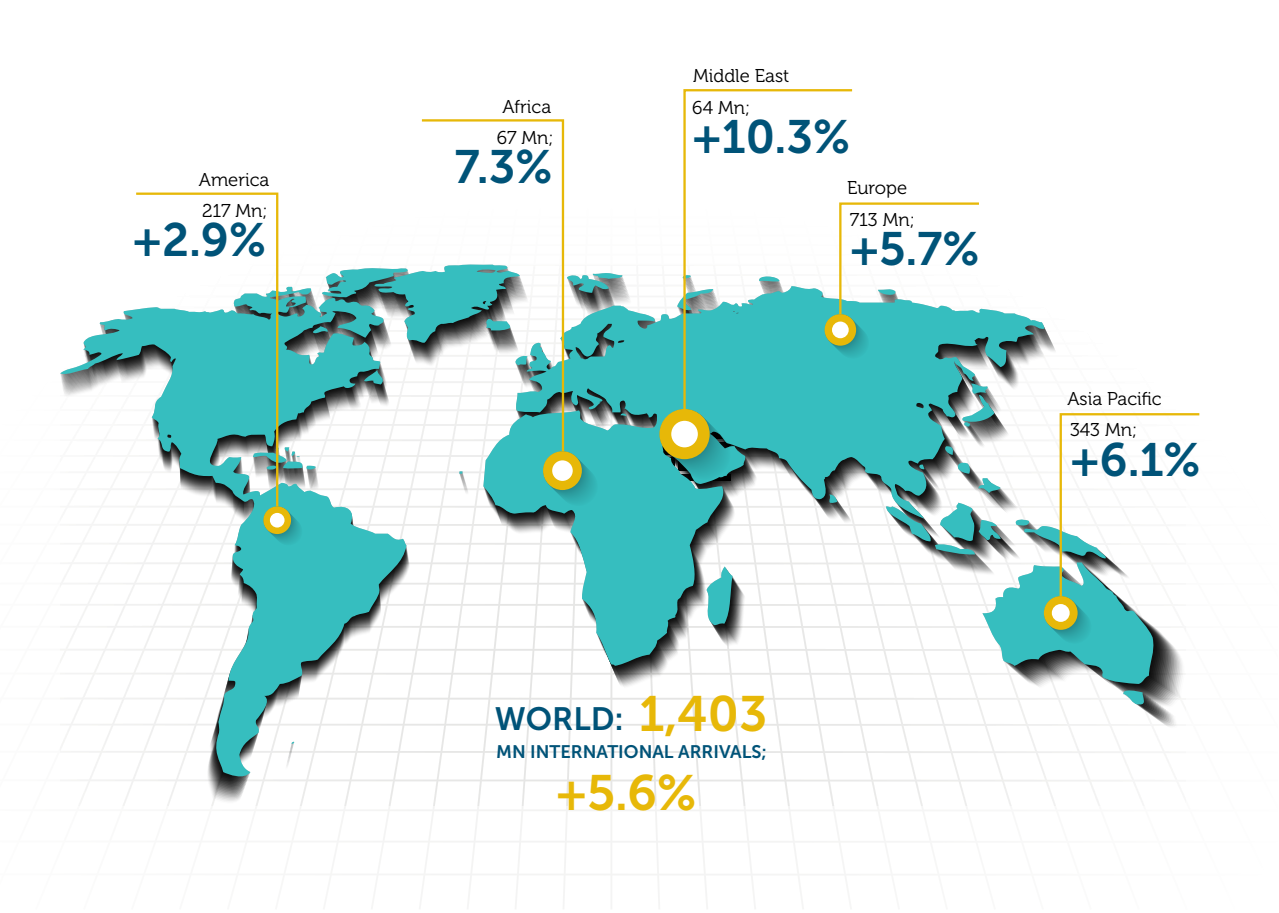
Year	Name
1973	Mr. Peter Goldsmith
1974	Mr. Peter Goldsmith
1975	Mr. Claude Mallac
1976	Mr. Claude Mallac
1977	Mr. Bernard De Rosnay
1978	Mr. Claude Mallac
1979	Mr. Claude Mallac
1980	Mr. Herbert Couacaud
1981	Mr. Eddie Goldsmith
1982	Mr. Paul Jones
1983	Mr. Eddie Goldsmith
1984	Mr. Jean Patrice Clozier
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
2018/2019	Mr. Jean Michel Pitot

INTERNATIONAL TOURIST ARRIVALS

The growth in international tourist arrivals in 2018 according to the UNWTO continues to be robust at 5.6% yoy, clearly above the 3.6% growth rate in the global economy. In absolute terms, arrivals reached the 1.4 billion mark two years ahead of forecasts. This performance represents a consolidation of the 2017 strong growth and exceeds the 4 to 5 percent growth rate forecasted by UNWTO. Factors that have contributed to this accelerated growth include: stronger economic growth, more affordable air travel through stable oil prices, technological changes, new business models and greater visa facilitation around the world.

In fact, except for the Americas (217 million arrivals or +2.9%), sturdy growth rates were reported in the other regions: +10.3% in the Middle East; +7.3% in Africa confirming the 2016 rebound for the second consecutive year; and +6.1% in the Asia-Pacific region. Europe, a mature destination, continues to grow though at a more moderate rate than last year (+5.7% v/s a colossal +8.6% last year).

Figure 1: International tourist arrivals and growth, 2018



Source: United Nations World Tourism Organisation (UNWTO), January 2019

An Insight into World Tourism (Cont'd)

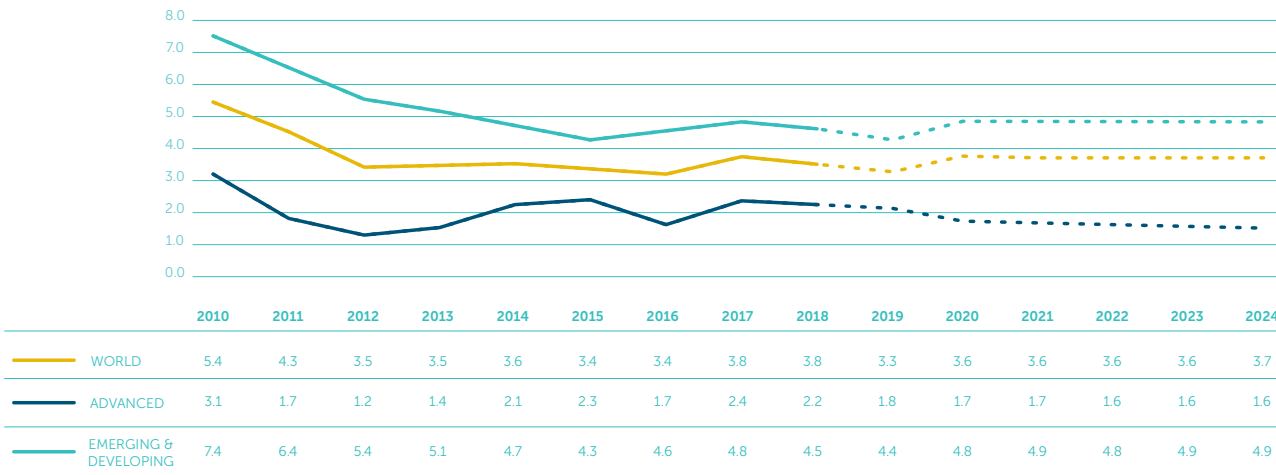
GLOBAL ECONOMIC PROSPECTS

After a broad-based upswing in cyclical growth that lasted nearly two years, a marked slowdown of the global economy was noticed in the second half of 2018 reflecting a confluence of factors affecting major economies notably a slowdown of the Chinese economy, further reduction in business and consumer confidence in the Euro area, tightening of financial conditions, prospects for a no-deal Brexit, natural disasters (especially in Japan) and softening global production amid an increase in trade tensions.

World economic growth is now forecasted to slow down from 3.6% in 2018 to 3.3% in 2019, before returning to 3.6% in 2020. Beyond 2020, global growth is expected to plateau at some 3.6% over the medium term.

A reduction in growth from 2.2% to 1.8% among advanced economies is predicted and further slowdown is expected in the medium term. Emerging and Developing countries will more or less stagnate and reach 4.4% in 2019 but pick up is forecasted for this country grouping afterwards.

Figure 2: GDP Growth in Selected Country Groupings, 2010 - 2024ⁱ



Source: International Monetary Fund

An Insight into World Tourism (Cont'd)

2019 ... roaming under the clouds of uncertainties

With the control on the production of oil, the price of this commodity has somewhat recovered and stabilised since the beginning of 2019. This stability has translated into more affordable air travel while air connectivity continues to improve in many destinations, facilitating the diversification of source markets. Trends also show strong outbound travel from emerging markets, especially India and Russia but also from smaller Asian and Arab source markets. Expansion continues in the eurozone, however, adverse risks such as tensions in financial markets, uncertainty surrounding the UK's divorce plans from the EU and worrisome forward-looking indicators bear on growth prospects for 2019.

The global economic slowdown, the uncertainty related to the Brexit, as well as geopolitical and trade tensions may prompt a "wait and see" attitude among investors and travellers. Indeed, the prospects in most of our main source markets are thus worrisome as growth rate is expected to drop in 2019 notably in France with the negative impact of the "gilets jaunes"; UK with the prolonged and growing uncertainty surrounding Brexit; Germany with the softening of private consumption and weak industrial production in the wake of revised vehicles' emission standards; and, Italy constrained with weak domestic demand. Growth in China continues to slow down and the mounting trade tensions with USA augur no better outlook. In India and South Africa growth is expected to be marginally stronger than the previous year despite elections in both countries during the second quarter of 2019. India's economy is supported by the continued recovery of investment and strong consumption amid a more expansionary stance of monetary policy and some expected impetus from fiscal policy.

Table 1: GDP growth forecast in selected source markets for Mauritius

Country	2018	2019	2020	2021	2022	2023	2024
France	1.5	1.3	1.4	1.5	1.5	1.5	1.6
United Kingdom	1.4	1.2	1.4	1.5	1.6	1.6	1.6
Germany	1.5	0.8	1.4	1.5	1.4	1.3	1.2
South Africa	0.8	1.2	1.5	1.8	1.8	1.8	1.8
India	7.1	7.3	7.5	7.7	7.7	7.7	7.7
China	6.6	6.3	6.1	6.0	5.8	5.6	5.5
Switzerland	2.5	1.1	1.5	1.6	1.6	1.6	1.6
Italy	0.9	0.1	0.9	0.7	0.6	0.6	0.6
Australia	2.8	2.1	2.8	2.8	2.6	2.7	2.6

Source: International Monetary Fund, World Economic Outlook Database, April 2019

Uncertainties and weaker economic growth will weigh on demand for travel and tourism and any dip in world GDP growth would have negative effects on the sector's future prospects.

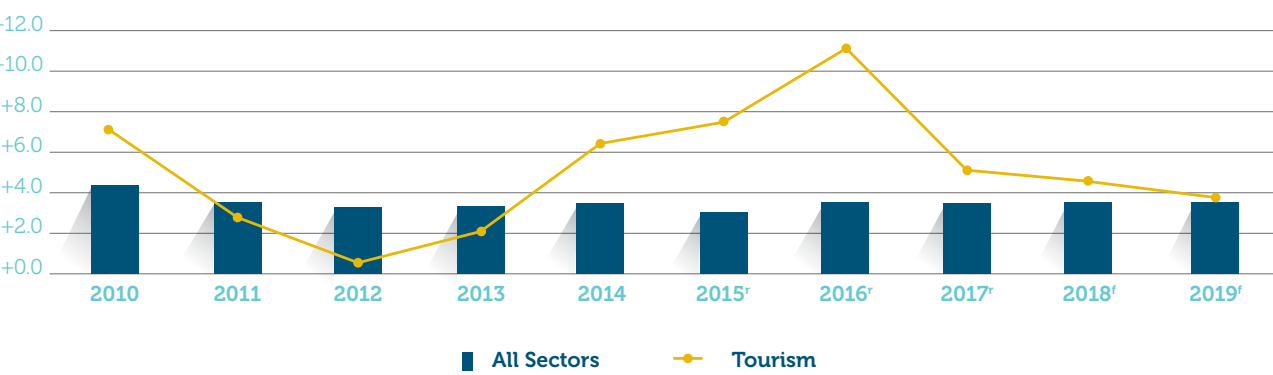
Industry Performance

IN MAURITIUS, 2018-2019

TOURISM AS AN INCLUSIVE AND SUSTAINABLE ECONOMIC GROWTH ENGINE

Since 2014, the growth of the Tourism sector (covering the components of “Accommodation and food service activities”, “Transport”, “Recreational and leisure” and “Manufacturing”, attributable to tourism) has consistently out-performed the national average with a peak of 11.1% observed in 2016 compared to the 3.6% posted that year for the national average. For 2019, growth in the Tourism sector (+3.8%) is expected to be slightly higher than the national average (+3.6%).

Figure 3: Real growth, tourism¹ sector v/s national average, 2010 – 2019^f



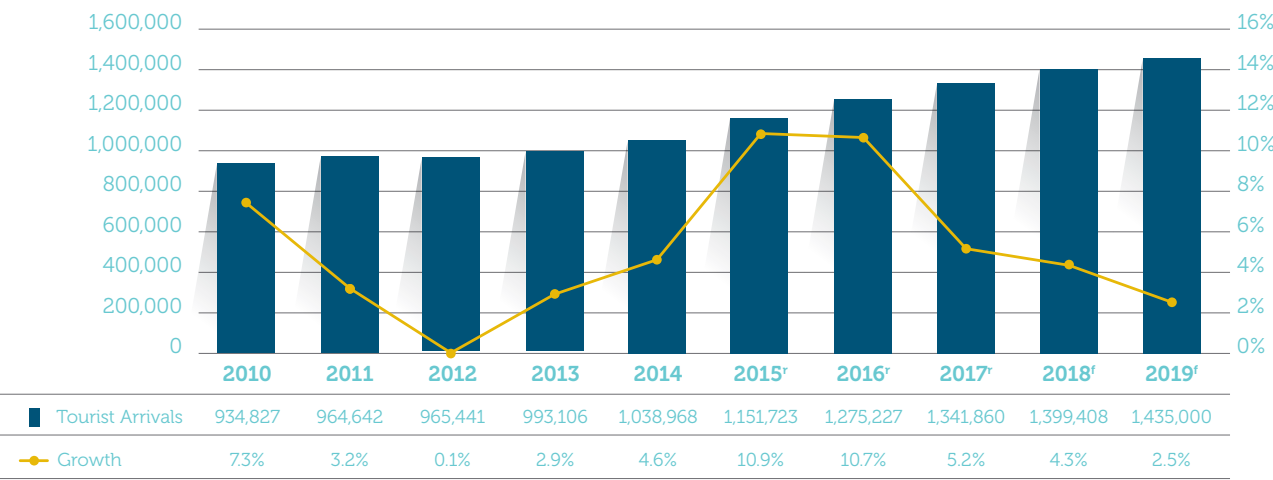
1: Tourism covers the components of “Accommodation and food service activities”, “Transport”, “Recreational and leisure” and “Manufacturing”, attributable to tourism

Source: Statistics Mauritius

Tourist arrivals

Since the double-digit growth rates achieved in 2015 and 2016, growth in tourist arrivals was at a satisfying 5.2% and 4.3% in 2017 and 2018 respectively. In its March 2019 issue on indicators for tourism, Statistics Mauritius is forecasting some 1,435,000 tourist arrivals, or a growth of 2.5% for the year 2019 compared to 2018.

Figure 4: Trend in tourist arrivals and growth in Mauritius, 2010 – 2019^f



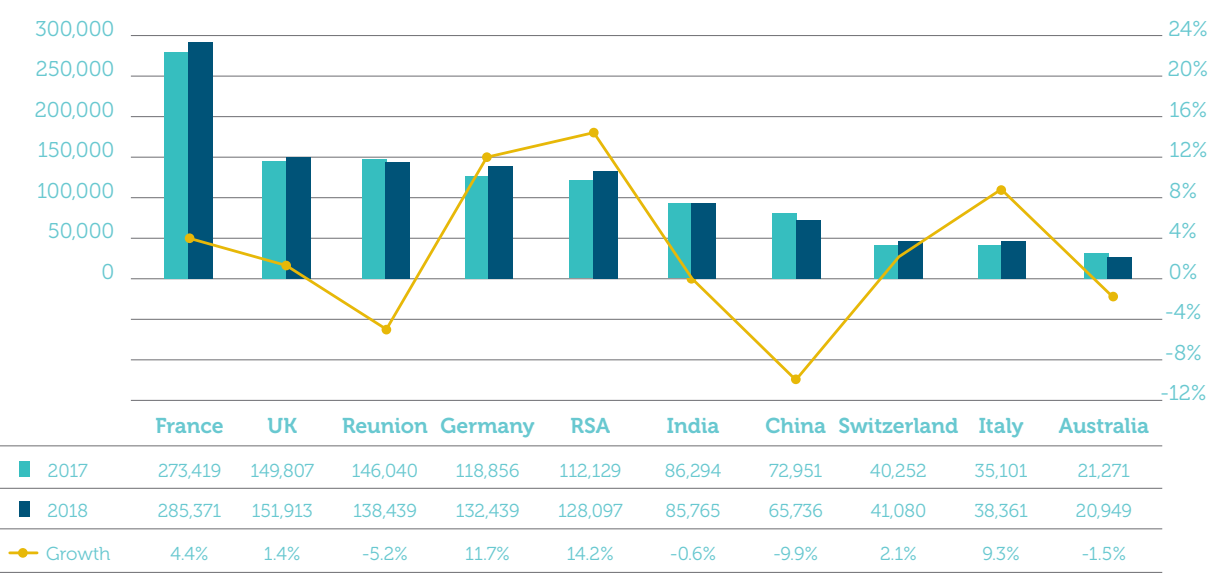
Source: Statistics Mauritius

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

Among our top 10 source markets in 2018, China, for the third consecutive year, recorded a substantial negative growth. After a marginal regression in 2017, the Reunion market scored a more significant drop (-5.2%) in 2018. Australia (-1.5%) and India (-0.6%) were also negative during 2018. Our main market France, after a stagnation in 2017, interestingly picked up (4.4%) while Switzerland and the UK both grew by 2.1% and 1.4% respectively. Germany and South Africa both boasted double digit growths (11.7% and 14.2% respectively) while Italy closely follow suit with 9.3%.

Figure 5: Tourist arrivals from top 10 markets and growth, 2017 & 2018



Source: Statistics Mauritius

Overall, from 2017 to 2018, the share of arrivals from our top 10 markets as a percentage of total arrivals dropped marginally from 78.7% to 77.8%. France that used to account for around a third of all arrivals, now hovers around 20%.

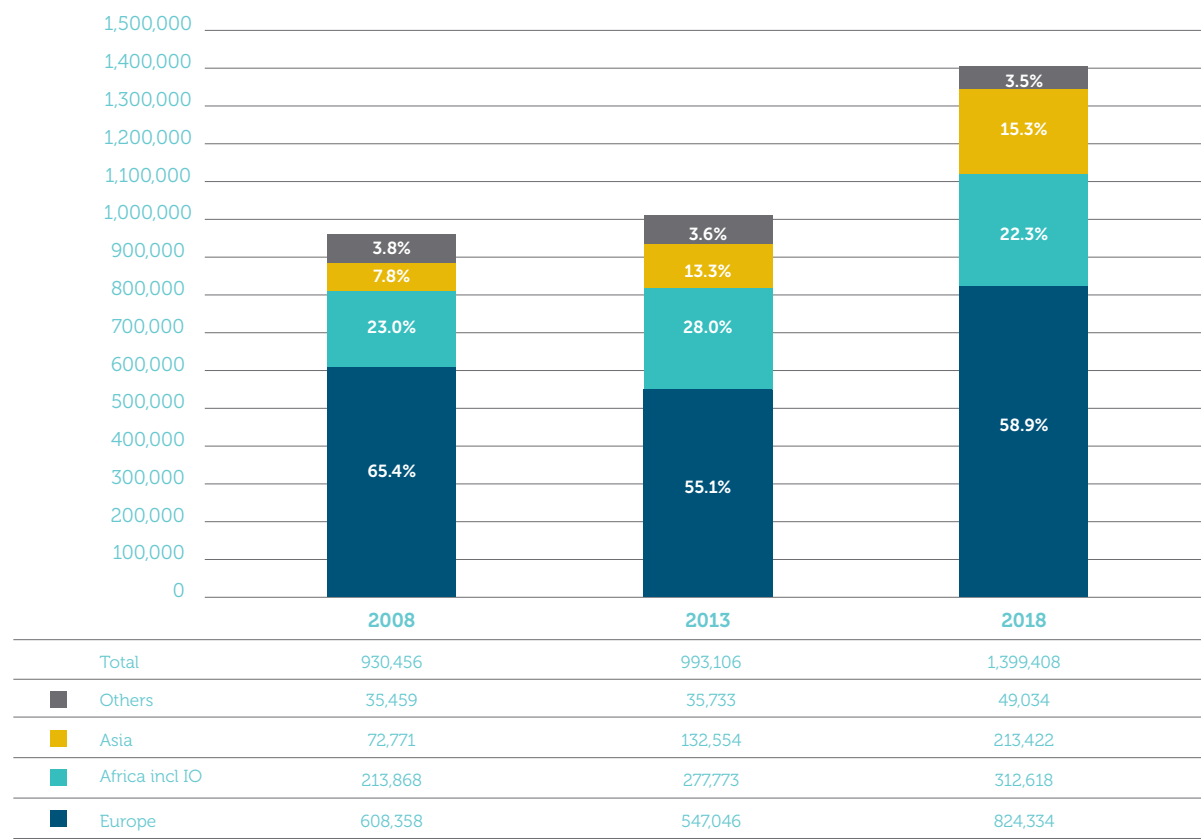
Netherlands, one of our freshly tackled markets, registered double-digit growth for the fourth consecutive year (+44.4%, +45.5%, +31.6% and 23.7%) while the Czech Republic also posted strong performances for three consecutive years (+17.0%, +23.4% and 35.8%). With the entrance of Saudi Airlines, arrivals from Saudi Arabia were strongly boosted and reached over 16,000 tourists (+221%) in 2018.

