AHRIM

ASSOCIATION DES HOTELIERS ET RESTAURATEURS ILE MAURICE

ANNUAL REPORT 2021/2022

A shared responsibility

"The potential of tourism is enormous, and we have a **shared responsibility** to make sure it is fully realized. On World Tourism Day 2022, UNWTO calls on everyone, from tourism workers to tourists themselves, as well as small businesses, large corporations and governments to **reflect and rethink** what we do and how we do it."

Mr. Zurab Pololikashvili
Secretary-General of the UNWTO

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AHRIM 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

YEAR	NAME
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
2019/2020	Mr. Jean Michel Pitot
2020/2021	Mr. Jean Michel Pitot
2021/2022	Mr. Désiré Elliah

Introduction 01

WORLD ECONOMY AT A GLANCE 1.1

After more than two years of the unprecedented pandemic that has brought the world economy to a near standstill, a series of destabilising shocks is affecting the green shoots of recovery. The Russian invasion of Ukraine with its significant adverse spill overs - global effects on commodity markets, supply chains, inflation, financial conditions, global energy markets and prices - is steepening the slowdown in global growth. The war is aggravating the existing strains on the global economy following the pandemic, with particularly large costs for poor and vulnerable populations.

The mounting tension between China and the USA is yet another factor maintaining pressure on the global economy with the possibility of a stubbornly high global inflation. Indeed, world inflation, from its lows in mid-2020, has increased sharply due to rebounding global demand, supply bottlenecks, and soaring food and energy prices, especially in the aftermath of Russia's invasion of Ukraine. The mounting prices of agricultural products is also exacerbating food insecurity and extreme poverty in many emerging market and developing economies.

The war in Ukraine is reducing further the policy space which is now much more limited following the COVID-19 pandemic. The world high inflation rate coupled with sluggish growth are the receipt of a stagflation that could encourage advanced economies to tighten monetary policy to curb inflation, which could lead to surging borrowing costs. Eventually, these factors could culminate in financial stress across the globe.

Following an initial recovery from the pandemic, but against the backdrop of this substantially more challenging environment, the world economy is expected to experience slower global growth from 6.1 percent in 2021 to 3.6 percent in 2022. Growth projections for 2022 have been downgraded for the majority of economies, including most commodity exporters.

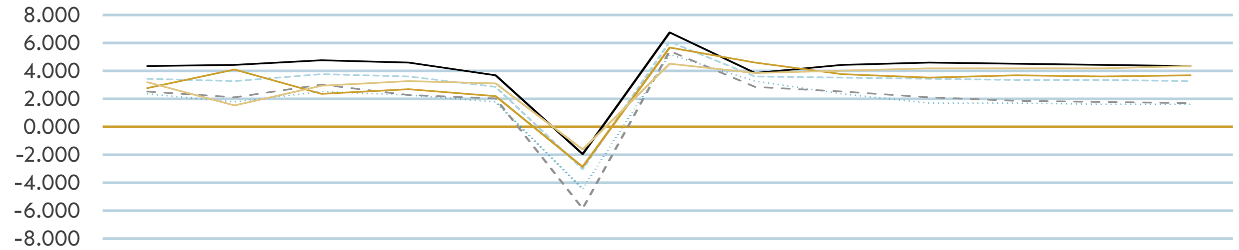
GDP GROWTH FORECASTS 1.2

As the Russo-Ukraine war enters the six-month threshold, the possibility that Ukraine remains a battlefield is fuelling concerns about continued continental and global instability for months, or even years. There is thus essentially no rebound projected next year: global growth is forecast to constant at still-subdued 3.6 percent in 2023 as many existing headwinds are expected to still prevail. Moreover, the ongoing deceleration of growth in the US coupled with China's strict zero-COVID policy, is adding to a negative economic outlook. The various downside risks, including intensifying geopolitical tensions, growing stagflationary headwinds, rising financial instability, continuing supply strains, and worsening food insecurity are clouding the outlook of this decade.

Widespread labour shortages in a number of advanced economies have and are expected to continue to damper growth rate and is putting significant upward pressure on wages. This reflects a combination of declining labour supply and mismatches between available jobs and worker preferences.

Based on IMF figures, in 2024, global growth is projected to further slide downwards to 3.4 percent and reach 3.3 percent in 2027. Advanced economies are expected to experience the brunt of this slowdown (2.4 and 1.7 percent growth in 2023 and 2024 respectively) while emerging and developing economies would fare better at 4.4 and 4.6 percent growth for the same years.

Figure 1: GDP Growth (constant prices) in Selected Country Groupings, 2015 – 2027^{e} (%)



	2015	2016	2017	2018	2019^{r}	2020^{r}	2021^{e}	2022^{e}	2023^{e}	2024^{e}	2025^{e}	2026^{e}	2027^{e}
World	3.424	3.251	3.747	3.612	2.865	-3.063	6.108	3.585	3.551	3.404	3.378	3.315	3.263
Advanced Economies	2.309	1.791	2.475	2.286	1.749	-4.490	5.186	3.259	2.358	1.698	1.704	1.632	1.568
European Union	2.491	2.087	3.004	2.249	2.001	-5.877	5.396	2.879	2.506	2.133	1.872	1.753	1.661
Emerging and developing economies	2.762	4.087	2.357	2.661	2.152	-2.902	5.710	4.568	3.726	3.541	3.663	3.637	3.717
Middle East and Central Asia	4.312	4.411	4.744	4.628	3.705	-2.014	6.777	3.821	4.397	4.581	4.503	4.417	4.343
Sub Saharan Africa	3.186	1.492	2.955	3.280	3.129	-1.657	4.505	3.824	4.012	4.168	4.194	4.181	4.366

Source: International Monetary Fund

European Union 1.2.1

The EU bloc is experiencing a strong divergence between a weak industrial sector plagued by headwinds such as supply bottlenecks, higher input costs, and weakening sentiment, and a solid services sector, which is experiencing a post-COVID rebound. As regards inflation, the upward revision due to energy prices following the ban on Russian oil coupled with the upward adjustment in food prices, has led to an average close to seven percent this year. In fact, headline inflation until June 2022 has hit record highs as energy and food prices continue to grow while price pressures broadened to services and other goods.

The EU economy remains particularly vulnerable to developments in energy markets due to its high reliance on Russian fossil fuels and weakening global growth from external demand. Economic activity for the second semester of 2022 is expected to be subdued, notwithstanding a promising summer tourism season.

At the start of 2022, output in the EU has nearly reached pre-pandemic level but this trend has been largely reversed following the invasion of Ukraine by Russia – GDP growth reached a healthy 5.4 percent in 2021 but is forecasted to regress to 2.9 percent in 2022 and 2.5 percent in 2023 according to the IMF.

New increases of gas prices could further drive up inflation and stifle growth. With the potential risks on financial stability, a sharper tightening of financial conditions could be expected. At the same time, the possibility that the resurging pandemic in the EU brings renewed disruptions to the economy cannot be excluded.

However, the recent downward tendencies of oil and other commodity prices could intensify, bringing a faster decline in inflation than currently expected. Furthermore, with a strong labour market, private consumption could prove more resilient to increasing prices especially if households were to use more of their accumulated savings.

FRANCE 1.2.1.1

Economic output declined in the first quarter of 2022 (-0.2 percent) on the back of peaking COVID cases in January and the outbreak of the Russo-Ukrainian war end February. GDP growth is however expected to come back into positive territory with the full lifting of pandemic-related restrictions, though the rebound will be limited in the second quarter (+0.2 percent) before slightly accelerating in the third quarter on account of the expected improvement in tourism activity. Easing of travel restrictions in the wake of successful vaccine roll-outs is therefore expected to allow only a partial rebound as private consumption is then projected to grow slowly, leaving the savings rate to hover around 23 percent.

The rebound of tourism and the gradual recovery of transport equipment (both aircraft and ships) would allow net exports to contribute positively to growth in 2022 and 2023, although slightly less than expected a few months ago. The forecast of GDP growth as from 2023 is thus very moderate: persistent supply bottlenecks and subdued internal demand in a context of declining real wages and tightening financial conditions have dampened the outlook.

Table 1: Selected Economic Indicators in France, 2018 - 2025

INDICATOR	UNIT	2018	2019	2020	2021	2022	2023	2024	2025
Gross domestic product, constant prices	% change	1.84	1.84	-7.99	6.98	2.94	1.36	1.54	1.45
Gross national savings	% of GDP	23.03	24.10	21.76	24.06	23.15	23.13	23.20	23.41
Inflation, average consumer prices	% change	2.10	1.30	0.53	2.06	4.08	1.78	1.72	1.63
Inflation, end of period consumer prices	Index	104.11	105.77	105.58	109.09	112.83	114.88	116.66	118.61
Volume of exports of goods and services	% change	4.60	1.50	-16.12	9.24	4.82	3.56	3.81	3.80
Unemployment rate	% of total labour force	9.01	8.42	8.01	7.85	7.83	7.60	7.50	7.40

Source: International Monetary Fund

GERMANY 1.2.1.2

In the first quarter of 2022 real GDP edged up by 0.2 percent in light of the rebound in construction activity. With the progressive lifting of the stringent pandemic containment measures, consumer spending is expected to be boosted though limited as households' purchasing power is dented by soaring inflation. A temporary relief in the form of an increase in the minimum wage later this year is expected to maintain consumption. However, trade disruptions are expected to be aggravated by the Russo-Ukrainian war; overall, GDP growth is expected to be subdued at 2.1 percent in 2022.

While manufacturers' order backlogs remain significant, their unwinding is likely to be held back by lingering supply bottlenecks and ever-increasing costs. Moreover, given Germany's relatively high dependence on Russian gas, a sudden stop in deliveries would constitute a significant downside risk to the outlook as it may heavily affect activity in key industry sectors. Against this background, a slight pickup in GDP growth is expected in 2023 (2.72 percent) followed by a more negative outlook at 1.49 percent in 2024.

Table 2: Selected Economic Indicators in Germany, 2018 - 2025

INDICATOR	UNIT	2018	2019	2020	2021	2022	2023	2024	2025
Gross domestic product, constant prices	% change	1.09	1.05	-4.56	2.79	2.10	2.72	1.49	1.39
Gross national savings	% of GDP	29.85	29.71	28.24	30.08	28.58	28.63	28.96	29.00
Inflation, average consumer prices	% change	1.94	1.35	0.37	3.21	5.46	2.90	1.83	1.83
Inflation, end of period consumer prices	Index	104.60	106.20	105.50	111.50	116.77	119.68	121.83	124.10
Volume of exports of goods and services	% change	2.46	1.14	-10.09	9.75	4.97	4.87	3.76	3.30
Unemployment rate	% of total labour force	3.40	3.15	3.83	3.52	3.22	3.21	3.21	3.17

Source: International Monetary Fund

UK 1.2.2

GDP growth has see-sawed after a strong start in mid-2021 as activity was hit by disruptions in energy and labour supply, and the imposition of 'Plan B' restrictions in response to the Omicron wave. Today, the inflationary effects of the war in Ukraine and lockdowns in China have added to existing price pressures, hitting consumer confidence and activity. A £ 15 Bn (0.6 percent of GDP) fiscal package that offers a mix of universal and targeted support was implemented to alleviate the cost-of-living crisis. This raised the UK government's support to a level that is comparable to other countries. Still, it is reckoned that inflation will rise to a 40-year high and the risk of a technical recession this year is increasing with contracting outputs as demand continues to drop.

The labour market remains exceptionally tight, with the number of vacancies almost matching the number of unemployed, compared to the pre-pandemic average of around three unemployed people per vacant job. As a result, unemployment seems unlikely to rise sharply as growth weakens further.

Amidst these conditions, the UK according to the IMF will close 2022 with a moderate 3.8 percent GDP growth while much slower growth is expected in 2023 and 2024.

Table 3: Selected Economic Indicators in UK, 2018 - 2025

INDICATOR	UNIT	2018	2019	2020	2021	2022	2023	2024	2025
Gross domestic product, constant prices	% change	1.65	1.67	-9.27	7.44	3.75	1.20	1.45	2.24
Gross national savings	% of GDP	13.99	15.34	14.19	14.50	12.10	12.39	12.96	13.85
Inflation, average consumer prices	% change	2.48	1.79	0.85	2.59	7.41	5.27	2.60	1.88
Inflation, end of period consumer prices	Index	107.14	108.53	109.17	115.05	123.79	128.12	130.49	133.10
Volume of exports of goods and services	% change	2.78	3.36	-12.96	-1.29	2.23	4.44	4.28	2.28
Unemployment rate	% of total labour force	4.08	3.83	4.53	4.50	4.15	4.63	4.93	4.33

Source: International Monetary Fund

South Africa 1.2.3

Growth in South Africa in 2022 has been dampened (1.9 percent) by the effects of high unemployment, infrastructure bottlenecks, including recurring power shortages, slow progress with reforms and weak private investment. Damages to the country's main port following severe floods, have exacerbated supply chain disruptions already caused by the invasion of Ukraine and mobility restrictions in China in response to pandemic outbreaks.

Tightening of monetary policy to combat rising inflation has also gathered pace in South Africa and interest rates have increased four times during the current hiking cycle, with further possible increases looming.

Furthermore, pandemic-related risks remain high in South Africa. The country has already seen five waves of COVID-19 infections, but above-average vaccination rates have contributed to a much milder last wave compared to previous outbreaks.

According to the IMF, the outlook for South Africa will remain subdued in the coming years.

Table 4: Selected Economic Indicators in South Africa, 2018 - 2025

INDICATOR	UNIT	2018	2019	2020	2021	2022	2023	2024	2025
Gross domestic product, constant prices	% change	1.49	0.11	-6.43	4.92	1.94	1.40	1.40	1.40
Gross national savings	% of GDP	13.58	13.44	14.73	16.64	15.73	13.50	13.21	13.32
Inflation, average consumer prices	% change	4.61	4.12	3.28	4.55	5.73	4.65	4.50	4.50
Inflation, end of period consumer prices	Index	88.74	92.07	94.99	100.15	105.69	110.44	115.41	120.61
Volume of exports of goods and services	% change	2.81	-3.41	-11.95	9.89	6.90	4.60	4.28	4.09
Unemployment rate	% of total labour force	27.13	28.70	29.18	34.20	35.22	37.00	38.09	38.67

Source: International Monetary Fund

Middle East and Central Asia 1.2.4

The region entered 2022 with robust economic growth, despite some softening caused by the Omicron-driven pandemic resurgence and the subsequent restrictions. The direct impact of the Russo-Ukrainian conflict on this region remains contained as trade and financial exposure to Russia and Ukraine is limited. However, the indirect spillovers have been significant, mainly through much higher commodity prices, tighter financial conditions, and weaker external demand. Export-oriented economies are thus facing pressures on their foreign exchange reserves that are dwindling resulting in import restrictions. Furthermore, surging food costs in a region populated by more than one-third of the global poor and where one-fifth of calories comes from wheat products, pose significant challenges to poverty alleviation and food security.

INDIA 1.2.4.1

The outlook for India is very encouraging and over the next few years, it will probably reign as the world's fastest growing economy: 8.2, 6.9 and 7.0 percent in 2022, 2023 and 2024 respectively. Being primarily a domestic demand–driven economy with consumption and investments contributing to 70 percent of the economic activity, India is being sheltered, to some extent, from the negative spill over effects of the war raging in Ukraine. Inflation, like in many other countries, has hit the consumers, with low-income households getting disproportionately impacted. The government has thus extended a food scheme to support poor households, reduced taxes on fuels, and reduced import duties on several products.

With the easing of mobility restrictions, consumer confidence is bolstered and there is an appetite for spending among the top 10 income percentile of the population that has not spent for more than a year and thus, is onto revenge buying and travelling. Also, the share of government capital spending is rising as it is cutting down recurrent expenses. Exports have performed exceptionally well during the pandemic and have positively contributed towards GDP growth and economic recovery.

Going forward, growth though still strong, will continue to face headwinds from rising inflation, supply chain disruptions, and geopolitical tensions offsetting buoyancy in the recovery from the pandemic.

Table 5: Selected Economic Indicators in India, 2018 - 2025

INDICATOR	UNIT	2018	2019	2020	2021	2022	2023	2024	2025
Gross domestic product, constant prices	% change	6.45	3.74	-6.60	8.95	8.15	6.89	6.99	7.04
Gross national savings	% of GDP	30.23	29.35	28.80	29.58	29.05	29.55	29.67	29.76
Inflation, average consumer prices	% change	3.43	4.76	6.18	5.52	6.08	4.81	4.31	4.07
Inflation, end of period consumer prices	Index	139.97	149.30	156.57	166.19	175.72	183.63	191.42	199.24
Volume of exports of goods and services	% change	4.79	-1.97	-6.07	20.87	6.75	5.96	5.69	5.96

Source: International Monetary Fund

CHINA 1.2.4.2

After a strong start in early 2022, the largest COVID-19 wave in two years that resulted in prolonged lockdowns in parts of China from March to May, has disrupted China's growth normalisation. Growth momentum is expected to rebound in the second half of 2022 strongly backed by aggressive policy stimuli to mitigate the economic downturn. The government has stepped up macroeconomic policy easing with large public spending, tax rebates, policy rate cuts, and a more dovish stance with low interest rates on the property sector.

Industrial production growth is expected to accelerate on the back of strong infrastructure investment growth. A shift towards higher value-added, less polluting, and less energy intensive manufacturing sectors is expected while the mining sector will sustain high growth amid the government's efforts to ensure energy safety. The recovery in services will be delayed again, hampered by China's zero-COVID strategy and weak housing market activity.

The outlook of China remains uncertain as it continues to rely on lockdowns and other strict restrictions to contain the spread of the virus. Indeed, recurrent COVID-19 outbreaks are adding to economic uncertainty, weighing on private investment and consumption and reducing the effectiveness of policy measures.
Today, the most prominent downside risks remain those related to the pandemic.

Table 6: Selected Economic Indicators in China, 2018 - 2025

INDICATOR	UNIT	2018	2019	2020	2021	2022	2023	2024	2025
Gross domestic product, constant prices	% change	6.75	5.95	2.24	8.08	4.37	5.07	5.09	4.97
Gross national savings	% of GDP	44.14	43.79	44.53	43.46	43.58	44.06	44.00	43.82
Inflation, average consumer prices	% change	2.11	2.90	2.39	0.85	2.08	1.84	1.98	2.00
Inflation, end of period consumer prices	Index	106.59	111.39	111.05	113.00	115.82	117.46	119.79	122.18
Volume of exports of goods and services	% change	3.99	0.45	2.12	18.15	2.31	3.52	4.11	3.80
Unemployment rate	% of total labour force	3.80	3.62	4.24	3.96	3.70	3.60	3.60	3.60

Source: International Monetary Fund

PHOTO CREDIT: LUX* ISLAND RESORTS

PHOTO CREDIT: LUX* ISLAND RESORTS

An Insight into World Tourism

02

TOURISM CONTINUES TO RECOVER AT A ROBUST PACE 2.1

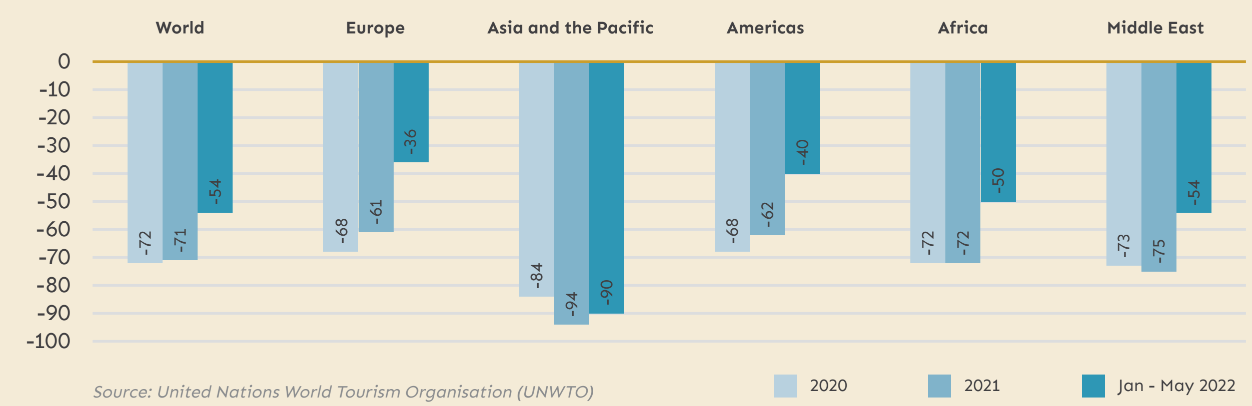
After a turbulent two-year crisis, international tourism in 2022 continues to show signs of a strong and steady recovery from the impact of the pandemic despite significant mounting economic and geopolitical challenges. According to the UNWTO, almost 250 Mn international arrivals were registered in the world in the first five months of 2022 indicating that tourism sector has recovered by almost half (46 percent) compared to the pre-pandemic level of 2019.

International tourist arrivals in Europe have increased four-fold compared to the first five months of 2021 (+350 percent), fuelled by high demand within Europe itself and the removal of all COVID travel restrictions in most European countries. The region saw particularly robust performance in April (+458 percent), reflecting a busy Easter period. In the Americas, the number of international arrivals has more than doubled (+112 percent). However, this result is explained by the effect of the low base of 2021. In fact, tourist flows to these two regions remain at 36 percent and 40 percent respectively below their levels of 2019.

A similar trend is observed in other regions. Though strong growth in the Middle East (+157 percent) and Africa (+156 percent) was recorded, it is also explained by the effect of a low base. In Asia and the Pacific, the number of international arrivals (+94 percent) almost doubled in comparison with the same January to May period in 2021. It is noteworthy however that these figures are 90 percent lower than in 2019, since the borders of some countries are still closed to tourists.

Some tourist subregions have already reached from 70 percent to 80 percent of their pre-pandemic levels while the Top 5 in terms of the recovery includes the Caribbean region, Central America, the Southern Mediterranean, Western and Northern Europe. Examples of destinations that have already exceeded the tourist arrival flows of 2019 include the Virgin Islands, Saint Martin, the Republic of Moldova, Albania, Honduras and Puerto Rico.

Figure 2: International Tourist Arrivals - Performance Against 2019 by Region (% change over 2019)



Source: United Nations World Tourism Organisation (UNWTO)

Stronger than expected recovery ahead 2.1.1

The latest UNWTO Confidence Index is indicating a marked upswing and for the first time since the pandemic, the index returned to 2019 levels. This new level of optimism among tourism experts around the world is based on strong pent-up demand, particularly intra-European travel and US travel to Europe.

Also, based on the latest UNWTO Panel of Experts survey, an overwhelming majority of tourism professionals (83 percent) see better prospects for 2022 than 2021, as long as the virus is contained, and destinations continue to ease or lift travel restrictions. However, the ongoing closure of some major outbound markets, mainly in Asia and the Pacific, and the uncertainty derived from the Russia-Ukraine conflict, could delay the effective recovery of international tourism.

Stronger than expected recovery ahead (cont'd) 2.1.1

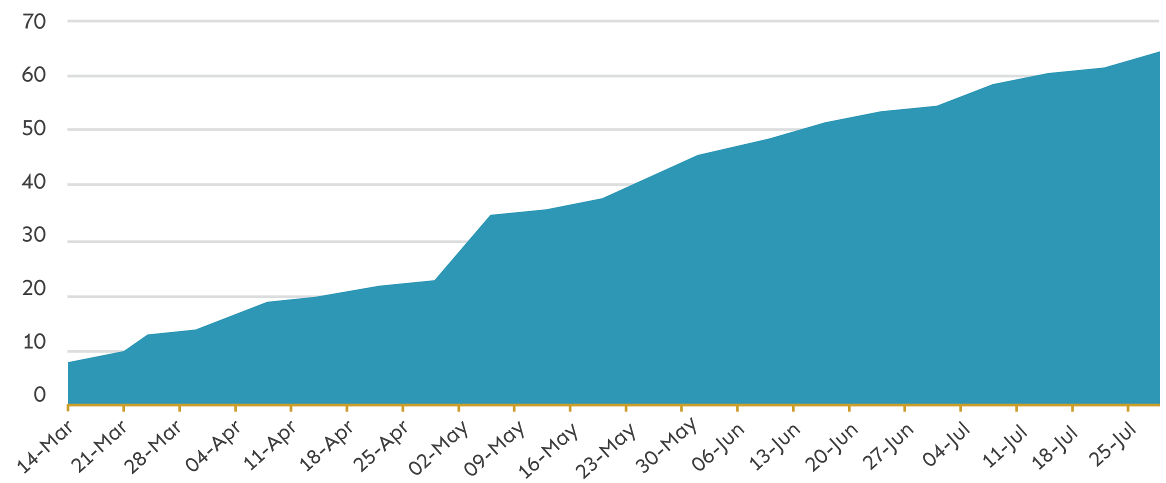
Accordingly, the UNWTO forecasts that international tourist arrivals will reach 55 percent to 70 percent of 2019 levels in 2022 with arrivals to Europe reaching 65 percent to 80 percent of the 2019 level, America 63 percent to 76 percent of 2019 level, Africa and the Middle East 50 percent to 70 percent of the pre-pandemic level. This proportion will be much lower in Asia and the Pacific (30 percent of the 2019 level) as stricter COVID rules and restrictions are still prevalent.

A higher number of experts (48 percent) now see a potential return of international arrivals to 2019 levels in 2023 (from 32 percent in the January survey), while the percentage indicating this could happen in 2024 or later (44 percent) has dropped compared to the January survey (64 percent).

More destinations are opening up 2.1.2

As of 29 July 2022, there were no restrictions related to COVID-19 in 65 destinations. 41 countries were in Europe, 11 in the Americas, 5 in both Asia and the Pacific and Middle East and three in Africa. As more destinations in Asia are easing COVID entry requirements, this number will continue to increase.

Figure 3: Number of Countries with no COVID Restrictions, 14 March to 29 July 2022



Source: UNWTO

Tourism spending is also rising 2.1.3

Rising tourism spending in major source markets is consistent with the observed recovery. International expenditure by tourists from France, Germany, Italy and the United States has reached 70 percent to 85 percent of pre-pandemic levels, while spending from India, Saudi Arabia and Qatar has already exceeded 2019 levels.

In terms of international tourism receipts earned in destinations, a growing number of countries, the Republic of Moldova, Serbia, Seychelles, Romania, North Macedonia, Saint Lucia, Bosnia & Herzegovina, Albania, Pakistan, Sudan, Turkey, Bangladesh, El Salvador, Mexico, Croatia and Portugal, have already attained their respective pre-pandemic levels.

Based on the UNWTO figures, USD 1 Bn were lost in export revenues from international tourism in 2021, adding to the USD 1 Bn already lost in the first year of the pandemic. Total export revenues from tourism (including passenger transport receipts) were estimated at USD 713 Bn in 2021, a four percent increase in real terms from 2020 but still 61 percent below 2019 levels. International tourism receipts dropped to USD 602 Bn, four percent higher in real terms than in 2020. Europe and the Middle East recorded the best results, with earnings climbing to about 50 percent of pre-pandemic levels in both regions.

Interestingly, the amount being spent per trip is on the rise – from an average of USD 1,000 in 2019 to USD 1,400 in 2021.

Table 7: Trend in World Tourism, 2000 – 2021

	INTERNATIONAL TOURIST ARRIVALS		INTERNATIONAL TOURISM RECEIPTS	
YEAR	**MILLION**	**GROWTH**	**USD BILLION**	**GROWTH**
2000	680	8.5%	496	4.0%
2001	675	-0.7%	485	-2.2%
2002	696	3.1%	506	4.3%
2003 (SARS)	692	-0.6%	554	9.5%
2004	764	10.4%	657	18.6%
2005	809	5.9%	707	7.6%
2006	855	5.7%	773	9.3%
2007	912	6.7%	892	15.4%
2008	930	2.0%	988	10.8%
2009 (Global financial crisis)	893	-4.0%	901	-8.8%
2010	952	6.6%	979	8.7%
2011	997	4.7%	1,096	12.0%
2012	1,044	4.7%	1,132	3.3%
2013	1,097	5.1%	1,219	7.7%
2014	1,143	4.2%	1,281	5.1%
2015	1,197	4.7%	1,222	-4.6%
2016	1,243	3.8%	1,250	2.3%
2017	1,333	7.2%	1,347	7.8%
2018	1,413	6.0%	1,454	7.9%
2019	1,466	3.8%	1,466	0.8%
2020[r] (COVID-19 pandemic)	405	-72.4%	602	-58.9%
2021[p]	427	5.4%	713	18.4%

Source: UNWTO

More challenges ahead 2.1.4

Despite these positive prospects, a challenging economic environment coupled with the invasion of Ukraine, poses a downside risk to the ongoing recovery of international tourism. The war in Ukraine seems to have had a limited direct impact on overall results, although it disrupts travel in Eastern Europe. However, the conflict has major economic repercussions globally, exacerbating already high oil prices and general inflation and disrupting international supply chains, which resulted in higher transport and accommodation costs for the tourism sector.

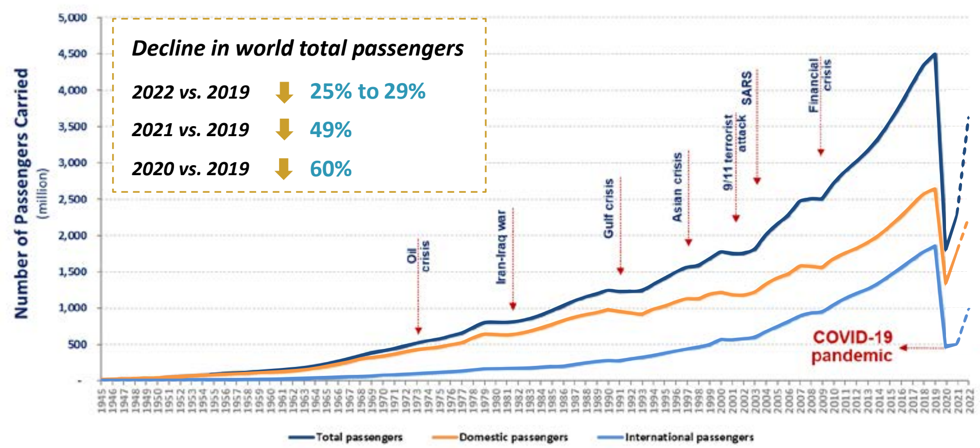
Moreover, higher-than-expected demand for travel and tourism has created serious operational and personnel challenges.

INTERNATIONAL TRAVEL BY AIR AND SEA 2.2

Air travel 2.2.1

After its worst downturn in the history to international travel, air travel is almost back on track. People are today savouring the freedom to travel in growing numbers to re-connect with one another and to see other parts of the world.

Figure 4: World Air Passenger Traffic Evolution, 1945 - 2022



Source: ICAO Air Transport Reporting Form A and A-S plus ICAO estimates

Based on International Civil Aviation Organisation (ICAO) figures, at end April, international air capacity across the Americas, Africa, Europe, North Atlantic and the Middle East has reached or is close to 80 percent of pre-crisis levels, and demand is following. ICAO further estimates that overall reduction in international air capacity in 2022 will be limited to 15 to 18 percent compared to 2019 while the number of passengers dropped by an estimated 921 to 1,079 Mn. These resulted in an estimated USD 133 to 155 Bn loss of gross passenger operating revenues for airlines.

Table 8: The COVID-19 Impact on World Scheduled Passenger Traffic for Year 2022 Compared to 2019

INDICATORS	DOMESTIC	INTERNATIONAL	OVERALL
Reduction in seats, %	-12 to -14	-20 to 25	-15 to -18
Reduction in passengers, Mn	464 to 537	457 to 544	921 to 1,079
Reduction in passengers, %	-18 to -20	-25 to -29	-21 to 24
Loss of gross passenger revenues, USD Bn	37 to 43	96 to 112	133 to 155

Source: ICAO

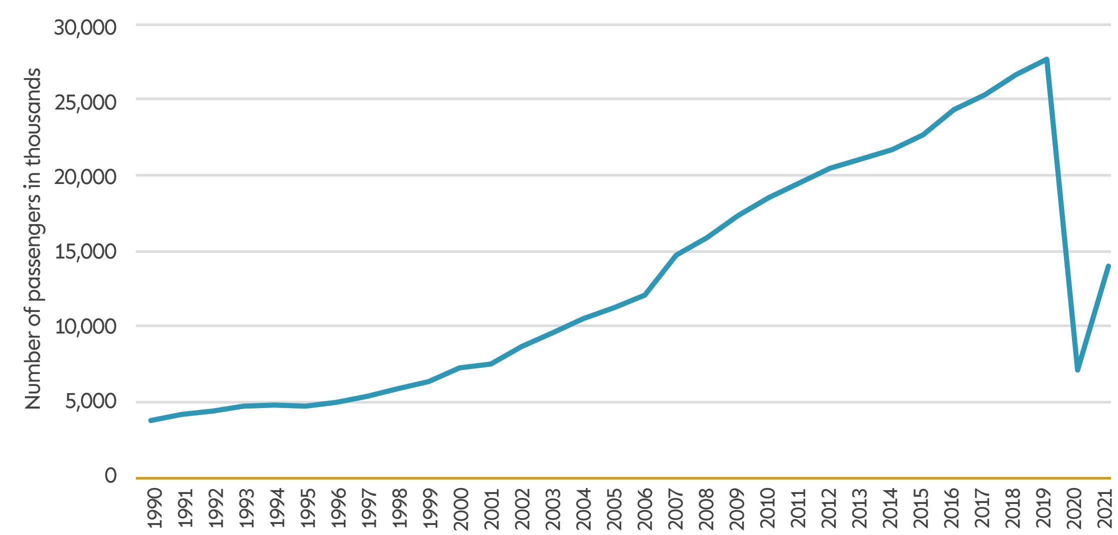
The recovery in international air travel is resilient to shocks, but Asia-Pacific is struggling with the strict sanitary measures still in force in this part of the world. In fact, a surge in ticket sales is often observed with the easing of air travel restrictions. Except for countries directly affected by the Russo-Ukrainian war, demand has been strong, with ticket sales falling for only a week or so before recovering. Not even inflation has so far put people off air travel. It is likely, though, that demand would have been stronger without these various shocks.

According to IATA, the Revenue Passenger Kilometers (RPK), number of kilometers travelled by paying passengers, in April 2022 was -37.2 percent compared to April 2019 (-25.8 percent for domestic and -43.4 percent for international travel). It also predicts that by the end of 2023, most regions will be at, or exceeding pre-pandemic levels of demand.

Sea travel 2.2.2

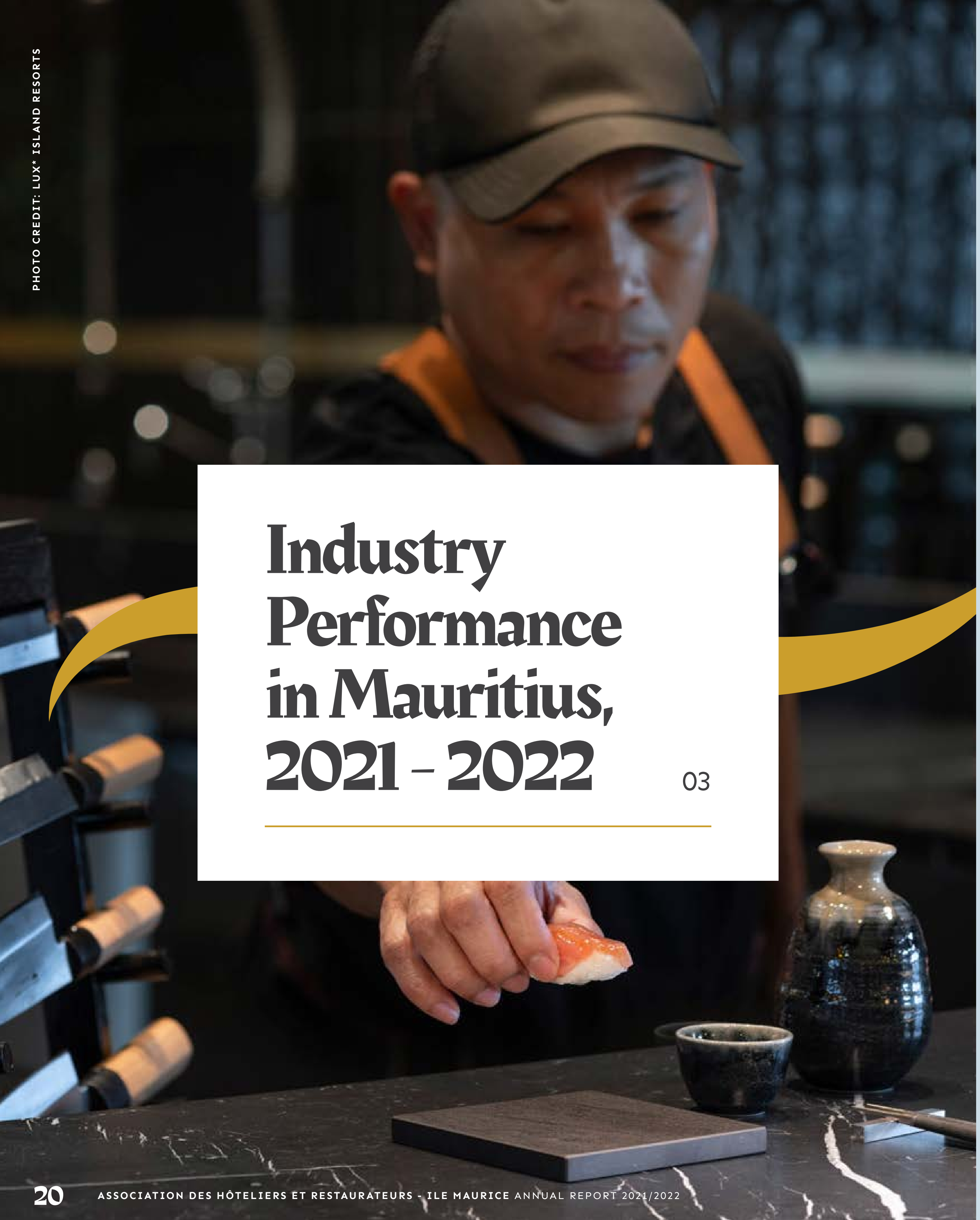
Worldwide, the ocean cruise industry had an annual passenger compounded annual growth rate of 6.6 percent over the 1990 – 2019 period. With the outbreak of COVID-19, the number of global cruise passengers collapsed and reached the Year 2000 level of nearly 7.1 Mn passengers from the peak of 27.5 Mn reached in 2019. With the relaxation of sanitary measures, the number of cruise passengers reached 13.9 Mn the next year. Some 44 percent of the passengers were from North America in 2021, 27 percent from Europe and 29 percent from other regions. These proportions were exactly the same in 2019, at 44, 27 and 29 percent respectively.

Figure 5: World Cruise Passenger Evolution, 1990 - 2022



Source: Cruise Market Watch

The pandemic also accelerated the retirement of 31 ships between 2019 and 2021 as fleets become more modern and environmentally friendly. Capacity was thus reduced by 49,105 but is partly offset with the introduction of eight new ships with a total passenger capacity of 34,312 in 2021. Total ocean passenger capacity thus stood at 581,200 with 323 ships.



Industry Performance in Mauritius, 2021 - 2022

03

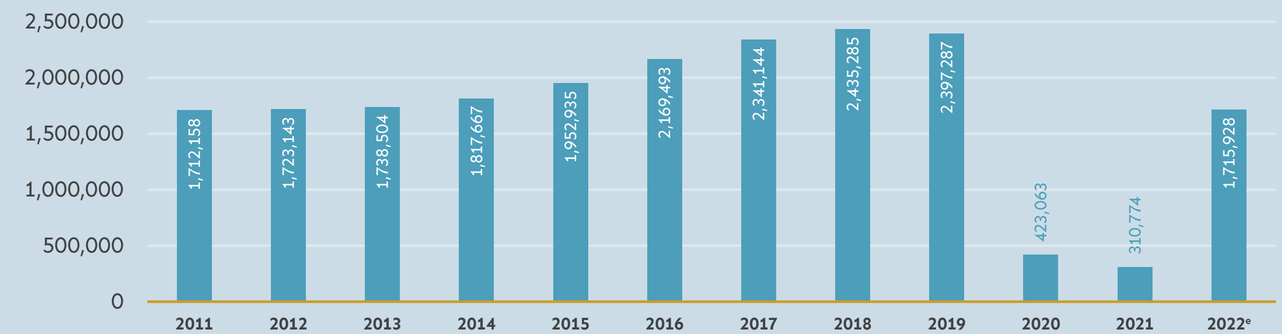
CONNECTIVITY 3.1

Transport, through its role in the movement of goods and people, decisively influences different economic sectors of a country, including travel and tourism. Without connectivity – air, sea and land – travel and tourism will not exist. As such, the development of transportation is directly related to the development of tourism and both are inter-dependent. Mauritius, as an island destination far from its main source markets, is dependent on its air connectivity for the sustainable growth of its tourism market.

Air connectivity 3.1.1

With most tourists (over 96 percent in 2019) arriving by air, air travel is indissociable from the development of the local tourism industry. Over the years, air seat capacity has increased in line with the development of the sector.

Figure 6: Number of Air Seats, 2011 – 2022[e]



Sources: Mauritius Tourism Promotion Authority, Department of Civil Aviation and airlines

Overlooking 2020 and 2021 during which period our borders were closed for 18 months following the outbreak of the COVID-19 pandemic, international air seat capacity in 2022 is estimated to reach around 72 percent of the 2019 level in absolute terms. Excluding 2019 seats on markets that are still not serviced at the time of writing in 2022, the estimated 1.7 Mn seats for 2022 will represent around 77 percent of relevant comparable seats in 2019.

Air Mauritius is estimated to account for 35 percent of total seats into Mauritius followed by Emirates with 19 percent, Air Austral with nine percent, Air France with seven percent, Corsair and Turkish Airlines both with four percent and British Airways with three percent.

Year 2022 welcomed two new airlines, Air Belgium (BRU) and Flysafair (JNB) while the only airline that has not yet returned at the time of writing is Air Madagascar. Airlines with scheduled flights present since at least January this year and airlines that started during the year or are scheduled later this year are presented in the following respective tables.

PRESENT SINCE AT LEAST EARLY 2022

AIRLINE	EMBARKATION POINT	AIRLINE	EMBARKATION POINT	AIRLINE	EMBARKATION POINT
Air Mauritius	BOM	EW Discover	FRA/CGN	Corsair	ORY/MRS/LYS
Air Belgium	BRU	Turkish Airlines	IST	Air Austral	RUN
Air France	CDG	Air Mauritius	JNB	Air Mauritius	RUN
Air Mauritius	CDG	Air Mauritius	LHR	Air Seychelles	SEY
Emirates	DXB	British Airways	LHR	Air Mauritius	TRN
Condor	FRA	Kenya Airways	NBO	Edelweiss AA	ZRH

RESUMED/STARTED OPERATIONS DURING 2022

AIRLINE	EMBARKATION POINT	STARTING MONTH
Flysafair	JNB	As from Mar
South African Airways	JNB	As from Mar
Austrian Airlines	VIE	Jan-May then as from Oct
Saudi A Airlines	JED	As from Jun
Comair	JNB	Feb to Jun
Evelop	MAD	As from Jun
Air Mauritius	KUL	As from end Oct
Air Mauritius	CTP (RSA)	As from Nov
Air Mauritius	PER-Australia	As from Nov
NEOS	FCO - Italy	As from Dec

From January to July 2022, total international seats in Mauritius stood at nearly 850K which represented some 67 percent of relevant seats in 2019 (comparable figures in 2019, i.e. excluding markets that are still closed or were closed during the period under consideration). The re-opening of our main markets and relaxation of sanitary measures both locally and in main markets are contributing towards the increasing number of international seats available to the destination. It is noteworthy that Emirates have requested and been granted a temporary third daily flight as from October 2022. Existing airlines, especially the national airline, have also increased capacity in line with increased demand for the destination.

Table 9: International Air Seats and Load Factor per Month, January to July 2019 and 2022

	JAN	FEB	MAR	APR	MAY	JUN	JUL	TOTAL
Total seats in 2022	106,172	88,391	113,783	130,897	126,018	122,182	160,280	847,723
Total seats available in 2019	247,881	191,860	214,836	182,026	175,213	168,870	202,858	1,383,544
Relevant total of air seats in 2019	220,665	170,052	194,044	172,106	172,106	157,853	187,513	1,274,339
2022 as a % of relevant 2019 seats	48%	52%	59%	76%	73%	77%	85%	67%
Load factor in 2022	48%	71%	71%	76%	71%	69%	76%	70%

Source: MTPA and airlines

The average load factor of all airlines has oscillated between 73.9 percent and 77.0 percent between 2011 and 2019; in 2019, it reached 75.9 percent. The overall load factor in 2022 has been gathering pace as the sector recovers; it reached a satisfactory 76 percent in July and an overall 70 percent for the first seven months of 2022.

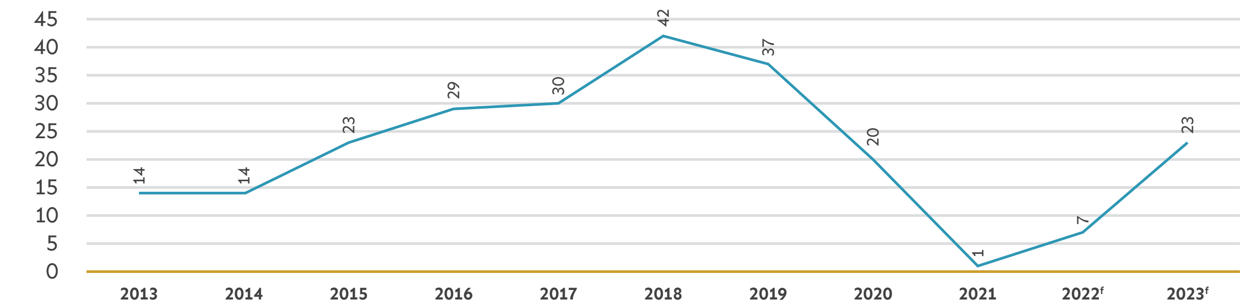
Air connectivity metrics can be useful in shedding light on the performance of the aviation sector at a national, regional, and airport level. They can also provide valuable insights into potential consequences of changes to our national air access policy.

Sea connectivity

3.1.2

Cruise vessels are presently provided with berthing facilities in the 125-meter-long dedicated cruise jetty at Les Salines' Multipurpose Terminal. For the cruise season 2022, seven cruise vessel calls have been scheduled. Between 2013 and 2019, the peak in the number of cruise vessel calls was 42 in 2018. Cruise vessels calling at Mauritius usually carry from 1,800 to 2,200 passengers onboard.

Figure 7: Number of Cruise Vessel Calls, 2013 – 2023f



Source: MPA

Table 10: Cruise Timetable 2022

CRUISE VESSELS	EXPECTED ARRIVAL DETAILS	EXPECTED DEPARTURE DETAILS
World Odyssey	24 October 2022: 07:00 hrs	26 October 2022: 20:00 hrs
MS Hanseatic Spirit (M)	06 November 2022: 04:00 hrs	06 November 2022: 18:00 hrs
MSC Orchestra	13 November 2022: 08:00 hrs	14 November 2022 17:00 hrs
MS Hanseatic Spirit	19 November 2022: 07:00 hrs	19 November 2022: 18:00 hrs
MS Hanseatic Spirit	02 December 2022: 07:00 hrs	02 December 2022: 20:00 hrs
MSC SINFONIA	07 December 2022: 09:00 hrs	08 December 2022: 18:00 hrs
AIDABLU	19 December 2022: 08:00 hrs	21 December 2022: 18:00 hrs

Source: MPA

Table 11: Cruise Timetable 2023

CRUISE VESSELS	EXPECTED ARRIVAL DETAILS	EXPECTED DEPARTURE DETAILS
MV Pacific World	01 January 2023: 07:00 hrs	01 January 2023: 18:00 hrs
AidaBlu	02 January 2023: 08:00 hrs	04 January 2023: 18:00 hrs
MS Island Sky	03 January 2023: 09:00 hrs	03 January 2023: 20:00 hrs
Nippon Maru	05 January 2023: 09:00 hrs	08 January 2023: 17:00 hrs
MSC Orchestra	05 January 2023: 08:00 hrs	05 January 2023: 21:00 hrs
AidaBlu	16 January 2023: 08:00 hrs	18 January 2023: 18:00 hrs
AidaSol	18 January 2023: 06:00 hrs	19 January 2023: 18:00 hrs
AidaBlu	30 January 2023: 08:00 hrs	01 February 2023: 18:00 hrs
MS Artania	04 February 2023: 08:00 hrs	06 February 2023: 18:00 hrs
AidaBlu	13 February 2023: 08:00 hrs	15 February 2023: 18:00 hrs

Table 11: Cruise Timetable 2023 (cont'd)

CRUISE VESSELS	EXPECTED ARRIVAL DETAILS	EXPECTED DEPARTURE DETAILS
Costa Deliziosa	15 February 2023 - 07:00 hrs	15 February 2023 - 18:00 hrs
Corale Geographer	18 February 2023	19 February 2023
World Odyssey	23 February 2023 - 08:00 hrs	23 February 2023 - 20:00 hrs
AidaBlu	27 February 2023 - 08:00 hrs	01 March 2023 - 18:00 hrs
AidaBlu	13 March 2023 - 08:00 hrs	15 March 2023 - 18:00 hrs
MSC Sinfonia	18 March 2023 - 09:00 hrs	19 March 2023 - 19:00 hrs
AidaBlu	27 March 2023 - 08:00 hrs	29 March 2023 - 18:00 hrs
Queen Mary II	29 March 2023 - 08:00 hrs	29 March 2023 - 18:00 hrs
Silver Shadow	02 April 2023 - 08:00 hrs	02 April 2023 - 18:00 hrs
MSC Orchestra	25 April 2023 - 08:00 hrs	25 April 2023 - 17:00 hrs
MS Vasco Da Gamma	18 November 2023 - 07:00 hrs	18 November 2023 - 20:00 hrs
Le Jacques Cartier	07 December 2023 - 08:00 hrs	07 December 2023 - 19:00 hrs
Le Jacques Cartier	19 December 2023 - 08:00 hrs	20 December 2023 - 18:00 hrs

Source: MPA

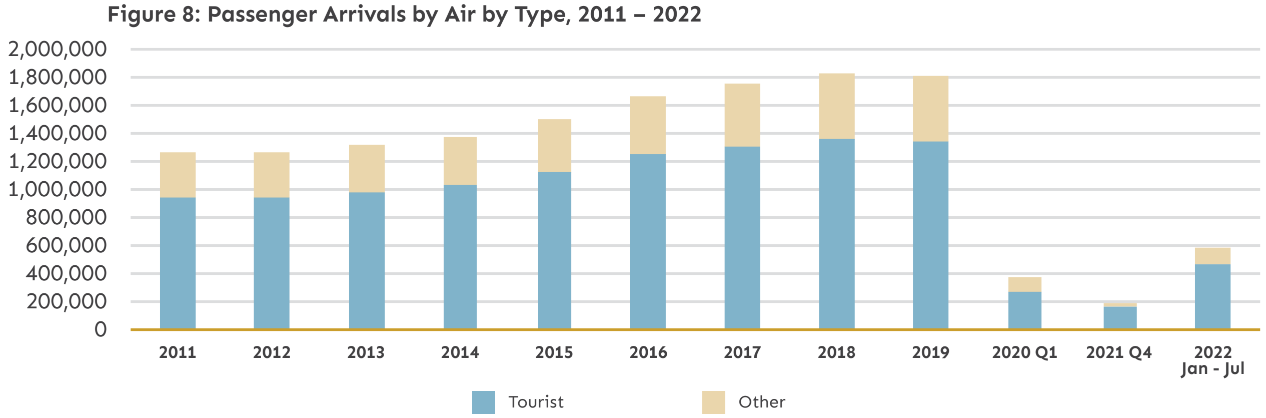
The Mauritius Ports Authority (MPA) has embarked onto a major project for a Cruise Terminal Building of 7,500 square metres adjacent to the Cruise Jetty located at Les Salines. The capacity should increase up to 4,000 passengers. Back in February 2019, an international bidding exercise was launched and the construction contract awarded for a value of MRU 770 Mn.

Airport activity 3.1.3

The peak in the number of international air passengers (including direct transfers who remain in the transit lounge but excluding crew members) was reached back in 2018 with 1.8 Mn passengers after seven years of constant growth. The air seat per passenger ratio between 2011 and 2019 remained between 1.30 and 1.35 seat. The ratio increased to 1.44 during the recovery months of 2022.

On average, around 73-75 percent of air passengers are tourists with a peak of 83 percent during the first three months after the re-opening of our borders whereby then existing sanitary conditions constrained Mauritians willing to travel abroad.

Figure 8: Passenger Arrivals by Air by Type, 2011 – 2022



Sources: MTPA, airlines and Statistics Mauritius

After the 18-month border closure, commercial airlines and passengers are steadily returning as the destination progressively relaxes its sanitary restrictions. From January to July 2022, nearly 590K international air passengers representing nearly 59 percent of 2019 figures, landed in Mauritius. In terms of tourists by air, 469,108 arrivals were recorded, representing 63 percent of the figure reached in 2019 during the same period. The recent robust trend is set to continue throughout the coming Mauritius summer months.

Among the above Other category, two groups – excursionists and direct transits can be isolated. Direct transits (remaining in the transit lounge of the airport upon arrival and not going through Police border portals) account for seven to eight percent of total passenger arrivals by air during the pre-COVID era. In 2019, it reached 132,660 or 7.3 percent of total passengers. For Semester 1 of 2022, these figures were respectively 27,438 and 5.9 percent. This category of passengers reached nearly 27,500 for the first semester of 2022.

The number of excursionists (who arrive and go through Police border portals but leave on the same day) reached a peak of 21,680 in 2017 before slightly going down over the years prior to the COVID-19 pandemic. During the first semester of 2022, excursionists were only 1,005.

Table 12: Direct Transits and Excursionists, 2014 - 2022

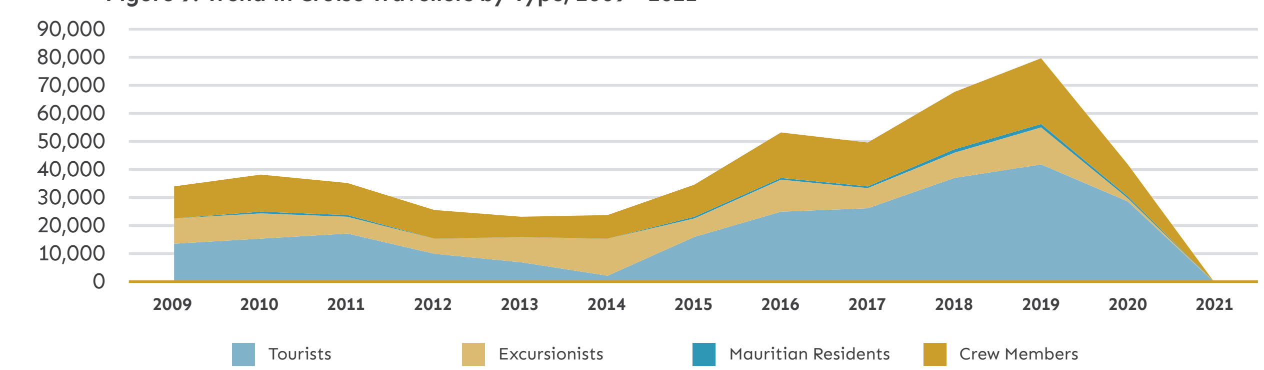
DETAILS	2014	2015	2016	2017	2018	2019	2020	2021	2022 S1
Direct transits	102,639	105,337	124,816	124,492	130,514	132,660	28,882	6,657	27,438
Excursionists	14,164	15,046	19,399	21,680	21,650	20,670	5,243	500	1,005

Source: Statistics Mauritius

Sea port activity 3.1.4

In 2019, a peak of nearly 84,000 passengers was reached of which 94 percent emanated from the cruise segment. Among the cruise passengers, 53 percent were tourists, 29 percent crew members, 17 percent were excursionists and one percent were Mauritian residents.

Figure 9: Trend in Cruise Travellers by Type, 2009 - 2021



Source: Statistics Mauritius

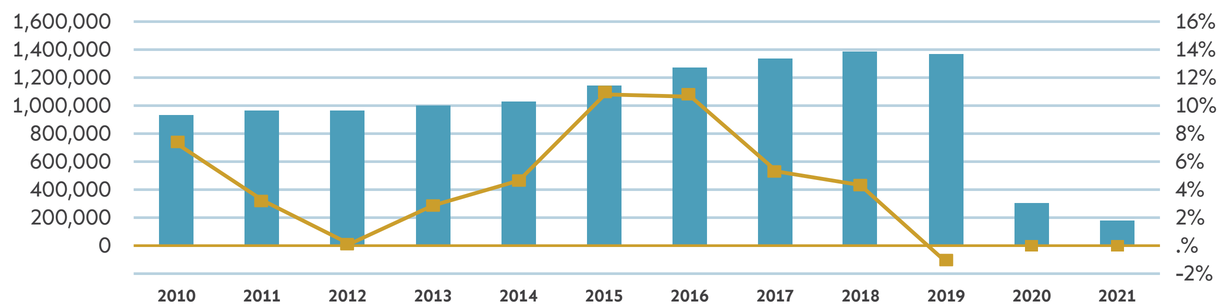
TOURISM IN FIGURES 3.2

Over 97 percent of tourists use the air mode of transport to Mauritius. On average, every 100 air seats carry 55 to 58 tourists into Mauritius. For cruise ships, the number of tourists varies significantly depending on the size of the ship and the nature of its call at Mauritius (with or without new passenger boarding). Between 2013 and 2020, the average number of tourists per cruise ship has varied from 178 to 1,425, the latter being in 2020. The highest number of cruise tourists was reached in 2019 (41,829 or 1,131 tourists per cruise ship on average).

Tourist arrivals – overall, by month and by country of last embarkation ports 3.2.1

After the double-digit peak achieved in 2015 and 2016, growth in tourist arrivals remained at a satisfactory rate of 5.2 percent and 4.3 percent in 2017 and 2018 respectively. However, after nine years of continuous growth, a deceleration was experienced in 2019 with a drop of -1.1 percent in arrivals.

Figure 10: Trend in Tourist Arrivals and Growth in Mauritius, 2010 – 2022



	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Tourist arrivals	934,827	964,642	965,441	993,106	1,038,960	1,151,720	1,275,220	1,341,860	1,399,400	1,383,488	308,980	179,790
Growth	7.3%	3.2%	0.1%	2.9%	4.6%	10.9%	10.7%	5.2%	4.3%	-1.1%		

Source: Statistics Mauritius

In 2020 and 2021, during which period our borders were closed for 18 months, tourist arrivals reached abyssal levels compared to normal years. From January to July 2022, tourist arrivals have attained 470,640 or 61.5 percent of its 2019 level for the same period. Over the months since our border reopening on 01 October 2021, the destination has slowly but surely been catching up with pre-pandemic period levels.

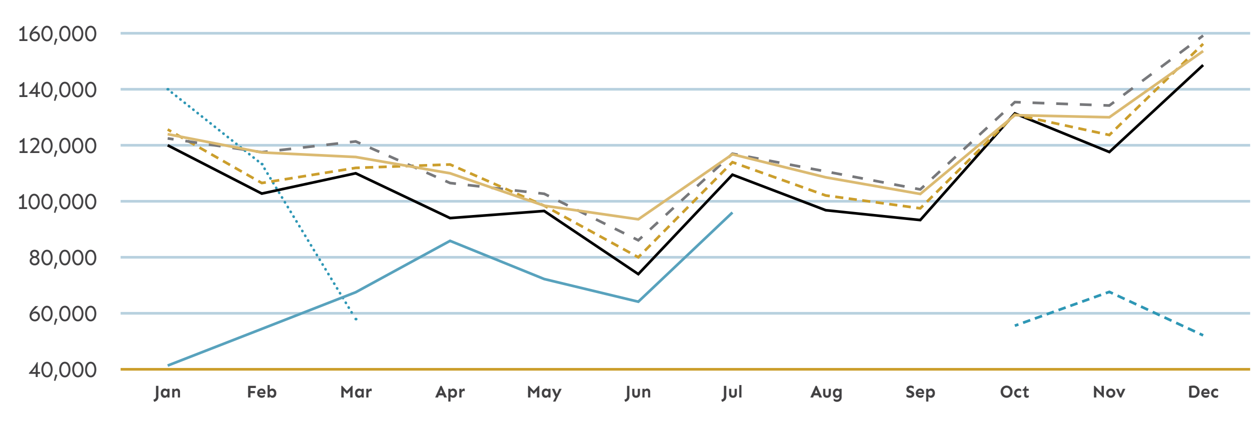
Table 13: Tourist Arrivals by Month, 2019 vs 2021 and 2022

	2021			2022							
	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	JAN-JUL
	54,434	65,922	49,964	40,028	52,724	66,066	84,268	70,462	63,008	94,084	470,640
2019	129,018	128,730	152,098	122,273	115,613	114,419	108,565	96,814	92,398	115,448	765,530
As a % of 2019	42.2	51.2	32.8	32.7	45.6	57.7	77.6	72.8	68.2	81.5	61.5

Source: Statistics Mauritius

Seasonality is still an important factor in Mauritius with the number of arrivals in the peak month of December standing at around twice the number in the “lowest” month of June. During the past few years, the ratio of arrivals between these two months has however followed a downward trend. Since 2017, the rate is below 2.0. In 2019, it reached a satisfactory rate of 1.65.