Overall growth was mostly driven by arrivals from Europe (+5.7% yoy) and the comparative share of European markets increased from 58.1% to 58.9% over the year 2018.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

Figure 6: Tourist arrivals by region, 2008, 2013 & 2018



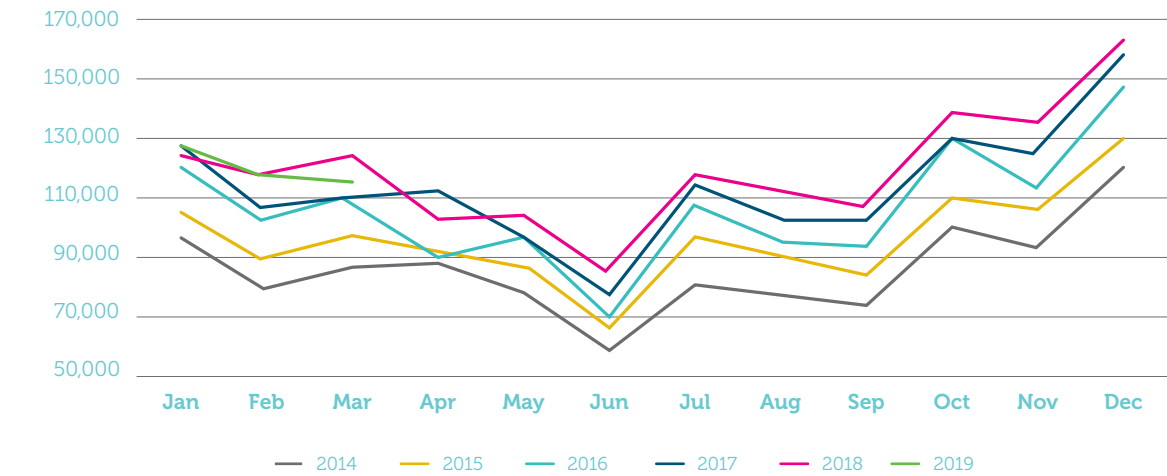
Source: Statistics Mauritius

As regards the diversification strategy pursued by Mauritius, figures achieved over the long run are noteworthy. In a continuous growth mode, the share of Asian markets has increased from 7.8% to 15.3% over the last 10 years, whilst in unit terms, arrivals increased by a massive 193.3% from 72,771 in 2008 to 213,422 last year.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

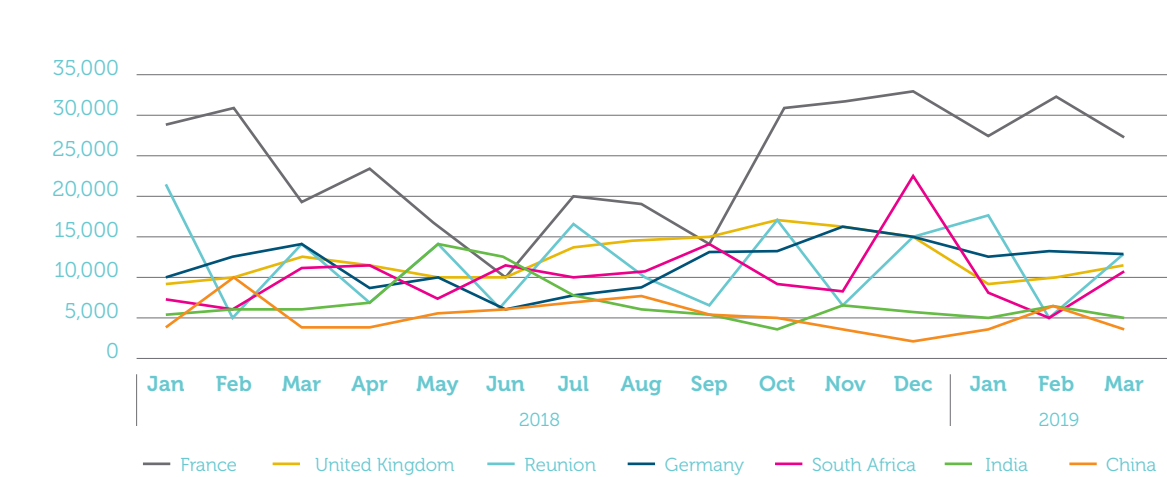
Figure 7: Tourist arrivals by months, 2014-2019



Source: Statistics Mauritius

Seasonality is an important feature in Mauritius with the number of arrivals in the peak month of December standing at around twice the number in the “lowest” month (June). Over the past five years, the ratio of arrivals between these two months has hovered at around 2.0 with a marginal decline in 2018 (1.9). Arrivals in the May to September period accounted for 36.7% of the total in 2018 and growth for these five months was higher (6.2%) than for the total of twelve months (4.3%) year-on-year.

Figure 8: Top 7 markets - Tourist arrivals by month, January 2018 to March 2019



Source: Statistics Mauritius

The seasonality features of our Top 7 markets and how they interplayed in 2018 are also quite interesting to note. The strong variations of the French market over the May – September period are not really compensated by the others for the moment. But the slight trends observed for India and China hint at the significant potential of these two markets in our bid to even out our winter season.

Industry Performance

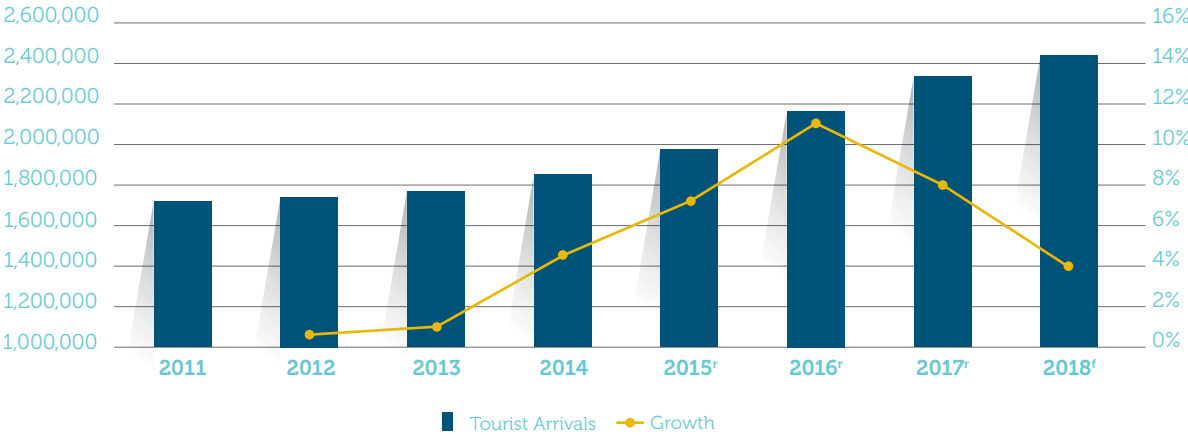
IN MAURITIUS, 2018-2019 (CONT'D)

Air lift

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

The number of seats available from various markets to Mauritius continued to report an increase, though more modest last year (+4.0% yoy) compared to the average growth realised since 2014.

Figure 9: Number of air seats and growth, 2011 - 2018



During 2018, Mauritius has welcomed one new airline, namely Kenya Airways as from 07 June 2018 while Meridiana stopped servicing Mauritius in May 2018. Air Mauritius ceased operating the Guangzhou route as from March 2018 and the Dar es Salaam route as from October 2018 while Wuhan, a new route, was serviced only from mid-August to mid-October 2018.

As for previous years, authorisations for special flights by Thomas Cook Airlines and TUI were granted during the peak season from Denmark, Sweden, Finland and Poland. Airlines already servicing Mauritius also operated special peak season flights in addition to their scheduled flights (e.g. Emirates, Air Mauritius, etc.). Alitalia confirmed its service to Mauritius as from end october 2018.

For the first quarter of 2019 year-on-year, an increase in the number of seats (+2.0%) was noted whilst the number of passengers dropped (-2.8%). This resulted into a dip in the average load factor during that quarter from 72.1% in 2018 to 68.6% this year.

It should be highlighted that the average load factor of all airlines has oscillated between 73.9% and 77.0% between 2011 and 2017. In 2018, the load factor remained at 75.1% as in 2017.

KLM Royal Dutch Airlines has announced that the joint venture with Air Mauritius will be suspended at the start of the 2019 IATA winter season i.e. as from 27 October 2019. This joint venture started in October 2017 with a thrice weekly operation to Amsterdam during the peak season by KLM and twice weekly by Air Mauritius during the low season. Amsterdam is one of the most important hubs in Europe and this suspension will certainly have a negative impact on demand from Europe.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

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

Table 2: Number of seats by originating country of flights, 2017 & 2018

Country	2017	2018	Change
Reunion	467,798	479,723	11,925
Dubai	406,800	420,695	13,895
France	323,478	316,903	-6,575
South Africa	251,163	260,510	9,347
India	126,858	129,068	2,210
U.K.	128,364	128,969	605
Germany	104,890	105,560	670
Madagascar	86,260	91,198	4,938
China (Guangzhou: Up to March 2018; Beijing: Up to November 2017; Wuhan: from 12 August to 14 October 2018)	97,725	79,927	-17,798
Seychelles	64,470	72,240	7,770
Turkey	63,606	67,392	3,786
Singapore	59,792	49,306	-10,486
Saudi Arabia (as from 14 September 2017 by Saudi Arabian Airlines)	14,006	45,892	31,886
Netherlands (as from 30 October 2017 by KLM/Air Mauritius)	7,866	39,112	31,246
Australia	40,972	38,961	-2,011
Switzerland (as from 19 November 2017 also by Air Mauritius)	21,473	30,101	8,628
Kenya (as from 07 June 2018 also by Kenya Airways)	11,904	25,925	14,021
Austria	15,845	15,650	-195
Italy	14,560	13,015	-1,545
Sweden	4,302	6,025	1,723
Spain	5,110	6,000	890
Poland	7,491	4,405	-3,086
Finland	2,446	3,130	684
Tanzania (up to October 2018)	6,864	3,036	-3,828
Denmark	2,115	2,410	295
Djibouti (special flight to transport athletes)	0	132	132
Iran (special flights in 2017 only)	894	0	-894
Mozambique (up to August 2017)	4,092	0	-4,092
Grand total	2,341,144	2,435,285	94,141

Sources: MTPA and ATOL

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

Table 3: Number of seats by airlines, 2017 & 2018

Airlines	2017	2018	Change
Air Mauritius	960,689	1,005,845	45,156
Emirates Airlines	406,800	420,695	13,895
Air Austral	224,405	224,195	-210
Air France	126,360	121,580	-4,780
South African Airways	115,152	104,187	-10,965
Air Seychelles	64,470	72,240	7,770
Turkish Airlines	63,606	67,392	3,786
Corsair	75,527	66,320	-9,207
British Airways	51,727	57,408	5,681
Condor	57,240	53,530	-3,710
Saudi Arabian Airlines	14,006	45,892	31,886
Eurowings	29,670	31,150	1,480
TUI - Thomson	31,929	29,142	-2,787
Edelweiss	19,423	22,680	3,257
Lufthansa	17,980	20,880	2,900
KLM	7,866	18,042	10,176
Austrian Airlines	15,845	15,650	-195
Air Madagascar	11,310	13,000	1,690
Kenya Airways	0	12,285	12,285
BA / Comair	8,529	9,018	489
Alitalia (as from end October 2018)	0	7,975	7,975
Evelop Airlines	5,110	6,000	890
Meridiana (Up to May 2018)	14,560	5,040	-9,520
Thomas Cook	2,304	2,659	355
Polish Airlines	2,170	2,480	310
Air Asia (from October 2016 to March 2017)	13,572	0	-13,572
Mahan Air (special flights in 2017)	894	0	-894
Total	2,341,144	2,435,285	94,141

Sources: MTPA and ATOL

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

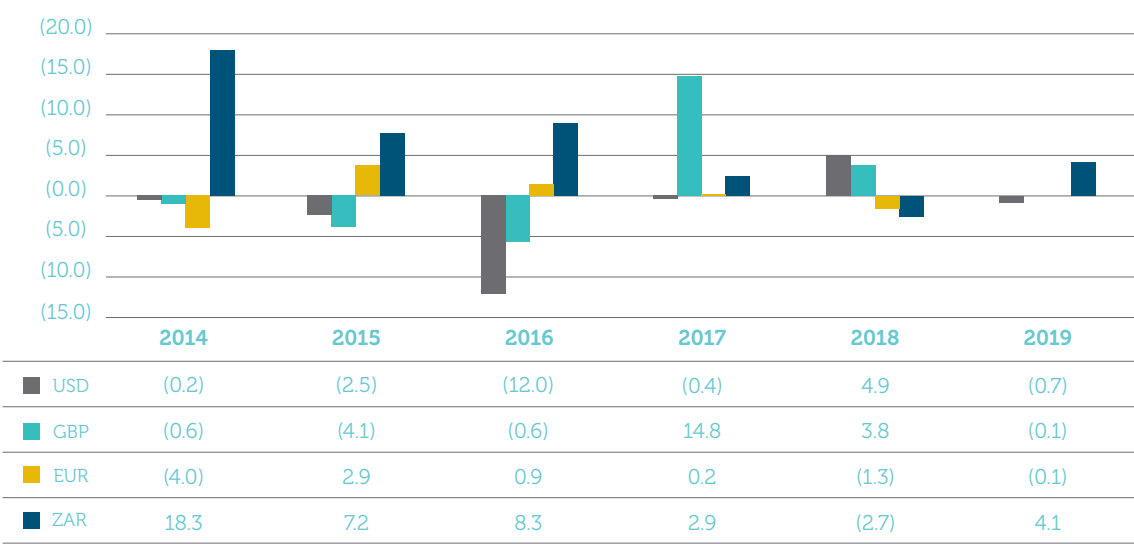
Tourism earnings

Since the second semester of 2018, a decline in tourism earnings is being observed. This trend continued in 2019 with total earnings for the first quarter dropping by 10.6% year-on-year and reaching Rs 16,518M only compared to Rs 18,483M in 2018. Since August 2018, earnings per tourist has followed a similar trend with double digit drops in September (-14.1%) and November 2018 (-13.4%) and February 2019 (-15.2%) year-on-year. For the whole year 2018, earnings per tourist did however increase, marginally by 1.9% compared to the previous year while for the first quarter of 2019, the drop reached 9.6% yoy.

Rate of exchange

On average, for the year ending March 2019, the MUR was stable against the GBP and EUR.

Figure 10: Appreciation/depreciation* of the Rupee against selected currencies 2014 - 2019



* Average for the 12 months ended March of each year

Source: Bank of Mauritius

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

TOURISM AS A MOTOR FOR EMPLOYMENT, SOCIAL INCLUSION AND POVERTY REDUCTION

The hotel industry is a major creator of jobs and career opportunities for the young people as well as workers looking for reskilling and recycling opportunities. 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 increasing 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 for the cruise industry.

Total direct employment in the sector (based on the results of the Continuous Multi-Purpose Household Survey) is estimated at 41,600 in 2018 or 7.3% of total employment. According to the Tourism Satellite Accounts (TSA) of 2017, direct employment in the tourism sector is over 73,600 distributed as follows among those major segments: 31.5% in the accommodation sector, 24.2% in food and beverage services, 9.6% for inland transport, 7.3% in recreational, cultural and sporting services. Based on the 2017 TSA, total direct employment in the tourism sector represents 12.8% of total employment

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). According to the survey of large establishments only (with 10 or more employees), 31,019 people were employed in hotel, restaurant, and travel & tourism activities at end March 2018. Hotels accounted for 78% of this total representing over 24,100 employees. This survey also revealed that expatriates in the sector totalled 359 at end March 2018 compared to 374 at the same date in 2017. The number of expatriates in the sector both in absolute and relative terms, have regressed continuously over the last five years.

Taxes and levies

For the FY 2017/18, some Rs 1,650 M was collected as passenger fee on air tickets and Rs 100 M as Tourist Enterprise License (TEL) fees compared to Rs 1,652 M and Rs 99 M respectively for the previous financial year. For the FY 2018/19, it is expected that some Rs 1,765 M would be collected as passenger fee and TEL fee revenue is to reach some Rs 110 M.

Total Environment Protection Fee collected amounted to Rs 385 M in 2017/18 and the forecasted figure for 2018/19 is Rs 405 M. It is interesting to note that the tourist accommodation sector is a predominant contributor to the EPF with a share of close to 85%.

Tourism operators

Some 3,097 entities (valid licenses at 31 March 2019) are directly registered with the Tourism Authority; in 2017, the total number was 4,028 (excluding spa, sports centres and beauty care centres located in hotels), meaning that officially licensed operators have dropped by 23% over two years. Over and above accommodation, license holders mostly include 791 restaurants (excluding hotel restaurants), 436 hawkers operating on beaches facing hotels, 325 tour operator services, 139 travel agencies, 64 boat house operators and 62 providers of scuba diving activities.

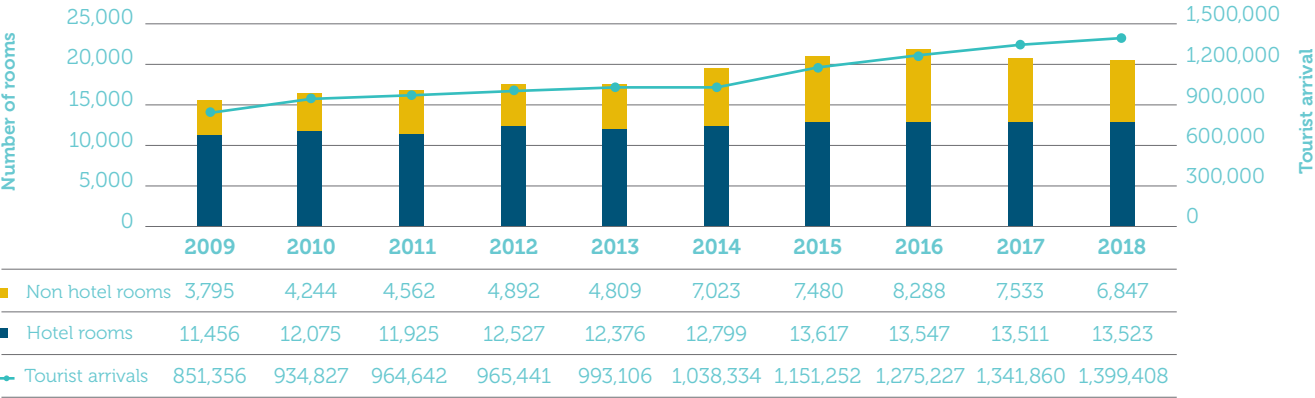
Accommodation facilities

At end December 2018, there were 113 operational hotels, 186 guest houses and 730 tourist residences giving a total of 20,370 operational licensed rooms of which 66% were hotel rooms. Over the last decade, tourist arrivals increased by 6.7% on average each year while hotel accommodation grew by 2.0% and non hotel accommodation by a strong 8.9% each year on average.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

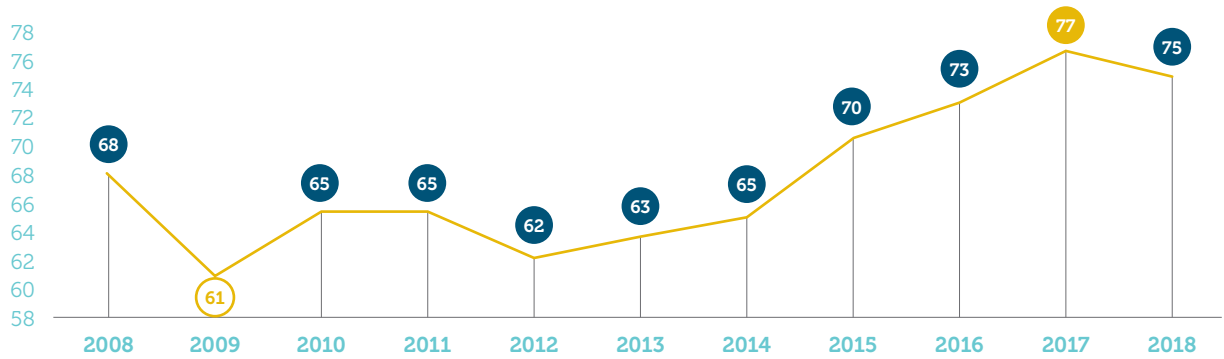
Figure 11: Accommodation and tourist arrivals, 2009 – 2018



Sources: Statistics Mauritius and Mauritius Tourism Authority

After six consecutive years where the average hotel room occupancy rate remained confined within the 61 to 65 percent bracket, it successfully reached 70% in 2015 and 73% in 2016. A new peak was further reached in 2017 with 77%. In 2018, this rate dropped by two percentage points to 75%.

Figure 12: Average hotel room occupancy rate (%), 2008 – 2018



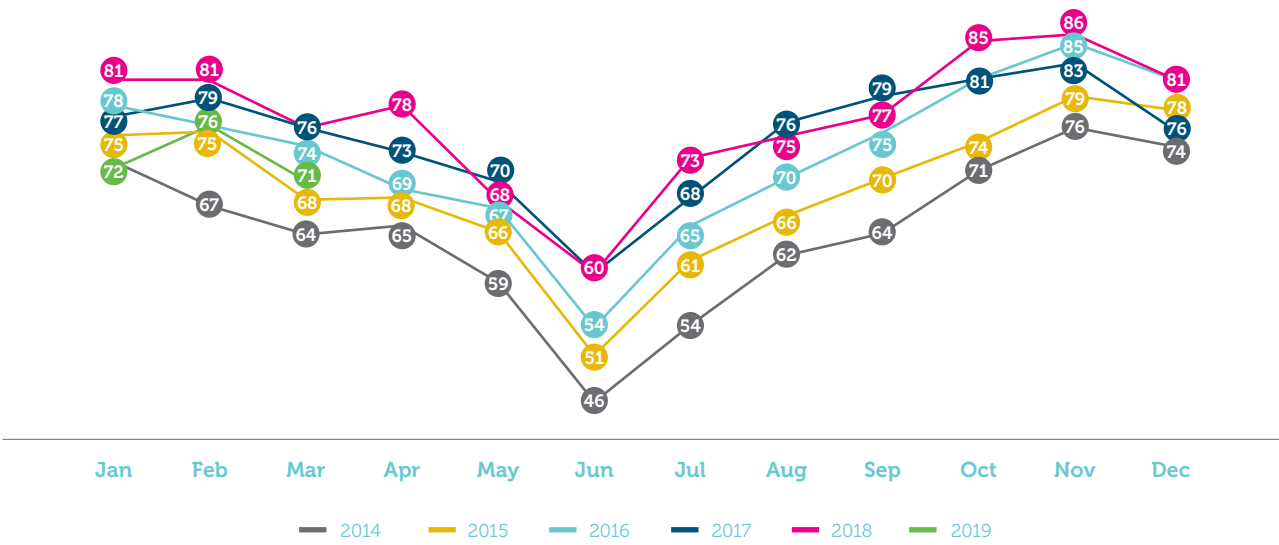
Source: Statistics Mauritius

The seasonality factor also has an important impact on the occupancy rate of hotels with typical dips in June. At the other end, occupancy during the peak months never went beyond the 86% mark during the five last years; in 2018, the peak of 83% was attained in November. Interestingly, highest occupation rates are actually achieved in the months of November and not December. With the promotion of Mauritius as an all-year round destination, the last two years have seen a significant upward push in the lowest monthly occupancy rate traditionally observed during June (+6 pp or 60%).

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

Figure 13: Average hotel room occupancy rate (%) by month, 2014 – 2019



Sources: Statistics Mauritius

Debt

The different restructuring plans implemented to reduce the burden of debt have contributed to contain the level of indebtedness in the accommodation sector. The level of debt in the sector at end December 2018 dropped by 7.0% yoy reaching Rs 36.5 Bn. These represented a share of 10.1 % of total debt in the private sector. The current debt situation is not expected to impede on the hotel renovation projects that were planned for 2019.

Investment

After the peak reached in 2009, local investment as measured through the Gross Fixed Capital Formation indicator (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 in the wake of the 2009 crisis have contributed to this slump. With recovery underway and the incentive of rebate in rental fees for leased state lands, several hotels have successfully implemented renovation plans during 2017 reflected with the massive 54.5% yoy increase in GFCF (Rs 6.7 Bn). The level of GFCG however dropped in 2018 but is expected to pick up again in 2019.

Gross direct investment flows from abroad is estimated to reach Rs 1,365 M in 2018 or a drop of 18.7% compared to 2017.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

ENVIRONMENT PROTECTION – A MAJOR ISSUE

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 has to be pointed out that over and above mandatory requirements, hotels have implemented various private projects/initiatives on a voluntary basis to reduce their environmental footprint and to date, more than half of our hotels are already engaged in eco-labels. However, the rest of the destination too often cannot boast such credentials.

In fact, latest observations from the annual Survey of Inbound Tourism point towards less favourable ratings for Mauritius on the environment aspect. The results of the last three years mention a perceived degradation of the environment especially with a drastic drop in “Excellent” ratings under the different indicators. In 2015, 41% of visitors rated the State of our Environment as Excellent. This percentage dropped to 34% in 2016, and in 2017, we scored a poor 19%.

Table 4: Percentage distribution of tourists interviewed by rating of state of environment, 2015 - 2017

Rating of the state of environment:	Very Poor/Poor			Satisfactory			Good			Excellent		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
- on beaches	1.4	2.4	3.3	7.9	9.0	9.9	40.6	47.1	61.5	49.4	40.9	24.0
- in lagoons	1.2	1.7	3.9	6.1	8.7	12.4	43.2	50.1	59.8	45.0	36.3	20.8
- in public places	4.4	6.1	5.7	18.9	20.2	15.7	47.4	49.1	60.1	26.7	22.1	15.6
- on tourist sites	0.6	1.1	1.5	6.8	9.5	9.7	50.4	51.1	65.4	38.4	34.5	17.7
- in accommodation	0.3	0.3	0.5	2.8	1.8	4.4	29.7	32.0	58.2	66.9	65.6	35.9
- in Mauritius	0.6	1.8	1.7	6.2	10.4	9.2	52.1	53.7	68.7	40.8	33.9	19.1

Source: Survey of Inbound Tourism, Statistics Mauritius

Indeed, the state of cleanliness of the country has seriously deteriorated over the years and national cleaning initiatives do not always converge. 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.

AHRIM is of the view that hoteliers are already contributing their fair share in the deployment of sustainable development initiatives in the country and while Government is also implementing its national green initiatives, a more holistic strategy for the country as a whole is warranted. End results speak for themselves and it is imperative that the lead-time to obtain clear-cut ground results, i.e. a clean and safe destination, be reduced drastically.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

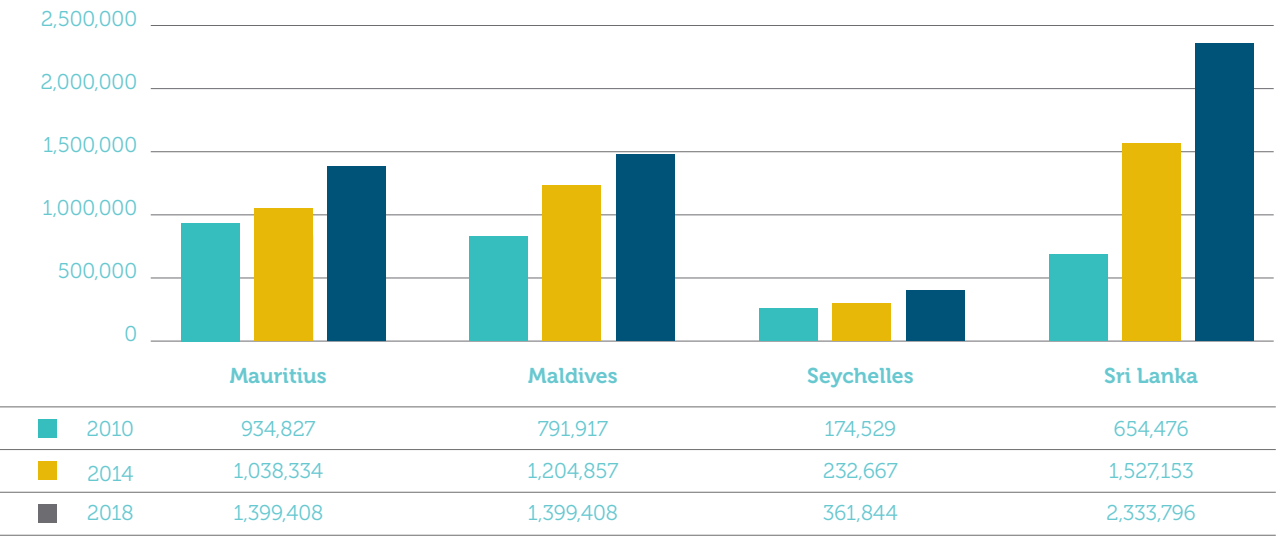
MAURITIUS AND DIRECTLY COMPETING LOCATIONS

Sri Lanka sees itself way above with double-digit growth rates attained consistently since 2010 save for 2017 and tourist arrivals more than trebling in eight years. The one-million arrivals mark which was attained in 2012, has more than doubled four years later and arrivals reached over 2.3 million last year. Recent events are however expected to dampen past remarkable performance levels.

After a slowdown in tourist arrival growth observed recently in Maldives, there was a rebound since 2017 in spite of arrivals from China having been slowly and consistently dropping over the last four 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 2009 and 2018, the compounded average increase in tourist arrivals was 6.7% annually in Mauritius, compared to 14.0% for Maldives, 14.4% for Seychelles, and an astronomical 46.8% for Sri Lanka.

In 2018, only Sri Lanka posted a double-digit year-on-year growth rate (10.3%) in front of Maldives (6.8%), Mauritius (4.3%) and Seychelles (3.4%).

Figure 14: Tourist arrivals in Mauritius, Maldives, Seychelles and Sri Lanka, 2010, 2014 & 2018



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

For the first quarter of 2019, double digit growth was recorded for Maldives (+15.0%) and Seychelles (+10.7%) year-on-year while Sri Lanka recorded a significant +4.6% growth. Growth in Mauritius was however negative during this same period (-1.2%).

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

CHALLENGES AHEAD

Tourism is vulnerable to many known factors and one can also talk of cycles when it comes to growth, slowdown or recovery. In the case of Mauritius, recovery ensuing the 2008/09 global crisis was slow (2009–2013), growth was then exceptionally strong (2014–2018), and entering 2019, one can observe a significant slowdown. Such negative performance can be expected but, in our case, it inevitably questions our overall tourism strategy as our main markets, excepting China, continue to bring growth to our direct competitors in the Indian Ocean and elsewhere.

Tourism arrivals into Mauritius are down; for the first quarter 2019, they have regressed by 1.2%. Compared to the same period last year, the number of tourist arrivals by air has dropped by a sizeable 4.5% and for our Top 10 markets, this drop is a massive 6.3% as per below table.

Table 5: Tourist Arrivals by Mode of Transport and by Selected Country of Residence, Quarter 1 of 2018 & 2019

Country of residence*	January - March 2018			January - March 2019			Year on Year change		
	Air	Ship	Total	Air	Ship	Total	Air	Ship	Total
France	81,351	1,432	82,783	81,868	3,762	85,630	0.6%	162.7%	3.4%
Germany	29,326	5,456	34,782	26,494	10,719	37,213	-9.7%	96.5%	7.0%
Reunion Island	39,139	414	39,553	34,802	318	35,120	-11.1%	-23.2%	-11.2%
United Kingdom	30,876	520	31,396	27,921	656	28,577	-9.6%	26.2%	-9.0%
South Africa	23,619	35	23,654	23,646	193	23,839	0.1%	451.4%	0.8%
India	17,119	91	17,210	16,164	89	16,253	-5.6%	-2.2%	-5.6%
China	17,917	111	18,028	12,192	192	12,384	-32.0%	73.0%	-31.3%
Italy	8,551	563	9,114	9,137	964	10,101	6.9%	71.2%	10.8%
Switzerland	10,095	338	10,433	8,044	762	8,806	-20.3%	125.4%	-15.6%
Czech Republic	5,908	58	5,966	7,130	211	7,341	20.7%	263.8%	23.0%
Total Top 10	263,901	9,018	272,919	247,398	17,866	265,264	-6.3%	98.1%	-2.8%
Total arrivals	344,231	12,184	356,415	328,764	23,541	352,305	-4.5%	93.2%	-1.2%

* top 10 markets in the first quarter of 2019
Source: Statistics Mauritius

While the growth in cruise tourism is laudable, its impact on the economy is less significant. Cruise activity remains seasonal and the average length of stay of cruise tourists is very short (one night compared to 10 nights for those arriving and departing by air). And though cruise excursionists do consume single-day activities and tours, these have a very limited impact on the local economy when compared to tourist nights actually spent on the island. This can partially explain the significant drop in tourism earnings (total and per tourist) observed since the second semester of 2018.

Indeed, as we can see, all numbers are going down and we do not know when and where would this drop come to a stop. Hotel room occupancy has also dropped from the 77% mark in Q1 of 2018 to 73% in 2019. Forward booking numbers for hotel room occupancy as at 01st June 2019 also do not really augur brighter days in the immediate to short term.

As hinted earlier, the lower demand for the Mauritius destination is in sharp contrast with how the competition is faring. Our direct Indian Ocean competitors are doing way better.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

Booking on Mauritius going down

Indeed, the increased competition as felt on our main markets is getting stronger. For example, based on the barometer of Les Entreprises du Voyage, at end 2018, booked long haul departures by French travellers on Mauritius are down by 11% for 2019. This figure is alarming given that France is our main market with a market share of 20% in 2018.

Furthermore, according to BSP tickets issued data, save for Germany (+12%), at early May 2019, passenger booking to Mauritius during the period May to December 2019 are down for UK (-19%) and Reunion (-8%) compared to the same period last year.

Indeed, we have a problem, partially linked to the known factors of economic slowdown and political or social unrest in our main markets, but more predominantly, we have an issue of the destination’s competitiveness facing increasingly strong competition. This could be on the price and/or the product and on how we maintain our competitiveness year in year out, and throughout each year, on all markets and in all seasons.

Perception of tourists on security and environment going down

Latest figures from Statistics Mauritius on visitor perceptions on the destination show for the year 2017 a significant deterioration of the product, namely on the state of the environment and the level of security:.

Table 6: Percentage distribution of tourists interviewed by rating of level of security, 2015-2017

Rating level of security:	Very Poor/Poor			Satisfactory			Good			Excellent		
	2015	2016	2017	2015	2016	2017	2015	2016	2017	2015	2016	2017
- in hotels	0.1	0.3	0.3	2.1	1.9	3.1	22.0	28.4	53.7	72.7	68.6	35.3
- in non-hotel accommodations	0.3	0.5	0.4	2.3	3.1	4.5	29.3	44.3	55.4	37.9	36.5	22.2
- of security regarding taxi service	0.6	0.5	0.4	3.7	3.9	7.3	38.4	46.9	57.5	47.6	35.8	18.0
- on beaches	0.4	2.4	0.5	3.0	9.0	5.1	37.3	47.1	67.8	58.2	40.9	25.0
- in public places	0.5	0.6	0.7	5.4	5.7	5.9	44.7	55.2	66.6	46.5	35.4	23.0
- on tourist sites	0.2	0.2	0.3	3.0	2.9	4.2	38.7	51.1	67.3	54.2	42.0	21.8
- in Mauritius	0.1	0.2	0.3	2.5	3.1	4.6	40.5	54.1	71.0	56.6	42.0	22.3

Source: Survey of Inbound Tourism, Statistics Mauritius

This leads us to believe that recommending Mauritius is now less strong from our visitors. Effectively, in 2016, 36% of visitors rated our destination as ‘beyond expectations’; this ‘wow’ rating dropped to a mere 22% in 2017.

In 2016, only 1% of visitors stated that they would not recommend Mauritius to their friends and relatives. In 2017, this non-recommendation statement reached 10% of our visitors.

This sub-par delivery issue could in fact be further accentuated with the increased informalisation noticed recently. The emergence of Airbnb is encouraging anyone, with or without the required license, with a “spare” room or a ‘new’ building to let to freely advertise on this platform. There is in those cases absolutely no control whatsoever on the quality of the infrastructure, the level of service, guest protection features, insurance, security etc. If these practices remain unchecked, further registered entities may be encouraged to leave the formal accommodation sector.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

Persistent labour shortage

On the HR side, to tackle the acute labour shortage, there is a need to promote an open labour market while preventing abuse through self-regulation. On paper, we have a beautiful human resource development policy, with adaptative measures on education, training and employment targets and ambitions. In reality, we need to recognise some of our market failures and the best corrective measures have to emanate from the private operators. Today, there is a current set-up of a Training Levy on employers, contributing to a National Training Fund, and which in turn, funds programmes targeted to specific solutions for the youth, women willing to go back to work, at time sectors such as ICT or nursing, etc. All end results are below par. Beneficiary numbers are not attained, lack of control induce abuse by beneficiaries and a few participating employers, and the system still doesn’t reach the end goal of improving employability and reducing unemployment.

Such inefficiencies are not unique to Mauritius; many economies endure time and again such mismatch. There is therefore a need for more direct employer engagement in such policy determination initiatives.

It is also important for each establishment to be able to employ expatriates in posts they deem necessary. Of course abuse need to be kept in check so that the number of expatriates can be capped as a proportion of total permanent staff per establishment. Indeed, the current scarcity list approach is a medley of outdated Remuneration Order job positions, technical competencies, hierarchical levels, and language skills. With time, authorities will be just unable to pursue its application, further complicated by rapidly changing industry requirements for new skills and competencies not yet mentioned in those scarcity lists.

The industry’s preference for local labour is undisputed; operators want and prefer local labour in their establishments. But the situation has become very difficult and in hiring foreign labour, such business risk taken by employers is to be reckoned with; authorities need to capture the reality of the situation, the sooner the better.

Policies not in line with the changing business environment

There are many gaps in the current framework guiding and regulating tourism and foreign presence on our lands. In 2018, a total of 100 markets from all continents provided us with anything between 1,000 and 270,000 tourists; one can imagine the sort of cohesive and coherent communication we should provide as a country to each of these visitors, coming from a different background and probably not equally comfortable in English or French.

As such issues on beaches, public areas, trade malpractices, taxis, canvasseurs, hawkers, pleasure crafts, unregistered businesses etc. need to be tackled with greater resolve and more appropriate means, including the use of technology, by the competent authorities. The visitor from abroad needs protection and will not fully recommend the destination should he or she encounter one single bad experience over his/her 10-day stay in a remote location.

In actual fact, we need to rethink the whole infrastructure of competent authorities and their respective mandates in order to adapt ourselves to the needs of the visitor, wherever he or she could come from.

The changing business environment also dictates a more conservative approach towards human activities impacting on the environment and threatening the sustainability of the destination. In that respect, scoping licensed activities and limiting numbers in line with sustainable business goals is recommended.

Lastly, the increased intervention of technology in consumer choice and behaviour is not falling within the competency of local authorities. We encounter licensing issues for innovative services and this entails absence of surveillance of prominent tourism activities.

Industry Performance

IN MAURITIUS, 2018-2019 (CONT'D)

CONCLUSION

The current outlook is certainly not one of blind pessimism and we need to fight back. The number of inconsistencies within our own country should not become an obstacle to Mauritius, an internationally recognised destination facing sheer competition from the rest of the world

In actual fact, the industry is faced with a highly visible lack of consistency and unity of purpose in the deployment of our tourism development strategies. Over the recent years, consultations between authorities, operators, and other stakeholders on the below subjects have remained ad hoc and with poor follow up and allocation of responsibilities and tasks. In fact, too many tourism-related issues fall outside the mandate and purview of the Ministry of Tourism, MTPA, Tourism Authority, Air Mauritius and hotels.

Also, licensing is key to Mauritius's success and further informalisation of the sector can have sizable negative impacts in terms of unreported revenue, or revenue forgone for Government. More importantly, any resolve in policy improvement or institutional strengthening would be vain as the image and reputation of Mauritius goes out of control.

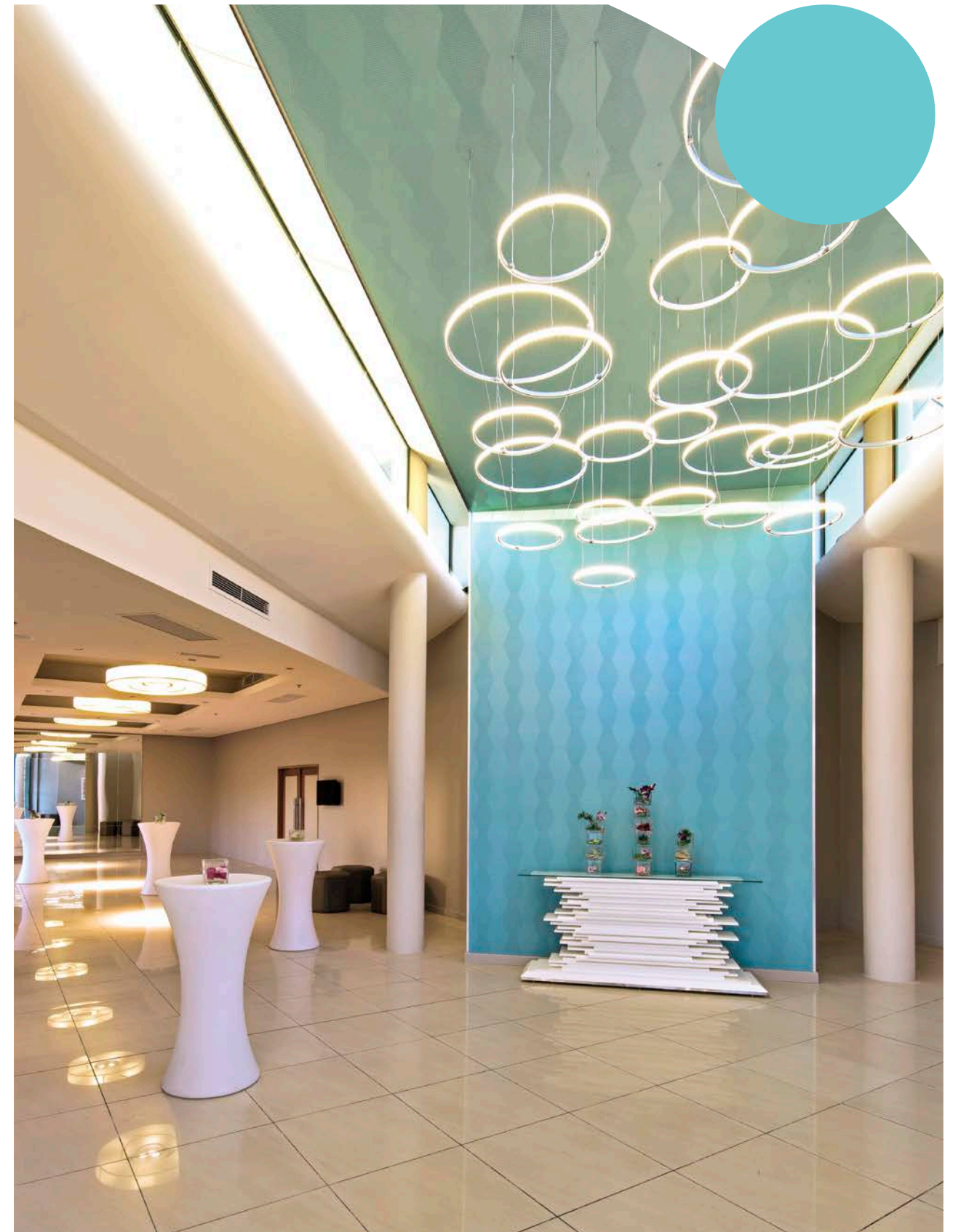
Whilst there is not much we can do in respect of more costlier fares and an airlift which is dependent on global airline business imperatives, we are aware of the country issues that directly affect our tourism and we have the duty to act upon them.

- On air access, we have been claiming for a highly competent air policy unit for years;
- Tourism targets in the Ministry of Tourism's Strategic Plan 2018 – 2021 are way below targets for the national carrier and the airport;
- The broadening of tourism within Mauritius, opening access to all kinds of operators, is not monitored with a guest-centred approach;
- Education and training remain too slow and laudable Government-led initiatives such as YEP or NSDP should be entrusted to employers predominantly and not to regulatory authorities;
- Low labour availability is impeding growth in all sectors but no authority seems willing to tackle the issue frontally;
- Hotels and other employers' decision to have recourse to expatriate employment should be better understood and better respected. The business risk taken is inherent to the hotel but the various authorities' go-ahead cannot be subjected to restrictive procedures disproportionately and differently enforced across sectors and across worker categories;
- Product development, except golf, has remained sub-standard. Museums, parks, UNESCO sites, road signage are all out of control of our tourism instances;
- Environment protection is a failure so far. At least 12 public bodies have their say in the management of public beaches;
- Hotel taxis are an outdated system but with liberalised fares; one of the biggest anomalies in Mauritius; and,
- The issue of stray animals, under the responsibility of the Ministry of Agro-Industry, persists.

It is therefore high time to eliminate this lack of unity by creating a central authority to oversee tourism development, as a real host to Destination Mauritius.

This can take the form of either a Directorate of Tourism or a National Tourism Board, under an appropriate authority cutting across all sectors and institutions having a bearing on tourism. It could regroup Tourism, Environment, Public Infrastructure, Local Government, External Communications, etc. and be co-chaired by public-private sectors, correctly leveraging on all other line Ministries.

On a final note, tourism development is about planning for the future. This is even more crucial when one becomes aware of climate change and the ensuing vulnerability of the destination. Long term planning should not just remain vain wishful thinking. Today, we need 5, 10, 20-year plans in order to forge our way ahead. It's all within our hands as a country and as an industry.



MAIN PROJECTS /FILES

National Budget 2019/20

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

The first action is centred around the need to reinforce our product through stronger policies, better regulation and proper licensing as proper business licensing and conduct is key in a country willing to match international practices and standards for safe and efficient tourism. AHRIM pointed out that any such surveillance can immediately benefit the whole population and basic features of ambitious tourist destinations could include:

- Strong consumer protection policies and practices, coupled with exemplary fining of malpractices and abuses, with abundant communication by the authorities;
- Omnipresent public education, sensitisation and awareness-building tools and displays for locals and visitors alike;
- Public transport including taxis amply signalled with applicable routes and fares and client protection policies and procedures well displayed and publicised;
- Mandatory price displays in all retail outlets, including details of taxes payable and/or refundable; and,
- Regular and forceful public advertising of listings of duly licensed operators in all fields of tourism, and proper warnings issued to tourists regarding the prohibited use of services of unlicensed operators.

The second line of action is focused on repositioning our destination as a prominent sustainable location especially as perception of tourists the state of our environment is going down. The measures proposed by AHRIM included the need to revisit our Green taxation policies and practices and review the Environment Protection Fee; and, unlock private sector engagement potential and reduce ground results lead time by giving the option to hotels to manage at least 50% of their EPF contribution towards environment/sustainability projects in their immediate and neighbouring locations. AHRIM maintained that such an approach would certainly avoid all the long procedures that delay local actions and would immediately benefit to communities around hotel establishments as well as visitors. This would also ensure that funds collected for the protection of the environment would be actually disbursed for this very same purpose.

The third and last line of action is on the need to review our labour market gaps and to adopt corrective short to medium term measures. Under this focus, the proposed measures are focused on:

- More employer involvement in HRD policy-making and planning would ensure more efficient resource allocation;
- Earlier and prompter interaction between employers and potential employees would increase permanent job opportunities; and,
- Providing an enabling framework governing the employment of expatriates.

AHRIM has stressed on the fact that the implementation of these three lines of action is critical and that it is not simply a case of the Ministry of Tourism, the MTPA, Tourism Authority, Air Mauritius or hotels being unable to meet the mark, it is the whole country which might not be prepared enough to be and act as a host of international standards and capabilities today in 2019.

Labour issues

National minimum wage

For the year 2019, the National Minimum Wage of every worker, other than a part-time worker and those working in the Export Enterprises sector, was revised to Rs 8,140 a month excluding the additional remuneration of Rs 360 payable under the Additional Remuneration and Other Allowances (2018) Act 2017 and the additional remuneration of Rs 400 payable under the Additional Remuneration and the other Allowances (2019) Act 2018. As such, as from January 2019, all full-time workers, except those employed in an export enterprise are entitled to a minimum wage of Rs 8,900 per month.

Relativity adjustment of RO Wages following the introduction of NMW

Following a referral made by the Minister of Labour, Industrial Relations and Employment to the National Remuneration Board for the review of wages in 30 existing Remuneration Order Regulations, the NRB has on 17th September 2018 made the following recommendations in respect of the Catering and Tourism Industries RO (2014) in order to bring necessary wage-relativity adjustments following disruption which arose with the application of the national minimum wages as from 01st January 2018:

- A nominal wage increase varying from 0.01% to 0.94% to the different categories of employees of restaurants with less than 40 covers and hotels with less than 60 rooms; and,
- No recommendations made in respect of restaurants with more than 40 covers and hotels with more than 60 rooms.

National Tripartite Committee

A tripartite exchange was held as usual in order to look into wage compensation for the year 2019. AHRIM, in collaboration with Business Mauritius participated actively in the discussions. Final recommendations by Government on the rate of compensation were as follows:

Full-Time Employees:	Rs 400 per month	
Part-Time Employees:	Monthly basic wage or salary	Additional remuneration per month
	Up to Rs 10,000	4 per cent rounded up to the next rupee
	Above Rs 10,000	Rs 400

AHRIM DRIVEN ACTIONS

AHRIM Check-In Magazine

In a view to give more visibility on the sector and important issues deemed important by the industry, AHRIM launched Check In, a biannual magazine in November 2017. In the first edition, there was a special focus on the shortage of labour. The second edition was published in August 2018 with spotlight on the need to protect our lagoon. The third edition was launched in May 2019 with a special dossier on the future of the tourism sector.

Check-In is produced in 500 print copies and is distributed to members and both public and private players of the sector. It is also uploaded on the AHRIM website with free access to guests.

“ Comprendre les perceptions et les attentes des jeunes mauriciens par rapport au secteur hotelier afin d’en ameliorer l’attractivite.”

With the ongoing difficulty to attract and retain the youth segment in the industry and to enable the sector to adopt appropriate strategies to hire more Mauritians, especially in guest-facing roles, AHRIM has retained the services of KANTAR TNS to conduct a research survey on the perception and attractiveness of the sector towards the youth segment. The survey, using both qualitative and quantitative methods, will contribute to shed light and give more insights into the prevailing situation, thereby triggering appropriate response strategies from industry players. The survey is expected to be completed by mid-August 2019.