Figure 11: Tourist Arrivals by Month, 2016 - 2022



Source: Statistics Mauritius

Tourist arrivals by port of last embarkation 3.2.2

An analysis of year 2019 figures (2020 to 2022 being “unusual” years) on air seats, passengers, tourist arrivals by last embarkation point gave the following insights:

- From France - there were 311,631 air seats available bringing 257,867 passengers of which 80 percent were tourists. Of these tourists, 73 percent were residing in France and five percent in Germany;
- From UK - there were 128,929 air seats available bringing 103,456 passengers of which 79 percent were tourists. Of these tourists, 90 percent were residing in UK and two percent in France;
- From Germany - there were 81,405 air seats available bringing 66,774 passengers of which 92 percent were tourists. Of these tourists, 69 percent were residing in Germany and eight percent in France;
- From India - there were 127,701 air seats available bringing 109,037 passengers of which 58 percent were tourists. Of these tourists, 89 percent were residing in India and six percent in South Africa;
- From China - there were 60,882 air seats available bringing 48,317 passengers of which 35 percent were tourists. Of these tourists, 98 percent were residing in China;

From the below hubs, the 2019 figures were as follows:

- From Dubai - there were 423,825 air seats available and 338,303 passengers of which 75 percent were tourists. Of these tourists, 18 percent were residing in UK, 13 percent in France, 12 percent in Germany, eight percent in Italy and five percent in UAE;
- From Turkey - there were 71,136 air seats available and 53,458 passengers of which 64 percent were tourists. Of these tourists, 16 percent were residing in France, 14 percent in Germany, seven percent in Turkey and six percent in Czech Rep;
- From Saudi Arabia - there were 44,700 air seats available and 26,116 passengers of which 78 percent were tourists. Of these tourists, 74 percent were residing in Saudi Arabia, six percent in France and four percent in the Philippines.

Table 14: Seats, Passengers and Tourist Arrivals by Air by Selected Country of Last Embarkation

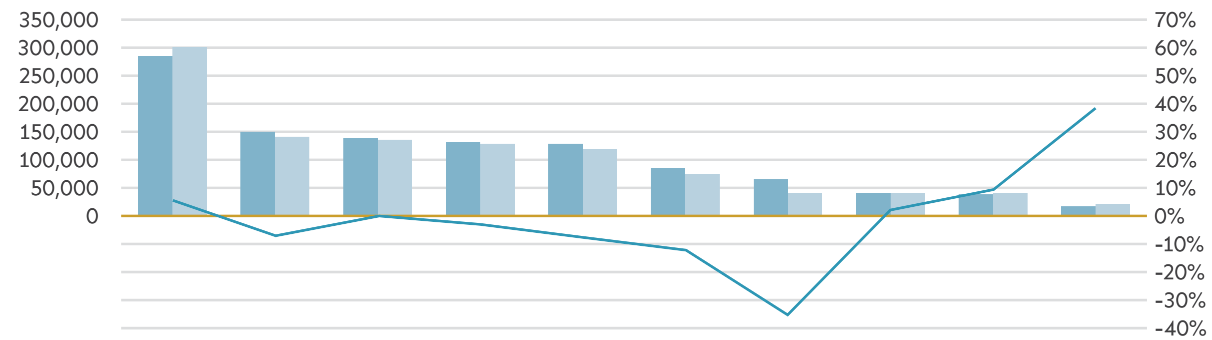
COUNTRY OF LAST EMBARKATION	SEATS	PASSENGERS	TOURISTS AS A % OF PASSENGERS	OF WHICH TOURIST ARRIVALS BY TOP MAIN COUNTRY OF RESIDENCE			
France	311,631	257,867	79.6%	France 73.5%	Germany 4.8%	Belgium 2.6%	Switzerland 2.2%
UK	128,929	103,456	79.4%	UK 90.3%	France 1.9%		
Germany	81,405	66,774	91.9%	Germany 69.2%	France 8.3%		
India	127,701	109,037	58.1%	India 89.4%	RSA 5.8%		
China	60,882	48,317	34.5%	China 97.8%			
Dubai	423,825	338,303	75.0%	UK 18.0%	France 12.9%	Germany 11.9%	Italy 8.0%
Turkey	71,136	53,458	63.9%	France 16.2%	Germany 14.0%	Turkey 6.9%	
Saudi Arabia	44,700	26,116	77.5%	Saudi Arabia 74.4%	France 5.6%		

Sources: MTPA, airlines and Statistics Mauritius

Tourist arrivals by markets 3.2.3

Overall, from 2018 to 2019, the share of arrivals from our top 10 markets as a percentage of total arrivals dropped marginally from 77.5 percent to 76.2 percent.

Figure 12: Tourist Arrivals from our Top 10 Markets and Growth, 2018 – 2019



	France	United Kingdom	Reunion Island	Germany	South Africa	India	China	Switzerland	Italy	Saudi Arabia
2018	258,371	151,913	138,439	132,780	128,097	85,765	65,736	41,080	38,361	16,507
2019	302,038	141,520	137,570	129,100	118,556	75,673	42,740	42,025	41,991	22,788
Growth	5.8%	-6.8%	-0.6%	-2.8%	-7.4%	-11.8%	-35.0%	2.3%	9.5%	38.1%

Source: Statistics Mauritius

During the recovery period, from January to July, the share of our main source market – France was 24 percent compared to 22 percent in 2019. UK became the second largest market with 15 percent share in 2022 versus 10 percent in 2019 for the same period, followed by South Africa with 11 percent, up by three percentage points. These two latter markets in terms of absolute figures, have reached respectively 94 percent and 80 percent of the 2019 figures. In fact, tourist arrivals from these two markets were, in some months, more than the same comparable months in 2019. France, with a much larger base, has reached 62 percent of the January to July 2019 level.

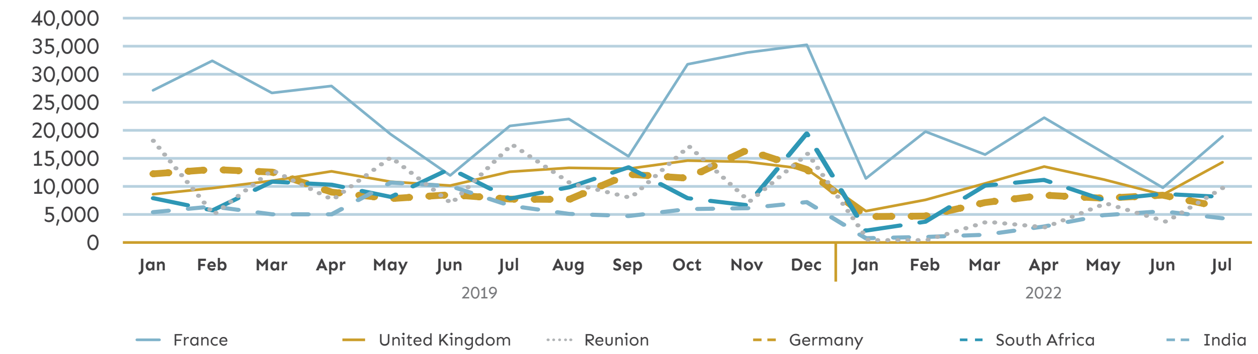
Table 15: Recovery Percentages by Selected Source Markets, 2022 vs 2019 by Month

SELECTED SOURCE MARKETS	2022/19		2022/19		2022/19		2022/19	
	JUL	JAN - JUL	JUN	JAN - JUN	MAY	JAN - MAY	APRIL	JAN - APR
France	90.7%	68.0%	81.1%	64.8%	82.5%	63.4%	79.5%	60.1%
Germany	80.4%	66.1%	98.7%	64.4%	100.4%	59.0%	93.5%	52.2%
UK	114.0%	94.4%	83.7%	90.4%	103.5%	91.7%	107.2%	88.7%
Reunion	55.6%	32.1%	51.8%	25.9%	44.6%	22.8%	34.0%	15.3%
South Africa	104.0%	80.0%	64.9%	76.7%	93.1%	80.4%	108.7%	77.4%
India	64.6%	40.1%	54.1%	36.4%	44.4%	30.9%	55.0%	24.1%
All countries	81.5%	61.5%	68.2%	57.9%	72.8%	56.2%	77.6%	52.7%

Source: Statistics Mauritius

The seasonality features of our Top 6 markets and how they interplayed in 2019 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.

Figure 13: Top 6 Markets - Tourist Arrivals by Month, 2019 and 2022



Source: Statistics Mauritius

Tourist profiles 3.2.4

Understanding the profile of visitors – why, how tourists select a destination and their behaviour during their stay in the destination – is important. Statistics Mauritius is the main source of such information and an exhaustive reading of tourist profile data has to combine the following:

- Monthly passenger and tourist arrivals
- Quarterly travel and tourism data which include tourist nights and hotel occupancy among others
- 2 or 3-yearly sample surveys of Incoming, Outbound and Domestic Tourism, with variations/rotations in the questions put to departing tourists

Consolidating the above data sources at any time of writing do display consistency in most cases. At times though, numbers and proportions would show a few unexplained differences; the industry is endeavouring to better harmonise such crucial information for the future.

Hereafter, the latest 2018 Survey of Outgoing Tourists is mostly used. For some aspects of the discussion, the 2017 SOT is used if the said aspect was not treated in 2018. It is also worth mentioning that SOT data can be purchased from Statistics Mauritius should one wish to run further data sorting, which is the case for us when we conduct additional analyses of hotel vs non-hotel tourists for example.

Mauritius already boasts an impressive 32-34 percent *repeat rate* and the behaviour of repeat tourists is different from that of first time visitors. A much higher proportion of first timers come for honeymoon, select a package tour, opt for hotel accommodation, come as a couple and select an All-inclusive or Half-board meal plan. First timers also spend more for each night of their stay.

The overwhelming majority (93.5 percent) of tourists selected Mauritius as Holiday destination followed by Business (3.7 percent) as *main purpose of visit* back in 2019. The main purpose of visit could also be the strong market positions like golf and kite surfing, both gaining in popularity but which are not reflected in the official figures available. The latest Survey of Outbound Tourism (SOT) available was undertaken in 2018 and gave additional insights on the purpose of visit: 79.3 percent for holidays, 13.1 percent for honeymoon, 2.7 percent for business purposes.

The SOT also gives information on the *average party size* that has slightly dropped from 2.2 pax in 2010 to 2.1 pax since the SOT 2016. According to the 2018 SOT, the average party size was 2.2 pax for those opting for hotel as main accommodation facilities compared to 2.0 pax for non-hotel, the latter being a widely heterogenous grouping of paid and unpaid, licensed and unlicensed accommodation.

Between 2010 to 2020, the *average length of stay* has oscillated between 10.1 to 10.9 days. As expected, the average stay was shorter for those opting for hotels, 9.0 days vs 15.5 days for non-hotel for an overall average length of stay of 10.4 days according to the 2018 SOT.

Tourist profiles (cont'd)

3.2.4

Around the world, many destinations are showcasing an increased average length of stay even after the removal of most of the sanitary restrictions. Factors that could be driving towards this upward trend could be revenge travelling and accumulated holiday credit and budget. Likewise, in Mauritius, since the re-opening of our borders, the average length of stay has reached record levels – 12.0 days for Q4 of 2021; 13.5 days for Q1 of 2022 and 12.4 days for S1 of 2022. By selected source markets, the average stay during the first semester of 2022 was 13.2 days vs 11.7 days in 2019 for the same period for tourists from France, 12.2 days vs 11.5 days respectively for tourists from UK and respectively 12.9 days vs 10.1 days for tourists from our third top source market, Germany.

Tourist nights amounted to 4.7 Mn for the first semester of 2022 compared to 7.1 Mn for the same period in 2019. As the average length of stay has increased, the comparatively lower number of tourists is being offset by the comparatively higher number of tourist nights. The destination is thus catching up faster if we account performance on total tourist nights and not solely on the number of tourist arrivals. In fact, in semester 1, while tourist arrivals in 2022 represented 57.9 percent of that in 2019, for tourist nights, this proportion is eight percent point higher (i.e. 66.1 percent).

Overall, the 2018 SOT indicated that 78.2 percent of tourists opted for a hotel as *tourist accommodation* facility, 10.8 percent for a tourist residence and 4.8 percent for a guest house. Some 5.3 percent claimed staying with friends and relatives; theoretically, these would be unpaid accommodation, but we are also aware of a certain number of unlicensed businesses operating, namely on platforms such as airbnb and the likes. Among our then top nine source markets, China topped the list with the highest proportion of tourists selecting a hotel accommodation followed by India, UK, Switzerland and Germany. As expected, Reunion with only around two-thirds of tourists choosing a hotel as accommodation facility, closed the hotel accommodation list.

The above 2018 survey also gave insights into the *expenditure patterns* of tourists in Mauritius. The overall per capita expenditure stood at MUR 46,500 while the per capita per diem one was MUR 4,500. These figures were respectively MUR 49,400 and MUR 5,500 for those opting for hotel accommodation and MUR 36,100 and MUR 2,300 for non-hotel tourists (a heterogenous grouping as already mentioned). By selected source markets that were published, the average spend per tourist was highest for tourists from the UAE at MUR 66,900 followed by the USA (MUR 64,700), Switzerland (MUR 59,800) and China (MUR 56,200). For our Top five source markets in 2018, this figure was MUR 46,200 for France, MUR 53,300 for UK, MUR 22,800 for Reunion, MUR 46,400 for Germany and MUR 33,900 for South Africa. Expenditure per tourist per night was highest by far for tourists residing in UAE (MUR 10,400) followed by those from China (MUR 7,100) and the USA (MUR 7,000). Tourists from Reunion Island have the lowest per capita per diem expenditure (MUR 3,300) followed by Australia (MUR 3,800) and France (MUR 3,900).

Table 16: Per Capita per Day Expenditure by Type and by Category of Tourists, 2017 (MUR)

			ACCOMMODATION USED		MEAL PLAN		
EXPENDITURE ITEM	FIRST TIMERS	REPEATERS	**HOTEL**	**NON-HOTEL**	**ALL INCLUSIVE**	**NON-AI**	ALL TOURISTS
Accommodation expenditure	3,161	2,008	3,676	728	3,647	2,162	2,720
Food expenditure	441	514	406	600	136	669	469
Land Transport expenditure	217	160	239	104	205	189	195
Car hire with driver	21	16	21	15	16	21	19
Car hire without driver	76	61	51	110	25	98	70
Sightseeing	420	193	420	153	395	297	333
Sports	199	93	194	85	183	144	158
Shopping	372	403	402	346	335	414	384
Other	48	76	38	102	35	73	59
Total Average expenditure	**4,956**	**3,525**	**5,447**	**2,244**	**4,976**	**4,067**	**4,409**

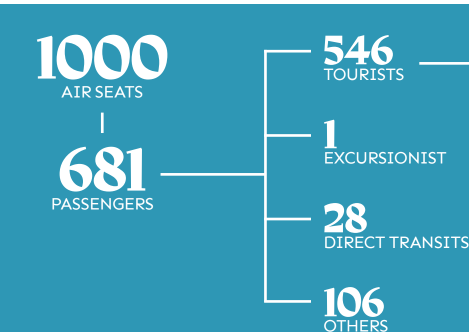
Source: Survey of Outgoing Tourists, 2017

In terms of expenditure per main item, accommodation accounted for the biggest chunk with 63 percent followed by meals and beverages (9.2 percent), shopping (8.0 percent), sightseeing (9.0 percent) and entertainment (5.0 percent). Tourists from Europe spent the highest proportion on accommodation with UK leading with 72.1 percent of their expenditure followed by Italy (68.1 percent) and Germany (67.9 percent). This proportion was lowest for Reunion (49.1 percent). For Meals and Beverages, Australians lead with up to 16.4 percent of their expenditure on this item followed by the US citizens (14.4 percent) and Reunion tourists (14.3 percent). Those indulging most in shopping were tourists from Reunion (15.5 percent of their expenditure) followed by Australians (14.4 percent) and Chinese and Emirati citizens (both 10.3 percent). Sightseeing was favoured most by tourists from Asia (11.2 percent of expenditure for Indians and 8.9 percent for Chinese).

An analysis of expenditure patterns by different categories of tourists made using the 2017 SOT data available (Note – the 2018 SOT did not include the following subject), gave another image of the All-Inclusive, at times stereotyped, tourists. The below table depicts the expenditure pattern of tourists; the per capita per day expenditure is higher for those tourists on the All-inclusive basis than the overall one (MUR 4,976 v/s MUR 4,409). By expenditure item, the same observation can be made for Sightseeing (MUR 395 vs MUR 384), Land Transport (MUR 205 vs MUR 195), Sports (MUR 414 vs MUR 384) and unmistakably for accommodation (MUR 3,647 v/s MUR 2,720). These observations support the view that All-inclusive practices indeed follow traveller demand.

Some key figures that illustrate the interplay between connectivity, tourism, and tourists' behaviour can be summarised below (based on the figures for semester 1 of 2022).

Total seats	687,443
Load factor	68.1%
Total passengers by air	467,851
Total international arrivals by air	510,576
Tourists by air	375,245
Direct transits	18,921
Excursionists	1,005
Other	115,404
Total passengers by sea	1,798



TOP 8 SOURCE MARKETS (% OF TOTAL)	
France	20.4
United Kingdom	10.9
Reunion	9.9
Germany	9.5
South Africa	9.2
India	6.1
China	4.7
Switzerland	2.9
TOTAL TOURIST NIGHTS	4,719,867
AVERAGE LENGTH OF STAY	12.4 nights

TOURIST PROFILE BASED ON SOT 2018

Indicators	Hotel tourists	Non-Hotel tourists	All tourists
Accommodation facilities used	78%	22% (Tourist Residence: 11% | VFR: 5% Guest Houses: 5% | Others: 1%)	100%
Purpose of visit	Holiday: 78.0 Honeymoon: 16.2	Holiday: 84.1 VFR: 5.9	Holiday: 13.1 Honeymoon: 16.2
Average party size	2.2	2.0	2.1
Average stay	9	15.5	10.4
Expenditure per tourist	MUR 49,400	MUR 36,100	MUR 46,500
Expenditure per tourist per night	MUR 5,500	MUR 2,300	MUR 4,500
Expenditure by category, MUR M	53,200	10,800	64,000
Accommodation	36,500	3,800	40,300
Meals & Beverages	3,400	2,500	5,900
Sightseeing	3,600	900	4,500
Shopping	3,600	1,500	5,100
Sports	2,600	600	3,200
Land Transport	2,200	500	2,700
Other	1,300	1,000	2,300

Sources: MTPA, airlines and Statistics Mauritius

The above gives clear indications on what Mauritius needs to do in order to increase unit tourist revenue; it also to some extent explains why our Indian Ocean competitors currently achieve higher per tourist revenue.

3.2.5

Mauritius and Directly Competing Locations

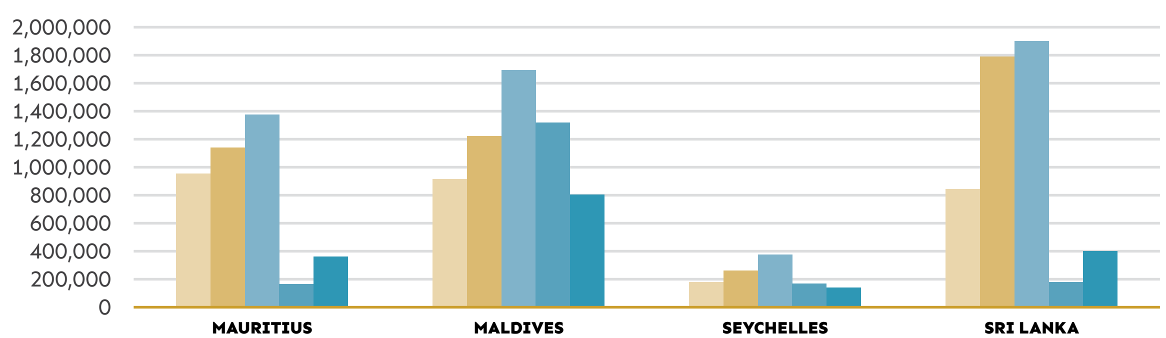
Maldives having been closed for only a few months in 2020 and with minimal sanitary restrictions following the re-opening, has very quickly gathered momentum and is recovering fast. Whilst in 2020 the number of tourists represented only 33 percent of the 2019 figures, in 2021 it was 78 percent and now 94 percent for the first semester of 2022. Maldives seems set to overtake the pre-COVID levels in this same year 2022.

The borders were closed in Seychelles for some seven months in all and recovery is also well underway with 30 percent of the 2019 figures reached in 2020 and 48 percent in 2021. This proportion has hiked to 84 percent for the first semester of 2022 compared to the same period in 2019.

Sri Lanka's borders were closed for around eight months. However, as the number of local COVID-19 cases was raging, recovery was laborious and the numbers really started to pick up only during the last quarter of 2021. Recovery looked promising but was short lived with the loss in the momentum of the Ukrainian and Russian tourism markets (some one-third of arrivals). With the ongoing social unrest and the current economic crisis, many countries are now inviting their travellers to reconsider non-essential travel to Sri Lanka. These additional shocks are heavily weighing on the recovery of the sector in this destination – for the first semester of 2022, the number of tourists represented 35 percent of the number in 2018 (Note - 2019 was not a "normal" year with the negative impacts of the Easter attacks).

As Mauritius was closed for 18 months since end March 2020, the current recovery period is thus shorter compared to above destinations. For the first semester of 2022, the number of tourist arrivals stood at 58 percent of that of 2019.

Figure 14: Tourist Arrivals in Mauritius, Maldives, Seychelles and Sri Lanka, 2011, 2015, 2019, 2021 and 2022 S1



	MAURITIUS	MALDIVES	SEYCHELLES	SRI LANKA
2011	964,642	931,333	194,476	855,975
2015	1,151,252	1,234,248	276,233	1,798,380
2019	1,383,488	1,702,887	384,204	1,903,332
2021	179,780	1,321,937	182,849	194,495
2022 S1	376,556	813,211	156,287	411,377

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

The Top five markets for the above competitors have somewhat been disturbed during the first quarter of 2022 especially with regard to China where the strict zero-COVID policy is still being enforced. At the other end, tourist arrivals from UK have increased substantially and is now ranked second in both Mauritius and Maldives as in Sri Lanka. India is now the top source market in both Maldives and Sri Lanka while Russia has entered into the Top five of Maldives, Seychelles and Sri Lanka. In Mauritius, Reunion was constrained with the specific sanitary measures but is now growing strongly.

Table 17: Top Five Markets in Mauritius, Maldives, Seychelles and Sri Lanka, Semester 1 of 2019 and 2022

MAURITIUS				MALDIVES				SEYCHELLES				SRI LANKA			
S1 2019		S1 2022		S1 2019		S1 2022		S1 2019		S1 2022		S1 2019		S1 2022	
MARKETS	SHARE	MARKETS	SHARE	MARKETS	SHARE	MARKETS	SHARE	MARKETS	SHARE	MARKETS	SHARE	MARKETS	SHARE	MARKETS	SHARE
France	22.2%	France	24.8%	China	16.3%	India	14.8%	Germany	14.5%	France	13.9%	India	15.6%	India	16.7%
Reunion	9.8%	UK	14.8%	India	9.5%	UK	11.9%	France	13.0%	Germany	12.0%	UK	11.7%	UK	12.1%
Germany	9.5%	RSA	11.2%	Italy	8.7%	Russia	10.1%	UK	6.9%	Russia	9.9%	China	9.7%	Russia	11.3%
UK	9.5%	Germany	10.6%	Germany	8.0%	Germany	8.3%	UAE	6.9%	UK	6.7%	Germany	7.1%	Germany	8.1%
RSA	8.4%	Reunion	4.4%	UK	7.5%	Italy	6.0%	Italy	6.5%	UAE	5.0%	France	5.5%	France	5.3%

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

Some comparative tourism-related indicators are summarised in the table below.

Table 18: Selected Tourism-Related Indicators in Competing Island Destinations in the Region, 2017 - 2021

INDICATORS	2017	2018	2019	2020	2021
Tourist arrivals					
Mauritius	1,341,860	1,399,408	1,383,488	308,980	179,780
Maldives	1,389,542	1,484,274	1,702,887	555,494	1,321,937
Seychelles	349,861	361,844	384,204	114,858	182,849
Sri Lanka	2,116,407	2,333,796	1,903,702	507,704	194,495
Annual growth rate in tourist arrivals					
Mauritius	5.2%	4.3%	-1.1%	-77.7%	-41.8%
Maldives	8.0%	6.8%	14.7%	-67.4%	138.0%
Seychelles	15.4%	3.4%	6.2%	-70.1%	59.2%
Sri Lanka	3.2%	10.3%	-18.4%	-73.3%	-61.7%
Average bed operational capacity					
Mauritius	29,650	30,296	31,024	28,104	32,157
Maldives - registered establishments	38,592	41,887	47,274	21,446	48,960
Of which: Resorts/Marinas	27,686	29,400	33,440	21,446	36,320
Seychelles	5,576	5,420	5,680	3,477	5,718
Sri Lanka	48,008	52,237	52,393	53,269	54,512
Average bed occupancy rate (%)					
Mauritius	68	67	64	20	17
Maldives	61	62	62	26	55
Of which: Resorts/Marinas	73	75	74	29	65
Seychelles	72	73	72	44	41
Sri Lanka (room occupancy)	73	73	57	15	19
Average length of stay (nights)					
Mauritius	10.3	10.4	10.6	12.6	14.7
Maldives	6.2	6.4	6.3	18.5	8.7
Seychelles	9.5	10.1	9.9	8.8	9.8
Sri Lanka	10.9	10.8	10.4	8.5	15.1

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

PERFORMANCE OF TOURISM OPERATORS 3.3

Inventory of Tourist Accommodation Facilities 3.3.1

As at March 2022, the Tourism Authority had issued a total of 1,151 annual Tourism Accommodation Certificates as follows:

Table 19: Operational Accommodation Facilities Licensed with the Tourism Authority, March 2021 and 2022

	MARCH 2022		MARCH 2021	
ACTIVITY	**NO.**	**ROOMS**	**NO.**	**ROOMS**
Hotel	111	13,694	108	13,507
Guest House	212	2,672	216	2,575
Tourist Residence	823	5,560	867	5,871
Domaine	5	16	2	13
Total	**1,151**	**21,942**	**1,193**	**21,966**

Sources: Statistics Mauritius and Tourism Authority

The above numbers show a slight reduction in the number tourist accommodation operators, namely in the Tourist Residence and Guest House categories.

Information gathered from the Tourism Authority point towards the inability of many operators to renew their annual licence due to the nature of their leases of State Lands; the current business licensing policy enforced by the authorities includes the compliance with an Industrial Lease agreement for business ventures, as opposed to residential purposes.

At the time of writing, Airbnb displayed Mauritius accommodation listings of over 1,000 "stays" for some 300 entities/hosts. There is obviously a number of short-term accommodation establishments that are not duly licensed by the Tourism Authority; their precise number is unknown.

Accommodation grading is applicable to hotels only. As at June 2022, the Tourism Authority had enlisted star-ratings of hotels as follows:

Table 20: Number of Hotels by Star Category

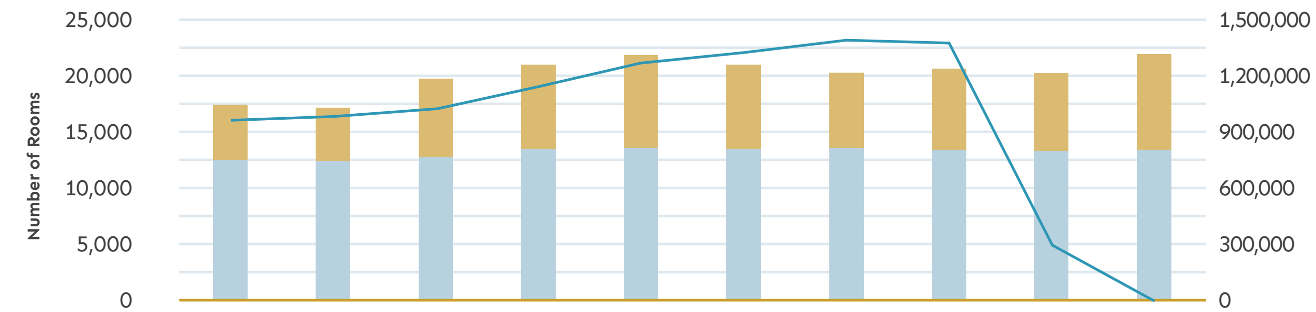
STAR CATEGORY	HOTELS	ROOMS
5 Star Luxury	8	933
5 Star	29	4,935
4 Star Superior	7	1,489
4 Star	25	4,157
3 Star Superior	14	1,036
3 Star	16	1,000
2 Star	12	405
In progress/new*	2	44
Total	**113**	**13,999**

* includes a new hotel but not yet operational and graded

Sources: Statistics Mauritius and Tourism Authority

At end-June 2022, there were 106 operational hotels (13,649 rooms), three were closed for renovation (269 rooms), another three were temporarily closed (61 rooms) and one new hotel that was not yet operational. There were active licences for 218 guest houses (2,747 rooms) and 447 tourist residences (5,577 rooms). In all there were nearly 22,000 operational active rooms of which 62 percent were hotel rooms.