OPERA - Orientation Programme for Education and Recruitment by AHRIM

OPERA, which was launched on 4th December 2017 had as objective to create awareness, raise interest and guide school leavers to career opportunities in the hospitality industry. A Facebook page was created and was regularly populated with profiles of young employees in the hotel sector, vacancies available, information on training providers and training available, job profiles career paths, etc. As at date, the OPERA Facebook page has attracted some 5,000 followers and its various posts regularly reacted up to 30,000 views.

HR indicators 2019

The annual HR Indicator Survey was launched in April 2019 after receiving the approval of the members of the AHRIM Human Resource Commission. The outcome of the survey is scheduled for June 2019 and 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 2018, AHRIM Training Centre trained 55 school leavers under the National Skills Development Programme (NSDP), a fully sponsored training programme by the Government implemented through the HRDC. 36 trainees were coached to take positions of waiter and 19 trainees for the positions of valet. They were all offered employment opportunities in hotel members of AHRIM. The experience was further renewed and 24 unemployed youth were enrolled in February 2019 to pursue a three months training programme towards F&B Attendant. A next intake is scheduled for July 2019.

Reward to the best students 2018 / 2019

AHRIM rewarded Mr Sean Allan Ozeer, Higher National Diploma in Hospitality Management from the EHSgd, for his brilliant performance. The awardee was rewarded with a trophy plus a cash prize.

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. This project will contribute to deepen the destination’s offering. Training sessions were held over two weeks on F&B and Food Safety / Health and Safety in July 2018. Communication tools, including a brochure, are also being finalised.

REGULAR AND ON-GOING ACTIVITIES

Participation in international fairs

Since last year, 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 for its members in the three main fairs. The following SMH members participated:

- IFTM TOP RESA, Paris Porte de Versailles, 25th to 28th September 2018: Aanari Hotel & Spa and Seapoint Boutique Hotel;
- World Travel Market, London, 05th to 07th November 2018: Aanari Hotel & Spa and Seapoint Boutique Hotel; and,
- ITB, Berlin, 06th to 10th March 2019: Aanari Hotel & Spa and Seapoint Boutique Hotel.

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 2018 and ITB 2019 Tourism Trade Fairs.

La Messe du Tourisme

World Tourism Day, celebrated every 27th September around the world, is a unique opportunity to raise awareness on tourism’s actual and potential contribution to sustainable development. The 2018 edition was officially celebrated in Budapest around the theme “Tourism and the digital transformation”. In line with this celebration, “La Messe du Tourisme” was held at Ste Croix Church and some 2,000 persons attended. The whole tourism industry was represented and over one thousand employees attended this special mass.

AHRIM's Year

IN REVIEW (CONT'D)

La Fête du Pain

“La Fête du Pain” is a yearly event organised by Les Moulins de la Concorde since 1992. The 2019 edition was held on 17th and 18th May and is themed “Le Pain, Les goûts de Maurice”. Once again under the patronage of AHRIM, several participant bakers and chefs from hotels and restaurants all over the island expressed their intention to participate.

For this year's edition, four competitions will be organised: Panier Gourmand; Restauration Boulangère; Pain Santé; and Pièces Artistiques. The winners from the different competitions will also have the opportunity to follow a training session with one of the ‘Meilleur Ouvrier de France en boulangerie’.

The prize giving ceremony is planned for mid-June 2019.

The winners for the 2018 edition were:

Bread master pieces contest		
First place	Second place (Ex Aequo)	Third place
Ezekel René	Ganwowree Bacan	Anwar Rungi
Vicky Gangoosirdar	Suraj Surjoo Chandradev Kumar	Vishal Jawahir
<i>Sofitel Mauritius L'Imperial Resort & Spa</i>	<i>Lux Grand Gaube Mauritius</i>	<i>Radisson Blu Poste Lafayette Resort and Spa Mauritius</i>
	Tatiah Stret Mulla	
	Beedessy Vimal	
	<i>Long Beach Mauritius</i>	

Restauration Boulangère		
First place	Second place	Third place
Attish Sujesh Mauree	Jude Samuel	Olivier Narainsamy
<i>So Sofitel Mauritius</i>	<i>Labourdonnais Waterfront Hotel</i>	<i>Lux Le Morne Mauritius</i>

Panier Gourmand		
First place	Second place (Ex Aequo)	Third place
Ludovic Gopaul	Sham Bhaya	Billy Dowlet
<i>Lux Le Morne Mauritius</i>	<i>Constance Prince Maurice</i>	<i>Sofitel Mauritius L'Imperial Resort & Spa</i>

Cake decoration contest		
First place	Second place	Third place
Michael Salece	Denis Coomaren	Nooriah Ghurbir
<i>Sugar Beach Resort</i>	<i>Ambre Resort & Spa Mauritius</i>	<i>Ambre Resort & Spa Mauritius</i>

AHRIM's Year

IN REVIEW (CONT'D)

Prizes that rewarded the winners included hotel stays and dinners that were offered by the following hotel members: Mauricia Beachcomber Resort and Spa, Victoria Beachcomber Resort and Spa, Paradis Beachcomber Golf Resort and Spa, Dinarobin Beachcomber Golf Resort and Spa, Canonnier Beachcomber Golf Resort and Spa, Ambre Resort & Spa Mauritius, Sugar Beach Resort, La Pirogue Resort & Spa Mauritius, Long Beach Mauritius, Lux* Belle Mare Mauritius, Lux* Grand Gaube Mauritius, Labourdonnais Waterfront Hotel, Le Suffren Hotel & Marina, Lux Le Morne Mauritius, Mauricia, Outrigger Mauritius Beach Resort, Sofitel L'Impérial Mauritius Resort and Spa, Pearle Beach Resort & Spa, Maritim Resort and Spa Mauritius, Maradiva Villas Resort & Spa, Hilton Mauritius Resort & Spa, Riu Le Morne, Veranda Grand Baie Hotel & Spa, Veranda Pointe aux Biches Hotel, Labourdonnais Waterfront Hotel, Le Suffren Hotel & Marina, Le Suffren Apart'hotel and The Address Boutique Hotel.

Festival International Kreol (FIK)

To close the 13th edition of Festival International Kreol 2018 which was held from 16th to 25th November 2018, a carnival was organised on Sunday 25th November 2018 in Grand Bay. The event was a public celebration, with parades, performance by foreign artists, public street parties and other entertainments along with a procession of some 20 floats. All the floats were decorated and animated to the theme of the Festival International Kreol 2018 “kreolite nou leritaz” and showcased the colours and music of the multi-cultural society of Mauritius.

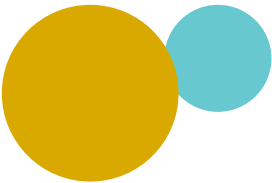
The hotel members of AHRIM from the northern region rallied behind one float and put in a brilliant show with non-stop dance, song and music - all the way from Choisy Mall to Grand Bay football ground.

Le Petit Futé 2019

Our subscription to Le Petit Futé website and guide has been renewed. In the 2019 guide, two-page advertisements served well its use of laying emphasis on the different offerings by our small and medium tourist accommodation providers.

Clean-up of the lagoon of Trou D'Eau Douce

The Ministry of Tourism, with the collaboration of the District Council of Flacq and the Trou D'Eau Douce Pleasure Craft Association, organised a clean-up of the lagoon of Trou D'Eau Douce on Sunday 07th April 2019. AHRIM supported this initiative, which saw the participation of some 250 volunteers from different organisations. The hotel members in the eastern region participated in the event by providing manpower and food and beverages to participants.



OTHER PROJECTS / CASES

AHRIM's actions v/s a major aquaculture project

In October 2017, the EIA licence was granted to Growfish International (Mauritius) Ltd with some 24 conditions attached to it. AHRIM decided to submit its appeal against the granting of this licence before the Environment and Land Use Appeal Tribunal (ELUAT) shortly after as it considered that the concerns of the hotel sector were not taken into consideration. The case was heard on its merits only as from 06th September 2018, after much time spent on administrative matters and legal obstacles. After some 15 hearing sessions, the case was closed before the Tribunal on 17th January 2019.

On 30th Avril 2019, the Tribunal's determination was released and AHRIM's appeal was allowed. The following grounds and sub-statements of AHRIM's Statement of Case, were upheld by the Tribunal:

- The risque "requin" has not been properly studied and assessed by the authorities and the Tribunal even questioned the Ministry of Fisheries who granted its go-ahead for the EIA licence in such 'voidness'. The increased presence of sharks around large-scale fish farms as proposed by Growfish is recognised;
- The lack of crucial information on the project and its proposed variability in scale (upwards or downwards) that has not been brought back before the EIA Committee have also been highlighted; and,
- The conflict of interest or lack of independence of the Ministry of Fisheries who is judge and party to the project is strongly documented; the EIA Licence is qualified as tainted.

At the time of printing, the respective Ministries of Environment and Fisheries, as well as Growfish International (Mauritius) Ltd have filed their appeal against the ELUAT determination of 30th April.

Framework for entertainers/artists

AHRIM participated in several meetings to discuss the need for entertainers to benefit from a legal protection framework. As most hotels have a service provider for performances by these artists, the latter are not employed by the hotels and are thus not governed by the CTIRO. Additionally, artists perform in a variety of venues and for a large array of clients, over and above hotels who also use their services. AHRIM was thus of view that focus should not be on "hotel performers" as per the initial discussions. The assistance of Business Mauritius was then requested as the problems faced by these entertainers go beyond AHRIM's mandate.

Hotel casinos

With the introduction of hotel casinos, a meeting, at the request of AHRIM was scheduled with the GRA to discuss the draft regulations and implementation timeframe. As the GRA Act provides for access only to foreigners and non-residents, AHRIM invited the GRA to study the possibility for access to be extended to hotel residing guests given that access to only foreign and non-resident hotel guests was not an option for hotels. This was however not positively considered by the GRA. Invitations were launched by the GRA for hotels / hotel casino operators to submit their applications to operate hotel casinos back in October 2018.

Coeurlineaire competition - Meilleur Ouvrier de Maurice

The first edition of this Meilleur Ouvrier de Maurice was organised by Vatel under the patronage of the Ministry of Tourism and Mrs Jacqueline Dalais and in collaboration with chefs of the Meilleurs Ouvriers de France from "la maison Paul Bocuse". AHRIM was also associated with this first event.

Some 38 chefs from hotels and restaurants took part in the contest, and the eight finalists were unveiled during a press conference in August 2018. The grand final that took place in Shandrani Beachcomber Resort & Spa designated Ajnisha Neeloo Ugnoo from the Gourmet Emporium as the first Meilleur Ouvrier de Maurice.

MEMBERS' CORNER

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. In May 2018, the rules obtained the formal approval of the Registry of Associations.

Change in Membership



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 90% of hotel rooms and 17 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 by our members in December 2016. In May 2018, the Registry of Associations sanctioned the new rules.

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; and,
- To meet the expectations of its members as well as those of partner stakeholders.



Overview OF AHRIM (CONT'D)

ORGANISATION AND STRUCTURE

List of AHRIM Members, 2018 / 2019 (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 & Spa	190
7.	Maritim Resort & Spa	212
8.	The Ravenala Attitude	272
9.	The Oberoi Mauritius	71
10.	Victoria Beachcomber Resort & Spa	295
11.	Le Méridien Ile Maurice	265
12.	Récif 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 & Spa	333
17.	Casuarina Resort & Spa	109
18.	Le Cardinal Exclusive Resort	13
19.	Club Med La Pointe aux Canonniers	286
20.	Canonnier Beachcomber Golf Resort & Spa	283
21.	Seapoint Boutique Hotel	23
22.	Boutique Hotel 20 Degrés Sud	36
23.	Ocean Villas	40
24.	Mauricia Beachcomber Resort & 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 & Spa	81

HOTELS		No. of Rooms
East		
34.	Radisson Blu Poste Lafayette Resort & Spa Mauritius	100
35.	La Maison d'Été	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 & Spa Mauritius	297
44.	Salt of Palmar	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
South East		
49.	Preskil Beach Resort Mauritius	175
50.	Astroea Beach Hotel	16
51.	Le Peninsula Bay Resort & Spa	88
52.	Shandrani Beachcomber Resort & Spa	327
South		
53.	So Sofitel Mauritius	92
54.	Outrigger Mauritius Resort & Spa	181
55.	Tamassa	214
56.	Heritage Awali Golf & Spa Resort	161
57.	Heritage Le Telfair Golf & Spa Resort	158

HOTELS	No. of Rooms
West / South West	
58. Riu Le Morne	218
59. The St Regis Mauritius Resort	172
60. Lux* Le Morne Mauritius	149
61. Dinarobin Beachcomber Golf Resort & Spa	175
62. Paradis Beachcomber Golf Resort & Spa	293
63. Tamarina Golf & 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 & Spa Mauritius	248
70. Gold Beach Resort & 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
Centre	
75. Hennessy Park Hotel	108
76. Voila Bagatelle	118
77. Gold Crest Business Hotel	50

GUEST HOUSES AND TOURIST RESIDENCES	No. of Rooms
North	
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
South	
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
West/Centre	
12. Villa Salines	12
13. The Bay	12
14. Les Lataniers Bleus (under reconstruction)	-
15. Lakaz Chamarel Exclusive Lodge	20
16. Les Chalets en Champagne	3
Rodrigues	
17. Bakwa Lodge	7

RESTAURANTS
Port Louis
1. Le Courtyard Restaurant
2. Indra Restaurant
Pamplemousses/Riviere du Rempart
3. Le Fangourin, L'Aventure du Sucre
4. Restaurant Reve d'R
Flacq
5. Restaurant Chez Manuel
6. Domaine de l'Etoile Restaurant
Grand Port
7. Le Jardin de Beau Vallon
8. Ile des Deux Cocos
Savanne/Riviere noire
9. Le Bois Chéri Restaurant
10. Le Crocodile Affamé, La Vanille Nature Park
11. Le Saint Aubin Restaurant
12. Restaurant Casela
13. Restaurant Le Chamarel
14. Varangue Sur Morne
Plaines Wilhems/Moka
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

IRS MEMBERS
1. Anahita Mauritius
2. Heritage Villas Valriche
3. La Balise Marina
4. Le Parc de Mont Choisy
5. Tamarina Golf Estate & Beach Club
6. Villas Club Med de la Plantation d'Albion
ASSOCIATE MEMBER
1. Association of Inbound Operators of Mauritius (AIOM)
AFFILIATE MEMBERS
1. Airports of Mauritius Ltd
2. Ecole Hotelière Sir Gaetan Duval
3. Institut Escoffier Ile Maurice
4. Mauritius Chefs Association
5. Mauritius Golf Tourism Association
6. Mauritius Scuba Diving Association

Executive Council, 2018 – 2019

The AHRIM Executive Council comprises of 20 members elected at the Annual General Meeting. Among the elected members, five seats constitute the representatives of Small and Medium Hotels Commission (2), Restaurants Commission, the Association of Inbound Operators Mauritius (AIOM) and the IRS Commission.

Name	Group/Hotel	Position
Mr Jean Michel Pitot	Attitude Resorts	President
Mr Désiré Elliah	LUX* Island Resorts Ltd	Vice President
Mr Tommy Wong	Sun Ltd	Treasurer
SMH - Mr Jean Marc Lagesse	Lakaz Chamarel Exclusive Lodge	Vice Treasurer
Mr Bertrand E. Piat	Beachcomber Resorts & Hotels	Secretary
Mr Jean Louis Pismont	Beachcomber Resorts & Hotels	Immediate Past President
Mr David Anderson	Sun Ltd	Member
Mr Lionel Benzoni	Club Med	Member
Mr Jacques Brune	Hilton Mauritius Resort & Spa	Member
Mr Mathieu de Tonnac	Starwood Hotels & Resort (now Marriott International)	Member
Mr Peter Edler	Maritim Resort & Spa Mauritius	Member
Mr François Eynaud	Veranda Leisure and Hospitality	Member
Mr Fabio Meo	Southern Cross Hotels	Member
Mr Rolph Schmid	Indigo Hotels	Member
Mr Jean Jacques Vallet	Constance Group of Hotels	Member
IRS - Mr Dominic Dupont	La Balise Marina	Member
Restaurant - Mr Paul Williams (up to end February 2019)	Casela World of Adventures	Member
SMH - Mr Clifford Ng	Ocean Villas	Member
Associate – Mr Fabien Lefébure	President of AIOM	Member

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

- 17th July 2018
- 24th September 2018
- 18th October 2018
- 30th November 2018
- 24th January 2019
- 29th May 2019

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 (up to 30 September 2018)
Accounts & Administrative Officer	Mrs Pamela Teeroovengadum
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: ahrim.mu

Auditors: Kemp Chatteris
Legal Advisers: ENSAfrica (Mauritius)

Representation on Boards and Committees, 2018 - 2019

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

Private Sector

- Business Mauritius
- Association of Inbound Operators - Mauritius

Public Sector – Tourism

- Mauritius Tourism Promotion Authority (MTPA) Board
- Star Rating Committee
- Sir Gaëtan 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
- National Wage Consultative 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

2018/2019 STATISTICAL BRIEF ON
MAURITIUS TOURISM



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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.

The Mauritius Tourism Sector at a Glance

Indicator	Unit	2018	
Tourist arrivals	Unit - %	1,399,408	
Air	"	1,359,688	97.2
Sea	"	39,720	2.8
Top 15 source markets			
1. France	Unit - %	285,371	20.4%
2. United Kingdom	"	151,913	10.9%
3. Reunion	"	138,439	9.9%
4. Germany	"	132,780	9.5%
5. South Africa	"	128,097	9.2%
6. India	"	85,765	6.1%
7. China	"	65,736	4.7%
8. Switzerland	"	41,080	2.9%
9. Italy	"	38,361	2.7%
10. Australia	"	20,949	1.5%
11. Austria	"	18,572	1.3%
12. Saudi Arabia	"	16,507	1.2%
13. Netherlands	"	16,419	1.2%
14. Belgium	"	15,727	1.1%
15. Sweden	"	15,539	1.1%
Accommodation capacity (operational at end of period)	Unit		
Hotels	"	113	
Hotel rooms	"	13,523	
Guest houses	"	186	
Guest house rooms	"	2,119	
Tourist residences	"	730	
Tourist residence rooms	"	4,728	
Average hotel room occupancy	%	75	
Tourist nights (by tourists departing in 2018)	"	14,296,274	
Airlines present in Mauritius (scheduled flights)	Unit	20	
Cities with regular non-stop air connectivity with Mauritius	"	31	
Total employment in the sector¹	"	44,000	
Direct employment in large² establishments (end March)	"	31,019	
Hotels	"	24,132	
Food Service	"	3,256	
Travel & Tourism (air transport services, TOs, travel agencies and car rental)	"	3,631	
Gross tourism earnings³ (BoM)	Rs M	64,037	
Proportion of Tourism⁴ in Gross Value Added at current basic prices	%	9.1	
of which contribution of Accommodation & Food Service Activities	%	89.1	
Tourist Profile, selected indicators (Survey of Inbound Tourism year 2017)		2017	
Accommodation arrangements			
Hotel	%	79.6	
Tourist residence	"	8.5	
Guest house	"	5.0	
With friends / relatives	"	5.8	
Other	"	1.1	
Average expenditure per tourist	Rs	45,518	
Average expenditure per tourist night	"	4,409	
Main purpose of visit			
Holiday	%	80.4	
Honeymoon	"	12.3	
Business	"	3.3	
Other	"	4.0	

Glance (Cont'd)

The Mauritius Tourism Sector at a Glance

Indicator	Unit	2018	
Land and sea		Mauritius	Rodrigues
Total land area	Km²	1,868.4	110.1
Forest area (2017)	Hectares	47,066	
Lagoon area	Km2	243	240
Offshore islets	Unit	49	18
Coastline length	Km	322	80
Length of protective coral reef	"	150	90
Public beaches	Unit	129	12
Total sea frontage of public beaches ⁵	Km	47.8	2.92
Culture and sports			
Museums	Unit	12	
UNESCO World Heritage Sites	"	2	
UNESCO Intangible Cultural Heritage of Humanity	"	2	1
Botanical/Endemic gardens	"	4	
Bird sanctuaries (excluding islets)	"	2	
18-hole golf courses	"	10	
Kite surf sites	"	14	
Deep sea fishing sites	"	5	
Environment and biodiversity			
Multilateral Environmental Agreements signed by Mauritius	Unit	36	
International Environmental Conventions and Protocols		14	
State proclaimed protected areas (inc islets)	"	28	4
State protected islets	"	16	2
Islet National Parks	"	8	
Islet Nature Reserves	"	7	2
Islet Ancient Monument	"	1	
Marine protected areas	"	25	5
Marine Parks		2	
Fishing Reserves		23	5
Nature parks, reserves, and domains (excluding islets)	"	15	
Ramsar sites (2 wetlands and 1 marine park)	"	3	
SSR International airport			
ICAO Category 9 airport (maximum is 10)			
Awarded Best Airport in Africa by Skytrax and Airport Council International in 2014, 2015 & 2016			
Capacity: 4 M 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			

1. In Accommodation and food service activities sector
2. From the report on Labour force, Employment and Unemployment based on the results of the Continuous Multi Purpose Household Survey
3. Revised methodolgy: earnings estimated by the Bank of Mauritius from banking records as well as returns submitted by Money-changers and Foreign exchange dealers.
4. Includes the components of Hotels and Restaurants, Transport, Recreational and leisure and Manufacturing, attributable to tourism
5. 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 2018

MAIN TOURIST INDICATORS			
		Progress	National Share
Tourist arrivals:	1,399,408	+4.3%	
Tourist nights:	14,296,274	+4.8%	
Gross tourism earnings:	Rs 64,037 M	+6.3%	
Contribution to GDP:	Rs 36,532 M ¹	+4.5%	8.6% ↑
Employment:	44,000 ²	-3.5%	8.1% ↓
Investment (GFCF)	Rs 4,775 M	-28.8%	12.3% ↑

ACCOMMODATION SECTOR			
Hotels			
- 114 built hotels (13,698 rooms)			
- Average room occupancy: 75 %			
Non-hotel accommodation			
- 730 Tourist Residences (4,728 rooms)			
- 186 Guest Houses (2,119 rooms)			
Gross Direct Investment Flows (Jan-Sep)	Rs 11,500 M	+4.2%	
- Accommodation and Food Services Activities	Rs 63 M	94.0%	
Rupee v/s Selected Hard Currencies (Average for 12 months ended March 2019)			
- Euro	40.4070	+0.3	
- Pound Sterling	45.7908	+0.1	
- US Dollar	34.8925	(0.7)	
- South African Rand	2.5797	+4.1	
Industry indebtedness (at end Dec)			
- Accommodation and food service activity	Rs 38,425 M		
- Hotels	Rs 36,494 M	-11.7%	
Taxes paid			
- Estimated VAT paid	Rs 4,611 M	+6.5%	
- Corporate tax (FY2017/18)	Rs 194 M	+2.1%	
- Environment Protection Fee (FY2017/18)	Rs 328 M	+4.1%	

1: of which 84% 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 2017
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

TOURIST PROFILE	
Top 7 main markets (share, %)	
1) France (20.4%)	↓
2) United Kingdom (10.9%)	↑
3) Reunion (9.9 %)	↓
4) Germany (9.5%)	↑
5) South Africa (9.2%)	↑
6) India (6.1%)	↓
7) China (4.7%)	↓
Main purpose of travel: Holidays (93.4%)	
Average length of stay: 10.4 days	
Average expenditure per tourist: Rs 45,760 ³	
Average expenditure per tourist night: Rs 4,479 ³	
Share of expenditure devoted to accommodation (2017): 61.7% ⁴	

SSR INTERNATIONAL AIRPORT	
• A Category 9 ICAO airport	
• No. of airlines (for scheduled flights): 20	
• No. of cities with direct connectivity: 31	
• No. of air seats: 2,435,285 (one-way)	
• Average load factor: 75.1%	
• 3,728,970 incoming and outgoing passengers (2017)	
- 3,533,515 international	
- 195,455 domestic	
• 1,862,289 passenger arrivals, of which;	
- 1,399,408 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	
• 42 cruise ship calls	
• 71,997 passenger arrivals by sea, of which:	
- 67,515 cruise passengers	
• 66,796 tourists	
• 9,294 excursionists	
• 20,703 crew members	
• 722 Mauritians	

Table A-1: Gross Value Added by Selected Industry Group at Current Basic Prices, 2015 - 2019

Selected industry group	2015	2016	2017 ^r	2018 ^r	2019 ^f
GDP contribution, Rs M					
Accommodation and food service activities	23,520	26,727	28,864	30,650	32,195
Sugar sector	3,727	4,129	3,116	2,290	2,321
Textile	16,700	15,887	15,633	15,312	15,525
Wholesale and retail trade	40,968	43,006	45,844	48,875	51,326
Financial and insurance activities	43,599	46,614	48,260	49,514	50,966
Real estate activities	21,923	22,813	23,907	24,962	25,886
Total Gross Value Added (basic prices)	363,547	385,902	402,998	423,622	444,263
Share by selected industry group					
Accommodation and food service activities	6.5%	6.9%	7.2%	7.2%	7.2%
Sugar sector	1.0%	1.1%	0.8%	0.5%	0.5%
Textile	4.6%	4.1%	3.9%	3.6%	3.5%
Wholesale and retail trade	11.3%	11.1%	11.4%	11.5%	11.6%
Financial and insurance activities	12.0%	12.1%	12.0%	11.7%	11.5%
Real estate activities	6.0%	5.9%	5.9%	5.9%	5.8%
Real growth rates of selected industry group (% over previous year)					
Accommodation and food service activities	+8.7	+9.2	+4.6	+4.1	+3.6
Sugar sector					
Sugarcane	-3.8	+5.2	-7.9	-9.1	+0.2
Sugar manufacturing	-5.1	+6.6	+2.4	-19.0	+7.0
Textile	-2.8	-5.8	-0.7	-6.8	-0.5
Wholesale and retail trade	+2.8	+3.0	+2.9	+3.5	+3.4
Financial and insurance activities	+5.3	+5.7	+5.5	+5.4	+5.2
Real estate activities	+4.3	+4.1	+3.4	+3.3	+3.4
Gross Value Added at basic prices	+3.1	+3.6	+3.6	+3.6	+3.6

Source: Statistics Mauritius

Table A-2: Gross Value Added of Selected Sub-sectors at Current Basic Prices, 2015 - 2019

Selected sub-sector	2015	2016 ^r	2017 ^r	2018 ^r	2019 ^f
Gross Value Added, Rs M					
Tourism ¹	27,070	31,865	34,349	36,532	38,463
ICT ²	21,137	21,970	22,894	24,248	25,448
Seafood ³	3,561	3,702	4,038	4,096	4,282
Freeport ⁴	2,380	2,457	2,508	2,650	2,695
Global business ⁵	21,072	21,461	22,749	24,003	24,827
Share of the selected industry group (%)					
Tourism ¹	7.4	8.3	8.5	8.6	9.1
ICT ²	5.8	5.7	5.7	5.7	6.0
Seafood ³	1.0	1.0	1.0	1.0	1.0
Freeport ⁴	0.7	0.6	0.6	0.6	0.6
Global business ⁵	5.8	5.6	5.6	5.7	5.9
Sectoral real growth rates (% over previous year)					
Tourism ¹	+7.2	+11.1	+5.2	+4.5	+3.8
ICT ²	+7.1	+5.4	+4.4	+5.3	+4.8
Seafood ³	+6.6	+3.6	+4.0	+6.3	+3.0
Freeport ⁴	+4.7	+2.9	+3.5	+2.4	+1.1
Global business ⁵	+4.0	+4.0	+4.3	+4.0	+3.8

1. Covers the components of "Accommodation and food service activities", "Transport", "Recreational and leisure" and "Manufacturing", attributable to tourism.
2. Covers components of "Manufacturing", "Wholesale and retail trade", "Information & communication" and "Call centres", related to ICT.
3. Covers mainly the activities of "fishing" and "fish processing"
4. Covers "wholesale and retail trade" and "storage" activities of the freeport operators
5. 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, 2012 - 2017 (000s)

Selected industry group	2012	2013	2014	2015	2016	2017
Large establishments (i.e. employing 10 or more persons)						
Agriculture, forestry and fishing	14.9	14.1	14.0	13.5	13.3	13.2
Manufacturing	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	4.4	4.4	4.3	4.4	4.4	4.4
Construction	15.1	14.6	12.7	12.4	12.4	12.4
Wholesale and retail trade; repair of motor vehicles and motorcycles	26.4	26.6	27.0	27.4	27.6	27.8
Transportation and storage	16.8	16.8	16.8	17.0	17.0	17.0
Accommodation and food service activities	25.4	25.4	25.7	26.0	26.8	27.1
Information and communication	10.3	10.5	10.8	11.2	11.5	11.7
Financial and insurance activities	12.3	12.6	12.9	12.9	12.9	12.9
Real estate activities	0.5	0.7	0.8	0.8	0.8	0.9
Professional, scientific and technical activities	5.8	6.1	6.2	6.4	6.9	7.2
Administrative and support service activities	15.2	15.2	16.0	15.8	15.9	16.0
Other industries	89.2	90.0	90.9	92.3	92.5	94.2
Total employment in large establishments	311.5	312.5	313.5	314.1	314.2	316.9
Other establishments						
Agriculture, forestry and fishing	24.4	26.2	27.3	28.0	28.0	28.0
Manufacturing	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	1.1	1.1	1.1	1.1	1.1	1.1
Construction	27.7	28.1	28.0	27.8	27.2	27.7
Wholesale and retail trade; repair of motor vehicles and motorcycles	59.4	61.7	64.0	65.6	66.4	68.3
Transportation and storage	15.8	19.0	19.6	21.3	21.5	22.4
Accommodation and food service activities	11.6	12.8	13.3	13.9	14.0	14.5
Information and communication	5.5	5.9	5.9	5.9	5.9	5.9
Financial and insurance activities	0.3	0.5	0.6	0.6	0.6	0.6
Real estate activities	0.6	0.6	0.6	0.6	0.6	0.6
Professional, scientific and technical activities		4.5	4.8	5.1	5.2	5.4
Administrative and support service activities	8.7	9.3	9.4	9.4	9.3	9.3
Other industries	45.5	43.7	44.9	46.2	46.7	47.3
Total employment in other establishments	224.2	239.5	245.7	252.5	253.0	256.6
All establishments						
Agriculture, forestry and fishing	39.3	40.3	41.3	41.5	41.3	41.2
Manufacturing	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	5.5	5.5	5.4	5.5	5.5	5.5
Construction	42.8	42.7	40.7	40.2	39.6	40.1
Wholesale and retail trade; repair of motor vehicles and motorcycles	85.8	88.3	91.0	93.0	94.0	96.1
Transportation and storage	32.6	35.8	36.4	38.3	38.5	39.4
Accommodation and food service activities	37.0	38.2	39.0	39.9	40.8	41.6
Information and communication	15.8	16.4	16.7	17.1	17.4	17.6
Financial and insurance activities	12.6	13.1	13.5	13.5	13.5	13.5
Real estate activities	1.1	1.3	1.4	1.4	1.4	1.5
Professional, scientific and technical activities	9.5	10.6	11.0	11.5	12.1	12.6
Administrative and support service activities	23.9	24.5	25.4	25.2	25.2	25.3
Other industries	134.7	133.7	135.8	138.5	139.2	141.5
Total employment	535.7	552.0	559.2	566.6	567.2	573.5

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, 2013 - 2017

Tourism-related industries	2013		2014		2015		2016		2017	
	No.	%	No.	%	No.	%	No.	%	No.	%
Accommodation services for visitors ¹	21,759	34.8	21,559	33.4	21,709	32.3	22,715	32.1	23,240	31.5
Food and beverage serving services	14,364	23.0	15,326	23.8	16,221	24.1	17,175	24.2	17,857	24.2
Road passenger transport services	5,462	8.7	5,760	8.9	6,210	9.2	6,555	9.3	7,080	9.6
Air and sea passenger transport services	2,446	3.9	2,411	3.7	2,451	3.6	2,449	3.5	2,388	3.2
Transport equipment rental services	1,642	2.6	1,742	2.7	1,897	2.8	2,067	2.9	2,247	3.0
Travel agencies and other reservation services	2,173	3.5	2,099	3.3	2,198	3.3	2,302	3.2	2,377	3.2
Recreational, cultural services and sporting services	4,025	6.4	4,325	6.7	4,646	6.9	4,994	7.1	5,348	7.3
Country specific tourism characteristics goods and services	3,216	5.1	3,457	5.4	3,699	5.5	3,958	5.6	4,156	5.6
other services	7,497	12.0	7,842	12.2	8,221	12.2	8,621	12.2	8,985	12.2
Total employment in tourism industry	62,584	100.0	64,521	100.0	67,252	100.0	70,836	100.0	73,678	100.0
Total employment	552,000		559,200		566,6000		567,200		573,500	
Share of total employment	11.3%		11.5%		11.9%		12.5%		12.8%	

1. Includes Accommodation services associated with all types of vacation home ownership
Source: Tourism Satellite Account, 2017, Statistics Mauritius

Table A-5: Direct Employment in Large Establishments in the Tourism Industry, 2012-2018 (at end March)

Type of establishment	2012	2013	2014	2015	2016 ^a	2017 ^a	2018 ^b
Hotels	22,210	22,432	22,593	22,630	23,624	24,087	24,054
Restaurants	2,779	3,027	3,167	3,249	3,371	3,168	3,256
Travel & Tourism	3,946	3,865	3,817	3,804	3,755	3,664	3,631
Total	28,935	29,324	29,577	29,683	30,750	30,919	30,941

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
Total	2,753	8,352	3,961	4,979	2,972	1,431	1,054	1,037	827	27,367

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

Table A-7: Foreign Workers Employed in Large Establishments by Industrial Group, March 2011 - March 2018

Industrial Group	2011	2012	2013	2014	2015	2016	2017 ^r	2018 ^o
Agriculture, forestry and fishing	22	39	66	200	131	51	52	47
Manufacturing	18,907	19,063	21,844	23,492	24,272	24,032	23,767	24,649
Electricity, gas, steam and air conditioning supply & water supply, sewerage, waste management and remediation activities	10	20	19	11	19	24	24	25
Construction	1,682	2,686	2,975	2,959	2,962	2,817	2,358	2,654
Wholesale and retail trade; repair of motor vehicles and motorcycles	205	207	216	279	335	306	394	512
Transportation and storage	97	114	102	119	136	126	117	120
Accommodation and food service activities	363	415	428	445	423	412	374	359
Information and communication	188	516	289	330	342	404	400	396
Financial and insurance activities	94	100	135	153	149	159	174	194
Real estate activities	4	5	6	21	17	14	17	12
Professional, scientific and technical activities	126	139	148	195	182	189	170	181
Administrative and support service activities	107	139	114	104	109	124	181	166
Public administration and defence; compulsory social security	22	5	26	22	3	27	13	29
Education	161	185	177	175	161	168	166	169
Human health and social work activities	234	226	175	195	204	189	205	200
Arts, entertainment and recreation	22	19	23	22	24	17	21	27
Other service activities	64	113	112	101	94	85	79	86
Total	22,325	24,003	26,865	28,831	29,563	29,144	28,512	29,826

Source: Statistics Mauritius

Table A-8: Wage Rate Index in Selected Industry Groups, 2012 - 2018

Industry group	Weight	2012	2013	2014	2015	2016	2017 ^r	2018 ^o
Accommodation and food service activities	65	103.1	106.6	111.0	119.9	122.0	102.9	105.5
Wholesale & retail trade; repair of motor vehicles and motorcycles	73	102.3	111.2	114.8	120.1	125.0	104.0	109.9
Financial and insurance activities	75	100.8	108.5	115.2	120.0	128.0	104.8	113.0
Real estate activities	4	101.9	109.2	112.7	129.5	145.0	103.1	105.4
All sectors	1,000	103.8	114.9	121.1	127.7	134.3	103.8	108.3

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
Base as from 2012: Q4 of 2011=100; Base as from 2017: Q4 of 2016=100

Source: Statistics Mauritius

Table A-9:Average Monthly Earnings in the Hotel and Restaurant Sector, 2011 - 2018 (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	19,264	3.4
2017	19,622	1.9
2018	20,010	2.0

Source: Statistics Mauritius

Table A-10: Labour, Capital and Multifactor Productivity by Selected Industry Groups, 2012 - 2018

Industrial Sector	2012	2013	2014	2015 ^r	2016 ^r	2017 ^r	2018
Labour productivity							
Accommodation and food service activities	89.7	89.4	92.9	98.7	105.4	108.1	112.6
Construction	109.7	100.9	96.9	93.3	94.7	100.6	109.8
Information and communication	155.8	160.8	168.0	175.4	182.6	190.4	200.9
Wholesale and retail trade	97.3	97.2	97.1	97.7	99.6	100.4	104.0
Financial and insurance activities	99.3	100.8	103.2	108.7	114.9	121.2	127.7
Real estate activities (other)	88.1	80.0	79.6	84.5	89.1	87.4	91.2
Export oriented manufacturing enterprises	140.8	137.8	139.2	137.4	134.1	135.3	135.2
Total economy	115.3	115.7	118.3	120.4	124.6	127.6	132.3
Capital productivity							
Accommodation and food service activities	70.9	71.5	75.8	82.7	90.7	93.5	97.8
Construction	63.5	55.8	48.3	44.5	45.0	48.6	47.6
Information and communication	157.9	166.8	176.4	187.0	197.2	208.5	213.2
Wholesale and retail trade	77.1	76.5	77.5	79.1	80.8	82.1	84.1
Financial and insurance activities	104.3	105.3	103.5	102.2	102.4	104.9	117.7
Real estate activities (other)	88.5	94.5	98.7	100.9	101.7	97.3	86.5
Export oriented manufacturing enterprises	162.4	157.0	151.0	151.5	145.3	146.6	143.6
Total economy	95.9	95.6	96.3	97.2	98.3	99.2	99.6
Multifactor productivity							
Accommodation and food service activities	75.8	76.4	80.6	87.2	94.9	97.8	102.1
Construction	79.6	71.1	63.7	59.8	60.7	64.8	65.1
Information and communication	157.1	164.2	172.7	181.8	190.6	200.2	207.6
Wholesale and retail trade	82.1	81.6	82.2	83.6	85.3	86.5	88.9
Financial and insurance activities	102.5	103.7	103.4	104.1	105.7	109.8	116.7
Real estate activities	88.4	92.0	95.3	97.6	99.4	95.5	87.3
Export oriented manufacturing enterprises		145.6	143.9	142.8	138.1	139.3	138.0
Total economy	102.9	103.1	104.2	105.5	107.6	109.3	111.0

Notes:
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;
Base: 2007=100

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

Table A-11: Monthly Gross Tourism Earnings, 2014 - 2019 (Rs M)

Month	2014	2015	New methodology				
			2015	2016	2017	2018	2019
January	4,190	4,340	4,872	5,250	6,119	6,615	6,178
February	3,769	3,534	3,918	4,912	4,713	6,060	5,140
March	3,557	3,988	4,381	4,841	5,254	5,808	5,200
April	3,886	3,671	4,091	4,382	4,830	5,631	
May	3,799	3,276	3,659	4,278	4,593	5,228	
June	3,376	N/A	3,318	3,525	3,810	4,118	
July	3,237	N/A	3,570	3,806	4,205	4,401	
August	3,363	N/A	3,654	4,322	4,329	4,501	
September	3,055	N/A	3,705	3,894	4,243	3,895	
October	3,703	N/A	4,486	4,973	5,511	5,440	
November	3,621	N/A	4,785	5,251	6,026	5,678	
December	4,748	N/A	5,751	6,433	6,629	6,662	
Total	44,304	N/A	50,191	55,867	60,262	64,037	

Based on Tourism Earnings published by the Bank of Mauritius						
Average Expenditure Per capita, Rs	42,668	N/A	43,597	43,809	44,909	45,760
Average Expenditure Per capita per diem², Rs	3,932	N/A	4,165	4,259	4,418	4,479

Based on Survey of Outbound/Inbound Tourism						
Per capita, Rs	N/A	43,986	44,660	45,518	N/A	
Per capita per diem, Rs	N/A	4154	4,290	4,409	N/A	

1: Earnings are calculated based on monthly statements of Inward and Outward Remittances of Commercial Banks.
2: Methodology of calculating tourist nights is different for the following periods:
as well as returns submitted by money changers and foreign exchange dealers as from 2015.
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

Table A-12: Tourism Earnings and Tourist Arrivals by Quarter and Semester, 2012 - 2019

Quarter/Semester	2012	2013	2014	New methodology				
				2015	2016	2017	2018	2019
Tourist earnings by quater, Rs M								
Quarter 1	13,768	12,064	11,516	13,172	15,003	16,086	18,483	16,518
Quarter 2	9,780	9,991	11,061	11,068	12,185	13,233	14,977	
Quarter 3	8,406	7,050	9,655	10,929	12,022	12,777	12,797	
Quarter 4	12,424	11,452	12,072	15,022	16,657	18,166	17,781	
Total	44,378	40,557	44,304	50,191	55,867	60,262	64,037	
Tourist earnings by semester, Rs M								
Semester 1	23,548	22,055	22,577	24,240	27,188	29,319	33,460	
Semester 2	20,830	18,502	21,727	25,951	28,679	30,943	30,578	
Total	44,378	40,557	44,304	50,191	55,867	60,262	64,037	
Tourist arrivals by quarter								
Quarter 1	261,995	265,838	263,060	291,047	327,836	339,682	356,415	352,305
Quarter 2	205,158	205,826	227,087	242,734	258,628	286,177	290,450	
Quarter 3	208,431	222,779	234,908	269,572	294,426	308,820	328,201	
Quarter 4	289,857	298,663	313,279	347,899	394,337	407,181	424,342	
Total	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408	
Tourist arrivals by semester								
Semester 1	467,153	471,664	490,147	533,781	586,464	625,859	646,865	
Semester 2	498,288	521,442	548,187	617,471	688,763	716,001	752,543	
Total	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408	

Sources: Statistics Mauritius and Bank of Mauritius

Table A-13: Distribution of Tourism Expenditure by Product and Category of Tourists, 2017

Product group	Internal tourism exp, %			Outbound tourism exp, %
	Inbound	Domestic¹	Total internal	
Tourism Characteristics Products	98.8	98.9	98.8	97.3
Accommodation² services for visitors	53.8	13.1	50.1	34.7
Food and beverage serving services	9.3	6.5	9.0	13.7
Road passenger transport services	4.2	2.2	4.0	5.5
Air and sea passenger transport services	12.8	52.1	16.3	8.8
Transport equipment rental services	1.4	2.2	1.5	0.9
Travel agencies and other reservation services	6.6	3.4	6.3	2.7
Recreational, cultural services and sporting services	3.1	6.8	3.5	2.7
Country specific tourism characteristics goods and services	7.6	12.6	8.0	28.3
Other consumption products and services	1.2	1.1	1.2	2.7
Total tourism expenditure	100.0	100.0	100.0	100.0
Total tourism expenditure, Rs M	69,142	6,854	75,996	25,250

1 Comprises expenditure for a domestic trip (between Mauritius and Rodrigues) and part of an outbound tourism trip by residents (mainly through air travel)
2 Includes Accommodation services associated with all types of vacation home ownership

Source: Tourism Satellite Account, 2017, Statistics Mauritius

Table A-14: Tourism Share in the Output of Tourism and Other Industries, 2017 (Rs M)

Tourism and Other industries		Total output of toursim industries	Other industries	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 for visitors ¹	Output	42,147		42,147		3,308	45,455		83.8
	Tourism share	34,793		34,793		3,308		38,101	
Food and beverage serving industry	Output	10,643		10,643		658	11,302		60.5
	Tourism share	6,181		6,181		658		6,840	
Road passenger transport services	Output	7,692		7,692			7,692		39.6
	Tourism share	3,043		3,043				3,043	
Air and sea passenger transport services	Output	29,678		29,678		1,522	31,200		39.8
	Tourism share	10,892		10,892		1,522		12,413	
Transport equipment rental services	Output	5,500		5,500		184	5,684		19.6
	Tourism share	930		930		184		1,114	
Travel agencies and other reservation services	Output	4,600		4,600		561	5,161		93.4
	Tourism share	4,261		4,261		561		4,821	
Recreational, cultural services and sporting services	Output	19,840		19,840		253	20,093		13.1
	Tourism share	2,381		2,381		253		2,634	
Country specific tourism characteristics goods and services	Output	3,054	2,138	5,192	916		6,109		100.0
	Tourism share	3,054	2,138	5,192	916			6,109	
Total tourism industries	Output	123,155	2,138	125,293	916	6,486	132,695		56.6
	Tourism share	65,535	2,138	67,673	916	6,486		75,075	
Other consumption products and services									
Other industries	Output		625,451	625,451	53,160	47,717	726,328		0.1
	Tourism share		920	920				920	

1. Includes Accommodation services associated with all types of vacation home ownership

Source: Tourism Satellite Account, 2017, Statistics Mauritius

Table A-15: Production Accounts of Tourism Industries and Other Industries (at basic prices), 2017 (Rs 000)

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
Tourism Industries							
Accommodation services ¹	Output	42,147,200	17,701,824	24,445,376	8,850,912	884,788	14,709,676
	Tourism share	34,792,908	14,613,021	20,179,887	7,306,511	730,401	12,142,975
Food and beverage-serving industry	Output	10,643,232	4,576,590	6,066,642	2,235,079	228,751	3,602,813
	Tourism share	6,181,476	2,596,220	3,585,256	1,298,110	132,856	2,154,290
Road passenger transport services	Output	7,692,308	2,692,308	5,000,000	1,615,385	134,569	3,250,046
	Tourism share	3,043,300	1,065,155	1,978,145	639,093	53,239	1,285,813
Air and sea passenger transport	Output	29,678,000	23,297,230	6,380,770	5,045,260	1,164,462	171,048
	Tourism share	10,891,868	8,386,738	2,505,130	1,851,618	427,359	226,153
Transport equipment rental services industry	Output	5,500,000	1,815,000	3,685,000	825,000	90,719	2,769,281
	Tourism share	930,014	306,905	623,109	139,502	15,340	468,267
Travel agencies and other reservation services industry	Output	4,600,000	2,070,000	2,530,000	782,000	103,465	1,644,535
	Tourism share	4,260,521	1,917,234	2,343,287	681,683	95,829	1,565,774
Sports, cultural and recreational industry	Output	19,840,000	6,944,000	12,896,000	2,976,000	347,081	9,572,919
	Tourism share	2,380,704	833,246	1,547,458	357,106	41,648	1,148,704
Retail trade of country-specific goods	Output	3,054,273	763,568	2,290,705	488,684	38,165	1,763,856
	Tourism share	3,054,273	763,568	2,290,705	488,684	38,165	1,763,856
Total tourism industries	Output	123,155,013	59,860,520	63,294,493	22,818,319	2,992,000	37,484,174
	Tourism share	65,535,064	30,482,088	35,052,976	12,762,306	1,534,838	20,755,832
Other industries							
Other industries	Output	627,589,431	287,641,924	339,947,507	143,378,681	209,000	196,359,826
	Tourism share	3,058,098	1,401,613	1,656,486	378,440	126	39
Gross output at basic prices	Output	750,744,444	347,502,444	403,242,000	166,197,000	3,201,000	233,844,000
	Tourism share	68,593,162	31,883,701	36,709,461	13,140,746	1,534,964	20,755,871

1. Includes Accommodation services associated with all types of vacation home ownership

Source: Tourism Satellite Account, 2017, Statistics Mauritius

Table A-16: Balance of Trade of Tourism Sector, Export-oriented Enterprises and Total Economy, 2013 - 2017 (Rs M)

Details	2013	2014	2015	2016	2017 ^p
Total exports of goods and services	180,305	200,198	200,007	193,835	193,495
of which: Tourism sector	48,877	52,650	58,854	64,860	69,104
Export-oriented enterprises	46,778	49,069	48,487	44,422	43,145
Total imports of goods and services	229,219	243,980	241,189	234,104	253,234
of which: Tourism sector	14,047	15,408	21,810	23,217	25,251
Export-oriented enterprises	29,340	28,596	27,312	25,638	27,179
Balance of Trade (goods and services)	(48,914)	(43,782)	(41,182)	(40,269)	(59,739)
of which: Tourism sector	34,830	37,242	37,044	41,643	43,853
Export-oriented enterprises	17,438	20,473	21,175	18,784	15,966