Figure 15: Accommodation and Tourist Arrivals, 2012 – 2021



	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Non-hotel rooms	4,892	4,809	7,023	7,480	8,288	7,533	6,847	7,202	7,022	8,446
Hotel rooms	12,527	12,376	12,799	13,617	13,547	13,511	13,523	13,489	13,297	13,507
Tourist arrivals	965,441	993,103	1,038,334	1,151,252	1,275,227	1,341,860	1,399,408	1,383,488	308,980	3,225

Sources: Statistics Mauritius and Mauritius Tourism Authority

Overall performance of licensed tourist accommodation 3.3.2

The distribution of tourist stays among the various types of accommodation is not measured exhaustively; the latest Statistics Mauritius Survey of Inbound Tourism (2018) does however give the following indications.

Table 21: Distribution of Tourists by Type of Accommodation, 2018

ACCOMMODATION	PERCENT
Hotel	78.2
Tourist residence	10.8
With friends/relatives	5.3
Boarding/guest house	4.8
In own villas/houses/bungalow/IRS	0.4
Other	0.4

Source: Survey of Inbound Tourism, Year 2018

Based on Table 21, and using the official average hotel room occupancy level in 2018, one can derive that *hotels capture around 68 percent of tourist nights.* The distribution of the remaining nights cannot be ascertained given the only official data split available being between hotel accommodation and others, the latter being quite an heterogenous collection of accommodation types, including unpaid ones.

Similarly, industry performance cannot be ascertained for non-accommodation tourism operators. This constitutes a major weakness in national tourism policy formulation.

HOTEL PERFORMANCE 3.3.2.1

Since the full reopening of our borders in October 2021, hotels have generally been doing quite well in their recovery path. In spite of an untimely hit caused early in December by the scarlet red listing by France and the closing of the Southern African markets due to uncertainties around the Omicron variant, hotel room occupancy has on average displayed consistent progress over the successive months. The table below displays measurement results for both the AHRIM membership and the whole hotel sector, as compiled by Statistics Mauritius.

Table 22: Monthly Hotel Room Occupancy Rate Since the Re-Opening of Borders, October 2021 to June 2022

		OCT 21	NOV 21	DEC 21	JAN 22	FEB 22	MAR 22	APR 22	MAY 22	JUN 22
AHRIM SURVEY*		43	66	45	45	47	54	67	63	54
Statistics Mauritius	Large hotels	38	59	42	44	46	52	67	61	53
	All hotels	37	57	40	42	44	50	63	58	51
YEAR 2019		OCT 19	NOV 19	DEC 19	JAN 19	FEB 19	MAR 19	APR 19	MAY 19	JUN 19
Statistics Mauritius	Large hotels	76	85	79	74	77	72	71	67	65
	All hotels	75	84	78	72	76	71	69	66	64

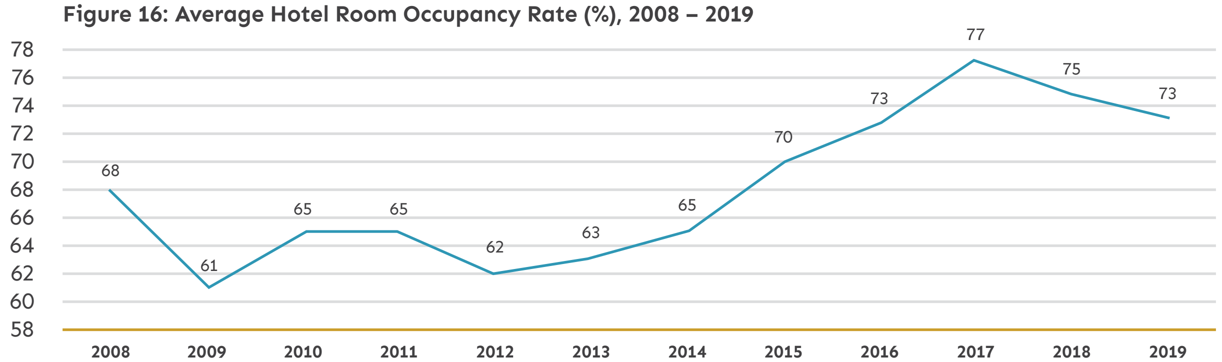
* based on some 65 AHRIM member hotels

Sources: Statistics Mauritius and AHRIM membership

The above table also uses the Year 2019 data for comparison purposes. It is interesting to note that in terms of average hotel room occupancy, the AHRIM membership displayed a 77.5 percent recovery for the first semester of 2022.

Between 2009 and 2014, average hotel room occupancy rate remained confined within the 61 to 65 percent bracket. The 70 percent mark was reached in 2015 and occupancy rate peaked at 77 percent in 2017 following which two successive two percentage point cuts were recorded in both 2018 and 2019.

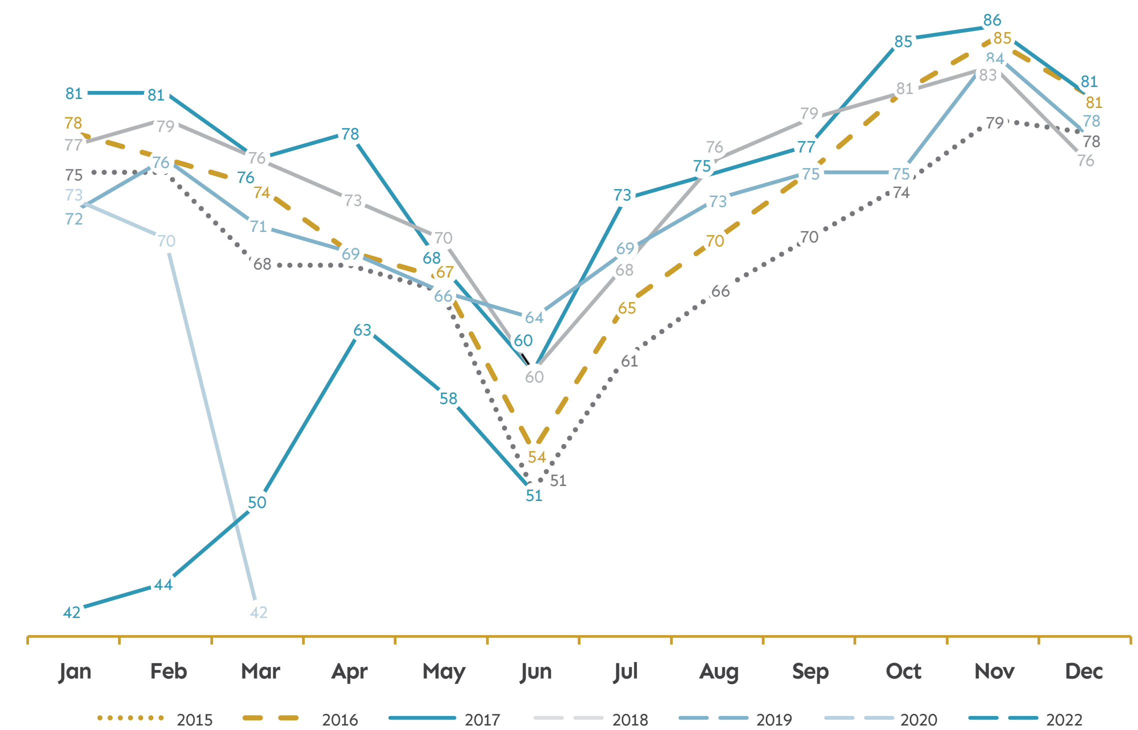
Figure 16: Average Hotel Room Occupancy Rate (%), 2008 – 2019



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 percent mark during the last five years; in 2019, the peak of 84 percent was attained in November. The promotion of Mauritius as an all-year round destination has, during the last three years, contributed to the substantial push upwards for the traditional lowest monthly occupancy rate, with a peak of 64 percent reached in June 2019.

Figure 17: Average Hotel Room Occupancy Rate (%) by Month, 2015 – 2022 (excluding 2021)



Source: Statistics Mauritius

3.3.2.2

RESTAURANTS

As at March 2022, the Tourism Authority had issued fresh licences to a total of 806 restaurants. This can be compared to the 818 Restaurant licences issued at March 2021, showing a drop of 12 operators over a year.

Other food outlets directly competing with restaurants are franchised and unfranchised outlets operating in food courts or as roadside establishments. Their relevant licences are issued by the local municipal and village councils and business registration, where applicable, is under the form of a Business Registration Number (BRN). Numbers are regularly published by the Statistical Business Register Unit of Statistics Mauritius.

Other tourism operators 3.3.3

The following table displays the comprehensive details of licences issued by the Tourism Authority as at March 2022 compared to March 2021.

Table 23: Licences Issued by the Tourism Authority to Other Tourism Operators, as at 31 March 2021 and 2022

ACTIVITY	MARCH 2021	MARCH 2022
Operating spa	86	15
- within hotel premises	77	4
- outside hotel premises	9	11
Operating health and fitness centre within hotel premises	70	1
Operating beauty parlour, including hairdressing, within hotel premises	49	0
Table d'Hôte	22	22
Operating golf course	9	8
Operating boat house	75	75
Operating rental agency for jet ski	0	0
Operating rental agency for kite surf	20	21
Operating rental agency for windsurf	2	2
Operating scuba diving centre	72	69
Operating helmet diving centre	10	10
Providing non-motorised water sports such as pedaloes, canoes, kayaks and laser	10	10
Hawking on beaches facing hotels	452	431
Hawking in tourist sites	16	16
Eco-tourism activities (nature-based tourism activities or adventure-related tourism activities, or both)	17	16
Operating rental agency for bus, including minibus	1	2
Operating rental agency for motorcycle	40	36
Operating rental agency for bicycle	24	18
Operating rental agency for quad	12	10
Karting	0	0
Operating aquarium displaying fish or marine animals for public viewing	1	1
Providing tour operator service	354	357
Working as tourist guide, including tourist guide employed by a tour operator	23	18
Operating travel agency	157	143
Nightclub	19	18
Private club	6	6
Pub	6	7

One can also add as relevant to local transport for tourists, the licences issued by the National Land Transport Authority to airport and hotel taxis as well as other vehicles mostly dedicated to visitors. Latest available data on the number of hotel taxis available dates back year 2014 when there was a total of 1,183 hotel taxis for a list of 82 hotels.

TOURISM AND THE ECONOMY 3.4

The Tourism Satellite Account (TSA) 2018 (a five-year publication) was released in September 2020. The TSA actually captures latest data from the respective Surveys of Inbound, Outbound and Domestic Tourism conducted in 2018, and it updates both historical and projected data on the main dimensions of the travel and tourism industry, including production and consumption accounts, value addition and employment, every 5 to 10 years using Census data. It is worth noting that the TSA does not take into account indirect contributions such as investment contribution (e.g. construction of hotels/recreation parks/restaurants; investment on aircraft/vehicles/boats; taxis, etc.) and government collective spending (e.g. output of MPTA, output of the Ministry of Tourism, and government spending on marketing and promotion campaigns).

TSA is also not geared towards capturing the induced contribution of the Travel and Tourism Industry. Spending of direct and indirect employees implies that the impact of the salaries (consumption) of the employees on the different local industries has to be measured (e.g. food and other manufacturing industries, transport, travel, construction, education, etc.).

In 2019, AHRIM was invited to chair, under the authority of the Statistics Board, a Working Group on the Improvement of Tourism Statistics. Works are ongoing.

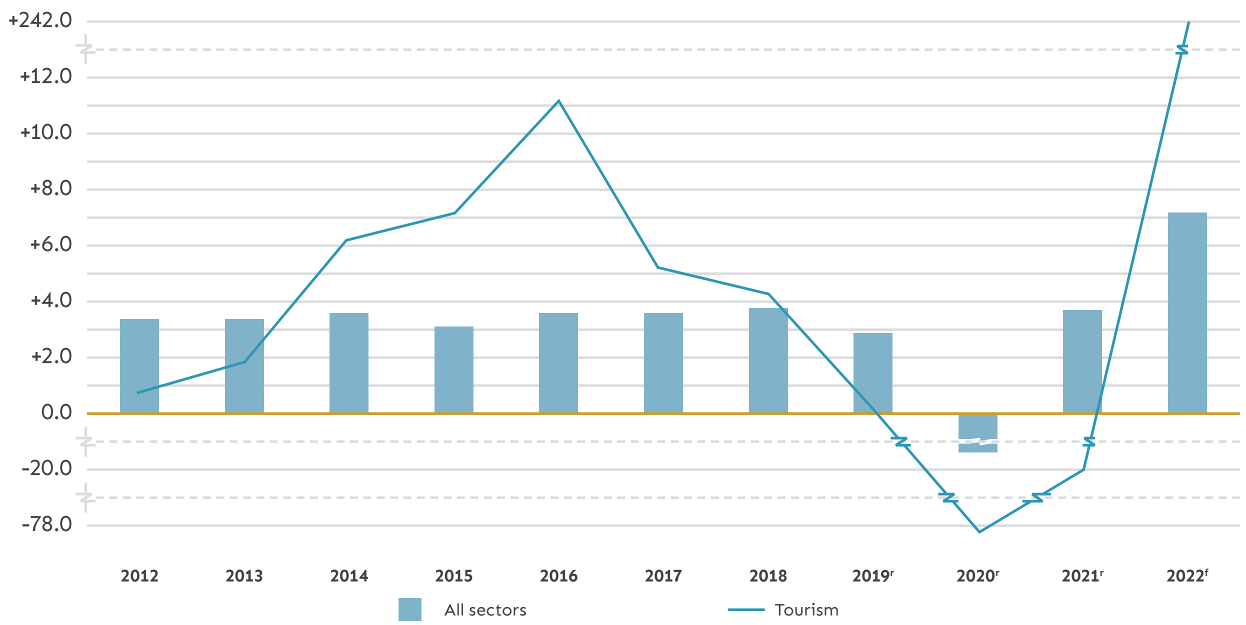
AHRIM is particularly concerned with factors such as the growing informalisation of the sector (non-renewal of licences, growth in airbnb offerings, etc.) and the growingly complex differentiation between tourists, excursionists, long stay visitors, Premium Visa holders, etc. Further clarification works are also required in respect of Rodrigues tourism and the various contributions of the airline industry.

Contribution to GDP 3.4.1

Between 2014 to 2018, the growth of the Tourism sector has consistently outperformed the national average. However, since 2019, the reverse is true. With the recovery, the contribution of the tourism sector from a negative base, was arithmetically exceptionally high at +219 percent compared to 7.9 percent for the whole economy in 2022. Gross value addition for the Tourism sector is estimated at MUR 28,603 Mn in 2022 below the level reached back in 2016.

It should also be highlighted that since 2020, with the border closure, the gross value added for Accommodation and Food Service Activities is higher than that for the Tourism sector (that covers components of “Accommodation and food service activities”, “Transport (incl. air travel)”, “Recreational and leisure” and “Manufacturing”, attributable to inbound tourism). In 2022, Accommodation and Food Service Activities generated MUR 32,356 Mn as value-added, MUR 3.7 Bn more than the value addition for the Tourism Sector.

Figure 18: Gross Value Added - Real Growth of Tourism Sector v/s National Average, 2012 – 2022f (%)



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

Source: Statistics Mauritius

Based on the Census of Economic Activities in 2018, value addition of the sector was MUR 33,960 Mn compared to the official estimates of MUR 31,648 Mn or 7.3 percent above the official estimates. For the whole economy, the Census was 3.2 percent above the official estimates (MUR 449,299 Mn v/s MUR 435,377 Mn).

The Tourism Satellite Account of 2018 gave a positive Balance of Trade (+MUR 48,681 Mn) for the tourism sector that contributes to reduce the overall trade balance deficit (-MUR 68,657 Mn).

Tourism and employment 3.4.2

Total direct employment in the sector (based on the results of the Continuous Multi-Purpose Household Survey) reached 44,000 in 2019 or 7.6 percent of total employment. Based on the 2018 Census of Economic Activities, total employment in the Accommodation and food service activities was 65,523 in the sector or 9.4 percent of total employment. Compared to the official estimates (41,600 in 2018), employment in the accommodation and food service activities was 58 percent higher. The 2018 Census also revealed that some 2,600 persons worked in small tourist accommodation facilities (less than 10 employees) and 26,937 were engaged in large ones.

According to the 2018 Tourism Satellite Accounts (TSA), direct employment in the tourism sector in 2019 was over 77,400 distributed as follows: 29.6 percent in the accommodation sector (around 22,900), 25.5 percent in food and beverage services, 9.7 percent for inland transport, 7.8 percent in recreational, cultural and sporting services. The share of total direct employment in the tourism sector represented 13.3 percent of total employment.

The annual survey of large establishments (with 10 or more employees) showed a drop in the labour force of the sector with 27,858 people at end March 2021 (reduction of nearly 4,400). Nearly 21,700 were employed in hotels, 3,460 in Food services and 2,700 in Travel and other services. The survey also revealed that expatriates in the sector totalled 538 at the same year end compared to 632 at end March 2020. As many hotels were closed or operating under its normal capacity, a 2.2 percent drop in average monthly earnings to MUR 20,505 at end of that period was also observed.

Tourism earnings 3.4.3

Tourist earnings in 2022 is strongly catching up with 2019 – for the first semester, the MUR 25,272 Mn recorded represented 81.4 percent of the earnings in 2019 for the same period. For the first quarter, this proportion was 75.9 percent and it climbed to 87.6 percent for the second quarter of 2022 versus that of 2019. Various factors could explain this rapid recovery as mentioned earlier, but mostly favourable exchange rate for export industries, i.e. a weaker rupee, also had an impact on these earnings.

Earnings per tourist achieved a peak of MUR 67,114 for the first semester of 2022 and a per capita per diem expenditure of MUR 5,354 compared to MUR 45,614 and MUR 4,362 respectively in 2019. The longer average length of stay witnessed in this post-COVID new era coupled with cumulated budget available for holidays and the depreciation of the MUR viz the Euro and other major currencies are all contributing towards these new heights.

Taxes and levies 3.4.4

For the FY 2022/23, some MUR 1,755 Mn were collected as passenger fee on air tickets after the significant dip in the wake of the COVID-19 outbreak. Tourist Enterprise Licence fees collected is also picking up (MUR 90 Mn) after being waived during the two-year pandemic period.

As tourist accommodation facilities is a major contributor (well over 75 percent) to the Environment Protection Fee, the total amount collected drastically dropped in FY 2020/21 to MUR 89 Mn. It jumped to MUR 318 Mn in FY 2021/22 and MUR 465 Mn is expected for FY 2022/23.

Debt 3.4.5

With the different restructuring plans implemented to reduce the burden of debt, the level of debt in the sector has been contained. However, with COVID-19, a peak of MUR 399.6 Bn was reached in June 2020. With the different financial instruments set in place by the Authorities to alleviate the financial havoc faced by the sector (especially through the Mauritius Investment Corporation – MIC) the level of bank loans to the sector has somewhat stabilised and reached MUR 396.3 Bn at end December 2021. These represented a share of 13.6 percent of total debt in the private sector.

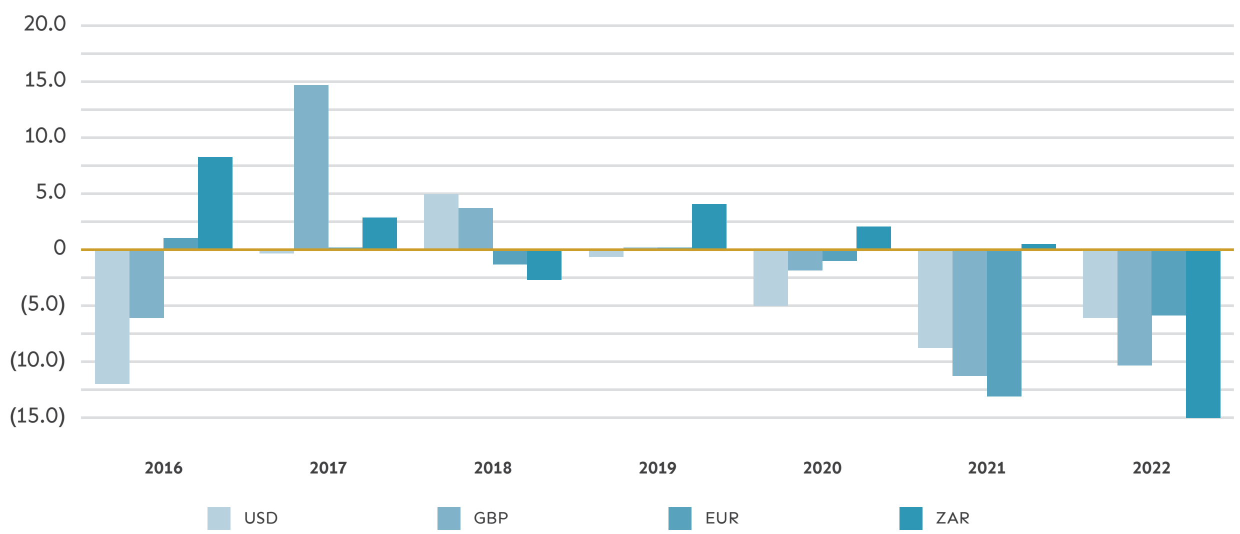
Investment 3.4.6

Gross Fixed Capital Formation (net increase in physical assets) in the Accommodation and Food Services Activities sector has picked up from the record low of MUR 3.9 Bn in 2020 and should reach MUR 4.9 Bn in 2022 or six percent of the total. The continuous investment in the existing facilities, even if it has reduced during the COVID-19 pandemic, ascertain the readiness of stakeholders to rebound from this unprecedented crisis. The preliminary estimates for gross direct investment from abroad in the Accommodation and Food Services Activities stood at MUR 958 Mn or 6.2 percent of the total.

Rate of exchange 3.4.7

On average, for the year ending March 2022, the MUR has continued to slide viz major currencies -14.9 percent for the ZAR, -10.4 percent for the GBP, -6.2 for the USD and -5.9 percent for the EUR.

Figure 19: Appreciation/Depreciation* of the MUR Against Selected Currencies, 2015 - 2022 (%)



* Average for the 12 months ended March of each year.

Source: Bank of Mauritius

Table 24: Exchange Rate of the MUR vis-a-vis Selected Hard Currencies, 2017 - 2022

	INDICATIVE SELLING RATES (AVERAGE FOR 12 MONTHS ENDED MARCH[1])					
CURRENCIES	**2017**	**2018**	**2019**	**2020**	**2021**	**2022**
US Dollar	36.3473	34.6500	34.8925	36.7311	40.2823	42.9336
Pound Sterling	47.5689	45.8444	45.7908	46.6674	52.6801	58.7873
Euro	39.8999	40.4450	40.4070	40.8192	47.0515	50.0274
Swiss franc	36.9378	35.7859	35.4053	37.4374	43.9034	47.0408
South African rand	2.6136	2.6850	2.5797	2.5282	2.5141	2.9545
Indian rupee (100)	54.7250	54.0090	50.6703	52.5929	55.1119	58.7136
CURRENCIES	YOY APPRECIATION/(DEPRECIATION) OF THE MUR					
US Dollar	(0.4)	4.9	(0.7)	(5.0)	(8.8)	(6.2)
Pound Sterling	14.8	3.8	0.1	(1.9)	(11.4)	(10.4)
Euro	0.2	(1.3)	0.1	(1.0)	(13.2)	(5.9)
Swiss franc	1.3	3.2	1.1	(5.4)	(14.7)	(6.7)
South African rand	2.9	(2.7)	4.1	2.0	0.6	(14.9)
Indian rupee (100)	2.3	1.3	6.6	(3.7)	(4.6)	(6.1)

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

INDUSTRY FILES 3.5

Conducting business 3.5.1

RELAXATION OF SANITARY MEASURES 3.5.1.1

The new general protocol in force since 01 July 2022 is a breath of fresh air for both the local population and visitors alike especially with the removal of the obligation to use face masks in public places and on the limitation of the number of people in a gathering. The relaxation of these two sanitary measures is yet another milestone reached for a return to normality.

This has contributed to further boost tourist arrivals especially from our major source markets where most, if not all, COVID-19-related sanitary measures have been removed.

PAYMENT FACILITIES FOR ANNUAL LAND LEASE RENTAL 3.5.1.2

Following the one-year (FY 2020/21) waiver of the annual lease rental for entities in the tourism sector, the Authorities have changed the regulation so that the rent is now payable in arrears as from FY 2021. This measure has actually provided a relief of two years to relevant players, including hotels, in the tourism sector.

An additional incentive in this regard is the re-conduction of the 50 percent waiver on rental in case of renovation. This facility is available until June 2023 under the same conditions as for previous years.

VAT REFUND ON MICE – ELIGIBLE NUMBER OF PARTICIPANTS REVIEWED DOWNWARDS 3.5.1.3

MICE with at least 50 participants can now benefit from the VAT refund scheme (from 100 participants previously). Together with the relaxation of sanitary measures, this amendment in the VAT refund scheme will contribute to kick-start the MICE segment that was “dormant” since March 2020.

LEVY OF SUGAR ON NON-STAPLE FOOD – IMPLEMENTATION DELAYED 3.5.1.4

The new levy on added sugar to non-staple foods introduced a few years back should be effectively implemented as from 01 July 2025. At the same time, the proposed application of this levy for the manufacture and sales of pastries, including in hotels, has been reviewed and largely simplified.

Budget 2022/23 3.5.2

As usual, AHRIM has prepared and submitted its Budgetary Proposals for 2022/23 which included the following requests:

- Further relax sanitary constraints
- Pursue air connectivity expansion strategy
- Allocate efficient and appropriate means for the targeted recovery
- Tackle our national labour market issues with more resolve
- Review and update the Environment Protection Fee (EPF)
- Reconsider the Training Levy
- Easing businesses’ immediate cash-flow issues
- Preparing for the next few years and beyond

GWAS and MIC 3.5.3

The Government Wage Assistance Scheme (GWAS) and facilities offered by the Mauritius Investment Corporation (MIC) have been crucial in maintaining afloat many operators and retaining the majority of their employees. A total of around MUR 27.3 Bn as GWAS has been injected by the Government of which around MUR 550 to 575 Mn per month in the tourism sector since March 2020 to end December 2021 through the MRA.

The support through the Mauritius Investment Corporation (MIC) contributes to financially support distraught entities heavily impacted by the COVID-19 pandemic. Based on figures available as at date, applications approved by the MIC totalled MUR 52.157 Bn of which 27.8 percent for the Accommodation and Food Service sector. As at end August 2022, MIC has disbursed MUR 46.734 Bn to a total of 41 entities.

URA consultations and works on CEB's proposed electricity rates 3.5.4

In July 2022, the Central Electricity Board (CEB) filed proposals for new electricity rates applicable to all users. The Utility Regulatory Authority (URA) immediately initiated consultations with the various user categories and works are ongoing at the time of writing.

AHRIM appropriately made representations on behalf of its members by proposing namely, further discussions on the rates of increase proposed by the CEB, the relevance of a commercial tariff for the hospitality sector, and the long-standing CEB methodology for the monthly computation of the Demand Charge component in its billing.

Labour 3.5.5

In March 2021, the tourism industry had lost around 4,400 workers compared to March 2020, of whom, 3,400 in hotels only. Figures for March 2022 are not available at the time of writing.

The whole ecosystem of our national labour market in fact needs an urgent review given acute shortages affecting the whole economy. Our national education framework has to cope with declining enrolment rates and decreasing proportions of students opting for the vocational fields. In the case of tourism and hospitality, we have a long-standing issue of our restrained national Hotel School.

At the same time, Government has adopted an explicit policy of exporting our local labour (promoting employment on cruise ships, advertising hospitality jobs in the Middle East and Northern America, signing more circular migration agreements, etc). Such new factors, coupled with the country's strategy to host more foreign international students on our campuses, call for an explicit policy towards opening up to more foreign labour.

AHRIM has officially proposed the setting up of an appropriate Inter-Ministerial Committee to urgently handle this national, and crucially strategic, responsibility and task.

ANNUAL WAGE COMPENSATION 3.5.5.1

AHRIM, together with Business Mauritius participated in the yearly tripartite exchange to look into the quantum for salary compensation for the year 2022. The agreed compensation rate was ratified in the Workers' Rights (Additional Remuneration) (2022) Regulations 2022 and were as follows:

Full-time worker:
- MUR 500 to those earning up to MUR 13,000 monthly, and
- MUR 400 to those earning above MUR 13,000.

Part-time worker:
- Up to MUR 13,000: 3.85% rounded up to the next rupee but not exceeding MUR 500 per month.
- Above MUR 13,000: MUR 400 per month.

CHANGES IN THE WORKERS' RIGHTS ACT 3.5.5.2

The 2022/2023 budget announced a series of Financial and Fiscal measures to facilitate and promote training and employment and at the same time, to ease the economic burden of the employees. The proposed measures were enacted in The Finance (Miscellaneous Provision) Act 2022, Act No. 15 of 2022 and came in force on 01 July 2022. The Workers' Rights Act was amended to cater for the following:

- Reimbursement of metro fares
- All unused sick leave can be accumulated as the ceiling of 90 days is removed
- Fuel allocation to be increased by 10 percent up to a maximum of MUR 2,000
- Cyclone allowance to be paid to workers working from home, during cyclone warning III or IV
- The definition of worker has been extended to include service providers or the like (except consultants) and who performs comparably the same work
- An employee who has been in continuous employment of at least 436 months, may retire before attaining the age of 60
- Parents will be allowed to take up to 10 days' leave with pay to be reckoned against his leaves entitlement to care for his sick child
- In case of death, the payment of PRGF lump sum in respect of past services can be made directly to the heirs of the deceased worker

OTHER HR-RELATED CHANGES 3.5.5.3

Several amendments were also brought that have a direct impact on the worker population. These changes include:

- An increase in the National Minimum Wage to MUR 11,075
- Recruitment of talents under the young professional occupation permit
- Training and skilling of 3,000 youths, men, and women under NAP, NSDP and GTES
  - An increase in stipend: (a) MUR 8,000 for those under the National Apprenticeship Programme and the National Skills Development Programme; and (b) MUR 10,000 for the Graduate Training for Employment Scheme
- A monthly Prime à l'Emploi of MUR 15,000 by Government for the first year of employment of 10,000 youths between 18 and 35 years and women up to 50 years
- A progressive income tax system was introduced:
  - For those earning between MUR 25,000 to MUR 53,846 monthly, that is up to MUR 700,000 annually, the income tax rate is now 10 percent
  - For those earning MUR 53,846 and up to MUR 75,000 monthly, that is up to MUR 975,000 annually, the income tax rate is now 12.5 percent
- Changes in income tax exemptions:
  - The exemption of travelling allowances deductible from income tax has increased from MUR 11,500 currently to MUR 20,000
  - Increase in the maximum deduction for medical insurance premiums from: (i) MUR 20,000 to MUR 25,000 for an individual and his first dependent; and (ii) MUR 15,000 to MUR 20,000 for every other dependent
  - Increase in the exemption in respect of an individual pension scheme from MUR 30,000 to MUR 50,000
- A direct monthly income allowance of MUR 1,000 earning a gross income of up to MUR 50,000

VACCINATION - BOOSTER DOSE 3.5.5.4

Following the change in the status of "Fully Vaccinated" and the coming into force of the Consolidated COVID-19 (Amendment No.5) (Amendment) Regulations 2022 on 19 February 2022, the booster dose became compulsory to have access to specified institutions, work places or premises. AHRIM sought the assistance of the MOHW and a total of 35 vaccination sessions were organised in order to vaccinate tourism employees. These sessions were held in the Beachcomber Training Academy, La Pirogue Resort & Spa, Sugar Beach Resort, Ambre Resort & Spa, Long Beach Mauritius, Le Shandrani Beachcomber Resort & Spa, Paradis Beachcomber Golf Resort & Spa and La Place du Moulin in Bel Ombre. AHRIM facilitated the booster dose for some 9,500 hotel staff.