Source: Tourism Satellite Account, 2017, Statistics Mauritius

Table B-1: Passenger Arrivals by Type and Mode of Transport, 2008, 2013, 2018 and 2019

Details	2008	2013	2018	Quarter 1	
				2018	2019
Passenger arrivals by mode of transport					
Arrivals by air	1,184,955	1,288,602	1,790,292	449,985	439,626
Arrivals by sea	41473	32,845	71,997	25,190	41,249
Total	1,226,428	1,321,447	1,862,289	475,175	480,875
Passenger arrivals by type					
Tourists	930,456	993,106	1,399,408	356,415	352,305
Excursionists²	17,783	22,179	31,709	13,246	13,203
Mauritian residents	229,580	258,780	431,172	105,514	115,367
Other (crew, foreign workers, etc)	48,609	47,382			
Total	1,226,428	1,321,447	1,862,289	475,175	480,875
Passenger arrivals by sea and by type					
Cruise travellers	26,388	23,180	67,515	24,058	39,877
- Tourists	n.a	7,379	36,796	11,313	22,586
- Excursionists	n.a	8,697	9,294	4,980	5,860
- Mauritian residents	n.a	15	722	117	359
- Crew members	9,351	7,089	20,703	7,648	11,072
Other	15,085	9,665	4,482	1,132	1,372
Total	41,473	32,845	71,997	25,190	41,249

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, 2012 - 2019

Year	Mode of transport		Total	Growth
	Air	Sea		
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%
2018	1,359,688	39,720	1,399,408	4.3%
January - March				
2017	329,379	10,303	339,682	3.6%
2018	344,231	12,184	356,415	4.9%
2019	328,764	23,541	352,305	-1.2%

Source: Statistics Mauritius

Table B-3: Tourist Arrivals by Mode of Transport and by Selected Country of Residence, Quarter 1 of 2018 & 2019

Continent by country of residence	January - March 2018			January - March 2019			Year on Year Change		
	Air	Ship	Total	Air	Ship	Total	Air	Ship	Total
Continent									
Europe	216,352	9,873	226,225	209,730	20,588	230,318	-3.1%	108.5%	1.8%
Africa	70,754	494	71,248	68,005	590	68,595	-3.9%	19.4%	-3.7%
Asia	46,729	773	47,502	41,226	1,285	42,511	-11.8%	66.2%	-10.5%
Oceania	4,220	276	4,496	3,493	256	3,749	-17.2%	-7.2%	-16.6%
America	6,073	753	6,826	6,171	808	6,979	1.6%	7.3%	2.2%
Others & Not Stated	103	15	118	139	14	153	35.0%	-6.7%	29.7%
Total	344,231	12,184	356,415	328,764	23,541	352,305	-4.5%	93.2%	-1.2%
Top 15 markets in Q1 2019									
France	81,351	1,432	82,783	81,868	3,762	85,630	0.6%	162.7%	3.4%
Germany	29,326	5,456	34,782	26,494	10,719	37,213	-9.7%	96.5%	7.0%
Reunion Island	39,139	414	39,553	34,802	318	35,120	-11.1%	-23.2%	-11.2%
United Kingdom	30,876	520	31,396	27,921	656	28,577	-9.6%	26.2%	-9.0%
South Africa	23,619	35	23,654	23,646	193	23,839	0.1%	451.4%	0.8%
India	17,119	91	17,210	16,164	89	16,253	-5.6%	-2.2%	-5.6%
China	17,917	111	18,028	12,192	192	12,384	-32.0%	73.0%	-31.3%
Italy	8,551	563	9,114	9,137	964	10,101	6.9%	71.2%	10.8%
Switzerland	10,095	338	10,433	8,044	762	8,806	-20.3%	125.4%	-15.6%
Czech Republic	5,908	58	5,966	7,130	211	7,341	20.7%	263.8%	23.0%
Sweden	7,678	125	7,803	6,611	276	6,887	-13.9%	120.8%	-11.7%
Austria	6,977	260	7,237	6,046	718	6,764	-13.3%	176.2%	-6.5%
Poland	3,729	61	3,790	4,189	239	4,428	12.3%	291.8%	16.8%
Russia	3,795	113	3,908	3,939	359	4,298	3.8%	217.7%	10.0%
Netherlands	3,236	78	3,314	3,548	90	3,638	9.6%	15.4%	9.8%
Total Top 15	289,316	9,655	298,971	271,731	19,548	291,279	-6.1%	102.5%	-2.6%

Source: Statistics Mauritius

Table B-4: Monthly Tourist Arrivals and Growth Rate, 2012 - 2019

Month	2012	2013	2014	2015	2016	2017	2018	2019
January	98,837	92,894	96,285	103,556	118,426	124,362	120,974	122,273
February	79,331	81,185	78,899	91,066	100,706	105,049	115,600	115,613
March	83,827	91,759	87,876	96,425	108,704	110,271	119,841	114,419
April	79,137	76,223	88,102	90,221	91,992	111,432	104,967	
May	71,396	74,596	78,545	87,054	94,830	96,557	101,138	
June	54,625	55,007	60,440	65,459	71,806	78,188	84,345	
July	76,166	77,374	81,934	95,694	108,122	112,347	115,881	
August	65,896	73,454	78,466	89,422	94,920	100,191	109,471	
September	66,369	71,951	74,508	84,456	91,384	96,282	102,849	
October	89,994	92,520	101,323	109,014	130,421	130,070	134,052	
November	84,398	89,057	91,213	106,204	115,782	121,496	132,247	
December	115,465	117,086	120,743	132,681	148,134	155,615	158,043	
Total	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408	

Monthly growth rate	2012	2013	2014	2015	2016	2017	2018	2019
January	-3.0%	-6.0%	3.7%	7.6%	14.4%	5.0%	-2.7%	1.1%
February	2.5%	2.3%	-2.8%	15.4%	10.6%	4.3%	10.0%	0.0%
March	0.6%	9.5%	-4.2%	9.7%	12.7%	1.4%	8.7%	-4.5%
April	-0.0%	-3.7%	15.6%	2.4%	2.0%	21.1%	-5.8%	
May	4.7%	4.5%	5.3%	10.8%	8.9%	1.8%	4.7%	
June	0.1%	0.7%	9.9%	8.3%	9.7%	8.9%	7.9%	
July	-2.4%	1.6%	5.9%	16.8%	13.0%	3.9%	3.1%	
August	-1.4%	11.5%	6.8%	14.0%	6.1%	5.6%	9.3%	
September	2.3%	8.4%	3.6%	13.4%	8.2%	5.4%	6.8%	
October	-0.7%	2.8%	9.5%	7.6%	19.6%	-0.3%	3.1%	
November	-3.4%	5.5%	2.4%	16.4%	9.0%	4.9%	8.8%	
December	2.8%	1.4%	3.1%	9.9%	11.6%	5.1%	1.6%	
Total	0.1%	2.9%	4.6%	10.9%	10.8%	5.2%	4.3%	

Source: Statistics Mauritius

Table B-5: Tourist Arrivals by Country of Residence, 2012 - 2019

Country of Residence	2012	2013	2014	2015	2016	2017	2018	Jan - Mar	
								2018	2019
EUROPE	555,528	547,046	570,684	631,627	734,506	780,209	824,334	226,225	230,318
Austria	8,151	7,937	8,303	11,425	16,643	17,596	18,572	7,237	6,764
Belgium	10,967	11,566	11,465	14,223	15,675	16,420	15,727	2,662	2,597
Czech Republic	5,247	5,543	6,852	7,265	8,503	10,495	14,254	5,966	7,341
France	256,929	244,752	243,655	254,323	271,963	273,419	285,371	82,783	85,630
Germany	55,186	60,530	62,212	75,237	103,761	118,856	132,780	34,782	37,213
Italy	40,009	31,205	29,553	29,185	31,337	35,101	38,361	9,114	10,101
Netherlands	4,434	4,499	4,795	6,926	10,080	13,269	16,419	3,314	3,638
Spain	9,473	8,441	8,632	10,013	15,304	15,252	15,063	2,079	1,570
Sweden	4,295	4,577	6,452	11,634	14,551	15,516	15,539	7,803	6,887
Switzerland	26,002	27,756	29,273	30,680	36,272	40,252	41,080	10,433	8,806
UK	87,648	98,017	115,239	129,754	141,904	149,807	151,913	31,396	28,577
CIS	23,094	18,689	16,222	14,489	13,624	15,226	14,920	5,299	6,253
Russian Federation	19,429	14,905	13,287	11,406	9,295	11,153	11,007	3,908	4,298
Other European	24,093	23,534	28,031	36,473	54,889	59,000	64,335	23,357	24,941
AFRICA	270,386	277,773	274,164	284,682	291,890	301,898	312,618	71,248	68,595
Comoros	1,076	1,147	938	758	800	886	956	232	231
Kenya	2,705	2,865	3,266	3,376	3,185	3,422	4,035	602	917
Malagasy Rep	13,563	13,943	13,038	12,215	11,740	12,730	14,365	2,516	3,065
Reunion Is	144,340	143,114	141,659	143,845	146,203	146,040	138,439	39,553	35,120
Seychelles	6,779	7,187	6,926	5,652	6,393	6,258	5,370	1,004	1,020
South Africa	89,058	94,208	93,075	101,943	104,834	112,129	128,097	23,654	23,839
Zimbabwe	1,568	1,526	1,735	1,892	2,047	2,553	2,496	338	476
Other African	11,297	13,783	13,527	15,001	16,688	17,880	18,860	3,349	3,927
ASIA	104,336	132,554	158,330	197,735	208,233	211,380	213,422	47,502	42,511
Hong Kong SAR	1,269	1,449	1,454	1,327	1,342	1,512	1,519	315	229
India	55,197	57,255	61,162	72,135	82,670	86,294	85,765	17,210	16,253
Japan	1,641	1,768	1,653	1,415	2,655	2,315	2,046	507	614
Korea Republic	2,651	2,778	3,182	3,494	6,025	6,858	7,204	1,283	1,531
Malaysia	1,967	3,174	2,969	2,557	4,628	4,352	2,264	459	345
China, PR	20,885	41,913	63,363	89,584	79,374	72,951	65,736	18,028	12,384
Singapore	2,078	2,112	1,849	1,779	2,840	3,230	2,809	524	468
UAE	5,403	8,161	8,000	9,049	9,614	11,866	12,058	2,243	2,558
Other Asian	13,245	13,944	14,698	16,395	19,085	22,002	34,021	6,933	8,129
OCEANIA	17,863	19,360	18,663	19,084	20,071	22,898	22,604	4,496	3,749
Australia	17,009	18,393	17,434	17,835	18,559	21,271	20,949	4,106	3,361
Other Oceania	854	967	1,229	1,249	1,512	1,627	1,655	390	388
AMERICA	16,624	15,473	16,330	17,891	19,766	24,795	25,912	6,826	6,979
Brazil	3,217	2,886	2,455	1,947	2,912	4,659	3,743	950	1,069
Canada	4,736	4,435	4,669	5,608	6,060	6,908	7,747	1,656	2,086
USA	6,374	5,777	7,139	8,546	8,524	9,655	10,525	2,624	2,362
Other American	2,297	2,375	2,067	1,790	2,270	3,573	3,897	1,596	1,462
Other & Not Stated	704	900	163	233	761	680	518	118	153
ALL COUNTRIES	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408	356,415	352,305

Source: Statistics Mauritius

Table B-6: Tourist Arrivals by Month and Country of Residence, 2018 ¹

Country of Residence	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov ²	Dec	Total
EUROPE	73,352	79,404	73,469	66,349	49,030	35,936	58,726	56,907	57,269	85,253	94,271	94,368	824,334
Austria	2,334	2,726	2,177	1,047	789	474	858	725	878	1,811	2,682	2,071	18,572
Belgium	818	778	1,066	1,623	819	943	2,047	1,157	1,206	1,907	1,637	1,726	15,727
Bulgaria	338	314	262	126	55	49	27	42	53	150	163	334	1,913
Czech Republic	1,352	2,333	2,281	1,190	502	395	509	357	817	977	1,711	1,830	14,254
Croatia	117	70	91	67	20	38	30	42	46	75	103	124	823
Denmark	882	1,505	1,108	259	201	114	750	193	225	832	702	647	7,418
Estonia	172	183	118	12	10	23	25	6	30	32	170	268	1,049
Finland	792	851	777	79	103	79	88	81	128	204	872	895	4,949
France	28,222	30,547	24,014	28,000	17,978	9,695	19,763	19,003	13,195	30,935	31,150	32,869	285,371
Germany	10,127	12,343	12,312	8,006	10,271	6,476	7,831	8,010	12,830	12,941	17,158	14,475	132,780
Greece	63	72	48	63	58	84	66	95	58	91	114	125	937
Hungary	639	548	412	157	90	79	110	70	104	302	304	462	3,277
Ireland	269	173	331	225	276	425	382	352	391	473	345	362	4,004
Italy	3,463	2,821	2,830	2,995	1,371	1,722	1,965	3,968	3,241	3,701	4,747	5,537	38,361
Latvia	127	79	81	54	38	27	22	9	30	113	107	113	800
Lithuania	122	104	94	47	57	39	32	31	42	68	116	77	829
Luxembourg	90	119	202	311	88	45	134	281	127	161	178	188	1,924
Netherlands	1,056	1,237	1,021	1,263	1,027	1,083	2,251	1,848	1,389	1,344	1,453	1,447	16,419
Norway	458	647	637	155	108	437	987	138	249	277	590	649	5,332
Poland	1,681	1,350	759	694	380	497	533	436	660	564	1,782	1,470	10,806
Portugal	255	239	413	307	457	288	449	566	664	471	405	398	4,912
Romania	524	629	325	268	220	182	183	177	319	361	539	641	4,368
Serbia	102	107	63	28	23	33	21	31	34	49	55	110	656
Slovakia	574	731	823	396	172	106	74	70	166	243	446	436	4,237
Slovenia	151	235	118	195	84	81	112	46	77	241	154	247	1,741
Spain	565	550	964	578	697	725	2,368	2,861	2,132	1,520	921	1,182	15,063
Sweden	2,831	2,901	2,071	279	205	352	382	153	226	953	2,043	3,143	15,539
Switzerland	3,165	3,445	3,823	4,618	1,599	1,102	3,014	1,258	2,872	6,448	5,372	4,364	41,080
Turkey	457	283	216	190	140	166	146	199	153	144	214	292	2,600
United Kingdom	8,971	10,041	12,384	11,629	10,270	9,667	12,961	14,088	14,112	16,571	16,377	14,842	151,913
CIS ³ countries	2,501	1,319	1,479	1,351	850	434	469	459	687	1,136	1,456	2,779	14,920
- Belarus	64	34	62	39	22	21	26	20	25	23	48	125	509
- Kazakhstan	41	24	60	7	10	11	23	15	20	18	29	48	306
- Russia	1,872	969	1,067	1,070	612	268	298	308	486	861	1,082	2,114	11,007
- Ukraine	494	264	247	223	188	119	101	91	141	216	255	426	2,765
- Other CIS	30	28	43	12	18	15	21	25	15	18	42	66	333
Other European	134	124	169	137	72	76	137	155	128	158	205	265	1,760

Table B-6: Tourist Arrivals, By Month and Country of Residence, 2018 ¹ (Cont'd)

Country of Residence	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov ¹	Dec	Total
AFRICA	30,349	13,493	27,406	21,310	26,046	20,817	30,024	25,906	24,341	30,332	18,329	44,265	312,618
IOC ⁴ countries	21,985	6,036	15,284	7,765	16,344	7,416	18,019	12,806	8,921	19,314	7,848	17,392	159,130
- Comoros	56	95	81	93	86	58	74	53	106	72	97	85	956
- Malagascar	603	809	1,104	1,227	1,070	900	1,335	1,882	1,264	1,394	1,099	1,678	14,365
- Reunion	20,996	4,832	13,725	5,998	14,705	6,083	16,246	10,374	7,136	17,512	6,190	14,642	138,439
- Seychelles	330	300	374	447	483	375	364	497	415	336	462	987	5,370
Algeria	18	19	21	16	20	22	28	48	31	24	24	32	303
Angola	27	53	67	71	23	45	55	36	48	75	38	99	637
Benin	5	4	11	9	10	18	4	18	10	10	12	8	119
Botswana	35	57	71	71	104	56	139	99	121	68	82	167	1,070
Burundi	4	5	10	8	6	6	11	5	12	4	11	2	84
Cameroon	19	21	16	30	31	38	49	63	61	31	45	41	445
Congo	37	42	41	82	52	37	46	65	37	42	43	79	603
Egypt	35	48	50	52	64	64	64	84	65	85	103	51	765
Ethiopia	12	14	18	21	80	29	21	13	29	20	19	33	309
Gabon	6	10	12	17	13	21	14	15	7	16	7	22	160
Ghana	57	49	58	81	57	116	83	85	121	82	154	68	1,011
Ivory Coast	23	40	26	48	25	61	40	54	30	67	40	40	494
Kenya	177	160	265	250	236	452	375	527	322	323	323	625	4,035
Lesotho	26	23	18	5	25	17	82	35	18	25	27	36	337
Malawi	30	15	19	22	51	16	65	32	55	49	36	30	420
Mayotte	34	155	83	148	143	39	169	63	40	121	71	289	1,355
Morocco	54	79	71	78	64	70	74	119	66	90	72	64	901
Mozambique	71	52	64	48	44	48	84	59	59	64	48	168	809
Namibia	82	56	102	183	184	58	77	180	83	64	85	204	1,358
Niger	6	5	13	9	7	39	8	8	20	11	14	20	160
Nigeria	71	114	227	123	137	334	164	197	199	194	243	154	2,157
Rwanda	12	19	5	5	9	24	27	28	31	19	14	24	217
Senegal	10	15	14	23	14	44	27	13	20	34	34	27	275
South Africa	7,196	6,076	10,382	11,482	7,830	11,222	9,644	10,371	13,281	8,835	8,280	23,498	128,097
Sudan	4	8	1	9	3	16	3	4	16	4	15	8	91
Kingdom of Eswatini ⁵	32	17	28	17	41	26	46	63	34	36	27	57	424
Tanzania	16	30	73	58	45	63	82	71	88	65	99	107	797
Togo	1	2	12	1	4	10	6	5	8	12	4	3	68
Tunisia	38	33	29	29	24	26	39	51	22	43	31	55	420
Uganda	32	23	46	36	58	57	49	53	86	70	76	90	676
Zimbabwe	108	96	134	285	166	125	170	375	190	185	182	480	2,496
Zambia	42	61	63	76	66	84	125	132	83	136	78	178	1,124
Other African	44	56	72	152	66	118	135	129	127	114	144	114	1,271

Table B-6: Tourist Arrivals, By Month and Country of Residence, 2018 ¹ (Cont'd)

Country of Residence	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov ²	Dec	Total
ASIA	12,795	19,477	15,230	13,790	23,002	24,066	22,496	22,948	17,030	14,292	14,668	13,628	213,422
Afghanistan	62	69	80	50	50	41	57	68	52	50	86	78	743
Bangladesh	224	58	45	49	61	68	124	41	112	147	167	99	1,195
Hong Kong SAR ⁶	59	98	158	81	75	118	139	191	167	131	92	210	1,519
India	5,057	6,248	5,905	5,967	13,825	11,896	7,500	6,714	5,273	4,469	6,650	6,261	85,765
Indonesia	111	296	545	110	117	136	107	207	347	207	150	186	2,519
Israel	125	170	115	77	314	78	120	143	385	139	268	231	2,165
Japan	97	168	242	186	155	135	153	168	206	159	160	217	2,046
Korea Republic	422	350	511	655	610	529	377	337	489	1,051	1,084	789	7,204
Malaysia	87	165	207	219	159	309	118	230	254	174	194	148	2,264
Maldives	0	2	7	1	6	15	3	5	2	3	6	1	51
Nepal	98	24	42	38	41	70	35	44	25	96	15	29	557
Pakistan	110	122	100	127	145	80	144	48	54	74	103	100	1,207
China	4,115	9,806	4,107	4,166	5,622	6,007	6,548	8,101	6,545	5,140	3,250	2,329	65,736
Philippines	201	298	383	187	202	162	149	266	276	273	300	175	2,872
Singapore	91	182	251	223	141	272	286	239	241	237	301	345	2,809
Sri Lanka	31	30	40	55	62	38	25	32	66	60	50	46	535
Taiwan	143	214	214	89	97	74	157	227	286	119	58	89	1,767
Thailand	14	23	44	56	28	31	41	54	33	49	64	49	486
Vietnam	25	131	88	19	23	31	88	56	63	139	46	31	740
Middle East Countries	1,720	1,002	2,129	1,404	1,258	3,951	6,298	5,743	2,118	1,538	1,588	2,199	30,948
- Bahrain	2	10	12	10	12	30	46	38	17	6	7	25	215
- Iran	2	17	129	6	12	13	24	18	8	6	12	11	258
- Jordan	4	6	18	10	5	10	16	22	12	15	17	17	152
- Kuwait	18	50	55	42	14	123	81	121	51	27	30	49	661
- Lebanon	31	33	47	37	20	49	49	48	53	60	30	42	499
- Oman	10	19	15	4	12	24	52	38	18	12	20	16	240
- Qatar	16	4	25	8	44	32	26	30	5	19	16	25	250
- Saudi Arabia	1,233	305	518	550	356	2,236	3,992	3,716	1,231	625	632	1,113	16,507
- UAE	398	551	1,294	730	778	1,430	1,999	1,704	704	757	816	897	12,058
- Other Middle East	6	7	16	7	5	4	13	8	19	11	8	4	108
Other Asian	3	21	17	31	11	25	27	34	36	37	36	16	294
OCEANIA	1,796	1,163	1,537	1,918	1,280	1,689	2,286	2,077	2,406	1,922	1,811	2,719	22,604
Australia	1,685	1,039	1,382	1,830	1,147	1,558	2,103	1,943	2,279	1,795	1,648	2,540	20,949
New Zealand	53	70	88	54	81	80	89	102	92	73	101	119	1,002
Other Oceanian	58	54	67	34	52	51	94	32	35	54	62	60	653
AMERICA	2,653	2,035	2,138	1,550	1,738	1,806	2,318	1,597	1,765	2,195	3,103	3,014	25,912
Brazil	499	208	243	285	374	177	209	216	406	364	443	319	3,743
Canada	533	538	585	389	458	602	904	518	412	590	1,011	1,207	7,747
USA	972	757	895	635	677	896	1,013	647	733	894	1,218	1,188	10,525
Other American	649	532	415	241	229	131	192	216	214	347	431	300	3,897
Others & not stated	29	28	61	50	42	31	31	36	38	58	65	49	518
All countries	120,974	115,600	119,841	104,967	101,138	84,345	115,881	109,471	102,849	134,052	132,247	158,043	1,399,408

1 Provisional 2 Revised 3 Commonwealth of Independent States 4 Indian Ocean Commission
5 Kingdom of Eswatini was formerly known as Swaziland 6 Special Administrative Region of China