Last year, the venue facilities of Ravenala Attitude, Sugar Beach Resort, Le Méridien Ile Maurice, Paradis Golf Resort and Spa and Maritim Crystals Beach were also used for vaccination purposes. The services of the mobile vaccination team of the Ministry of Health and Wellness were secured and some 4,400 hotel staff received their jabs.

Other files / projects 3.5.6

CONVENTION SUR LES PROBLÉMATIQUES SÉCURITAIRES DU SECTEUR HÔTELIER 3.5.6.1

AHRIM, in collaboration of the SMF–GIPM and AGIGN (Réunion Island), organised a "Convention sur les problématiques sécuritaires du secteur hôtelier" at the Ravenala Attitude on 27 July 2022. The security managers of the hotel members of AHRIM were invited to attend. The workshop enabled those present to gain new insights onto security issues and also to share their understanding and state of readiness. A "démonstration dynamique" also took place to showcase the seriousness of threats and the readiness of the SMF-GIPM.

REWARD TO THE BEST STUDENTS 2022 3.5.6.2

For the year 2022, AHRIM rewarded two students from EHSGD for their brilliant performances in the Higher National Diploma in Hospitality Management. The two awardees each received a personalised trophy plus a cash prize.

TOURISM AND ENVIRONMENT PROTECTION 3.6

The Environment Protection Fee (EPF) 3.6.1

The EPF was introduced in 2002 for a list of designated operators, including accommodation providers, enterprises engaged in stone crushing or in the manufacture or processing of aggregates, concrete blocks, pre-cast units, coral sand, rock sand or basalt sand, and enterprises engaged in the manufacture, assembly, or importation of mobile phones, batteries for vehicles, and pneumatic tyres, as part of a direct funding effort towards environment protection strategies.

With the difficulties encountered by the tourism sector since 2009, Government granted a suspension of the EPF commitment for loss-making enterprises for two years – 2013 and 2014. A similar suspension in 2020 (March to December) was granted in the wake of the COVID-19 pandemic.

Since the introduction of the EPF in 2002, no change has been brought save for the above suspension measures for the hotel sector and a few changes in the applicable rates. Hotel accommodation already contributes more than a fair share of the Environment Protection Fee (MUR 332 Mn in 2018/19 out of the total of MUR 424 Mn for the country, i.e. 78 percent). At the national level, hotels rank well above the average in terms of economic operators' efforts towards greener and more sustainable practices.

AHRIM has invited Government to reconsider its position on the EPF. Among others, a larger list of operators from other economic sectors, updated and identified from national changes having occurred since 2002 as well as a smarter use of improved measurements of environmental impacts of the various industries and trades, could be considered with associated applicable rates.

Pending such works by the authorities, we are proposing as an immediate and proactive response to our daily observations on the state of the environment, that enterprises contributing towards the EPF be given the option to manage at least 50 percent of their contribution towards environment/sustainability projects in their immediate and neighbouring locations, under the control of the competent authorities. This local approach would definitely bring clearer and more visible results on the ground.

Cleaning campaigns 3.6.2

Clean-up campaigns undertaken with Tourism Authority and the Ministry of Environment were noted for 2021. Many hoteliers and other AHRIM members participated on those various occasions and AHRIM co-sponsored public education and sensitisation billboards on some key public beaches.

Creating a new economic sector around our natural assets and cultural heritage 3.6.3

On cultural heritage, a joint Working Group with Ministry of Arts and Culture, MTPA, BM and AHRIM has met on several occasions since the Budget Speech of 2021. The private sector participants have proposed a novel approach regarding the ownership, management and uplifting of our various sites, landmarks and monuments, around new concepts of guest experience, which would attract both locals and visitors. Such a fresh orientation would also relieve the various public bodies from the burden of costly maintenance works that cannot be recouped with relevant future income streams.

It is worth mentioning the launch of an app by the National Heritage Fund in May 22. This tool is a praiseworthy initiative that will help to drive this new economic sector.

On our natural parks and forests, AHRIM has participated in consultations with the public authorities and made proposals for fresh income streams required to maintain the various sites around the island.

Catch neuter and release policy 3.6.4

On 13 May 2022, Cabinet approved the proposal of the Ministry of Agro-Industry and Food Security to embark on a sustainable project for the dog population control in Mauritius, to be conducted by the Mauritius Society for Animal Welfare. The project includes the adoption of a new Catch-Neuter-Release approach, which will aim at curbing the growth of the dog population in a more humane, efficient and cost-effective manner. An Expression of Interest would be launched for the services of local and international service providers to implement the project across the island for sterilisation, registration and micro-chipping of dogs. Relevant amendments would be made to the current regulatory framework for the operationalisation of the project.

Eco labels and hotel initiatives 3.6.5

FOOD WASTE 3.6.5.1

The Food Waste Prevention Programme started in June 2021 with the main objective to reduce food waste and by extension cutting unnecessary costs and negative environmental impacts. This program was implemented by LightBlue, a UN awarded social entreprise, with the assistance of HRDC and SigneNatir with Business Mauritius. It was locally supported by FoodWise and facilitated by Living Labs. It is noteworthy to highlight that out of the 10 entities that embarked on this journey, nine were hotel restaurants showcasing once again, the continuous and uncompromising effort of the hotel sector towards sustainability.

At the end of nine-month journey to reduce food waste, the key outcomes in figures were:

Figure 20: Key outcomes of the Foodwaste project

62,147 Kg OF FOOD NOT WASTED = **124,295** MEALS SAVED

43% AVERAGE FOOD WASTE REDUCTION

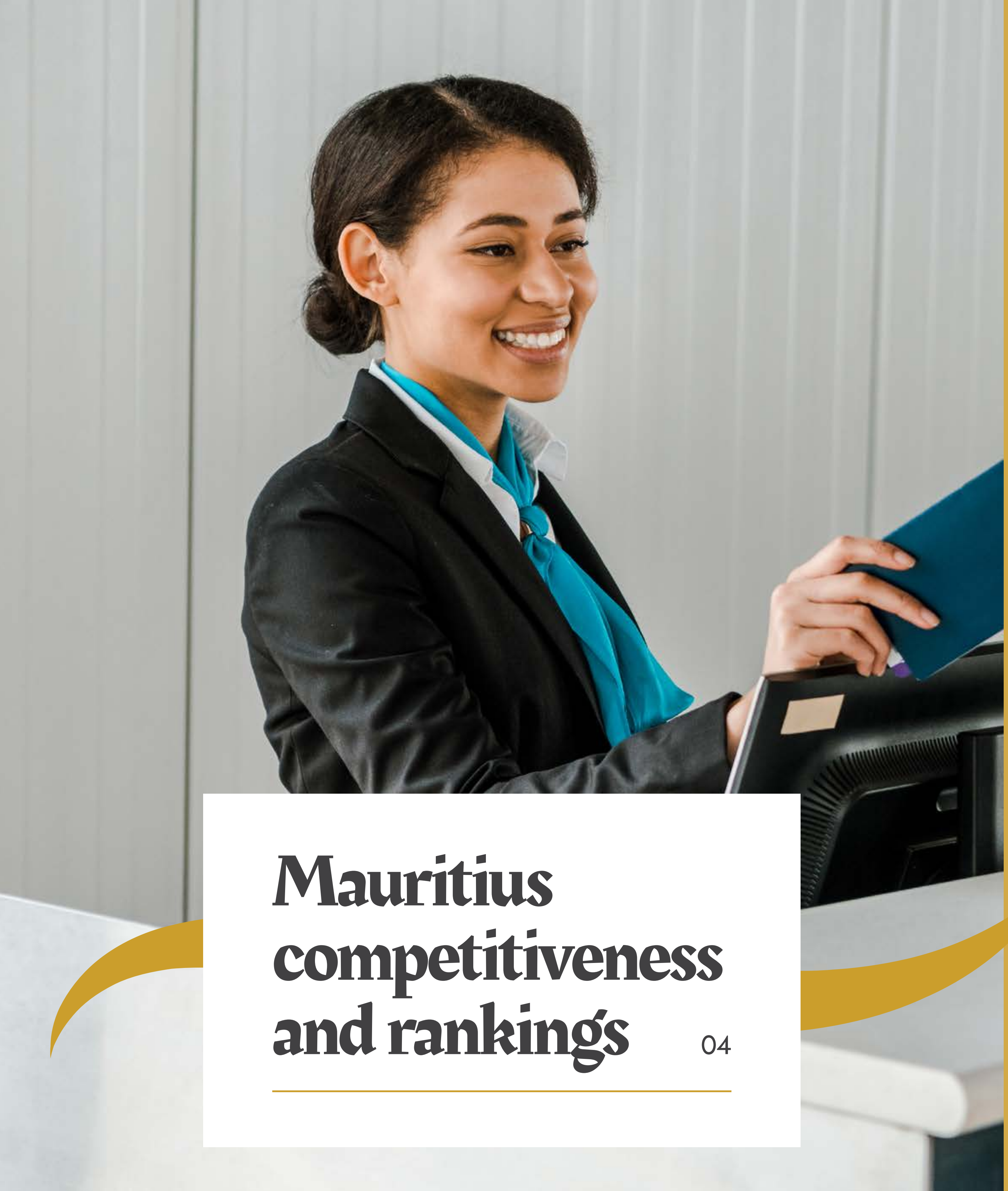
155.4 T OF CARBON EMISSIONS NOT EMITTED = **97** PARIS - MAURITIUS FLIGHTS

USD 209,723 MONEY NOT WASTED (TOTAL)

96 PERSONS TRAINED

Source: The PLEDGE™ on Food Waste

All the participants successfully reached the international certification The PLEDGE™ on Food Waste: namely Heritage Awali Golf and Spa Resort, LUX* Le Morne Mauritius, La Pirogue Resort and Spa Mauritius, Veranda Tamarin Hotel Mauritius, Constance Belle Mare Plage, LUX* Belle Mare Mauritius, Preskil Beach Resort Mauritius and Victoria Beachcomber Resort and Spa.



Mauritius competitiveness and rankings

04

INTERNATIONAL TOURISM RANKINGS

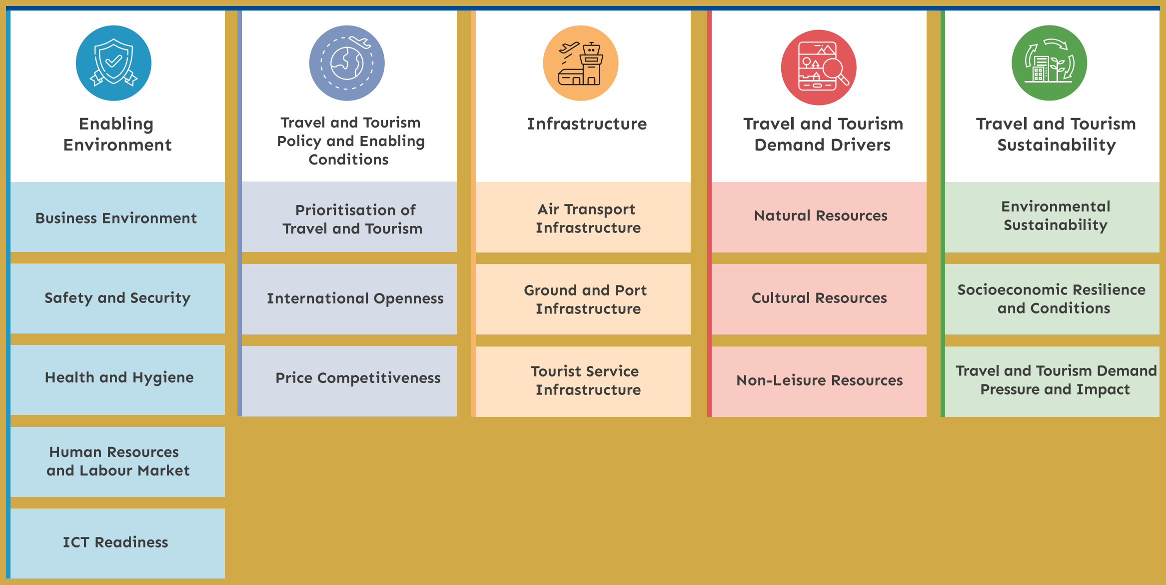
4.1

The Travel & Tourism Development Index 2021 - Rebuilding for a Sustainable and Resilient Future released an Insight Report in May 2022. It replaces the Travel & Tourism Competitiveness Index of the World Economic Forum.

The Travel & Tourism Development Index (TTDI) 2021 is an evolution of the 15-year-old Travel & Tourism Competitiveness Index (TTCI) series, a flagship index of the World Economic Forum's Platform for Shaping the Future of Mobility. This revised index serves as a strategic benchmarking tool for policy-makers, companies and complementary sectors to advance the future development of the Travel and Tourism (T&T) sector by providing unique insights into the strengths and development areas of each country/economy to enhance the realisation of sector potential and growth. Furthermore, it serves as a platform for multi-stakeholder dialogue to understand and anticipate emerging trends and risks in global T&T, direct policies, practices and investment decisions, and accelerate new models that ensure the longevity of this important sector.

Travel & Tourism Development Index 2021 - Rebuilding for a Sustainable and Resilient Future,
INSIGHT REPORT MAY 2022

Figure 21: Travel & Tourism Development Index framework



Source: Travel & Tourism Development Index Report 2021

Figure 22: Travel & Tourism Development Index 2021 Overall Rankings[1]

Rank	Economy	Score[2]	Change since 2019[3] Rank	Change since 2019[3] Score	Diff. from TTDI Avg. (%)
1	Japan	5.2	1	0.7%	31.8%
2	United States	5.2	-1	-1.0%	30.7%
3	Spain	5.2	2	0.0%	29.5%
4	France	5.1	2	-0.2%	28.8%
5	Germany	5.1	-1	-1.8%	27.3%
6	Switzerland	5.0	1	-2.1%	26.0%
7	Australia	5.0	1	-1.3%	25.6%
8	United Kingdom	5.0	-5	-4.5%	24.8%
9	Singapore	5.0	0	-1.4%	24.6%
10	Italy	4.9	2	0.8%	23.9%
11	Austria	4.9	0	0.4%	23.6%
12	China	4.9	3	2.3%	23.5%
13	Canada	4.9	-3	-2.1%	22.9%
14	Netherlands	4.9	0	0.2%	22.3%
15	Korea, Rep.	4.8	4	1.9%	21.4%
16	Portugal	4.8	-3	-2.1%	19.8%
17	Denmark	4.7	-1	-1.5%	18.9%
18	Finland	4.7	-1	-2.2%	17.3%
19	Hong Kong SAR	4.6	-1	-3.0%	16.3%
20	Sweden	4.6	1	-1.9%	16.0%
21	Luxembourg	4.6	2	-0.5%	15.4%
22	Belgium	4.6	3	-0.6%	14.4%
23	Iceland	4.5	-1	-1.8%	14.2%
24	Ireland	4.5	-4	-3.9%	13.9%
25	United Arab Emirates	4.5	1	0.7%	13.9%
26	Czech Republic	4.5	1	0.3%	13.3%
27	New Zealand	4.5	-3	-2.5%	12.6%
28	Greece	4.5	0	0.2%	12.1%
29	Estonia	4.4	2	-0.6%	10.7%
30	Poland	4.4	3	0.8%	10.6%
31	Cyprus	4.4	-1	-0.8%	10.5%
32	Indonesia	4.4	12	3.4%	10.3%
33	Saudi Arabia	4.3	10	2.3%	9.3%
34	Chile	4.3	4	0.9%	9.1%
35	Malta	4.3	-3	-1.9%	9.0%
36	Thailand	4.3	-1	0.2%	8.8%
37	Hungary	4.3	0	0.3%	8.7%
38	Malaysia	4.3	-9	-3.0%	8.4%
39	Slovenia	4.3	-3	-0.7%	7.8%
40	Mexico	4.3	-6	-1.2%	7.4%
41	Bulgaria	4.3	-2	-0.4%	7.3%
42	Lithuania	4.3	3	0.6%	7.2%
43	Qatar	4.3	-2	-0.2%	7.0%
44	Georgia	4.3	3	1.4%	6.8%
45	Turkey	4.2	4	1.3%	6.4%
46	Croatia	4.2	-4	-0.6%	6.4%
47	Israel	4.2	-7	-1.0%	6.2%
48	Latvia	4.2	0	0.6%	5.9%
49	Brazil	4.2	3	2.3%	5.2%
50	Costa Rica	4.2	1	1.2%	4.5%
51	Egypt	4.2	6	4.3%	4.4%
52	Vietnam	4.1	8	4.7%	4.1%
53	Romania	4.1	-3	-0.7%	3.6%
54	India	4.1	-8	-2.6%	3.6%
55	Uruguay	4.1	6	3.6%	3.0%
56	Slovak Republic	4.1	-3	0.2%	2.9%
57	Bahrain	4.1	-2	1.0%	2.1%
58	Colombia	4.0	4	2.3%	1.6%
59	Argentina	4.0	-5	-1.2%	0.6%
60	Panama	4.0	-2	0.5%	0.3%
61	Armenia	4.0	4	1.9%	-0.2%
62	Mauritius	4.0	-6	-0.9%	-0.5%
63	Azerbaijan	4.0	-4	-0.3%	-0.6%
64	Jordan	3.9	-1	-0.6%	-1.8%
65	Peru	3.9	4	2.1%	-2.1%
66	Kazakhstan	3.9	0	0.3%	-2.3%
67	Montenegro	3.9	-3	-0.7%	-2.6%
68	South Africa	3.8	0	-0.3%	-3.8%
69	Dominican Republic	3.8	3	2.6%	-3.9%
70	Serbia	3.8	0	1.3%	-3.9%
71	Morocco	3.8	-4	-2.1%	-4.8%
72	Albania	3.8	-1	1.0%	-5.0%
73	Ecuador	3.8	1	1.0%	-5.7%
74	Sri Lanka	3.7	1	1.4%	-6.0%
75	Philippines	3.7	-2	0.1%	-6.3%
76	Botswana	3.7	2	3.0%	-6.6%
77	Moldova	3.6	4	1.2%	-8.6%
78	Kenya	3.6	2	0.5%	-9.1%
79	Cambodia	3.6	3	1.1%	-9.2%
80	Tunisia	3.6	-3	-0.5%	-9.2%
81	Tanzania	3.6	5	2.6%	-10.2%
82	Cape Verde	3.6	1	1.4%	-10.2%
83	Pakistan	3.6	6	2.9%	-10.2%
84	Mongolia	3.6	-8	-2.1%	-10.6%
85	Trinidad & Tobago	3.6	0	1.5%	-10.7%
86	Kuwait	3.5	-7	-1.8%	-11.0%
87	North Macedonia	3.5	-3	-0.3%	-12.1%
88	Namibia	3.5	0	0.0%	-12.6%
89	Rwanda	3.5	1	0.7%	-12.7%
90	Kyrgyz Republic	3.4	3	1.9%	-13.9%
91	Bolivia	3.4	5	1.6%	-14.5%
92	Tajikistan	3.4	-1	-0.3%	-14.6%
93	Lao PDR	3.4	1	0.7%	-15.0%
94	Lebanon	3.4	-7	-3.1%	-15.1%
95	Bosnia & Herzegovina	3.4	-3	-0.7%	-15.2%
96	El Salvador	3.3	2	1.7%	-16.1%
97	Guatemala	3.3	-2	-0.6%	-16.1%
98	Zambia	3.3	1	1.7%	-16.3%
99	Paraguay	3.3	2	2.1%	-17.1%
100	Bangladesh	3.3	3	2.0%	-17.6%
101	Ghana	3.3	-1	0.9%	-17.6%
102	Nepal	3.3	0	1.8%	-17.8%
103	Benin	3.2	3	4.0%	-18.7%
104	Nicaragua	3.2	-7	-2.0%	-19.1%
105	Senegal	3.2	0	0.4%	-20.2%
106	Honduras	3.1	-2	-2.1%	-21.5%
107	Côte d'Ivoire	3.1	3	2.6%	-22.6%
108	Venezuela	3.1	-1	-0.5%	-23.1%
109	Malawi	3.0	-1	0.2%	-24.0%
110	Nigeria	3.0	1	0.6%	-24.1%
111	Lesotho	3.0	-2	-1.5%	-25.6%
112	Cameroon	2.9	0	1.6%	-26.2%
113	Angola	2.9	0	2.8%	-26.5%
114	Sierra Leone	2.8	1	1.5%	-30.6%
115	Mali	2.7	-1	-0.5%	-31.0%
116	Yemen	2.6	0	2.7%	-34.2%
117	Chad	2.5	0	1.3%	-37.5%

The Americas · Asia-Pacific · Europe and Eurasia · Middle East and North Africa · Sub-Saharan Africa

1. Index results represent the latest data available at the time of collection (end of 2021).
2. Overall scores range from 1 to 7 where 1 = worst and 7 = best.
3. Change since 2019 refers to 2019 results using new index framework and methodology.

Source: Travel & Tourism Development Index Report 2021

Mauritius ranks 62nd and highest in the African region. The best-ranked countries in Eastern, Southern and Western Africa are Mauritius, South Africa (68th) and Cape Verde (82nd) respectively.

OTHER INTERNATIONAL RANKINGS

4.2

In general, Mauritius is well ranked in international rankings as highlighted in the table below:

Table 25: Performance of Mauritius in Selected International Rankings

NAME	SOURCE	YEAR	RANK	YEAR	RANK
African Index on Economic Transformation	African Center for Economic Transformation	N/A	N/A	2014	1 out of 83
Ibrahim Index of African Governance	Mo Ibrahim Foundation	2019	1 out of 54	2014	1 out of 52
Economic Freedom Index	The Heritage Foundation	2022	30 out of 177	2014	8 out of 178
Ease of doing business index	World Bank	2020	13 out 190	2014	20 out of 189
Human Development Index	United Nations	2019	66 out 189	2014	63 out of 187
Global Competitiveness Report	World Economic Forum	2019	52 out of 141	2013-14	45 out of 148
Travel and Tourism Competitiveness Report	World Economic Forum	2019	54 out of 140	2013	58 out of 140
Global Innovation Index	Cornell University, INSEAD, World Intellectual Property Organization	2021	52 out of 132	2013	53 out of 142
International Property Rights Index	Americans for Tax Reform's Property Rights Alliance	2021	42 out of 129	2013	40 out of 131
Democracy Index	Economist Intelligence Unit	2021	19 out of 167	2012	18 out of 167
Corruption Perceptions Index	Transparency International	2021	54 out of 180	2013	52 out of 175
Global Peace Index	Institute for Economics and Peace	2022	28 out of 163	2014	24 out of 162
Global Terrorism Index	Institute for Economics and Peace	2022	163 out of 163 (no risk)	2012	116 out of 116 (no risk)
Press Freedom Index	Reporters Without Borders	2022	64 out of 180	2014	70 out of 180
Networked Readiness Index	World Economic Forum	2021	71 out of 130	2014	48 out of 148
E-government Readiness	United Nations	N/A	N/A	2014	76 out of 193
Environmental Performance Index	Yale University, Columbia University	2022	77 out of 180	2014	56 out of 178
Environmental Vulnerability Index	South Pacific Applied Geoscience Commission, UNEP	N/A	N/A	2012	192 out of 234
Happy Planet Index	New Economics Foundation	2019	32 out of 152	2012	111 out of 151
Global Gender Gap Report	World Economic Forum	2020	115 out of 153	2014	106 out of 142
Social Progress Index	Social Progress Imperative	2021	45 out of 168	2014	34 out of 132
Mercer Quality of Living Survey	Mercer	N/A	N/A	2014	82 out of 223

With an air quality value of 10.5PM2.5, Mauritius is ranked 124 out of 135 in the global listing of countries with worst air quality – Sweden with a value 5.7PM2.5, had the cleanest air while Niger with a score of 93.2 PM2.5 was at the other end of the ranking according to World Economics. However, based on the Tourism Sustainable Development Index 2020, Mauritius was ranked 140th over 190 countries. With a score of 1.04 over 10, the island is displaying its vulnerability to climate change and the environmental challenges.

PHOTO CREDIT: HERITAGE LE TELFAIR

Overview of AHRIM

05

Since 1973, AHRIM is the main professional association of private operators in the hospitality industry in Mauritius. A non-profit making organisation, AHRIM regroups tourist accommodation facilities (representing 80 hotels or 83 percent of hotel rooms and 18 tourist residences/guest houses), 23 restaurants, 6 IRS estates and Affiliate / Associate member associations of tour operators, airport management, scuba diving, chefs, and professional training.

As an organisation respectful of the proper execution of its mandate in a changing environment, AHRIM has undertaken so far three major restructuring exercises in 1996, 2005 and 2016. A completely new set of rules was drafted and approved by our members in December 2016. In May 2018, the Registry of Associations sanctioned these new rules.

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

OUR MANDATE 5.1

- 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

ORGANISATION AND STRUCTURE 5.2

Our Members 2021 - 2022 (as at March) 5.2.1

HOTELS

NORTH WEST / NORTH

HOTELS	NO. OF ROOMS
Le Suffren Hotel and Marina	100
Labourdonnais Waterfront Hotel	105
Hotel Saint Georges	81
Le Jadis Beach Resort & Wellness	55
Intercontinental Mauritius Resort Balaclava Fort	210
The Westin Turtle Bay Resort and Spa	190
The Ravenala Attitude	272
The Oberoi Mauritius	71
Victoria Beachcomber Resort and Spa	295
Le Méridien Ile Maurice	265
Récif Attitude Hotel	70
Voile Bleue	22
Veranda Pointe aux Biches Hotel	115
Le Sakoa Hotel	16
Be Cosy apart Hotel	102
Trou aux Biches Beachcomber Golf Resort and Spa	333
Casuarina Resort and Spa	109

HOTELS	NO. OF ROOMS
Le Cardinal Exclusive Resort	13
Club Med La Pointe aux Canonniers	286
Canonnier Beachcomber Golf Resort and Spa	284
Seapoint Boutique Hotel	23
Boutique Hotel 20 Degrés Sud	36
Ocean Villas	40
Mauricia Beachcomber Resort and Spa	239
Veranda Grand Baie Hotel & Spa	94
Royal Palm Beachcomber Luxury Hotel	69
LUX* Grand Baie	169
Coin de Mire Attitude Hotel	102
Paradise Cove Boutique Hotel	67
Lagoon Attitude	182
Zilwa Attitude	215
LUX* Grand Gaube Hotel	198
Veranda Paul et Virginie Hotel and Spa	81

EAST

HOTELS	NO. OF ROOMS
Radisson Blu Poste Lafayette Resort and Spa Mauritius	100
La Maison d'Été	16
Constance Prince Maurice	89
One & Only Le Saint Géran	143
Constance Belle Mare Plage	255
Long Beach Mauritius	255
Solana Beach	116
Sunrise Attitude	61
LUX* Belle Mare Mauritius	186
Veranda Palmar Beach Hotel	77
Ambre Resort and Spa Mauritius	297
Salt of Palmar	59
Friday Attitude	51
Tropical Attitude	60
Shangri-La's Le Touessrok Resort & Spa Mauritius	303
Four Seasons Resort Mauritius @ Anahita	136

SOUTH EAST

HOTELS	NO. OF ROOMS
Preskil Beach Resort Mauritius	214
Astroea Beach Hotel	16
Le Peninsula Bay Resort & Spa	88
Shandrani Beachcomber Resort and Spa	327
Anantara Iko Mauritius Resort & Spa	164
Holiday Inn Mauritius Mon Trésor	140

SOUTH

HOTELS	NO. OF ROOMS
So Sofitel Mauritius	92
Outrigger Mauritius Resort and Spa	181
Tamassa Resort	214
Heritage Awali Golf and Spa Resort	160
Heritage Le Telfair Golf & Spa Resort	158

WEST / SOUTH WEST

HOTELS	NO. OF ROOMS
Riu Le Morne	218
JW Marriott Mauritius Resort	172
LUX* Le Morne Mauritius	149
Dinarobin Beachcomber Golf Resort and Spa	175
Paradis Beachcomber Golf Resort and Spa	299
Tamarina, Golf and Spa Boutique Hotel	50
Sands Suites Resort & Spa	92
Maradiva Villas Resort & Spa	65
Hilton Mauritius Resort & Spa	193
Sugar Beach Resort	258
La Pirogue Resort and Spa Mauritius	248
Gold Beach Resort and Spa	31
Pearle Beach Resort & Spa	74
Aanari Hotel & Spa	50
Anelia Resort & Spa	150
Veranda Tamarin	110
Club Med La Plantation d'Albion	266

CENTRE

HOTELS	NO. OF ROOMS
Hennessy Park Hotel	108
Voila Bagatelle	118
Gold Crest Business Hotel	55

GUESTHOUSES AND TOURIST RESIDENCES

NORTH

GUESTHOUSES AND TOURIST RESIDENCES	NO. OF ROOMS
Mont Choisy Beach Villas	20
Mystik Life Style	25
Ocean Beauty	9
Navani Villas	4
La Demeure Saint Antoine	4
Toparadis	23
Le Domaine de Grand Baie	125

SOUTH

GUESTHOUSES AND TOURIST RESIDENCES	NO. OF ROOMS
Les Aigrettes	12
Chill Pill	8
Coco Villas	9
Pingouinvillas	8
Le Jardin de Beau Vallon	7
Auberge de Saint Aubin	3

WEST / CENTRE

GUESTHOUSES AND TOURIST RESIDENCES	NO. OF ROOMS
Villa Salines	12
The Bay	12
Lakaz Chamarel Exclusive Lodge	20
Les Chalets en Champagne	3

RODRIGUES

GUESTHOUSES AND TOURIST RESIDENCES	NO. OF ROOMS
Bakwa Lodge	7

RESTAURANTS

PORT LOUIS
Le Courtyard Restaurant
Indra Restaurant

PAMPLEMOUSSES / RIVIÈRE DU REMPART
L'Aventure du Sucre
Rêve D'R
Amigo Restaurant

FLACQ
Splash & Fun
Restaurant Chez Manuel
Domaine de l'Étoile

GRAND PORT
Le Jardin de Beau Vallon
Ile des Deux cocos

SAVANNE / RIVIÈRE NOIRE
Le Bois Cheri Restaurant
La Vanille Nature Park
Le Saint Aubin Restaurant
Casela Nature Parks
Restaurant Le Chamarel
Varangue sur Morne

PLAINES WILHEMS / MOKA
La Nouvelle Potinière
Great Delight Restaurant
Restaurant La Clef des Champs
Flame & Grill Barbeque & Curry House
The Gourmet Emporium
Eureka
Flying Dodo Brewing Company

IRS

Anahita Mauritius
Heritage Villas Valriche
La Balise Marina
Le Parc de Mont Choisy
Tamarina Golf Estate & Beach Club
Villa Club Med de la Plantation d'Albion

ASSOCIATE MEMBER

Association of Inbound Operators of Mauritius (AIOM)

AFFILIATE MEMBERS

Airports of Mauritius Ltd
Ecole Hôtelière Sir Gaëtan Duval
Institut Escoffier Ile Maurice
Mauritius Chefs Association
Mauritius Golf Tourism Association
Mauritian Scuba Diving Association

CHANGE IN MEMBERSHIP 5.2.1.1

Maritim Resort & Spa Mauritius resigned as AHRIM member since October 2021.