Source: Statistics Mauritius

Table B-7: Tourist Arrivals and Share (%) by Selected Markets, 2012 - 2018

Continent / Top 10 markets	Number of tourist arrivals						
	2012	2013	2014	2015	2016	2017	2018
Continent							
Europe	555,528	547,046	570,684	631,627	734,506	780,209	824,334
Africa	270,386	277,773	274,164	284,682	291,890	301,898	312,618
Asia	104,336	132,554	158,330	197,735	208,233	211,380	213,422
Oceania	17,863	19,360	18,663	19,084	20,071	22,898	22,604
America	16,624	15,473	16,330	17,891	19,766	24,795	25,912
Others & Not Stated	704	900	163	233	761	680	518
Total	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408
Top 10 markets in 2018							
France	256,929	244,752	243,655	254,323	271,963	273,419	285,371
United Kingdom	87,648	98,017	115,239	129,754	141,904	149,807	151,913
Reunion Island	144,340	143,114	141,659	143,845	146,203	146,040	138,439
Germany	55,186	60,530	62,212	75,237	103,761	118,856	132,780
South Africa	89,058	94,208	93,075	101,943	104,834	112,129	128,097
India	55,197	57,255	61,162	72,135	82,670	86,294	85,765
China	20,885	41,913	63,363	89,584	79,374	72,951	65,736
Switzerland	26,002	27,756	29,273	30,680	36,272	40,252	41,080
Italy	40,009	31,205	29,553	29,185	31,337	35,101	38,361
Australia	17,009	18,393	17,434	17,835	18,559	21,271	20,949
Total Top 10	792,263	817,143	856,625	944,521	1,016,877	1,056,120	1,088,491
Tourist arrivals as a proportion of total arrivals							
Continent / Top 10 markets	2012	2013	2014	2015	2016	2017	2018
Continent							
Europe	57.5%	55.1%	55.0%	54.9%	57.6%	58.1%	58.9%
Africa	28.0%	28.0%	26.4%	24.7%	22.9%	22.5%	22.3%
Asia	10.8%	13.3%	15.2%	17.2%	16.3%	15.8%	15.3%
Oceania	1.9%	1.9%	1.8%	1.7%	1.6%	1.7%	1.6%
America	1.7%	1.6%	1.6%	1.6%	1.5%	1.8%	1.9%
Others & Not Stated	0.1%	0.1%	0.0%	0.0%	0.1%	0.1%	0.0%
Total	100%	100%	100%	100%	100%	100%	100%
Top 10 markets in 2018							
France	26.6%	24.6%	23.5%	22.1%	21.3%	19.5%	20.4%
United Kingdom	9.1%	9.9%	11.1%	11.3%	11.1%	11.2%	10.9%
Reunion Island	15.0%	14.4%	13.6%	12.5%	11.5%	10.9%	9.9%
Germany	5.7%	6.1%	6.0%	6.5%	8.1%	8.9%	9.5%
South Africa	9.2%	9.5%	9.0%	8.9%	8.2%	8.4%	9.2%
India	5.7%	5.8%	5.9%	6.3%	6.5%	6.4%	6.1%
China	2.2%	4.2%	6.1%	7.8%	6.2%	5.4%	4.7%
Switzerland	2.7%	2.8%	2.8%	2.7%	2.8%	3.0%	2.9%
Italy	4.1%	3.1%	2.8%	2.5%	2.5%	2.6%	2.7%
Australia	1.8%	1.9%	1.7%	1.5%	1.5%	1.6%	1.5%
Total Top 10	82.1%	82.3%	82.5%	82.0%	79.7%	78.7%	77.8%

Source: Statistics Mauritius

Table B-8: Tourist Arrivals by Air and by Main Port of Last Embarkation for Selected Markets, 2018

Country of last embarkation	Total tourist arrivals	of which, arrivals from selected country of residence										
		France	Germany	Italy	Switzerland	UK	Russia	Reunion	RSA	India	China	Australia
EUROPE	486,333	165,853	78,840	16,485	23,768	87,854	3,307	271	301	151	251	713
France	199,062	143,054	9,246	4,717	5,689	6,421	1,111	199	80	45	60	302
Germany	78,277	5,458	56,412	1,260	1,677	1,284	209	11	28	9	49	88
Italy	8,832	727	48	6,908	120	320	270	0	0	4	0	1
Netherlands	30,023	4,308	3,994	1,019	1,196	2,251	187	15	38	6	19	30
Switzerland	21,347	2,797	2,074	351	13,832	374	82	5	5	2	6	12
Turkey	32,317	5,834	5,017	1,464	588	1,902	1,063	26	21	20	66	47
UK	85,279	3,035	544	522	303	75,071	103	14	123	65	46	152
AFRICA	451,585	82,759	12,162	2,982	4,554	10,735	637	133,856	117,109	8,819	3,892	3,318
Kenya	12,096	463	136	62	105	714	40	149	607	757	480	214
Madagascar	18,891	1,131	187	123	123	378	146	244	207	438	789	281
Reunion	232,557	77,276	4,504	402	2,362	1,170	113	132,725	1,453	1,228	973	423
Seychelles	17,614	2,161	340	98	300	357	116	48	261	5,780	164	158
South Africa	169,983	1,699	6,978	2,293	1,646	8,089	209	690	114,570	606	1,480	2,236
ASIA	404,163	32,300	26,974	17,541	11,366	48,991	6,476	3,074	6,240	76,463	61,070	2,328
Hong Kong	17,871	122	32	38	9	106	12	129	89	18	13,741	127
India	74,789	163	46	33	17	385	28	191	5,286	65,678	42	105
Malaysia	7,498	570	40	28	19	133	24	1,236	169	101	455	380
China	33,484	20	8	10	0	14	5	60	13	5	33,028	15
Saudi Arabia	18,705	1,629	480	273	98	319	219	37	24	261	56	12
Singapore	7,490	431	51	38	169	149	24	849	266	108	408	429
UAE	244,258	29,365	26,317	17,121	11,054	47,881	6,151	572	393	10,288	13,330	1,260
OCEANIA	17,585	368	56	20	29	370	4	501	1,171	36	28	13,950
Australia	17,585	368	56	20	29	370	4	501	1,171	36	28	13,950
Total arrivals by air	1,359,688	281,280	118,032	37,029	39,717	147,950	10,424	137,702	124,821	85,469	65,241	20,309
of which:		France	Germany	Italy	Switzerland	UK	Russia	Reunion	RSA	India	China	Australia
Direct ¹		50.9%	47.8%	18.7%	34.8%	50.7%	Napp	96.4%	91.8%	76.8%	50.6%	68.7%
From UAE		10.4%	22.3%	46.2%	27.8%	32.4%	59.0%	0.4%	0.3%	12.0%	20.4%	6.2%
From Turkey		2.1%	4.3%	4.0%	1.5%	1.3%	10.2%	0.0%	0.0%	0.0%	0.1%	0.2%
From France		N/A	7.8%	12.7%	14.3%	4.3%	10.7%	0.1%	0.1%	0.1%	0.1%	1.5%
From Reunion		27.5%	3.8%	1.1%	5.9%	0.8%	1.1%	N/A	1.2%	1.4%	1.5%	2.1%
From Netherlands		1.5%	3.4%	2.8%	3.0%	1.5%	1.8%	0.0%	0.0%	0.0%	0.0%	0.1%
From South Africa		0.6%	5.9%	6.2%	4.1%	5.5%	2.0%	0.5%	N/A	0.7%	2.3%	11.0%

1 Direct from own country of residence
Source: Statistics Mauritius

Table B-9: Tourist Arrivals by Main Purpose of Visit, 2012 - 2019

Purpose of Visit	2012	2013	2014	2015	2016	2017	2018 ^p	Quarter 1 of 2019 ^p	
								Number	As a % of total
Holiday	896,977	923,247	969,524	1,077,442	1,200,047	1,260,231	1,307,653	329,417	93.5
Business	36,962	36,616	37,715	42,028	44,133	46,856	50,463	12,484	3.5
Transit	23,081	22,684	21,012	21,569	21,302	25,134	29,908	9,117	2.6
Conference	5,605	6,866	7,072	6,310	6,264	5,700	8,010	977	0.3
Sports	1,253	1,920	1,797	2,408	2,120	2,592	2,137	73	0.0
Other & not stated	1,563	1,773	1,848	1,495	1,361	1,347	1,237	237	0.1
Total	965,441	993,106	1,038,968	1,151,252	1,275,227	1,341,860	1,399,408	352,305	100

Source: Statistics Mauritius

Table B-10: Tourist Arrivals by Age and Sex for Selected Markets, 2013 & 2018

Age group (years)	Market: France							
	2013			2018 ¹			Share by age group	
	Male	Female	Total	Male	Female	Total	2013	2018 ¹
Under 15	15,657	15,599	31,256	19,685	19,708	39,393	12.8%	13.8%
15 - 24	6,947	9,357	16,304	9,113	12,127	21,240	6.7%	7.4%
25 - 34	20,493	23,261	43,754	21,065	24,410	45,475	17.9%	15.9%
35 - 44	22,604	22,418	45,022	22,981	23,267	46,248	18.4%	16.2%
45 - 54	23,257	23,111	46,368	26,331	27,130	53,461	18.9%	18.7%
55 - 64	19,555	19,008	38,563	23,122	22,427	45,549	15.8%	16.0%
65 & over	12,306	11,164	23,470	17,495	16,510	34,005	9.6%	11.9%
Total	120,819	123,918	244,737	139,792	145,579	285,371	100.0%	100.0%

Age group (years)	Market: Reunion							
	2013			2018 ¹			Share by age group	
	Male	Female	Total	Male	Female	Total	2013	2018 ¹
Under 15	14,057	13,944	28,001	13,767	13,595	27,362	19.6%	19.8%
15 - 24	5,740	7,553	13,293	5,566	7,040	12,606	9.3%	9.1%
25 - 34	9,894	11,935	21,829	9,224	11,123	20,347	15.2%	14.7%
35 - 44	12,925	12,566	25,491	11,237	11,910	23,147	17.8%	16.7%
45 - 54	13,218	12,341	25,559	11,993	11,867	23,860	17.9%	17.2%
55 - 64	9,014	8,993	18,007	9,381	9,440	18,821	12.6%	13.6%
65 & over	5,272	5,722	10,994	5,848	6,448	12,296	7.7%	8.9%
Total	70,120	73,054	143,174	67,016	71,423	138,439	100.0%	100.0%

Age group (years)	Market: UK							
	2013			2018 ¹			Share by age group	
	Male	Female	Total	Male	Female	Total	2013	2018 ¹
Under 15	5,702	5,400	11,102	9,298	8,983	18,281	11.3%	12.0%
15 - 24	3,006	4,008	7,014	4,577	5,599	10,176	7.2%	6.7%
25 - 34	8,789	10,021	18,810	13,321	15,877	29,198	19.2%	19.2%
35 - 44	8,206	7,639	15,845	11,751	11,321	23,072	16.2%	15.2%
45 - 54	9,769	9,916	19,685	13,109	13,776	26,885	20.1%	17.7%
55 - 64	8,027	7,920	15,947	11,762	11,805	23,567	16.3%	15.5%
65 & over	5,415	4,145	9,560	11,055	9,679	20,734	9.8%	13.6%
Total	48,914	49,049	97,963	74,873	77,040	151,913	100.0%	100.0%

Table B-10: Tourist Arrivals by Age and Sex for Selected Markets, 2013 & 2018 (Cont'd)

Age group (years)	Market: Germany							
	2013			2018 ¹			Share by age group	
	Male	Female	Total	Male	Female	Total	2013	2018 ¹
Under 15	1,848	1,845	3,693	4,051	4,078	8,129	6.1%	6.1%
15 - 24	1,263	1,984	3,247	3,281	5,274	8,555	5.4%	6.4%
25 - 34	5,557	7,007	12,564	13,334	16,353	29,687	20.8%	22.4%
35 - 44	4,952	4,698	9,650	8,780	8,593	17,373	16.0%	13.1%
45 - 54	7,526	7,797	15,323	13,419	14,800	28,219	25.4%	21.3%
55 - 64	4,917	4,405	9,322	13,035	12,628	25,663	15.4%	19.3%
65 & over	3,666	2,968	6,634	8,366	6,788	15,154	11.0%	11.4%
Total	29,729	30,704	60,433	64,266	68,514	132,780	100.0%	100.0%

Age group (years)	Market: South Africa							
	2013			2018 ¹			Share by age group	
	Male	Female	Total	Male	Female	Total	2013	2018 ¹
Under 15	7,827	7,838	15,665	9,824	9,767	19,591	16.6%	15.3%
15 - 24	3,478	4,359	7,837	4,179	5,352	9,531	8.3%	7.4%
25 - 34	8,455	9,885	18,340	10,510	12,251	22,761	19.5%	17.8%
35 - 44	11,212	10,553	21,765	13,977	13,563	27,540	23.1%	21.5%
45 - 54	8,454	7,498	15,952	11,682	10,962	22,644	16.9%	17.7%
55 - 64	5,137	4,417	9,554	7,850	8,151	16,001	10.1%	12.5%
65 & over	2,622	2,402	5,024	5,049	4,980	10,029	5.3%	7.8%
Total	47,185	46,952	94,137	63,071	65,026	128,097	100.0%	100.0%

Age group (years)	All markets							
	2013			2018 ¹			Share by age group	
	Male	Female	Total	Male	Female	Total	2013	2018 ¹
Under 15	61,303	60,528	121,831	86,258	84,811	171,069	12.3%	12.2%
15 - 24	33,198	45,988	79,186	46,048	62,858	108,906	8.0%	7.8%
25 - 34	106,647	114,843	221,490	146,170	160,593	306,763	22.3%	21.9%
35 - 44	98,574	88,220	186,794	126,883	116,928	243,811	18.8%	17.4%
45 - 54	94,376	86,224	180,600	124,363	120,813	245,176	18.2%	17.5%
55 - 64	66,806	61,118	127,924	98,292	94,743	193,035	12.9%	13.8%
65 & over	40,012	34,666	74,678	68,679	61,969	130,648	7.5%	9.3%
Total	500,916	491,587	992,503	696,693	702,715	1,399,408	100.0%	100.0%

1 Provisional

Source: Statistics Mauritius

Table B-11: Tourist Nights and Average Length of Stay, 2012 - 2019

Indicator	2012	2013	2014	2015	2016	2017	2018	2019 Q1
Tourist arrivals	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408	352,305
YoY change, %	0.1	2.9	4.6	10.9	10.8	5.2	4.3	-1.2
Tourist nights ¹ (000s)	10,044	10,676	11,267	12,050	13,118	13,641	14,296	4,118
YoY change, %	5.8	6.3	5.5	7.0	8.9	4.0	4.8	0.0
Average length of stay	10.5	10.8	10.9	10.6	10.4	10.3	10.4	10.8

1 - Tourist nights for a reference period will refer to nights spent by tourists departing in the reference period.

Source: Statistics Mauritius

Table B-12: Tourist Nights and Average Length of Stay for Selected Markets, 2013 & 2018

Country of residence	Tourist nights		Average length of stay (days)	
	2013	2018 ¹	2013	2018 ¹
France	3,023,973	3,374,924	12.4	11.9
United Kingdom	1,370,172	1,712,734	13.8	11.5
Germany	718,706	1,365,304	12.0	10.8
Reunion	1,016,159	952,281	7.1	6.9
South Africa	786,433	1,003,710	8.4	7.9
India	578,976	857,580	10.2	10.1
China	376,235	513,754	9.2	7.9
Switzerland	347,927	471,147	12.6	11.5
Italy	331,093	370,388	10.4	9.9
Australia	223,008	268,042	12.2	12.9
Belgium	159,824	196,253	13.7	12.5
Austria	93,864	199,693	12.0	10.9
Sweden	55,499	178,537	12.5	11.5
Russia	184,407	141,472	12.2	13.4
Netherlands	50,889	163,588	11.2	10.0
Spain	68,742	118,058	8.2	7.9
All markets	10,675,598	14,296,274	10.8	10.4

1 Provisional

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.

Source: Statistics Mauritius

Table B-13: Tourist Nights and Average Length of Stay by Quarter in 2013, 2018 & 2019

Year		Tourist nights	Average length of stay
2013	1 st Quarter	3,202,096	11.1
	2 nd Quarter	2,241,442	10.4
	Semester 1	5,443,538	10.8
	3 rd Quarter	2,522,260	11.6
	4 th Quarter	2,709,800	10.1
	Semester 2	5,232,060	10.8
	Year	10,675,598	10.8
2018	1 st Quarter	4,127,448	10.9
	2 nd Quarter	2,995,925	9.9
	Semester 1	7,123,373	10.4
	3 rd Quarter	3,481,916	10.8
	4 th Quarter	3,690,985	9.9
	Semester 2	7,172,901	10.3
	Year	14,296,274	10.4
2019 ¹	1 st Quarter	4,117,859	10.8

1 Provisional

Note: "Tourist nights" for a reference period refer to nights spent by tourists departing in that reference period.

Source: Statistics Mauritius

Table B-14: Survey of Outbound Tourism, 2004, 2010 - 2013 & 2015 - 2017

Indicators	2004	2010	2011	2012	2013	2015	2016	2017
1. Average length of stay by travel arrangement (nights)	9.7	9.6	9.3	9.5	9.2	10.6	10.4	10.3
Package	8.8	8.4	8.3	8.3	8.2	8.8	9.0	8.8
Non- package	11.9	12.4	11.7	11.9	11.4	14.0	13.2	12.9
2. Average party size	2.1	2.2	2.2	2.2	2.2	2.2	2.1	2.1
3. Travel arrangement (%)								
Package Tour	68.5	68.0	68.9	64.0	65.8	65.7	67.0	63.1
Non-package tour	31.5	32.0	31.1	36.0	34.2	34.3	33.0	36.9
4. Purpose of visit (%)								
Holiday	71.8	76.9	74.8	75.3	71.4	76.5	75.8	80.4
Honeymoon	16.9	12.1	13.5	12.9	17.3	15.6	17.4	12.3
Business	6.9	5.5	6.2	5.4	4.9	2.6	2.6	3.3
Visiting friends/relatives	1.9	2.6	2.8	3.3	2.5	2.1	0.9	1.0
To get married*	N/A	N/A	N/A	0.1	0.5	0.5	0.4	0.3*
Other	2.4	2.9	2.7	3.0	3.4	2.8	2.8	2.8
5. Frequency of Visit (%)								
First visit	68.4	N/A	N/A	N/A	68.0	73.0	68.0	66.7
Repeat Visit	31.6	N/A	N/A	N/A	32.0	27.0	32.0	33.3
6. Accommodation used (%)								
Hotel	81.7	79.0	78.4	75.1	80.3	82.3	81.2	79.6
In own villas/houses/bungalow/IRS	6.2	N/A	N/A	N/A	1.0	0.6	0.6*	0.8
Boarding/guest house	3.6	6.3	4.3	5.4	5.4	2.9	4.8	5.0
Tourist residence	N/A	N/A	9.8	9.7	6.5	8.3	7.3	8.5
With friends/relatives	5.7	8.1	6.7	9.2	6.2	5.5	5.5	5.8
Other	2.8	6.6	0.7	0.5	0.7	0.4*	0.5	0.3*
7. Evaluation of visit (%)								
Beyond expectation	16.3	N/A	17.0	N/A	26.0	35.0	34.0	21.9
As expected	78.6	N/A	81.0	N/A	70.0	63.0	63.0	75.6
Below expectation	5.1	N/A	3.0	N/A	3.0	3.0	3.0	2.3
Highly enjoyable	0.0	N/A	N/A	N/A	N/A	N/A	N/A	N/A
No response	0.0	N/A	N/A	N/A	2.0	N/A	0.0	0.1
8. Per capita expenditure (Rs)	32,157	43,853	39,960	40,035	42,168	43,986	44,660	45,518
9. Per capita per diem expenditure (Rs)	3,307	4,550	4,322	4,221	4,647	4,154	4,290	4,409
10. Per capita per diem (Rs) by travel arrangement								
Package tourists	4,098	5,768	3,671	5,397	5,644	4,904	4,923	5,158
Non-package tourists	1,940	2,736	2,711	2,760	3,321	3,244	3,410	3,537
11. Distribution of total expenditure by category, %								
Accommodation	52.9	52.2	60.2	58.5	58.9	60.5	60.7	61.7
Meals & Beverages	18.2	13.6	12.5	14.2	10.0	10.9	10.5	10.6
Transportation (local)	5.8	9.8	7.8	7.5	7.9	4.5	4.6	4.4
Sightseeing	3.2	5.3	5.6	4.9	5.9	6.2	7.5	7.6
Entertainment	2.6	2.6	2.2	3.3	5.0	5.2	4.5	3.6
Shopping	13.0	12.1	10.5	10.7	10.5	10.2	8.9	8.7
Other	4.2	4.4	1.1	1.0	1.7	2.5	3.3	3.4

*These figures 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

Table B-15: Selected Tourism Statistics by Type of Accommodation (hotel/non-hotel), 2015-2017

Details	2015			2016			2017		
	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total
Average party size	2.2	2.1	2.2	2.1	2.0	2.1	2.2	1.9	2.1
Average length of stay (nights)	9.0	18.1	10.6	9.1	16.2	10.4	8.8	16.4	10.3
Travel arrangement, %									
Package	79.0	4.4	65.7	80.5	8.8	67.0	77.6	6.2	63.1
Non-package	21.0	95.6	34.3	19.5	91.2	33.0	22.4	93.8	36.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Purpose of visit, %									
Holiday	76.3	77.5	76.5	73.8	84.5	75.8	79.6	83.4	80.4
Honeymoon	18.6	1.6*	15.6	20.9	2.1	17.4	15.1	1.2*	12.3
Business	2.2	4.3	2.6	2.4	3.1	2.6	2.9	4.6	3.3
Visiting friends/relatives	0.2*	10.9	2.1	0.0*	4.8	0.9	0.1*	4.7	1.0
To get married	0.4	0.6*	0.5	0.5	0.1*	0.4	0.3*	0.1*	0.3*
Other	2.3	5.1	2.8	2.3	5.4	2.8	2.0	6.0	2.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.1
Average expenditure (Rs)									
Per tourist	45,782	35,657	43,986	46,556	36,477	44,660	47,727	36,875	45,518
Per tourist per night	5,104	1,970	4,154	5,138	2,247	4,290	5,447	2,243	4,409

*These figures 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-16: Group Composition, Influencing Factor and Meal Arrangement of Tourists, 2017

Group composition	%	Influencing factor	%	Meal arrangement	%
Couple without children	56	Friends	52	All Inclusive	41
With friends and / or relatives	18	Internet	17	Half Board	28
Couple with children	17	Travel agencies	14	Bed only	10
Alone	7	Publicity in newspapers, magazines, films	9	Bed & Breakfast	10
Business associates	1	Social medias	3	Full Board	5
Other	1	Others	5	Free	6

Source: 2017 Survey of Inbound Tourism, Statistics Mauritius

Table B-17: Selected Expenditure Patterns of Tourists by Selected Country of Residence, 2017

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	48,190	4,216	4,756	3,457	4,216	64.7	10.5	4.1	7.5	3.2	6.5	3.4
France	44,468	3,760	5,137	2,724	3,760	59.1	13.5	4.4	7.9	3.4	7.9	3.7
Germany	46,977	4,229	4,290	4,038	4,229	68.8	8.1	4.3	7.9	3.1	4.6	3.2
Italy	41,851	4,169	4,870	3,288	4,169	67.6	8.0	4.3	8.1	2.1	7.5	2.4
Russia*	78,039	5,627	5,364	5,782	5,627	49.6	10.6	3.2	6.4	7.5	19.7	2.9
Switzerland	64,282	5,468	5,579	5,272	5,468	68.3	9.3	3.5	9.6	2.3	4.7	2.3
UK	48,192	4,124	4,390	3,369	4,124	70.8	7.7	3.9	6.4	3.2	5.2	2.7
Africa	31,376	3,852	4,767	3,164	3,852	54.0	12.0	5.3	5.7	4.0	14.3	4.7
Reunion	22,780	3,372	4,104	2,910	3,372	49.6	14.1	6.3	6.2	2.6	17.6	3.6
RSA	34,571	4,184	4,885	3,115	4,184	64.4	8.7	4.4	5.7	5.9	7.8	3.0
Asia	53,553	5,864	7,229	4,282	5,864	58.2	10.2	4.7	9.2	4.3	11.4	2.1
China	55,620	7,428	8,341	5,621	7,428	58.5	9.3	5.0	9.5	4.4	11.4	2.0
India	36,892	4,026	5,160	2,131	4,026	55.5	9.0	5.3	11.5	6.2	11.1	1.4
UAE*	53,027	8,218	7,516	8,615	8,218	67.7	9.0	6.0	5.5	2.5	7.5	1.7
Oceania	53,914	4,275	7,847	3,078	4,275	55.2	9.2	3.4	12.0	6.9	9.7	3.6
Australia	54,039	4,272	8,125	3,060	4,272	55.1	9.2	3.3	12.1	6.9	9.7	3.7
America	60,255	5,696	7,390	4,972	5,696	67.6	9.9	5.1	5.4	2.4	6.3	3.2
USA*	54,930	6,055	8,087	5,193	6,055	67.1	12.0	4.9	5.5	2.1	5.9	2.4
Total	45,518	4,409	5,158	3,537	4,409	61.7	10.6	4.4	7.6	3.6	8.7	3.4

*Figures for these countries should be treated with caution; they are subject to low reliability since they are based on fewer than 30 observations in the sample.