Our Executive Council for 2021 – 2022 5.2.2

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

NAME	GROUP/HOTEL	POSITION
Mr Désiré Elliah	LUX* Island Resorts Ltd	President
Mr Thierry Montocchio	Rogers Hospitality	Vice-President
Mr Tommy Wong	Sun Ltd	Treasurer
SMH - Mr Ludovic Lagesse	Trimetys Hotels	Vice Treasurer & SMH representative
Mr Nicolas Staub	Beachcomber Resorts & Hotels	Secretary
Mr Jean Michel Pitot	Attitude Resorts	Immediate Past President
Mr Jacques Brune	Hilton Mauritius Resort & Spa	Member
Ms Karine Curé	Beachcomber Resorts & Hotels	Member
Mrs Geneviève Dardanne	Vice President AIOM	AIOM Representative
Mr Mathieu De Tonnac	JW Marriott Mauritius Resort	Member
Mr François Eynaud	Sun Ltd	Member
Mr Patrice Legris	Alteo Properties	IRS representative
Mr Fabio Meo	Southern Cross Hotels	Member
Mr Clifford Ng	Ocean Villas	Member & SMH representative
Mr Oscar Olsen	Flying Dodo Brewing Co Ltd	Restaurant representative
Mr Rolph Schmid	Indigo Hotels	Member
Mr Jean Jacques Vallet	Constance Group of Hotels	Member

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

- 18 December 2021
- 03 March 2022
- 16 June 2022

Our commissions 5.2.3

The Small and Medium Hotels, Restaurants and IRS Commissions each meet as independent entities. Once elected by their respective members, the Presidents of these Commissions propose project plans and raise issues relevant to their members with the Council.

Four Commissions making up for a broader representation of AHRIM members, namely Finance, Marketing, Environment and Human Resource Commissions, 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 5.2.4

Within the organisational structure of AHRIM are five full time staff members providing a wide array of services. 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
Administrative/Accounts 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
Website: http://www.ahrim.mu
Auditors: Kemp Chatteris
Legal Advisers: ENSAfrica (Mauritius)

Representation on Boards and Committees, 2021 - 2022 5.2.5

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

Private Sector
Business Mauritius
Mauritius Chamber of Commerce and Industry
Association of Inbound Operators - Mauritius

Public Sector – Tourism
Mauritius Tourism Promotion Authority (MTPA) Board
Star Rating Committee (under Tourism Authority)
Tourism Employees Welfare Fund Board
Tourism Statistics Committee
(Tourist arrivals forecast - Statistics Mauritius)
Committee on Improvement of Tourism Statistics
(under Statistics Board)
Regulatory Review - Sub-committee on Tourism

Public Sector – COVID-19
Joint Working Group on Reopening of Borders
Sub-Committees on:
- Entry Requirements and Health Protocols
- Air Connectivity
- Destination Marketing

Technical Sub-Committee on MauritiusNow initiative (MTPA and AHRIM)

Public Sector - General
National Tripartite Forum
Human Resource Development Council
National Wage Consultative Council
National Productivity and Competitiveness Council (January - June 2022)
Integrated Coastal Zone Management Committee – Ministry of Environment and NDU
Coordination Committee on the Implementation of the Mauritius' Intended Nationally Determined Contribution
Sub-Committee on Engagement with the Private Sector for the Restoration, Preservation, Promotion and Management of National Heritage Sites
PAGE Green Recovery Fund National Steering Committee

Affiliations
AHRIM was affiliated with the following organisations:
- Business Mauritius
- Association of Inbound Operators – Mauritius

2021/2022 Statistical brief on Mauritius Tourism

06

FACT SHEET

LAND AND SEA	UNIT	MAURITIUS	RODRIGUES
Total land area	Km^2	1,868	108
Forest area	Hectares	47,031	3427
Pas Géométriques	"	589	
Lagoon area	Km^2	243	240
Offshore islets	Unit	49	18
Coastline length	Km	322	80
Length of protective coral reef	"	150	90
Public beaches	Unit	130	12
Total sea frontage of public beaches	Km	47.915	2.92

CULTURE AND SPORTS	UNIT	MAURITIUS	RODRIGUES
Museums	"	18	
UNESCO World Heritage Sites	"	2	
UNESCO Intangible Cultural Heritage of Humanity	"	3	1
18-hole golf courses	"	11	
Kitesurf spots	"	17	
Deep sea fishing sites	"	8	

ENVIRONMENT AND BIODIVERSITY	UNIT	MAURITIUS	RODRIGUES
Multilateral Environmental Agreements signed by Mauritius	Unit	36	
State Protected Areas (main land and offshore islets)	Number	Area (ha)	
National Parks	2	7,071.2	
Nature Reserves	7	200.3	3 (79.5 ha)
Ramsar Sites (wetlands of International importance)	2	46.0	
National Protected Area	1	275.0	
Islet National Parks	8	134.4	
Islet Nature Reserves	7	598.6	2 (23 ha)
Ramsar sites (2 wetlands and 1 marine park)	Unit (ha)	3 (401)	
Marine protected areas	Unit/area (ha)	8 (7,190)	10 (8,730)
Marine Parks	"	2 (838)	4 (6,730)
Fishing Reserves	"	6 (6,352)	5 (2,000)
Multiple-use MPA (including two fishing reserves in Rodrigues)	"		1 (4,300)
Mangrove covered area	Km^2	1.45	0.4
Botanical/Endemic gardens	Unit	4	
Bird and Wildlife sanctuaries (excluding islets)	"	2	

SSR INTERNATIONAL AIRPORT

- ICAO Category 9 airport (maximum is 10)
- Capacity: 4 Mn passengers
- 1 runway (3,040m x 75m) and 1 emergency runway (2,279m x 60m)
- 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 m^2
- 6 baggage claim conveyors
- 32 check-in counters

PORT LOUIS HARBOUR

- 125-metre-long dedicated cruise jetty
- ISO 14001 Environmental Management System implemented
- Project: 7,500 m^2 Cruise Terminal Building with a capacity of 4,000 passengers

List of tables

Table 1: Air Seats, Passengers, Load Factor and Tourist Arrivals by Air per Month, 2018, 2019 and 2022

Month	2018				2019				2022p			
	Seats	Passengers[1]	LF, %	Tourist arrivals by air	Seats	Passengers[1]	LF, %	Tourist arrivals by air	Seats	Passengers[1]	LF, %	Tourist arrivals by air
Jan	236,901	168,718	71.2	116,369	247,881	164,129	66.2	113,660	106,172	51,338	48.4	39,734
Feb	187,616	138,330	73.7	109,569	191,860	136,784	71.3	107,145	88,391	62,724	71.0	52,402
Mar	216,942	155,128	71.5	118,293	214,836	148,255	69.0	107,959	113,783	80,832	71.0	65,872
Apr	182,637	141,195	77.3	104,663	182,026	144,880	79.6	108,265	130,897	99,602	76.1	84,177
May	184,154	130,706	71.0	100,924	175,213	126,114	72.0	96,510	126,018	89,426	71.0	70,372
Jun	166,605	115,760	69.5	84,052	168,870	125,442	74.3	92,155	122,182	83,929	68.7	62,689
Jul	198,646	163,772	82.4	115,729	202,858	161,426	79.6	115,092	160,280	121,905	76.1	93,862
Aug	196,709	154,547	78.6	109,188	197,482	156,658	79.3	107,007	159,488	115,638	72.5	86,349
Sep	181,620	138,208	76.1	102,619	179,814	136,083	75.7	100,468				
Oct	222,287	169,768	76.4	131,272	206,538	165,148	80.0	126,845				
Nov	214,514	158,167	73.7	121,600	204,955	160,009	78.1	119,335				
Dec	246,654	195,332	79.2	145,410	224,954	194,407	86.4	143,794				
Year	***2,435,285***	***1,829,631***	***75.1***	***1,359,688***	***2,397,287***	***1,819,335***	***75.9***	***1,338,235***				

Quarter	2018				2019				2022p			
	Seats	Passengers[1]	LF, %	Tourist arrivals by air	Seats	Passengers[1]	LF, %	Tourist arrivals by air	Seats	Passengers[1]	LF, %	Tourist arrivals by air
Quarter 1	641,459	462,176	72.1	344,231	654,577	449,168	68.6	328,764	308,346	194,894	63.2	158,008
Quarter 2	533,396	387,661	72.7	289,639	526,109	396,436	75.4	296,930	379,097	272,957	72.0	217,238
Quarter 3	576,975	456,527	79.1	327,536	580,154	454,167	78.3	322,567				
Quarter 4	683,455	523,267	76.6	398,282	636,447	519,564	81.6	389,974				
Year	***2,435,285***	***1,829,631***	***75.1***	***1,359,688***	***2,397,287***	***1,819,335***	***75.9***	***1,338,235***				

Semester	2018				2019				2022p			
	Seats	Passengers[1]	LF, %	Tourist arrivals by air	Seats	Passengers[1]	LF, %	Tourist arrivals by air	Seats	Passengers[1]	LF, %	Tourist arrivals by air
Semester 1	1,174,855	849,837	72.3	633,870	1,180,686	845,604	71.6	625,694	687,443	467,851	68.1	375,246
Semester 2	1,260,430	979,794	77.7	725,818	1,216,601	973,731	80.0	712,541				
Year	***2,435,285***	***1,829,631***	***75.1***	***1,359,688***	***2,397,287***	***1,819,335***	***75.9***	***1,338,235***				

1 Includes direct transfers (i.e. those remaining in the transit lounge at the airport but exclude crew members).

Sources: Mauritius Tourism Promotion Authority and Statistics Mauritius

Table 2: Number of Air Seats, Passengers and Load Factor by Source Market and Airline, 2019 and 2022

Source market/Airline	2019			January - August 2022[p]		
	Seats	Passengers[1]	Load factor	Seats	Passengers[1]	Load factor
France	311,631	257,867	83%	209,238	157,501	75%
Air Mauritius	122,780	114,763	93%	90,954	76,205	84%
Air France	127,764	109,499	86%	70,121	60,705	87%
Corsair	61,087	33,605	55%	48,163	20,591	43%
UK	128,929	103,456	80%	76,392	63,502	83%
Air Mauritius	51,219	41,460	81%	40,854	33,772	83%
British Airways	63,262	48,308	76%	35,538	29,730	84%
Dreamliner - Thomson	14,448	13,688	95%			
Germany	81,405	66,774	82%	51,765	37,604	73%
Condor - Frankfurt	49,290	40,850	83%	24,438	19,141	78%
Condor (Munich)	2,385	2,041	86%			
Lufthansa	22,910	18,675	82%	3,546	2,996	84%
Eurowings (Cologne)	1,550	1,193	77%	4,588	1,752	38%
Euro Wings (Munich)	4,340	3,112	72%			
Euro Wings Dusseldorf	930	903	97%			
Switzerland	38,465	33,440	87%	24,806	13,775	56%
Air Mauritius	9,170	6,940	76%	2,198	1,375	63%
Edelweiss	29,295	26,500	90%	22,608	12,400	55%
Austria	18,912	15,984	85%	17,548	13,090	75%
Austrian Airlines	18,912	15,984	85%	17,548	13,090	75%
Spain	5,435	4,368	80%	3,373	3,323	99%
Evelop	5,435	4,368	80%	3,373	3,323	99%
Belgium				21,330	9,345	44%
Air Belgium				21,330	9,345	44%
Romania				168	25	15%
Air Seychelles				168	25	15%
Denmark	1,240	1,147	93%	283	266	94%
Thomson Airways	1,240	1,147	93%			
Qatar Airways				283	266	94%
Norway	620	389	63%	283	270	95%
Thomson Airways	620	389	63%			
Qatar Airways				283	270	95%
Netherlands	27,633	23,807	86%			
KLM	10,476	9,608	92%			
Air Mauritius	17,157	14,199	83%			
Italy	18,425	13,614	74%			
Alitalia	18,425	13,614	74%			
Sweden	7,148	6,721	94%			
Thomson Airways	7,148	6,721	94%			
Poland	4,650	3,672	79%			
Polish Airlines	4,650	3,672	79%			
Scandinavia	930	771	83%			
Thomson Airways	930	771	83%			
Turkey	71,136	53,458	75%	40,676	33,726	83%
Turkish Airlines	71,136	53,458	75%	40,676	33,726	83%
Dubai	423,825	338,303	80%	168,538	134,823	80%
Emirates Airlines	423,473	338,223	80%	168,538	134,823	80%
Abu Dhabi	352	80	23%			

Table 2: Number of Air Seats, Passengers and Load Factor by Source Market and Airline, 2019 and 2022 (Cont'd)

Source market/Airline	2019			January - August 2022[p]		
	Seats	Passengers[1]	Load factor	Seats	Passengers[1]	Load factor
Saudi Arabia	44,700	26,116	58%	11,920	8,721	73%
Saudi Airlines	44,700	26,116	58%	11,920	8,721	73%
India	127,701	109,037	85%	40,510	33,085	82%
Air Mauritius - Mumbai	70,130	58,802	84%	40,510	33,085	82%
Air Mauritius - Delhi	32,428	29,228	90%			
Air Mauritius - Chen/Bang	25,143	21,007	79%			
China	60,882	48,317				
Air Mauritius - Hong Kong	31,681	26,490	84%			
Air Mauritius - Shanghai	29,201	21,827	75%			
Malaysia/Singapore	47,954	45,100	94%			
Air Mauritius	47,954	45,100	94%			
Australia	30,276	25,759	85%			
Air Mauritius	30,276	25,759	85%			
South Africa	258,633	208,741	81%	95,911	77,934	81%
Air Mauritius - Johannesburg	105,999	82,697	78%	69,786	57,407	82%
Air Mauritius - Cape Town	30,862	24,366	79%			
Air Mauritius - Durban	21,482	17,473	81%			
South African Airways	90,935	76,423	84%	9,150	7,402	81%
British Airways / Comair	9,355	7,782	83%	7,619	5,150	68%
Flysafair				9,356	7,975	85%
Kenya	52,825	32,130	61%	26,294	13,960	53%
Air Mauritius	15,004	6,629	44%	1,746	1,140	65%
Kenya Airways	37,821	25,501	67%	24,548	12,820	52%
Djibouti				136	121	89%
Air Bulgaria				136	121	89%
Tanzania	924	617	67%			
Air Mauritius	924	617	67%			
Reunion	474,624	317,495	67%	179,070	85,882	48%
Air Mauritius - St Denis	203,380	136,241	67%	102,024	39,530	39%
Air Mauritius - St Pierre	54,516	39,289	72%			
Air Austral - St Denis	195,122	131,123	67%	77,046	46,352	60%
Air Austral - St Pierre	21,606	10,842	50%			
Madagascar	99,349	56,852	57%	29,080	13,052	45%
Air Mauritius	88,169	51,662	59%	29,080	13,052	45%
Air Madagascar	11,180	5,190	46%			
Seychelles	58,464	24,990	43%	9,890	5,364	54%
Air Seychelles	52,920	21,854	41%	9,890	5,364	54%
Air Mauritius	5,544	3,136	57%			
Maldives - JIOI 2019	298	178	60%			
Maldivian Airlines	298	178	60%			
Comoros - JIOI 2019	273	232	85%			
Air Mauritius	273	232	85%			
TOTAL	**2,397,287**	**1,819,335**	**76%**	**1,007,211**	**705,369**	**70%**

1 Includes direct transfers (i.e. those remaining in the transit lounge at the airport but exclude crew members).

Sources: Mauritius Tourism Promotion Authority and airlines

Table 3A: Air Lift Indicators by Selected Country of Last Embarkation, Main Airports and Hubs, 2019

Country of last embarkation: FRANCE

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**311,631**	**82.7%**	**257,867**	**66**	**205,181**	150,789	3,789	9,864	4,540	4,163	41	72
Air Mauritius	122,780	93.5%	114,763									
Air France	127,764	85.7%	109,499									
Corsair	61,087	55.0%	33,605									

Country of last embarkation: UNITED KINGDOM

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**128,929**	**80.2%**	**103,456**	**64**	**82,171**	1,589	74,202	386	240	455	67	61
Air Mauritius	51,219	80.9%	41,460									
British Airways	63,262	76.4%	48,308									
Thomson	14,448	94.7%	13,688									

Country of last embarkation: GERMANY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**81,405**	**82.0%**	**66,774**	**75**	**61,348**	5,088	454	42,455	757	874	13	23
Condor	51,675	83.0%	42,891									
Lufthansa	22,910	81.5%	18,675									
Eurowings	6,820	76.4%	5,208									

Country of last embarkation: SWITZERLAND

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**38,465**	**86.9%**	**33,440**	**85**	**32,827**	4,078	574	4,970	17,662	723	5	9
Air Mauritius	9,170	75.7%	6,940									
Edelweiss	29,295	90.5%	26,500									

Country of last embarkation: DUBAI

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**423,825**	**79.8%**	**338,303**	**60**	**253,733**	32,750	45,649	30,280	10,573	20,359	8,719	10,183
Emirates	423,473	79.9%	338,223									
Abu Dhabi	352	22.7%	80									

Country of last embarkation: TURKEY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Turkish Airlines	71,136	75.1%	53,458	48	34,160	5,546	1,015	4,794	581	1,127	20	83

Country of last embarkation: SAUDI ARABIA

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Saudia Airlines	44,700	58.4%	26,116	45	20,234	1,136	284	275	52	189	248	54

Table 3A: Air Lift Indicators by Selected Country of Last Embarkation, Main Airports and Hubs, 2019 (Cont'd)

Country of last embarkation: FRANCE

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Of which: Belgium	Canada	Czech Rep
Total	**311,631**	**82.7%**	**257,867**	**66**	**205,181**	22	19	2	31,880	5,316	3,085	2,328
Air Mauritius	122,780	93.5%	114,763									
Air France	127,764	85.7%	109,499									
Corsair	61,087	55.0%	33,605									

Country of last embarkation: UNITED KINGDOM

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Of which: Ireland	USA	Canada
Total	**128,929**	**80.2%**	**103,456**	**64**	**82,171**	90	2	1	5,078	523	484	442
Air Mauritius	51,219	80.9%	41,460									
British Airways	63,262	76.4%	48,308									
Thomson	14,448	94.7%	13,688									

Country of last embarkation: GERMANY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Of which: Austria	Czech Rep	Belgium
Total	**81,405**	**82.0%**	**66,774**	**75**	**61,348**	2	23	2	11,657	1,395	1,183	801
Condor	51,675	83.0%	42,891									
Lufthansa	22,910	81.5%	18,675									
Eurowings	6,820	76.4%	5,208									

Country of last embarkation: SWITZERLAND

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Of which: Austria	Belgium	Canada
Total	**38,465**	**86.9%**	**33,440**	**85**	**32,827**	1	5	-		699	426	411
Air Mauritius	9,170	**75.7%**	6,940									
Edelweiss	29,295	**90.5%**	26,500									

Country of last embarkation: DUBAI

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Of which: Belgium	Czech Rep	Korea Rep
Total	**423,825**	**79.8%**	**338,303**	**60**	**253,733**	12,890	193	7,194	74,943	6,015	6,005	5,661
Emirates	423,473	**79.9%**	338,223									
Abu Dhabi	352	**22.7%**	80									

Country of last embarkation: TURKEY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Of which: Czech Rep	Ukraine	Finland
Turkish Airlines	71,136	75.1%	53,458	48	34,160	9	2,350	30	18,605	1,945	1,596	1,308

Country of last embarkation: SAUDI ARABIA

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Of which: Philippines	Indonesia	Pakistan
Saudia Airlines	44,700	58.4%	26,116	45	20,234	76	103	15,055	2,762	709	467	262

* Tourist arrivals by air from the country of last embarkation indicated.

Source: Statistics Mauritius

Table 3B: Air Lift Indicators by Selected Country of Last Embarkation, Main Airports and Hubs, Semester 1 of 2022p

Country of last embarkation: FRANCE

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**156,340**	**74.6%**	**116,643**	**63**	**99,020**	66,541	5,415	7,712	1,592	1,845	25	76
Air Mauritius	63,896	83.0%	53,017									
Air France	53,721	85.2%	45,750									
Corsair	38,723	46.2%	17,876									

Country of last embarkation: UNITED KINGDOM

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**53,300**	**79.8%**	**42,540**	**64**	**34,142**	270	32,027	67	42	67	33	29
Air Mauritius	26,814	78.1%	20,945									
British Airways	26,486	81.5%	21,595									

Country of last embarkation: GERMANY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airlines	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Total	**40,900**	**71.3%**	**29,177**	**68**	**27,860**	1,950	435	20,498	494	242	18	4
Condor	18,928	79.1%	14,967									
Lufthansa	3,546	84.5%	2,996									
Eurowings	18,426	60.9%	11,214									

Country of last embarkation: SWITZERLAND

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Edelweiss	19,154	50.8%	9,731	48	9,142	1,010	300	1,057	4,030	142	5	2

Country of last embarkation: DUBAI

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Emirates	104,910	77.1%	80,891	55	57,881	2,964	13,901	5,065	1,885	2,197	2,576	243

Country of last embarkation: TURKEY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Turkish Airlines	29,116	82.2%	23,920	65	18,843	1,009	1,266	2,091	313	1,989	17	22

Country of last embarkation: SAUDI ARABIA

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
Airline	Seats	LF	Pax	Tourist per 100 seats		France	UK	Germany	Switzerland	Italy	India	China
Saudia Airlines	3,874	47.0%	1,822	42	1,627	15	4	19	1	-	14	-

Table 3B: Air Lift Indicators by Selected Country of Last Embarkation, Main Airports and Hubs, Semester 1 of 2022p (Cont'd)

Country of last embarkation: FRANCE

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
										Of which		
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Poland	Canada	Belgium
Total	**156,340**	**74.6%**	**116,643**	**63**	**99,020**	9	5	2	15,798	1,372	1,289	1,164
Air Mauritius	63,896	83.0%	53,017									
Air France	53,721	85.2%	45,750									
Corsair	38,723	46.2%	17,876									

Country of last embarkation: UNITED KINGDOM

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
										Of which		
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Canada	USA	Ireland
Total	**53,300**	**79.8%**	**42,540**	**64**	**34,142**	31	-	3	1,573	195	143	137
Air Mauritius	26,814	78.1%	20,945									
British Airways	26,486	81.5%	21,595									

Country of last embarkation: GERMANY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
										Of which		
Airlines	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Czech Rep	Austria	Estonia
Total	**40,900**	**71.3%**	**29,177**	**68**	**27,860**	2	10	2	4,205	616	521	395
Condor	18,928	79.1%	14,967									
Lufthansa	3,546	84.5%	2,996									
Eurowings	18,426	60.9%	11,214									

Country of last embarkation: SWITZERLAND

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
										Of which		
Airline	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Portugal	Austria	Spain
Edelweiss	19,154	50.8%	9,731	48	9,142	3	-	-	2,593	257	198	144

Country of last embarkation: DUBAI

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
										Of which		
Airline	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Czech Rep	India	Russia
Emirates	104,910	77.1%	80,891	55	57,881	4,116	90	2,526	22,318	2,861	2,576	2,497

Country of last embarkation: TURKEY

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
										Of which		
Airline	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Denmark	Russia	Romania
Turkish Airlines	29,116	82.2%	23,920	65	18,843	6	1,593	6	10,531	984	877	836

Country of last embarkation: SAUDI ARABIA

Indicator					Tourist arrivals by air*	of which, arrivals from selected country of residence						
										Of which		
Airline	Seats	LF	Pax	Tourist per 100 seats		UAE	Turkey	Saudi Arabia	Others	Philippines	India	Indonesia
Saudia Airlines	3,874	47.0%	1,822	42	1,627	8	7	1,430	129	48	14	13

* Tourist arrivals by air from the country of last embarkation indicated.

Source: Statistics Mauritius

Table 4: International Arrivals by Type and Mode of Transport, 2016 - 2019 and Semester 1 of 2022

Details	2016	2017	2018	2019	Semester 1	
					2019	2022p
INTERNATIONAL ARRIVALS[1] BY TYPE						
Tourists	1,275,227	1,341,860	1,399,408	1,383,488	650,082	376,556
Interlining passengers (direct transit)	124,816	124,492	130,514	132,660	56,008	18,921
Excursionists[2]	31,646	29,615	31,709	34,808	21,204	1,134
Mauritian residents	379,486	409,546	431,172	458,440	216,501	78,613
Other (crew, foreign workers, etc.)						37,150
Total	**1,811,175**	**1,905,513**	**1,992,803**	**2,009,396**	**943,795**	**512,374**
INTERNATIONAL ARRIVALS[1] BY AIR AND BY TYPE						
Tourists	1,246,862	1,312,295	1,359,688	1,338,235	625,694	375,246
Excursionists[2]	19,399	21,680	21,650	20,670	10,526	1,005
Interlining passengers (direct transit)	124,816	124,492	130,514	132,660	56,008	18,921
Other (including crew)	362,502	393,341	408,954	433,858	202,057	115,404
International arrivals directly in Rodrigues	1,524	1,197	511	1,968	429	0
Total	**1,753,579**	**1,851,808**	**1,920,806**	**1,925,423**	**894,285**	**510,576**
INTERNATIONAL ARRIVALS[1] BY SEA AND BY TYPE						
Cruise travellers	52,862	49,355	67,515	79,225	47,277	353
- Tourists	24,930	26,124	36,796	41,829	22,794	0
- Excursionists[2]	12,247	7,935	10,059	14,138	10,678	0
- Mauritian residents	647	662	722	1,186	365	0
- Crew members	16,057	15,381	20,703	22,992	13,440	353
Other (including tourists)	4,734	4,350	4,482	4,748	2,233	1,445
Total	**57,596**	**53,705**	**71,997**	**83,973**	**49,510**	**1,798**

1 Excluding inter island traffic between the main island of Mauritius and the other constituent islands of the Republic of Mauritius but includes direct arrivals in Rodrigues direct from Reunion Island and crew members.