Source: 2017 Survey of Inbound Tourism, Statistics Mauritius

Table B-18: Hotel & Non-Hotel Tourists, Travel Arrangements and Average Stay of Tourists by Selected Country of Residence, 2017

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
Europe	81.0	19.0	65.9	34.1	10.1	13.9	11.4
France	71.0	29.0	58.0	42.0	8.8	16.1	11.8
Germany	85.8	14.2	74.2	25.8	11.3	10.5	11.1
Italy	85.5	14.5	63.3	36.7	8.8	12.1	10.0
Russia*	56.4*	43.6*	39.2*	60.8*	13.1*	14.4*	13.9*
Switzerland*	88.5	11.5*	65.9	34.1	11.4	12.5	11.8
UK	88.6	11.4	78.2	21.8	11.0	14.0	11.7
Africa	71.4	28.6	54.5	45.5	6.4	10.2	8.1
Reunion	66.6	33.4	47.2	52.8	5.5	7.8	6.8
RSA	83.7	16.3	71.7	28.3	7.0	11.6	8.3
Asia	89.1	10.9	71.4	28.6	6.9	14.8	9.1
China*	92.5	7.5*	77.7	22.3	6.4	11.3	7.5
India	91.9	8.1	80.0	20.0	7.2	17.1	9.2
UAE*	86.1	13.9*	35.9*	64.1	6.5*	6.4	6.5
Oceania	64.6	35.4	30.8	69.2	10.3	13.6	12.6
Australia	63.7	36.3	29.5	70.5	10.3	13.6	12.6
America*	73.8	26.2	38.1	61.9	8.3	12.0	10.6
USA*	62.2	37.8*	28.6*	71.4	9.5*	8.9	9.1
Total	79.6	20.4	63.1	36.9	8.8	12.9	10.3

*Figures for these countries should be treated with caution; they are subject to low reliability since they are based on fewer than 30 observations in the sample.

Source: 2017 Survey of Inbound Tourism, Statistics Mauritius

Table C-1: Operational Tourist Accommodation Facilities, Air Seats Capacity and Tourist Arrivals, 2012 - 2019

Details	2012	2013	2014	2015	2016	2017	2018	2019 Q1
Total operational rooms	17,419	17,185	19,822	21,097	21,835	21,046	20,370	19,434
Hotel	12,527	12,376	12,799	13,617	13,547	13,511	13,523	12,346
Guesthouse	1,124	1,145	1,994	2,198	2,376	2,188	2,119	2,197
Tourist residence	3,768	3,664	5,029	5,282	5,912	5,347	4,728	4,891
Total air seats	1,723,143	1,738,504	1,817,667	1,952,935	2,169,493	2,341,144	2,435,285	654,577
Total tourist arrivals	965,441	993,106	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408	352,305

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

Table C-2: Operational Capacity, 2012 - 2019

Year	Guesthouse		Tourist residence		Hotel		Total number of rooms
	Unit	Room	Unit	Room	Unit	Room	
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	201	2,188	830	5,345	111	13,511	21,044
2018	186	2,119	730	4,728	113	13,523	20,370
2019 Q1	196	2,197	738	4,891	111	13,430	20,518

Sources: Statistics Mauritius and Mauritius Tourism Authority

Table C-3: Built Hotel Capacity, 2012 – 2019

Year	Hotels	Rooms
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	114	13,698
2019 Q1	113	13,623

Source: Statistics Mauritius

Table C-4: Room Occupancy Rate, 2012 - 2019 (%)

Month	Large hotels*							
	2012	2013	2014	2015	2016	2017	2018	2019 ^p
January	76	69	74	77	81	83	78	74
February	69	67	69	79	80	82	81	77
March	66	66	65	70	78	77	78	72
April	66	63	69	71	73	80	75	
May	61	61	62	68	69	69	72	
June	46	42	47	52	56	61	62	
July	53	54	57	65	68	76	71	
August	60	62	67	70	74	79	79	
September	62	67	68	74	78	79	82	
October	70	72	75	77	84	87	83	
November	71	75	78	82	87	87	84	
December	74	74	76	81	82	82	78	
Whole Year	65	65	67	75	76	79	77	
Quarter								
Quarter 1	70	68	70	75	80	80	79	74
Quarter 2	58	55	59	64	66	70	70	
Quarter 3	58	61	64	70	73	78	77	
Quarter 4	72	74	76	80	84	85	82	
Whole Year	65	65	67	75	76	79	77	
Semester								
Semester 1	64	61	64	69	73	76	74	
Semester 2	65	68	70	75	79	76	79	
Whole Year	65	65	67	75	76	79	77	
Month	All hotels							
	2012	2013	2014	2015	2016	2017	2018	2019 ^p
January	74	67	72	75	78	81	77	72
February	67	66	67	75	76	81	79	76
March	65	63	64	68	74	76	76	71
April	62	60	65	68	69	78	73	
May	59	58	59	66	67	68	70	
June	45	42	46	51	54	60	60	
July	52	53	54	61	65	73	68	
August	56	60	62	66	70	75	76	
September	60	65	64	70	75	77	79	
October	67	71	71	74	81	85	81	
November	69	74	76	79	85	86	83	
December	71	73	74	78	81	81	76	
Whole Year	62	63	65	70	73	77	75	
Quarter								
Quarter 1	69	65	68	73	76	79	77	73
Quarter 2	55	54	57	62	63	69	68	
Quarter 3	56	59	60	66	70	75	74	
Quarter 4	69	73	74	77	82	84	80	
Whole Year	62	63	65	70	73	77	75	
Semester								
Semester 1	62	60	62	67	70	74	73	
Semester 2	63	66	67	72	76	79	77	
Whole Year	62	63	65	70	73	77	75	

* Large hotels are well established beach hotel of over 80 rooms

Source: Statistics Mauritius

Table C-5: Passengers¹, Seats, Load Factors and Tourist Arrivals, 2015 - 2019

Month	2015			2016			2017			2018		
	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %
Jan	136,430	194,292	70.2	153,192	208,529	73.5	168,679	232,948	72.4	168,718	236,901	71.2
Feb	112,182	145,457	77.1	122,243	160,264	76.3	129,170	176,850	73.0	138,330	187,616	73.7
Mar	122,830	172,402	71.2	137,045	179,973	76.1	141,719	198,445	71.4	155,128	216,942	71.5
Apr	117,835	153,111	77.0	123,368	160,426	76.9	144,734	184,994	78.2	141,195	182,637	77.3
May	112,159	155,344	72.2	124,164	172,491	72.0	126,423	176,341	71.7	130,706	184,154	71.0
Jun	90,793	131,889	68.8	100,591	149,168	67.4	105,570	160,897	65.6	115,760	166,605	69.5
Jul	131,300	160,807	81.7	150,362	179,644	83.7	156,714	194,669	80.5	163,772	198,646	82.4
Aug	128,309	163,852	78.3	135,809	178,339	76.2	142,898	192,993	74.0	154,547	196,709	78.6
Sep	110,754	139,555	79.4	121,764	155,198	78.5	128,048	168,846	75.8	138,208	181,620	76.1
Oct	138,909	171,763	80.9	159,882	194,687	82.1	162,624	205,973	79.0	169,768	222,287	76.4
Nov	131,085	163,709	80.1	144,995	189,070	76.7	152,225	205,254	74.2	158,167	214,514	73.7
Dec	171,950	200,754	85.7	192,644	241,704	79.7	199,154	242,934	82.0	195,332	246,654	79.2
Year	1,504,536	1,952,935	77.0	1,666,059	2,169,493	76.8	1,757,958	2,341,144	75.1	1,829,631	2,435,285	75.1

Quarter	2015			2016			2017			2018		
	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %
Quarter 1	371,442	512,151	72.5	412,480	548,766	75.2%	439,568	608,243	72.3	462,176	641,459	72.1
Quarter 2	320,787	440,344	72.8	348,123	482,085	72.2%	376,727	522,232	72.1	387,661	533,396	72.7
Quarter 3	370,363	464,214	79.8	407,935	513,181	79.5%	427,660	556,508	76.8	456,527	576,975	79.1
Quarter 4	441,944	536,226	82.4	497,521	625,461	79.5%	514,003	654,161	78.6	523,267	683,455	76.6
Year	1,504,536	1,952,935	77.0	1,666,059	2,169,493	76.8%	1,757,958	2,341,144	75.1	1,829,631	2,435,285	75.1

Semester	2015			2016			2017			2018		
	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %	Passenger	Seat	LF, %
Semester 1	692,229	952,495	72.7	760,603	1,030,851	73.8	816,295	1,130,475	72.2	849,837	1,174,855	72.3
Semester 2	812,307	1,000,440	81.2	905,456	1,138,642	79.5	941,663	1,210,669	77.8	979,794	1,260,430	77.7
Year	1,504,536	1,952,935	77.0	1,666,059	2,169,493	76.8	1,757,958	2,341,144	75.1	1,829,631	2,435,285	75.1

Month	2019									
	Passenger		Seat		LF, %	Tourist arrival				
	No.	YoY chg	No.	YoY chg		No.	YoY chg	Prop²		
Jan	164,129	-2.7%	247,881	4.6%	66.2	122,273	1.1%	74.5%		
Feb	136,784	-1.1%	191,860	2.3%	71.3	115,613	0.0%	84.5%		
Mar	148,255	-4.4%	214,836	-1.0%	69.0	114,419	-4.5%	77.2%		
Quarter 1	449,168	-2.8%	654,577	2.0%	68.6	352,305	-1.2%	78.4%		

1 Includes direct transfers (ie those remaining in the transit lounge at the airport).
2 tourist arrivals as a proportion of total passenger arrivals.

Sources: Mauritius Tourism Promotion Agency and Statistics Mauritius

Table C-6: Number of Licenses Issued by the Tourism Authority as at 31 March, 2016-2019

Activity	March 2016		March 2017		March 2018		March 2019	
	No.	Rooms	No.	Rooms	No.	Rooms	No.	Rooms
Hotel	119	13,710	120	13,329	108	12,495	113	13,430
Guest House	217	2,212	231	2,360	181	2,024	196	2,197
Tourist Residence	866	5,413	961	5,985	723	4,763	738	4,891
Restaurant ¹	1,089		1,123		742		791	
Table d'Hôte	14		16		18		17	
Operating spa within hotel premises ²	82		82		Attached to Hotel Certificate		79	
Operating health and fitness centre within hotel premises ²	54		54				62	
Operating beauty parlour, including hairdressing, within hotel premises ²	46		46				47	
Operating boat house	79		82		60		64	
Operating golf course	9		8		9		9	
Hawking on beaches facing hotels	507		509		482		436	
Hawking in tourist sites	16		17		16		16	
Eco-tourism activities (nature-based tourism activities or adventure-related tourism activities, or both)	13		16		17		17	
Operating aquarium displaying fish or marine animals for public viewing	1		1		1		1	
Operating rental agency for bicycle	41		43		25		27	
Operating rental agency for bus, including minibus	2		2		1		1	
Operating rental agency for car	90		90		n/a		n/a	
Operating rental agency for jet ski	0		3		0		0	
Operating rental agency for kite surf	18		18		15		19	
Operating rental agency for windsurf	2		2		2		2	
Operating scuba diving centre	69		74		63		62	
Operating helmet diving centre	9		10		9		10	
Providing non-motorised water sports such as pedaloes, canoes, kayaks and laser	8		11		10		10	
Operating rental agency for motorcycle	37		42		34		39	
Operating rental agency for quad	10		10		10		11	
Karting	1		1		1		1	
Providing tour operator service	358		393		330		325	
Working as tourist guide, including tourist guide employed by a tour operator	21		30		27		23	
Operating travel agency	158		180		143		139	
Nightclub	0		23		9		20	
Private club	15		6		6		6	
Pub	6		6		4		4	
Total	3,957		4,210		3,046		3,097	

1: As from March 2018, number excludes restaurants in hotels as no separate license is required.
2: The number of spa, health & fitness and beauty palour for March 2019 is already included in the hotel license and no separate license is required.

Source: Mauritius Tourism Authority

Table C-7: GFCF¹ in the Accommodation and Food Service Acitivities Sector, 2012 - 2019

Indicator	2012	2013	2014	2015	2016	2017 ^r	2018 ^r	2019 ^r
GFCF in Accommodation and food service activities (Rs M)	7,712	6,510	4,645	4,375	4,316	6,704	4,775	5,070
As a proportion of total private sector GFCF (%)	12.8	11.0	8.4	8.5	7.7	11.1	7.0	7.3
Total private sector GFCF (Rs M)	60,175	59,267	55,048	51,735	55,797	60,624	68,093	69,296
Year on year growth								
Accommodation and food service activities	-2.5%	-15.6%	-28.6%	-5.8%	-1.4%	55.3%	-28.8%	6.2%
Total private sector GFCF	0.9%	-1.5%	-7.1%	-6.0%	7.9%	8.7%	12.3%	1.8%

1: 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, 2012 - 2018

Indicator	2012	2013	2014	2015	2016 ^r	2017 ^r	2018 ¹
Flows from Abroad in the Accommodation and Food Service Activities sector (Rs M) ²	1,839	756	5,986	1,939	1,478	1,679	1,365
As a proportion of total (%)	9.0	5.5	32.4	14.1	8.1	7.9	7.9
Total Gross Direct Investment Flows (Rs M) ²	20,373	13,766	18,497	13,726	18,161	21,242	17,350
Year on year growth							
Accommodation and food service activities	84.1%	-58.9%	691.8%	-67.6%	-23.8%	13.6%	-18.7%
Total Flows	58.0%	-32.4%	34.4%	-25.8%	32.3%	17.0%	-18.3%

1: Preliminary. Data would be revised in the wake of results from future FALS and are therefore not strictly comparable with prior years' data.
2: The data for 2012 to 2017 have been supplemented with the results from the annual Foreign Assets and Liabilities Survey (FALS) and therefore also include reinvested earnings and shareholders' loans. The data for 2018 include an estimate of the data obtained from FALS.

Source: Bank of Mauritius

Table C-9: Evolution in Indebtedness of the Tourism Sector, 2012 - 2018 (Rs M)

Indicator	Dec-12	Dec-13	Dec-14	Dec-15	Dec-16	Dec-17	Dec-18 ¹
Tourism sector debt	44,806	48,756	47,562	48,228	42,966	43,551	38,425 ¹
Growth (%)	4.1	8.8	-2.4	1.4	-10.9	1.4	N/A
Hotels	26,758	28,895	28,198	28,325	28,008	30,617	36,494
Growth (%)	2.2	8.0	-2.4	0.5	-1.1	9.3	
Hotel management companies	14,040	15,297	14,877	15,844	11,296	9,718	
Restaurants	850	1,058	1,020	1,050	663	632	797
Total private sector debt	256,025	271,248	274,647	286,172	285,484	308,284	359,661
Tourism debt as a % of total	17.5	18.0	17.3	16.9	15.1	14.1	10.7 ¹

1: As from October 2018, change from "Tourism" to "Accommodation and food service activities". Figures are not comparable as such

Source: Bank of Mauritius

Table C-10: Some Direct/Indirect Taxes and Levies Paid to Government, 2012 - 2019 (Rs M)

Details	2012	2013'	2014	2015 (Jan - Jun)	2015/16'	2016/17'	2017/18'	2018/19 ^e
Passenger Fee on Air Tickets ¹	1,204	1,219	1,213	730	1,230	1,652	1,650	1,765
Contribution in respect of Tourism Development Projects on State Lands	8	17	4	5	10	2	50	55
Tourist Enterprise Licenses	81	85	85	40	110	99	100	110
Environment Protection Fee	145	130	159	180	403	383	385	405
- of which by tourist accommodation facilities	89	75	96	161	333	315	328	N/A
Estimated VAT paid by hotels and restaurants (calendar year)	3,187	2,974	3,255	1,764	3,528	4,009	4,330	4,611
Corporate Tax paid by the accommodation sector	127	69	82	41	191	190	194	N/A

1: Exclude service charge and terminal expansion fee - paid to AML.
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

Table C-11: Exchange Rate of the Rupee vis-à-vis Selected Hard Currencies, 2012 - 2019

Currencies	Indicative selling rates average for 12 months ended March ¹							
	2012	2013	2014	2015	2016	2017	2018	2019
US Dollar	29.272	30.982	31.053	31.858	36.217	36.347	34.650	34.893
Pound Sterling	46.709	48.933	49.247	51.332	54.626	47.569	45.844	45.791
Euro	40.357	39.879	41.553	40.365	39.987	39.900	40.445	40.407
Swiss franc	33.316	32.990	33.883	34.393	37.423	36.938	35.786	35.405
South African rand	3.997	3.691	3.121	2.913	2.690	2.614	2.685	2.580
Indian rupee (100)	61.896	57.565	52.016	52.651	56.007	54.725	54.009	50.670
Currencies	YoY appreciation/(depreciation) of the Rupee							
US Dollar	7.3	(5.5)	(0.2)	(2.5)	(12.0)	(0.4)	4.9	(0.7)
Pound Sterling	4.4	(4.5)	(0.6)	(4.1)	(6.0)	14.8	3.8	0.1
Euro	2.7	1.2	(4.0)	2.9	0.9	0.2	(1.3)	0.1
Swiss franc	(6.8)	1.0	(2.6)	(1.5)	(8.1)	1.3	3.2	1.1
South African rand	10.3	8.3	18.3	7.2	8.3	2.9	(2.7)	4.1
Indian rupee (100)	12.0	7.5	10.7	(1.2)	(6.0)	2.3	1.3	6.6

1: Calculated on the basis of the daily average exchange rates for the period April to March. The daily average exchange rate of the Rupee is based on the average indicative selling rates for T.T. & D.D. of banks.

Source: Bank of Mauritius

Table C-12: GDP Growth in Selected Source Countries, 2017 - 2024

Region/country	2017	2018	2019 ^e	2020 ^e	2021 ^e	2022 ^e	2023 ^e	2024 ^e
Euro area	2.4	1.8	1.3	1.5	1.5	1.4	1.4	1.4
Germany	2.5	1.5	0.8	1.4	1.5	1.4	1.3	1.2
France	2.2	1.5	1.3	1.4	1.5	1.5	1.5	1.6
Italy	1.6	0.9	0.1	0.9	0.7	0.6	0.6	0.6
UK	1.8	1.4	1.2	1.4	1.5	1.6	1.6	1.6
Switzerland	1.7	2.5	1.1	1.5	1.6	1.6	1.6	1.6
China	6.8	6.6	6.3	6.1	6.0	5.8	5.6	5.5
India	7.2	7.1	7.3	7.5	7.7	7.7	7.7	7.7
Russia	1.6	2.3	1.6	1.7	1.7	1.6	1.6	1.6
South Africa	1.4	0.8	1.2	1.5	1.8	1.8	1.8	1.8
World	3.8	3.6	3.3	3.6	3.6	3.6	3.6	3.7

Source: World Economic Outlook Database, April 2019, International Monetary Fund

Table C-13: Selected Tourism-Related Indicators in Competing Island Destinations in the Region, 2014 - 2018

Indicators	2014	2015	2016	2017	2018
Tourist arrivals					
Mauritius	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408
Maldives	1,204,857	1,234,248	1,286,135	1,389,542	1,484,274
Seychelles	232,667	276,233	303,177	349,861	361,844
Sri Lanka	1,527,153	1,798,380	2,050,832	2,116,407	2,333,796
Annual growth rate in tourist arrivals					
Mauritius	4.6%	10.9%	10.8%	5.2%	4.3%
Maldives	7.1%	2.4%	4.2%	8.0%	6.8%
Seychelles	1.0%	18.7%	9.8%	15.4%	3.4%
Sri Lanka	19.8%	17.8%	14.0%	3.2%	10.3%
Average bed ¹ operational capacity					
Mauritius	26,174	28,732	29,139	29,650	30,296
Maldives	22,986	23,348	24,568	27,686	29,373
Seychelles	9,083	10,284	5,061	5,576	5,420
Sri Lanka	35,976	37,720	45,509	48,008	52,237
Average bed occupancy rate (%)					
Mauritius	58	65	65	68	67
Maldives	82	76	74	73	75
Seychelles	58	59	74	72	73
Sri Lanka (room occupancy)	74	75	75	73	73
Average length of stay (nights)					
Mauritius	10.9	10.6	10.4	10.3	10.4
Maldives	6.1	5.7	6.0 ^r	6.2	6.4
Seychelles	10.2	9.9	9.9	9.5	10.3
Sri Lanka	9.9	10.1	10.2	10.9	10.8

1: For Mauritius: beds in Hotels only at end December; For Maldives: beds in Resorts only; For Seychelles: beds in all types of tourist accommodation facilities up to 2015. As from 2016, relates to hotels only; 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.

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

Year	International tourist arrivals		International tourism receipts	
	Million	Growth	US\$ billion	Growth
2000	680	8.5%	495	3.8%
2001	675	-0.7%	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	951	6.5%	961	9.1%
2011	998	4.9%	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	1,196	5.2%	1,196	-4.5%
2016 ^r	1,235	3.3%	1,220	2.0%
2017 ^r	1,329	7.6%	1,340	9.8%
2018 ^r	1,403	5.6%	1,448	8.1%
2020 [*]	1,360			
2030 [*]	1,809			

* Forecast
Source: UNWTO

Table D-2: Forecasted Outbound Tourism from Selected Markets, 2018

Country	Number of outbound tourists, 000s			Average annual growth, 2018-2023, %		
	Short haul	Long haul	Total	Short haul	Long haul	Total
Australia	628	17,871	18,499	5.50%	6.30%	6.20%
Brazil	2,686	8,189	10,874	7.60%	3.90%	4.80%
Canada	23,407	15,575	38,982	2.90%	3.50%	3.10%
China	48,665	49,834	98,499	4.20%	5.40%	4.90%
India	852	18,839	19,691	5.90%	6.80%	6.80%
Japan	9,027	15,634	24,660	2.30%	3.20%	2.90%
Russia	22,525	7,430	29,956	5.60%	3.70%	5.20%
UAE	1,193	1,739	2,932	11.10%	2.30%	6.20%
USA	47,680	71,813	119,494	3.60%	4.60%	4.20%

Source: European Tourism - Trends & Prospects, Q1/2019, European Travel Commission

Table D-3: Outbound Tourists Growth Forecasts, 2018 - 2022

Region	2018 ^e	2019 ^f	2020 ^f	2021 ^f	2022 ^f
Europe	5.2%	4.2%	3.3%	3.6%	3.7%
EU	4.7%	3.9%	3.1%	3.3%	3.5%
Non-EU	7.3%	5.6%	4.0%	4.6%	4.5%
Northern	-0.1%	4.1%	3.6%	4.3%	4.7%
Southern/Mediterranean	5.2%	3.9%	2.9%	2.9%	3.0%
Western	8.5%	4.7%	3.5%	3.4%	3.8%
Central/Eastern	9.7%	4.8%	3.5%	3.9%	3.8%
Asia & the Pacific	6.1%	4.7%	4.7%	4.7%	4.8%
North East	5.0%	4.8%	4.6%	4.7%	4.7%
South East	7.2%	3.1%	4.3%	4.0%	4.4%
South	7.8%	8.0%	5.5%	5.7%	5.8%
Oceania	4.8%	4.5%	5.3%	5.5%	5.3%
Africa	7.0%	4.8%	3.6%	3.6%	3.6%
Middle East	1.5%	4.2%	4.3%	5.4%	6.0%
Americas	4.4%	4.1%	3.0%	3.0%	3.3%
North America	5.6%	4.1%	2.8%	2.7%	3.0%
Caribbean	2.4%	5.9%	5.6%	5.1%	5.5%
Central & South America	0.7%	4.1%	3.4%	3.9%	4.2%
World	5.2%	4.3%	3.6%	3.8%	4.0%

Source: European Tourism - Trends & Prospects, Q1/2019, European Travel Commission

Table D-4: Top 10 World Spenders, 2016 - 2018 (US\$ billion)

Rank	2016	2017	2018
1 China	250.1	257.7	277.3
2 United States	123.6	135.2	144.2
3 Germany	79.8	83.7	94.2
4 United Kingdom	64.8	63.4	75.8
5 France	40.3	41.4	47.8
6 Australia	30.8	34.0	36.8
7 Russia	24.0	31.1	34.5
8 Canada	28.7	32.0	33.3
9 Republic of Korea	27.2	30.6	32.0
10 Italy	25.0	27.1	30.1

Source: UNWTO



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