2 Visitors arriving and leaving on the same day.

Source: Statistics Mauritius

Table 5: Tourist Arrivals and Growth Rate per Month, Quarter and Semester, 2018 - 2022

Month	2018	2019	2020	2021	2022p
January	120,974	122,273	137,419	1,232	40,028
February	115,600	115,613	111,560	1,229	52,724
March	119,841	114,419	55,863	311	66,066
April	104,967	108,565	10	58	84,268
May	101,138	96,814	20	115	70,462
June	84,345	92,398	9	280	63,008
July	115,881	115,448	45	1,242	94,084
August	109,471	107,275	317	2,499	86,605
September	102,849	100,837	369	2,494	
October	134,052	129,018	1,149	54,434	
November	132,247	128,730	1,177	65,922	
December	158,043	152,098	1,042	49,964	
TOTAL	**1,399,408**	**1,383,488**	**308,980**	**179,780**	**557,245**
BY QUARTER					
Quarter 1	356,415	352,305	304,842	2,772	158,818
Quarter 2	290,450	297,777	39	453	217,738
Quarter 3	328,201	323,560	731	6,235	
Quarter 4	424,342	409,846	3,368	170,320	
TOTAL	**1,399,408**	**1,383,488**	**308,980**	**179,780**	
BY SEMESTER					
Semester 1	646,865	650,082	304,881	3,225	376,556
Semester 2	752,543	733,406	4,099	176,555	
TOTAL	**1,399,408**	**1,383,488**	**308,980**	**179,780**	
YEAR ON YEAR GROWTH RATE					
Month	**2018**	**2019**	**2020**	**2021**	**2022 vs 2019**
January	-2.7%	1.1%	12.4%	-99.1%	-67.3%
February	10.0%	0.0%	-3.5%	-98.9%	-54.4%
March	8.7%	-4.5%	-51.2%	-99.4%	-42.3%
April	-5.8%	3.4%	-100.0%	480.0%	-22.4%
May	4.7%	-4.3%	-100.0%	475.0%	-27.2%
June	7.9%	9.5%	-100.0%	3011.1%	-31.8%
July	3.1%	-0.4%	-100.0%	2660.0%	-18.5%
August	9.3%	-2.0%	-99.7%	688.3%	-19.3%
September	6.8%	-2.0%	-99.6%	575.9%	
October	3.1%	-3.8%	-99.1%	4637.5%	
November	8.8%	-2.7%	-99.1%	5500.8%	
December	1.6%	-3.8%	-99.3%	4695.0%	
TOTAL	**4.3%**	**-1.1%**	**-77.7%**	**-41.8%**	
BY QUARTER					**2022 vs 2019**
Quarter 1	4.9%	-1.2%	-13.5%	-99.1%	-54.9%
Quarter 2	1.5%	2.5%	-100.0%	1061.5%	-26.9%
Quarter 3	6.3%	-1.4%	-99.8%	752.9%	
Quarter 4	4.2%	-3.4%	-99.2%	4957.0%	
TOTAL	**4.3%**	**-1.1%**	**-77.7%**	**-41.8%**	
BY SEMESTER					**2022 vs 2019**
Semester 1	3.4%	0.5%	-53.1%	-98.9%	-42.1%
Semester 2	5.1%	-2.5%	-99.4%	4207.3%	
TOTAL	**4.3%**	**-1.1%**	**-77.7%**	**-41.8%**	

Source: Statistics Mauritius

Table 6: Tourist Arrivals and Share by Selected Markets, 2018 - 2022

Market share by continent / country of residence	Number of tourist arrivals				
	2018	2019	2020	2021	2022 S1ᴾ
CONTINENT					
Europe	824,334	835,946	207,641	145,812	267,237
Africa	312,618	310,928	58,917	17,303	70,760
Asia	213,422	189,849	32,339	13,526	31,061
Oceania	22,604	20,804	3,500	440	1,722
America	25,912	25,379	6,392	2,575	5,583
Others & Not Stated	518	582	191	124	193
Total	**1,399,408**	**1,383,488**	**308,980**	**179,780**	**376,556**
TOP 10 MARKETS IN 2019					
France	285,371	302,038	79,510	51,525	93,446
United Kingdom	151,913	141,520	22,687	34,194	55,717
Reunion Island	138,439	137,570	30,581	5,288	16,490
Germany	132,780	129,100	36,047	18,605	39,834
South Africa	128,097	118,556	19,370	8,061	42,022
India	85,765	75,673	12,781	2,845	15,059
China	65,736	42,740	5,189	499	594
Switzerland	41,080	42,045	7,328	7,011	9,130
Italy	38,361	41,991	7,567	3,954	6,854
Saudi Arabia	16,507	22,788	4,982	4,028	4,013
Total Top 10	**1,084,049**	**1,054,021**	**226,042**	**136,010**	**283,159**

Market share by continent / country of residence	Tourist arrivals as a proportion of total arrivals				
	2018	2019	2020	2021	2022 S1ᴾ
CONTINENT					
Europe	58.9%	60.4%	67.2%	81.1%	71.0%
Africa	22.3%	22.5%	19.1%	9.6%	18.8%
Asia	15.3%	13.7%	10.5%	7.5%	8.2%
Oceania	1.6%	1.5%	1.1%	0.2%	0.5%
America	1.9%	1.8%	2.1%	1.4%	1.5%
Others & Not Stated	0.0%	0.0%	0.1%	0.1%	0.1%
Total	**100%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**
TOP 10 MARKETS IN 2019					
France	20.4%	21.8%	25.7%	28.7%	24.8%
United Kingdom	10.9%	10.2%	7.3%	19.0%	14.8%
Reunion Island	9.9%	9.9%	9.9%	2.9%	4.4%
Germany	9.5%	9.3%	11.7%	10.3%	10.6%
South Africa	9.2%	8.6%	6.3%	4.5%	11.2%
India	6.1%	5.5%	4.1%	1.6%	4.0%
China	4.7%	3.1%	1.7%	0.3%	0.2%
Switzerland	2.9%	3.0%	2.4%	3.9%	2.4%
Italy	2.7%	3.0%	2.4%	2.2%	1.8%
Saudi Arabia	1.7%	2.3%	1.6%	2.2%	1.1%
Total Top 10	**77.5%**	**76.2%**	**73.2%**	**75.7%**	**75.2%**

Source: Statistics Mauritius

Table 7: Tourist Arrivals by Selected Country of Residence, 2018 - 2022

Selected country of residence	2018	2019	2020	2021	January to June	
					2019	2022ᴾ
Europe	**824,334**	**835,946**	**207,641**	**145,812**	**392,120**	**267,237**
Austria	18,572	18,390	6,343	4,111	9,336	7,161
Belgium	15,727	16,959	2,310	4,817	6,491	5,765
Czech Republic	14,254	14,729	6,066	2,561	9,294	7,492
France	285,371	302,038	79,510	51,525	144,189	93,446
Germany	132,780	129,100	36,047	18,605	61,901	39,834
Italy	38,361	41,991	7,567	3,954	17,135	6,854
Netherlands	16,419	16,814	2,206	1,212	7,156	2,863
Spain	15,063	14,307	1,523	1,457	3,858	2,838
Sweden	15,539	13,215	5,732	1,784	7,835	2,437
Switzerland	41,080	42,045	7,328	7,011	17,784	9,130
UK	151,913	141,520	22,687	34,194	61,607	55,717
CIS	14,920	16,242	7,263	3,556	9,110	6,613
- Russian Federation	11,007	11,191	5,191	2,686	6,386	4,453
Other European	64,335	68,596	23,059	11,025	36,424	27,087
Africa	**312,618**	**310,928**	**58,917**	**17,303**	**140,725**	**70,760**
Comoros	956	1,305	169	85	488	202
Kenya	4,035	4,887	746	541	2,364	1,102
Madagascar	14,365	15,979	2,553	753	6,261	2,907
Reunion Is	138,439	137,570	30,581	5,288	63,747	16,490
Seychelles	5,370	6,838	1,093	483	2,266	974
South Africa	128,097	118,556	19,370	8,061	54,782	42,022
Zimbabwe	2,496	3,021	355	167	1,314	734
Other African	18,860	22,772	4,050	1,925	9,503	6,329
Asia	**213,422**	**189,849**	**32,339**	**13,526**	**95,501**	**31,061**
Hong Kong SAR	1,519	1,432	116	18	521	87
India	85,765	75,673	12,781	2,845	41,386	15,059
Japan	2,046	2,234	429	86	1,024	131
Korea Republic	7,204	7,072	776	136	3,313	207
Malaysia	2,264	2,045	287	104	1,017	130
China, PR	65,736	42,740	5,189	499	21,945	594
Singapore	2,809	2,794	258	99	1,230	244
UAE	12,058	13,999	1,587	1,931	7,087	4,398
Other Asian	34,021	41,860	10,916	7,808	17,978	10,211
Oceania	**22,604**	**20,804**	**3,500**	**440**	**8,949**	**1,722**
Australia	20,949	18,997	3,073	321	8,144	1,465
Other Oceania	1,655	1,807	427	119	805	257
America	**25,912**	**25,379**	**6,392**	**2,575**	**12,491**	**5,583**
Brazil	3,743	3,521	868	91	1,702	212
Canada	7,747	8,011	1,804	993	3,954	2,089
USA	10,525	10,407	2,651	1,328	4,779	2,867
Other American	3,897	3,440	1,069	163	2,056	415
Others & Not Stated	**518**	**582**	**191**	**124**	**296**	**193**
All countries	**1,399,408**	**1,383,488**	**308,980**	**179,780**	**650,082**	**376,556**

Source: Statistics Mauritius

Table 8: Tourist Arrivals by Mode of Transport and by Selected Country of Residence, Semester 1 of 2019 & 2022

Continent / country of residence	January - June 2019			January - June 2022p			Change		
	Air	Ship	Total	Air	Ship	Total	Air	Ship	Total
CONTINENT									
Europe	371,218	20,902	392,120	267,022	215	267,237	-28.1%	-99.0%	-31.8%
Africa	140,067	658	140,725	70,675	85	70,760	-49.5%	-87.1%	-49.7%
Asia	93,835	1,666	95,501	30,094	967	31,061	-67.9%	-42.0%	-67.5%
Oceania	8,670	279	8,949	5,569	14	5,583	-35.8%	-95.0%	-37.6%
America	11,622	869	12,491	1,695	27	1,722	-85.4%	-96.9%	-86.2%
Others & Not Stated	282	14	296	191	2	193	-32.3%	-85.7%	-34.8%
Total	**625,694**	**24,388**	**650,082**	**375,246**	**1,310**	**376,556**	**-40.0%**	**-94.6%**	**-42.1%**
TOP 15 MARKETS IN SEMESTER 1 OF 2019									
France	140,395	3,794	144,189	93,413	33	93,446	-33.5%	-99.1%	-35.2%
Germany	51,159	10,742	61,901	39,834	0	39,834	-22.1%	-100.0%	-35.6%
United Kingdom	60,869	738	61,607	55,709	8	55,717	-8.5%	-98.9%	-9.6%
South Africa	54,562	220	54,782	42,014	8	42,022	-23.0%	-96.4%	-23.3%
India	41,239	147	41,386	15,024	35	15,059	-63.6%	-76.2%	-63.6%
China	21,700	245	21,945	593	1	594	-97.3%	-99.6%	-97.3%
Switzerland	17,009	775	17,784	9,130	0	9,130	-46.3%	-100.0%	-48.7%
Italy	16,171	964	17,135	6,854	0	6,854	-57.6%	-100.0%	-60.0%
Austria	8,616	720	9,336	7,161	0	7,161	-16.9%	-100.0%	-23.3%
Czech Republic	9,083	211	9,294	7,492	0	7,492	-17.5%	-100.0%	-19.4%
Saudi Arabia	9,217	2	9,219	4,013	0	4,013	-56.5%	-100.0%	-56.5%
Australia	7,921	223	8,144	1,452	13	1,465	-81.7%	-94.2%	-82.0%
Sweden	7,559	276	7,835	2,437	0	2,437	-67.8%	-100.0%	-68.9%
Netherlands	7,065	91	7,156	2,863	0	2,863	-59.5%	-100.0%	-60.0%
United Arab Emirates	7,083	4	7,087	4,398	0	4,398	-37.9%	-100.0%	-37.9%
Total Top 15	**459,648**	**19,152**	**478,800**	**292,387**	**98**	**292,485**	**-36.4%**	**-99.5%**	**-38.9%**

Source: Statistics Mauritius

Table 9: Tourist Arrivals per Month and by Country of Residence, Semester 1 of 2022p

Selected country of residence	Jan	Feb	Mar	Apr	May	Jun	Semester 1		
							Air	Sea	Total
Europe	**35,041**	**44,307**	**45,790**	**61,508**	**44,217**	**36,374**	**267,022**	**215**	**267,237**
Austria	1,503	1,601	1,307	1,462	723	565	7,161	0	7,161
Belgium	761	748	836	1,587	864	969	5,765	0	5,765
Bulgaria	206	305	239	240	61	30	1,080	1	1,081
Czech Republic	1,166	1,888	2,236	1,240	649	313	7,492	0	7,492
Croatia	35	23	49	51	25	20	199	4	203
Denmark	613	737	576	1,117	302	246	3,591	0	3,591
Estonia	224	253	219	88	14	17	815	0	815
Finland	142	182	144	118	56	108	750	0	750
France	11,180	19,536	15,418	22,048	15,756	9,508	93,413	33	93,446
Germany	4,386	4,494	6,911	8,205	7,640	8,198	39,834	0	39,834
Greece	63	49	38	54	43	41	271	17	288
Hungary	375	358	328	222	92	111	1,486	0	1,486
Ireland	103	90	181	302	191	290	1,157	0	1,157
Italy	1,200	717	1,223	1,364	1,028	1,322	6,854	0	6,854
Latvia	63	64	119	35	29	19	327	2	329
Lithuania	141	145	141	94	32	36	582	7	589
Luxembourg	42	61	62	329	123	87	704	0	704
Netherlands	233	178	281	891	623	657	2,863	0	2,863
Norway	190	299	189	673	154	373	1,874	4	1,878
Poland	453	443	258	416	549	987	3,100	6	3,106
Portugal	164	130	283	356	464	632	2,025	4	2,029
Romania	667	362	690	1,050	310	306	3,380	5	3,385
Serbia	89	59	68	112	50	92	470	0	470
Slovakia	463	639	508	369	141	64	2,184	0	2,184
Slovenia	78	83	116	177	60	37	550	1	551
Spain	232	312	298	575	399	1,022	2,813	25	2,838
Sweden	627	507	351	453	273	226	2,437	0	2,437
Switzerland	1,153	1,094	1,058	3,293	1,461	1,071	9,130	0	9,130
Turkey	283	170	316	366	392	217	1,738	6	1,744
United Kingdom	5,340	7,382	10,317	13,370	10,992	8,316	55,709	8	55,717
CIS[1] countries	2,785	1,280	930	659	571	388	6,523	90	6,613
- Belarus	*58*	*76*	*60*	*32*	*25*	*18*	*267*	*2*	*269*
- Kazakhstan	*18*	*9*	*12*	*13*	*28*	*16*	*96*	*0*	*96*
- Russia	*1,734*	*772*	*691*	*531*	*428*	*297*	*4,400*	*53*	*4,453*
- Ukraine	*882*	*398*	*95*	*36*	*47*	*40*	*1,465*	*33*	*1,498*
- Other CIS	*93*	*25*	*72*	*47*	*43*	*17*	*295*	*2*	*297*
Other European	81	118	100	192	150	106	745	2	747

Table 9: Tourist Arrivals per Month and by Country of Residence, Semester 1 of 2022[p] (Cont'd)

Selected country of residence	Jan	Feb	Mar	Apr	May	Jun	Semester 1		
							Air	Sea	Total
Africa	**2,717**	**5,060**	**15,252**	**16,319**	**16,552**	**14,860**	**70,675**	**85**	**70,760**
IOC[2] countries	*289*	*604*	*3,973*	*3,673*	*7,553*	*4,481*	*20,532*	*41*	*20,573*
- Comoros	*30*	*26*	*27*	*28*	*39*	*52*	*202*	*0*	*202*
- Madagascar	*65*	*156*	*193*	*949*	*834*	*710*	*2,869*	*38*	*2,907*
- Reunion Island	*121*	*321*	*3,569*	*2,470*	*6,517*	*3,492*	*16,490*	*0*	*16,490*
- Seychelles	*73*	*101*	*184*	*226*	*163*	*227*	*971*	*3*	*974*
Algeria	8	1	13	3	14	32	71	0	71
Angola	3	12	7	19	7	11	59	0	59
Benin	0	2	5	11	12	7	36	1	37
Botswana	13	25	40	84	88	55	305	0	305
Burundi	2	1	3	5	5	2	18	0	18
Cameroon	12	30	32	47	36	53	209	1	210
Congo	10	19	23	21	23	25	121	0	121
Egypt	20	31	80	24	104	75	333	1	334
Ethiopia	5	3	5	8	18	93	132	0	132
Gabon	2	2	3	7	4	5	23	0	23
Ghana	19	17	43	51	66	78	273	1	274
Ivory Coast	10	14	42	19	49	22	148	8	156
Kenya	72	118	166	276	167	303	1,098	4	1,102
Lesotho	0	3	30	2	9	6	50	0	50
Malawi	4	15	5	25	30	25	104	0	104
Mayotte	7	23	34	35	84	60	243	0	243
Morocco	13	36	49	28	52	73	251	0	251
Mozambique	27	19	21	35	30	47	179	0	179
Namibia	7	33	57	174	164	166	600	1	601
Niger	7	12	7	5	5	6	42	0	42
Nigeria	59	159	119	168	221	161	881	6	887
Rwanda	8	5	28	31	22	20	114	0	114
Senegal	7	1	31	11	16	34	90	10	100
South Africa	1,883	3,454	9,961	10,965	7,338	8,421	42,014	8	42,022
Sudan	2	1	2	12	1	7	25	0	25
Eswatini[3]	6	7	23	23	18	18	95	0	95
Tanzania	41	36	31	42	41	40	228	3	231
Togo	1	4	0	4	9	1	19	0	19
Tunisia	20	51	40	13	29	51	204	0	204
Uganda	24	62	11	35	31	82	245	0	245
Zimbabwe	40	71	122	236	135	130	734	0	734
Zambia	8	33	36	84	77	81	319	0	319
Other African	88	156	210	143	94	189	880	0	880

Table 9: Tourist Arrivals per Month and by Country of Residence, Semester 1 of 2022[p] (Cont'd)

Selected country of residence	Jan	Feb	Mar	Apr	May	Jun	Semester 1		
							Air	Sea	Total
Asia	**1,628**	**2,668**	**3,935**	**5,144**	**8,032**	**9,654**	**30,094**	**967**	**31,061**
Afghanistan	9	16	32	26	21	13	117	0	117
Bangladesh	16	36	44	36	65	74	271	0	271
Hong Kong SAR[4]	4	7	13	12	26	25	87	0	87
India	536	785	1,111	2,656	4,647	5,324	15,024	35	15,059
Indonesia	199	393	523	110	36	137	990	408	1,398
Israel	41	86	170	616	196	130	1,239	0	1,239
Japan	8	23	8	22	38	32	131	0	131
Korea Republic	6	2	7	39	63	90	191	16	207
Malaysia	18	23	24	26	20	19	123	7	130
Maldives	0	2	9	14	1	4	29	1	30
Nepal	3	12	16	25	13	27	95	1	96
Pakistan	25	18	68	29	50	60	249	1	250
China	48	112	118	125	74	117	593	1	594
Philippines	335	432	244	74	103	196	986	398	1,384
Singapore	6	19	25	37	49	108	244	0	244
Sri Lanka	11	21	46	38	24	38	168	10	178
Taiwan, China	7	68	25	9	23	20	133	19	152
Thailand	4	8	12	19	14	20	77	0	77
Vietnam	12	47	89	8	10	32	147	51	198
Middle East countries	325	554	1,348	1,221	2,552	3,182	9,182	0	9,182
- Bahrain	*12*	*12*	*7*	*20*	*11*	*37*	*99*	*0*	*99*
- Iran	*5*	*8*	*27*	*8*	*2*	*19*	*69*	*0*	*69*
- Jordan	*4*	*12*	*10*	*5*	*16*	*7*	*54*	*0*	*54*
- Kuwait	*11*	*12*	*20*	*35*	*93*	*100*	*271*	*0*	*271*
- Lebanon	*12*	*10*	*26*	*16*	*18*	*9*	*91*	*0*	*91*
- Oman	*5*	*2*	*17*	*12*	*17*	*17*	*70*	*0*	*70*
- Qatar	*2*	*11*	*15*	*19*	*14*	*27*	*88*	*0*	*88*
- Saudi Arabia	*65*	*123*	*336*	*175*	*1,186*	*2,128*	*4,013*	*0*	*4,013*
- UAE	*207*	*358*	*885*	*928*	*1,189*	*831*	*4,398*	*0*	*4,398*
- Other Middle East	*2*	*6*	*5*	*3*	*6*	*7*	*29*	*0*	*29*
Other Asian	15	4	3	2	7	6	18	19	37
Oceania	**148**	**163**	**275**	**395**	**338**	**403**	**1,695**	**27**	**1,722**
Australia	120	134	248	338	286	339	1,452	13	1,465
New Zealand	13	15	12	23	26	34	109	14	123
Other Oceanian	15	14	15	34	26	30	134	0	134
America	**472**	**485**	**796**	**870**	**1,282**	**1,678**	**5,569**	**14**	**5,583**
Brazil	23	23	32	46	37	51	212	0	212
Canada	182	183	298	264	464	698	2,084	5	2,089
USA	237	228	384	496	658	864	2,865	2	2,867
Other American	30	51	82	64	123	65	408	7	415
Others & not stated	**22**	**41**	**18**	**32**	**41**	**39**	**191**	**2**	**193**
All countries	**40,028**	**52,724**	**66,066**	**84,268**	**70,462**	**63,008**	**375,246**	**1,310**	**376,556**

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

Source: Statistics Mauritius

Table 10: Tourist Arrivals by Air and by Main Port of Last Embarkation for Selected Markets, Semester 1 of 2022p

Country of last embarkation	Total tourist arrivals	of which, arrivals from selected country of residence									
		France	Germany	UK	Switzerland	Italy	Turkey	Russia	Reunion	RSA	India
Europe	**207,066**	**71,691**	**33,370**	**39,955**	**6,764**	**4,380**	**1,614**	**1,684**	**38**	**129**	**101**
France	99,020	66,541	7,712	5,415	1,592	1,845	5	384	28	41	25
Germany	27,860	1,950	20,498	435	494	242	10	54	1	7	18
Switzerland	9,142	1,010	1,057	300	4,030	142	0	47	0	14	5
Turkey	18,843	1,009	2,091	1,266	313	1,989	1,593	877	9	18	17
UK	34,142	270	67	32,027	42	67	0	20	0	46	33
Africa	**96,813**	**18,725**	**1,376**	**1,818**	**475**	**274**	**26**	**192**	**16,337**	**41,724**	**865**
Kenya	5,444	668	56	277	27	29	4	51	12	418	123
Madagascar	3,827	248	26	22	9	9	9	17	396	150	158
Reunion	38,061	17,519	734	205	265	52	3	10	15,885	1,182	338
Seychelles	2,119	97	47	77	15	18	3	79	4	30	33
South Africa	47,174	188	500	1,237	159	166	7	35	40	39,944	209
Asia	**71,359**	**2,997**	**5,088**	**13,936**	**1,891**	**2,200**	**98**	**2,516**	**115**	**161**	**14,058**
India	11,820	18	4	30	5	3	1	2	27	10	11,468
Saudi Arabia	1,627	15	19	4	1	0	7	4	0	3	14
UAE	57,881	2,964	5,065	13,901	1,885	2,197	90	2,497	88	145	2,576
Arrivals by air	**375,246**	**93,413**	**39,834**	**55,709**	**9,130**	**6,854**	**1,738**	**4,400**	**16,490**	**42,014**	**15,024**
of which:		France	Germany	UK	Switzerland	Italy	Turkey	Russia	Reunion	RSA	India
Direct[1]		71.2%	51.5%	57.5%	44.1%	Napp	91.7%	Napp	96.3%	95.1%	76.3%
From UAE		3.2%	12.7%	25.0%	20.6%	32.1%	5.2%	56.8%	0.5%	0.3%	17.1%
From Turkey		1.1%	5.2%	2.3%	3.4%	29.0%		19.9%	0.1%	0.0%	0.1%
From France			19.4%	9.7%	17.4%	26.9%	0.3%	8.7%	0.2%	0.1%	0.2%
From Reunion		18.8%	1.8%	0.4%	2.9%	0.8%	0.2%	0.2%		2.8%	2.2%
From South Africa		0.2%	1.3%	2.2%	1.7%	2.4%	0.4%	0.8%	0.2%		1.4%

1 Direct from own country of residence.

Source: Statistics Mauritius

Table 11: Tourist Arrivals by Main Purpose of Visit, 2018 - 2022

Purpose of Visit	2018	2019	2020	2021	Semester 1 of 2022p	
					Number	As a % of total
Holiday	1,307,653	1,294,160	289,175	168,246	356,073	94.6
Business	50,463	50,543	10,187	6,504	12,095	3.2
Transit	29,908	28,387	8,599	4,304	6,382	1.7
Conference	8,010	5,507	510	308	372	0.1
Sports	2,137	3,736	166	34	1,041	0.3
Other & not stated	1,237	1,155	343	384	593	0.2
Total	**1,399,408**	**1,383,488**	**308,980**	**179,780**	**376,556**	**100**

Source: Statistics Mauritius

Table 12: Tourist Arrivals by Age and Sex for Selected Markets, Semester 1 of 2019 and 2022

Age group (years)	Market: France							
	Semester 1 of 2019			Semester 1 of 2022^p			Share by age group	
	Male	Female	Total	Male	Female	Total	2019	2022^p
Under 15	10,206	10,170	20,376	6,600	6,447	13,047	14.1%	14.0%
15 - 24	3,863	5,528	9,391	2,804	4,074	6,878	6.5%	7.4%
25 - 34	9,668	11,728	21,396	6,860	8,791	15,651	14.8%	16.7%
35 - 44	11,544	12,395	23,939	7,523	7,899	15,422	16.6%	16.5%
45 - 54	14,014	14,405	28,419	8,494	8,908	17,402	19.7%	18.6%
55 - 64	11,729	11,444	23,173	7,895	7,492	15,387	16.1%	16.5%
65 & over	9,069	8,426	17,495	5,025	4,634	9,659	12.1%	10.3%
Total	**70,093**	**74,096**	**144,189**	**45,201**	**48,245**	**93,446**	**100.0%**	**100.0%**

Age group (years)	Market: United Kingdom							
	Semester 1 of 2019			Semester 1 of 2022^p			Share by age group	
	Male	Female	Total	Male	Female	Total	2019	2022^p
Under 15	3,564	3,648	7,212	3,854	3,816	7,670	11.7%	13.8%
15 - 24	1,307	1,996	3,303	1,419	1,904	3,323	5.4%	6.0%
25 - 34	5,432	6,698	12,130	5,239	6,670	11,909	19.7%	21.4%
35 - 44	5,274	5,084	10,358	4,789	4,840	9,629	16.8%	17.3%
45 - 54	4,986	5,311	10,297	4,058	4,396	8,454	16.7%	15.2%
55 - 64	5,056	5,149	10,205	4,409	4,498	8,907	16.6%	16.0%
65 & over	4,408	3,694	8,102	3,174	2,651	5,825	13.2%	10.5%
Total	**30,027**	**31,580**	**61,607**	**26,942**	**28,775**	**55,717**	**100.0%**	**100.0%**

Age group (years)	Market: Germany							
	Semester 1 of 2019			Semester 1 of 2022^p			Share by age group	
	Male	Female	Total	Male	Female	Total	2019	2022^p
Under 15	1,842	1,847	3,689	1,772	1,842	3,614	6.0%	9.1%
15 - 24	1,187	2,142	3,329	1,031	1,728	2,759	5.4%	6.9%
25 - 34	5,252	6,584	11,836	4,922	6,175	11,097	19.1%	27.9%
35 - 44	3,912	3,994	7,906	3,377	3,176	6,553	12.8%	16.5%
45 - 54	6,122	6,877	12,999	3,128	3,278	6,406	21.0%	16.1%
55 - 64	6,944	6,880	13,824	3,374	3,204	6,578	22.3%	16.5%
65 & over	4,482	3,836	8,318	1,620	1,207	2,827	13.4%	7.1%
Total	**29,741**	**32,160**	**61,901**	**19,224**	**20,610**	**39,834**	**100.0%**	**100.0%**

Table 12: Tourist Arrivals by Age and Sex for Selected Markets, Semester 1 of 2019 and 2022 (Cont'd)

Age group (years)	Market: Reunion							
	Semester 1 of 2019			Semester 1 of 2022^p			Share by age group	
	Male	Female	Total	Male	Female	Total	2019	2022^p
Under 15	6,108	6,068	12,176	1,282	1,205	2,487	19.1%	15.1%
15 - 24	2,389	2,903	5,292	527	738	1,265	8.3%	7.7%
25 - 34	4,247	5,286	9,533	1,125	1,473	2,598	15.0%	15.8%
35 - 44	5,305	5,662	10,967	1,430	1,374	2,804	17.2%	17.0%
45 - 54	5,650	5,630	11,280	1,562	1,420	2,982	17.7%	18.1%
55 - 64	4,487	4,430	8,917	1,395	1,222	2,617	14.0%	15.9%
65 & over	2,772	2,810	5,582	972	765	1,737	8.8%	10.5%
Total	**30,958**	**32,789**	**63,747**	**8,293**	**8,197**	**16,490**	**100.0%**	**100.0%**

Age group (years)	Market: South Africa							
	Semester 1 of 2019			Semester 1 of 2022^p			Share by age group	
	Male	Female	Total	Male	Female	Total	2019	2022^p
Under 15	4,091	4,111	8,202	3,378	3,345	6,723	15.0%	16.0%
15 - 24	1,581	2,022	3,603	1,250	1,463	2,713	6.6%	6.5%
25 - 34	4,369	5,138	9,507	3,036	3,875	6,911	17.4%	16.4%
35 - 44	6,164	5,953	12,117	4,599	4,601	9,200	22.1%	21.9%
45 - 54	5,372	4,704	10,076	3,848	3,686	7,534	18.4%	17.9%
55 - 64	3,512	3,395	6,907	2,757	2,680	5,437	12.6%	12.9%
65 & over	2,215	2,155	4,370	1,776	1,728	3,504	8.0%	8.3%
Total	**27,304**	**27,478**	**54,782**	**20,644**	**21,378**	**42,022**	**100.0%**	**100.0%**

Age group (years)	All markets							
	Semester 1 of 2019			Semester 1 of 2022^p			Share by age group	
	Male	Female	Total	Male	Female	Total	2019	2022^p
Under 15	39,711	39,620	79,331	24,793	24,241	49,034	12.2%	13.0%
15 - 24	18,812	26,936	45,748	11,571	15,705	27,276	7.0%	7.2%
25 - 34	64,555	71,824	136,379	37,142	43,558	80,700	21.0%	21.4%
35 - 44	60,322	56,420	116,742	37,180	34,454	71,634	18.0%	19.0%
45 - 54	59,066	56,715	115,781	32,788	31,324	64,112	17.8%	17.0%
55 - 64	47,745	45,602	93,347	27,271	25,567	52,838	14.4%	14.0%
65 & over	33,134	29,620	62,754	16,703	14,259	30,962	9.7%	8.2%
Total	**323,345**	**326,737**	**650,082**	**187,448**	**189,108**	**376,556**	**87.8%**	**87.0%**

Source: Statistics Mauritius

Table 13: Tourist Arrivals, Nights and Average Length of Stay by Quarter, 2018 - 2022

Year		Tourist arrivals	Tourist nights	Average length of stay
2018	1st Quarter	356,415	4,127,448	10.9
	2nd Quarter	290,450	2,995,925	9.9
	Semester 1	***646,865***	***7,123,373***	***10.4***
	3rd Quarter	328,201	3,481,916	10.8
	4th Quarter	424,342	3,690,985	9.9
	Semester 2	***752,543***	***7,172,901***	***10.3***
	Year	**1,399,408**	**14,296,274**	**10.4**
2019	1st Quarter	352,305	4,117,859	10.8
	2nd Quarter	297,777	3,028,030	10.2
	Semester 1	***650,082***	***7,145,889***	***10.6***
	3rd Quarter	323,560	3,599,943	11.3
	4th Quarter	409,846	3,720,033	10.2
	Semester 2	***733,406***	***7,319,976***	***10.7***
	Year	**1,383,488**	**14,465,865**	**10.6**
2020	1st Quarter	304,842	3,854,358	11.0
	2nd Quarter	39	230,780	105.4
	Semester 1	***304,881***	***4,085,138***	***11.6***
	3rd Quarter	731	191,439	146.1
	4th Quarter	3,368	208,680	118.9
	Semester 2	***4,099***	***400,119***	***130.5***
	Year	**308,980**	**4,485,257**	**12.6**
2021	1st Quarter	2,772	153,588	77.2
	2nd Quarter	453	146,216	115.7
	Semester 1	***3,225***	***299,804***	***92.2***
	3rd Quarter	6,235	189,954	46.7
	4th Quarter	170,320	1,678,483	12.0
	Semester 2	***176,555***	***1,868,437***	***13.0***
	Year	**179,780**	**2,168,241**	**14.7**
2022p	1st Quarter	158,818	2,188,334	13.5
	2nd Quarter	217,738	2,531,533	11.6
	Semester 1	***376,556***	***4,719,867***	***12.4***

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

Source: Statistics Mauritius

Table 14: Tourist Nights and Average Length of Stay for Selected Markets, Semester 1 of 2019 and 2022

Country of residence	Tourist nights		Average length of stay (days)	
	S1 2019	S1 2022p	S1 2019	S1 2022p
France	1,820,428	1,297,094	11.7	13.2
United Kingdom	728,896	703,525	11.5	12.2
Germany	592,478	517,259	10.1	12.9
Reunion Island	489,203	119,348	7.0	7.5
South Africa	476,932	395,987	8.0	10.3
India	443,124	208,462	11.1	15.6
China	227,583	22,080	10.8	47.9
Switzerland	224,367	135,589	11.8	13.6
Italy	184,365	80,742	9.9	10.5
Australia	125,444	32,061	14.0	24.4
Belgium	90,852	87,305	13.0	13.9
Austria	104,617	94,742	10.7	11.5
Sweden	107,881	36,446	11.6	11.6
Russian Federation	100,717	88,094	13.9	17.7
Netherlands	71,750	35,279	9.7	12.0
Spain	35,317	30,719	9.3	11.6
Sub-total	***5,823,954***	***3,884,732***	***10.4***	***12.5***
All markets	***7,145,889***	***4,719,867***	***10.6***	***12.4***

Note: "Tourist nights" for a reference period refer to nights spent bytourists 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 15: Main Results of the Survey of Outbound Tourism, 2013 & 2015 - 2018

Indicators	2013	2015	2016	2017	2018
Average length of stay by travel arrangement (nights)	**9.2**	**10.6**	**10.4**	**10.3**	**10.4**
Package	8.2	8.8	9.0	8.8	8.9
Non-package	11.4	14.0	13.2	12.9	13.0
Average party size	**2.2**	**2.2**	**2.1**	**2.1**	**2.1**
Travel arrangement (%)					
Package Tour	65.8	65.7	67.0	63.1	63.3
Non-package tour	34.2	34.3	33.0	36.9	36.7
Purpose of visit (%)					
Holiday	71.4	76.5	75.8	80.4	79.3
Honeymoon	17.3	15.6	17.4	12.3	13.1
Business	4.9	2.6	2.6	3.3	2.7
Visiting friends/relatives	2.5	2.1	0.9	1.0	1.4
To get married	0.5	0.5	0.4	0.3*	0.5*
Other	3.4	2.8	2.8	2.8	3.0
Frequency of Visit (%)					
First visit	68.0	73.0	68.0	66.7	66.0
Repeat Visit	32.0	27.0	32.0	33.3	34.0
Accommodation used (%)					
Hotel	80.3	82.3	81.2	79.6	78.2
In own villas/houses/bungalow/IRS	1.0	0.6	0.6*	0.8	0.4
Boarding/guest house	5.4	2.9	4.8	5.0	4.8
Tourist residence	6.5	8.3	7.3	8.5	10.8
With friends/relatives	6.2	5.5	5.5	5.8	5.3
Other	0.7	0.4*	0.5	0.3*	0.4
Evaluation of visit (%)					
Beyond expectation	26.0	35.0	34.0	21.9	
As expected	70.0	63.0	63.0	75.6	
Below expectation	3.0	3.0	3.0	2.3	N/A
Highly enjoyable	N/A	N/A	N/A	N/A	
No response	2.0	N/A	0.0	0.1	
Per capita expenditure (MUR)	**42,168**	**43,986**	**44,660**	**45,518**	**46,500**
Per capita per diem expenditure (MUR) (by travel arrangement)	**4,647**	**4,154**	**4,290**	**4,409**	**4,500**
Package tourists	5,644	4,904	4,923	5,158	5,200
Non-package tourists	3,321	3,244	3,410	3,537	3,600
Distribution of total expenditure by category, %					
Accommodation	58.9	60.5	60.7	61.7	63.0
Meals & Beverages	10.0	10.9	10.5	10.6	9.2
Transportation (local)	7.9	4.5	4.6	4.4	4.3
Sightseeing	5.9	6.2	7.5	7.6	7.0
Entertainment	5.0	5.2	4.5	3.6	5.0
Shopping	10.5	10.2	8.9	8.7	8.0
Other	1.7	2.5	3.3	3.4	3.5

*These figures should be treated with caution; they are subject to low reliability since they are based on few observations in the sample.

Source: Survey of Outbound/Inbound Tourism, Statistics Mauritius

Table 16: Selected Tourism Statistics by Type of Accommodation (hotel/non-hotel), 2015 - 2018

Details	2015			2016			2017			2018		
	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total
Average party size	2.2	2.1	2.2	2.1	2.0	2.1	2.2	1.9	2.1	2.2	2.0	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	9.0	15.5	10.4
Travel arrangement, %												
Package	79.0	4.4	65.7	80.5	8.8	67.0	77.6	6.2	63.1	79.2	6.2	63.3
Non-package	21.0	95.6	34.3	19.5	91.2	33.0	22.4	93.8	36.9	20.8	93.8	36.7
Total	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***
Purpose of visit, %												
Holiday	76.3	77.5	76.5	73.8	84.5	75.8	79.6	83.4	80.4	78.0	84.1	79.3
Honeymoon	18.6	1.6*	15.6	20.9	2.1	17.4	15.1	1.2*	12.3	16.2	2.0	13.1
Business	2.2	4.3	2.6	2.4	3.1	2.6	2.9	4.6	3.3	2.6	3.4	2.7
Visiting friends/ relatives	0.2*	10.9	2.1	0.0*	4.8	0.9	0.1*	4.7	1.0	0.1*	5.9	1.4
To get married	0.4	0.6*	0.5	0.5	0.1*	0.4	0.3*	0.1*	0.3*	0.5*	0.2*	0.5*
Other	2.3	5.1	2.8	2.3	5.4	2.8	2.0	6.0	2.8	2.6	4.3	3.0
Total	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.0***	***100.1***	***100.0***	***100.0***	***100.0***
Average expenditure (MUR)												
Per tourist	45,782	35,657	43,986	46,556	36,477	44,660	47,727	36,875	45,518	49,400	36,100	46,500
Per tourist per night	5,104	1,970	4,154	5,138	2,247	4,290	5,447	2,243	4,409	5,500	2,300	4,500

*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 17: Group Composition, Influencing Factor and Meal Arrangement of Tourists, 2018

Group composition	%	Influencing factor	%	Meal arrangement	%
Couple without children	58	Friends	54	All Inclusive	42
With friends and/or relatives	17	Internet	16	Half Board	28
Couple with children	17	Travel agencies	12	Bed only	11
Alone	6	Publicity in newspapers, magazines, films	11	Bed & Breakfast	10
Business associates	1	Social medias	3	Full Board	3
Other	1	Others	4	Free	6

Source: 2018 Survey of Inbound Tourism, Statistics Mauritius

Table 18: Expenditure of Tourists by Country of Residence and by Type, 2013 & 2015 - 2018

Indicators	2013	2015	2016	2017	2018
COUNTRY OF RESIDENCE					
France	11,000	10,600	11,700	12,000	13,100
Germany	3,200	3,500	4,800	5,400	5,900
Italy	1,400	1,200	1,200	1,400	1,600
Switzerland	1,700	1,700	2,100	2,500	2,500
United Kingdom	4,800	6,800	6,900	7,100	7,900
Reunion Island	3,500	3,300	3,600	3,300	3,200
South Africa	3,500	3,200	3,300	3,900	4,300
China	2,000	4,700	4,400	4,000	3,700
India	1,800	2,400	3,300	3,100	4,000
Other countries	9,000	12,600	14,900	17,300	17,900
All countries	**41,900**	**50,000**	**56,200**	**60,100**	**64,000**
TYPE OF EXPENDITURE					
Accommodation	24,700	30,300	34,100	37,100	40,300
Meals & Beverages	4,200	5,400	5,900	6,400	5,900
Transport	3,300	2,300	2,600	2,700	2,700
Entertainment	4,600	5,700	6,800	6,700	7,700
Shopping	4,400	5,100	5,000	5,200	5,100
Other	700	1,300	1,900	2,000	2,300
Grand total	**41,900**	**50,000**	**56,200**	**60,100**	**64,000**

Note: Slight discrepancies may occur due to rounding off of figures.

Source: Survey of Inbound Tourism, Statistics Mauritius

Table 19: Selected Expenditure Patterns of Tourists by Selected Country of Residence, 2018

Country of residence	Average expenditure, MUR		Expenditure by major item, %						
	Per tourist	Per tourist per night	Accommodation	Meals & Beverages	Local Transport	Sightseeing	Entertainment & Recreation	Shopping	Other
Europe	**48,700**	**4,300**	**65.8**	**8.8**	**3.9**	**6.9**	**4.6**	**6.2**	**3.8**
France	46,200	3,900	61.3	10.2	3.9	7.2	4.3	8.2	4.9
Germany	46,400	4,300	67.9	7.5	4.2	7.4	4.7	4.6	3.7
Italy	43,300	4,400	68.1	8.6	4.3	7.5	3.3	5.1	3.1
Switzerland	59,800	5,200	64.6	11.3	3.4	6.1	4.7	6.1	3.9
UK	53,300	4,600	72.1	6.2	3.5	5.7	5.1	4.5	2.8
Africa	**31,400**	**3,900**	**58.1**	**10.9**	**5.6**	**5.5**	**4.1**	**12.6**	**3.4**
Reunion	22,800	3,300	49.1	14.3	6.6	5.9	4.3	15.5	4.3
RSA	33,900	4,300	65.4	8.0	4.7	5.2	4.4	9.3	3.0
Asia	**59,200**	**5,900**	**59.6**	**8.3**	**4.2**	**8.5**	**7.4**	**9.7**	**2.3**
China	56,200	7,100	59.9	8.5	3.9	8.9	5.8	10.3	2.8
India	47,700	4,700	56.7	6.9	5.1	11.2	9.8	9.3	0.9
UAE	66,900	10,400	64.2	8.4	2.9	5.5	7.2*	10.3	1.5*
Oceania	**50,000**	**3,900**	**46.0**	**16.1**	**5.1**	**6.6**	**4.9**	**13.9**	**7.4**
Australia	49,400	3,800	45.2	16.4	5.1	6.6	4.8	14.4	7.4
America	**56,800**	**5,300**	**62.3**	**11.9**	**3.8**	**5.9**	**4.7**	**7.3**	**4.1**
USA	64,700	7,000	62.0	14.4	5.2	5.6	4.4*	5.6	2.8
All countries	**46,500**	**4,500**	**63.0**	**9.2**	**4.3**	**7.0**	**5.0**	**8.0**	**3.5**

*These figures should be treated with caution; they are subject to low reliability since they are based on few observations in the sample.

Source: 2018 Survey of Inbound Tourism, Statistics Mauritius

Table 20: Average Expenditure by Hotel and Non-Hotel Tourists for Selected Source Markets, 2018

Country of residence	Hotel & non-hotel tourists, %		Average expenditure per tourists, MUR			Average expenditure per tourist night, MUR		
	Hotel	Non-hotel	Hotel	Non-hotel	Total	Hotel	Non-hotel	Total
Europe	**79.8**	**20.2**	**51,200**	**38,500**	**48,700**	**5,200**	**2,200**	**4,300**
France	70.0	30.0	49,300	39,000	46,200	5,600	2,100	3,900
Germany	84.7	15.3	47,700	39,600	46,400	4,600	2,900	4,300
Italy	81.5	18.5	44,000	40,300	43,300	5,400	2,300	4,400
Switzerland	83.4	16.6*	60,300	57,300*	59,800	5,600	3,800*	5,200
UK	93.1	6.9	54,700	34,300	53,300	5,000	1,800	4,600
Africa	**69.0**	**31.0**	**34,300**	**24,900**	**31,400**	**5,200**	**2,200**	**3,900**
Reunion	59.4	40.6	25,600	18,700	22,800	4,700	2,100	3,300
RSA	84.1	15.9	34,500	31,000	33,900	5,100	2,200	4,300
Asia	**90.5**	**9.5**	**58,800**	**62,500**	**59,200**	**6,700**	**2,900**	**5,900**
China	92.8	7.2*	57,600	38,400*	56,200	7,500	3,600*	7,100
India	95.0	5.0*	47,900	42,800*	47,700	5,400	1,300*	4,700
UAE	84.0	16.0*	65,600	73,500*	66,900	10,400	10,100*	10,400
Oceania	**50.8**	**49.2***	**52,500**	**47,400***	**50,000**	**5,700**	**2,800***	**3,900**
Australia	49.8	50.2*	51,300	47,500*	49,400	5,600	2,800*	3,800
America	**64.1**	**35.9**	**67,100**	**38,400**	**56,800**	**7,800**	**2,600**	**5,300**
USA	72.9	27.1*	80,800	21,600*	64,700	9,700	1,900*	7,000
All countries	**78.2**	**21.8**	**49,400**	**36,100**	**46,500**	**5,500**	**2,300**	**4,500**

*These figures should be treated with caution; they are subject to low reliability since they are based on few observations in the sample.

Source: 2018 Survey of Inbound Tourism, Statistics Mauritius

Table 21: Distribution of Tourism Expenditure by Product and Category of Tourists, 2018

Product group	Internal tourism expenditure (%)			Outbound tourism expenditure, %
	Inbound	Domestic[1]	Total internal	
Tourism characteristics products	**98.8**	**97.6**	**98.7**	**98.5**
Accommodation[2] services for visitors	55.1	14.6	51.5	31.2
Food and beverage serving services	8.0	9.9	8.2	12.6
Road passenger transport services	3.8	2.8	3.7	4.5
Air and sea passenger transport services	12.5	52.8	16.1	10.2
Transport equipment rental services	1.8	2.4	1.9	0.4
Travel agencies and other reservation services	6.1	1.9	5.7	3.4
Recreational, cultural services and sporting services	4.4	0.9	4.1	0.6
Country specific tourism characteristics goods and services	7.0	12.3	7.5	35.6
Other consumption products and services	**1.2**	**2.4**	**1.3**	**1.5**
Total tourism expenditure	**100.0**	**100.0**	**100.0**	**100.0**
Total tourism expenditure (MUR Mn)	**73,214**	**7,125**	**80,339**	**24,531**

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, 2018, Statistics Mauritius

Table 22: Number of Tourist Accommodation Facilities, Air Seats Capacity and Tourist Arrivals, 2018 - 2021

Details	2018	2019	2020	2021	2022 S1
BUILT HOTEL CAPACITY					
Number of hotels	114	114	113	112	113
Number of hotel rooms	13,698	13,676	13,451	13,921	13,999
OPERATIONAL TOURIST ACCOMMODATION FACILITIES					
Hotel	186	199	222	210	218
Guesthouse	113	112	113	112	111
Tourist residence	730	756	871	847	847
Domaine	N/A				5
OPERATIONAL ROOMS					
Hotel	13,523	14,108	13,865	13,801	13,865
Guesthouse	2,119	2,124	2,629	2,633	2,747
Tourist residence	4,728	4,814	5,869	5,858	5,577
Domaine	N/A				16
Total operational rooms	**20,370**	**21,046**	**22,363**	**22,292**	**22,189**
AIR SEATS AND TOURIST ARRIVALS					
Total air seats	2,435,285	2,397,287	N/A	N/A	682,549
Total tourist arrivals	1,399,408	1,383,488	308,980	179,780	376,556

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

Table 23: Number of Licences Issued by the Tourism Authority as at 31 March 2017, 2019 and 2022

Activity	March 2017		March 2019		March 2022	
	No.	Rooms	No.	Rooms	No.	Rooms
Hotel	120	13,329	113	13,430	111	13,694
Guest House	231	2,360	196	2,197	212	2,672
Tourist Residence	961	5,985	738	4,891	823	5,560
Domaine	N/A		N/A		5	16
Operating spa					15	
- within hotel premises[1]	82		79		4	
- outside hotel premises					11	
Operating health and fitness centre within hotel premises[1]	54		62		1	
Operating beauty parlour, including hairdressing, within hotel premises[1]	46		47		0	
Restaurant[2]	1,123		791		806	
Table d'Hôte	16		17		22	
Operating golf course	8		9		8	
Operating boat house	82		64		75	
Operating rental agency for jet ski	3		0		0	
Operating rental agency for kite surf	18		19		21	
Operating rental agency for windsurf	2		2		2	
Operating scuba diving centre	74		62		69	
Operating helmet diving centre	10		10		10	
Providing non-motorised water sports such as pedaloes, canoes, kayaks and laser	11		10		10	
Hawking on beaches facing hotels	509		436		431	
Hawking in tourist sites	17		16		16	
Eco-tourism activities (nature-based tourism activities or adventure-related tourism activities, or both)	16		17		16	
Operating rental agency for bus, including minibus	2		1		2	
Operating rental agency for car	90		N/A		N/A	
Operating rental agency for motorcycle	42		39		36	
Operating rental agency for bicycle	43		27		18	
Operating rental agency for quad	10		11		10	
Karting	1		1		0	
Operating aquarium displaying fish or marine animals for public viewing	1		1		1	
Providing tour operator service	393		325		357	
Working as tourist guide, including tourist guide employed by a tour operator	30		23		18	
Operating travel agency	180		139		143	
Nightclub	23		20		18	
Private club	6		6		6	
Pub	6		4		7	
TOTAL	**4,292**		**3,097**		**3,264**	

1 The number of spa, health & fitness and beauty parlour for March 2019 is already included in the hotel licence and no separate licence is required.

2 As from March 2018, number excludes restaurants in hotels as no separate licence is required.

Source: Tourism Authority

Table 24: Large Establishments in the Accommodation and Food Service Activities - Number, Employment and Production Account, 2018

Indicators	Accommodation				F&B service activities	Total
	Large hotels[a]	Small hotels[b]	Other[c]	Total		
Number of establishments	77	43	11	131	80	211
Number of persons engaged	23,496	3,044	397	26,937	3,427	30,364
Gross output at basic prices, MUR Mn	33,121	3,783	394	37,298	5,081	42,379
Gross output per establishment, MUR '000	430,143	87,977	35,818	284,718	63,513	200,848
Gross output per person engaged, MUR '000	1,410	1,243	992	1,385	1,483	1,396
Value added at basic pricces, MUR Mn	20,216	2,162	239	22,617	1,924	24,541
Value added as a % of Gross output	61.0	57.2	60.7	60.6	37.9	57.9
Value added per establishment, MUR '000	262,546	50,279	21,727	172,649	24,050	116,308
Value added per person engaged, MUR '000	860.4	710.2	602.0	839.6	561.4	808.2
Compensation of employees, MUR Mn	7,104	906	95	8,105	1,061	9,166
Compensation as a % of Value added	35.1	41.9	39.7	35.8	55.1	37.3

a: Large hotels with more than 80 rooms.

b: Small hotels with up to 80 rooms.

c: Other: establishments with more than 10 persons.

Source: Census of Economic Activities - Large Establishments, 2018, Statistics Mauritius

Table 25: Large Establishments in Selected Economic Activities - Number, Employment and Production Account, 2018

Indicators	Accommodation and food service activities	Wholesale trade[a]	Information and communication	Financial and insurance	Real estate	All economic activities
Number of establishments	211	189	82	95	34	2,119
Number of persons engaged	30,364	10,919	11,055	13,855	1,244	221,707
Gross output at basic prices, MUR Mn	42,379	15,688	22,802	58,766	3,218	399,531
Gross output per establishment, MUR '000	200,848	83,005	278,073	618,590	94,647	188,547
Gross output per person engaged, MUR '000	1,396	1,437	2,063	4,242	2,587	1,802
Value added at basic prices, MUR Mn	24,541	9,517	17,373	47,164	2,042	229,695
Value added as a % of Gross output	57.9	60.7	76.2	80.3	63.5	57.5
Value added per establishment, MUR '000	116,308	50,355	211,866	496,463	60,059	108,398
Value added per person engaged, MUR '000	808.2	871.6	1,571.5	3,404.1	1,641.5	1,036.0
Compensation of employees, MUR Mn	9,166	4,131	6,010	13,683	655	87,620
Compensation as a % of Value Added	37.3	43.4	34.6	29.0	32.1	38.1

a: Wholesale trade excluding motor vehicles and motor cycles.

Source: Census of Economic Activities - Large Establishments, 2018, Statistics Mauritius

Table 26: Small Establishments in the Accommodation and Food Service Activities – Number, Employment and Production Account, 2018

Details	Hotel and tourist residences	Restaurants (small)	Bars	Victuallers, selling cooked food on and off premises	Caterers, others	Total
NUMBER OF ESTABLISHMENTS BY EMPLOYMENT SIZE						
1 to 3 persons	659	1,087	1,180	5,674	1,925	10,525
4 to 6 persons	115	470	0	811	484	1,880
7 to 9 persons	100	152	0	189	571	1,012
Total number of units	**874**	**1,709**	**1,180**	**6,674**	**2,980**	**13,417**
PERSONS ENGAGED IN THE SMALL ESTABLISHMENT BY TYPE						
Employer	563	786	202	2,101	1,254	4,906
Own account worker	327	770	997	4,710	1,725	8,529
Employee	1,463	3,407	404	5,217	6,484	16,975
Contributing Family worker	246	939	0	3,279	305	4,769
Total number of persons engaged	**2,599**	**5,902**	**1,603**	**15,307**	**9,768**	**35,179**
FULL-TIME AND PART-TIME EMPLOYMENT BY SEX						
Full-time	1,996	5,280	1,584	13,390	6,248	28,498
- Male	829	2,790	1,382	5,087	2,598	12,686
- Female	1,166	2,490	202	8,303	3,650	15,811
Part-time	603	622	0	1,917	3,520	6,662
- Male	161	260	0	907	1,712	3,040
- Female	443	362	0	1,010	1,808	3,623
PRODUCTION ACCOUNT, MUR Mn						
Gross output	1,626	3,624	746	6,936	4,197	17,129
Intermediate consumption	308	1,478	281	2,968	1,473	6,508
Value added at basic prices	1,318	2,146	465	3,968	2,723	10,620
Compensation of employees	384	586	69	619	661	2,319
Other taxes on production	12	16	24	17	10	79
Gross operating surplus	922	1,544	372	3,331	2,053	8,222
Gross Domestic Fixed Capital Formation, MUR 000s	22,520	14,437	2,371	8,909	8,499	56,736

Source: Census of Economic Activities - Small Establishments, 2018, Statistics Mauritius

Table 27: Number of Informal[1] Units and Persons Engaged, Gross Output and Value Added by Industry Group, 2018

Industry Group	Number of units	Number of persons engaged	Gross output (MUR Mn)	Value Added (MUR Mn)
Manufacturing	6,495	9,946	3,194	1,514
Construction	4,517	10,378	5,692	2,614
Wholesale and retail trade; repair of motor vehicles and motorcycles	12,914	21,074	4,388	3,540
Transportation and storage	9,044	12,807	4,891	3,169
Accommodation and food service activities	3,181	5,888	1,812	1,079
Information and communication	40	58	33	26
Real estate activities	50	75	168	162
Professional, scientific and technical activities	186	231	94	69
Administrative and support service activities	208	602	250	214
Education	175	189	116	93
Human health and social work activities	276	529	168	113
Arts, entertainment and recreation	384	687	488	393
Other service activities	1,080	1,923	438	341
Total	**38,550**	**64,387**	**21,732**	**13,327**

1 The informal sector comprises of household unincorporated market enterprises that do not have a complete set of accounts. These are not considered as separate legal entities independent of the households who own them.

Source: Census of Economic Activities - Small Establishments, 2018, Statistics Mauritius

Table 28: Hotel Room Occupancy Rate, 2018 - 2022 (%)

Month	Large hotels[1]				
	2018	2019	2020	2021	2022p
January	78	74	75	18	44
February	81	77	72	14	46
March	78	72	43	9	52
April	75	71	0	1	67
May	72	67	0	3	61
June	62	65	1	6	53
July	71	70	1	8	
August	79	75	5	16	
September	82	77	8	11	
October	83	76	16	38	
November	84	85	17	59	
December	78	79	21	42	
Whole Year	**77**	**74**	**24**	**21**	

QUARTER	2018	2019	2020	2021	2022p
Quarter 1	79	74	64	14	47
Quarter 2	70	68	0	3	60
Quarter 3	77	74	4	12	
Quarter 4	82	80	18	46	
Whole Year	**77**	**74**	**24**	**21**	

SEMESTER	2018	2019	2020	2021	2022p
Semester 1	74	71	35	9	54
Semester 2	79	77	12	32	
Whole Year	**77**	**74**	**24**	**21**	

Table 28: Hotel Room Occupancy Rate, 2018 - 2022 (%) (Cont'd)

Month	All hotels				
	2018	2019	2020	2021	2022p
January	77	72	73	18	42
February	79	76	70	15	44
March	76	71	42[2]	8	50
April	73	69	1	2	63
May	70	66	0	3	58
June	60	64	1	6	51
July	68	69	2	8	
August	76	73	5	16	
September	79	75	9	12	
October	81	75	16	37	
November	83	84	17	57	
December	76	78	21	40	
Whole Year	**75**	**73**	**24**	**21**	

QUARTER	2018	2019	2020	2021	2022p
Quarter 1	77	73	63	14	45
Quarter 2	68	66	1	3	57
Quarter 3	74	72	5	12	
Quarter 4	80	79	18	45	
Whole Year	**75**	**73**	**24**	**21**	

SEMESTER	2018	2019	2020	2021	2022p
Semester 1	73	69	34	9	51
Semester 2	77	76	12	31	
Whole Year	**75**	**73**	**24**	**21**	

1 Large hotels are well established beach hotel of over 80 rooms.

2 Excludes number of nights spent in hotels which were used as quarantine centres in March 2020.

Source: Statistics Mauritius

Table 29: Tourism Earnings and Tourist Arrivals by Quarter and Semester, 2018 - 2022

Quarter/Semester	2018	2019	2020	2021	2022
TOURISM EARNINGS BY QUARTER (MUR Mn)					
Quarter 1	18,483	16,518	14,144	522	12,539
Quarter 2	14,977	14,534	1,939	385	12,733
Quarter 3	12,797	14,052	824	1,704	
Quarter 4	17,781	18,003	757	12,642	
Total	**64,037**	**63,107**	**17,664**	**15,253**	
TOURISM EARNINGS BY SEMESTER (MUR Mn)					
Semester 1	33,460	31,052	16,083	907	25,272
Semester 2	30,578	32,055	1,581	14,346	
Total	**64,037**	**63,107**	**17,664**	**15,253**	
TOURIST ARRIVALS BY QUARTER					
Quarter 1	356,415	352,305	304,842	2,772	158,818
Quarter 2	290,450	297,777	39	453	217,738
Quarter 3	328,201	323,560	731	6,235	
Quarter 4	424,342	409,846	3,368	170,320	
Total	**1,399,408**	**1,383,488**	**308,980**	**179,780**	
TOURIST ARRIVALS BY SEMESTER					
Semester 1	646,865	650,082	304,881	3,225	376,556
Semester 2	752,543	733,406	4,099	176,555	
Total	**1,399,408**	**1,383,488**	**308,980**	**179,780**	

Note: Tourism earnings are estimated by the Bank of Mauritius based on monthly statements of Inward and Outward Remittances of Commercial Banks as well as returns submitted by Money-changers and Foreign exchange dealers as from 2015.

Sources: Statistics Mauritius and Bank of Mauritius

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Table 30: Monthly Gross Tourism Earnings, 2018 - 2022 (MUR Mn)

Month	2018	2019	2020	2021	2022
January	6,615	6,178	5,995	243	4,343
February	6,060	5,140	4,899	176	3,556
March	5,808	5,200	3,250	103	4,640
April	5,631	5,450	808	90	4,296
May	5,228	4,915	748	124	4,309
June	4,118	4,169	383	171	4,128
July	4,401	4,937	414	370	5,128
August	4,501	4,753	195	577	
September	3,895	4,362	215	757	
October	5,440	5,434	222	3,044	
November	5,678	5,964	254	4,962	
December	6,662	6,605	281	4,636	
Total	**64,037**	**63,107**	**17,664**	**15,253**	**30,400**

AVERAGE EXPENDITURE BASED ON TOURISM EARNINGS PUBLISHED BY THE BANK OF MAURITIUS (MUR)

	2018	2019	2020	2021	2022 S1
Per capita	45,760	45,614	Not comparable - COVID-19 pandemic		67,114
Per capita per diem[1]	4,479	4,362			5,354

AVERAGE EXPENDITURE BASED ON SURVEY OF OUTBOUND/INBOUND TOURISM (MUR)

	2018	2019–2022
Per capita	46,500	N/A
Per capita per diem	4,500	

Note: Tourism earnings are estimated by the Bank of Mauritius based on monthly statements of Inward and Outward Remittances of Commercial Banks as well as returns submitted by Money-changers and Foreign exchange dealers as from 2015.

1 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 31: Some Direct/Indirect Taxes and Levies Paid to Government, 2018/19 - 2022/23 (MUR Mn)

Details	2018/19	2019/20	2020/21r	2021/22r	2022/23p
Passenger Fee on Air Tickets[1]	1,602	1,264	26	650	1,755
Contribution in respect of Tourism Development Projects on State Lands	24	6	0	30	35
Tourist Enterprise Licences	112	73	24	70	90
Environment Protection Fee	424	330	89	318	465
- of which by tourist accommodation facilities	332	248	14	237	
Estimated VAT paid by hotels and restaurants (calendar year up to 2018)	4,874	4,121	873	3,115	N/A
Corporate Tax paid by the accommodation sector	217	250	-26	17	
CSR paid to the MRA by the Accommodation And Food Service Activities	21	27	20	10	
Training levy paid by the Accommodation And Food Service Activities	N/A	94	61	93	

1 Exclude service charge and terminal expansion fee.

Sources: Digest of Public Finance and Mauritius Revenue Authority

Table 32: Tourism Share in the Output of Tourism and Other Industries, 2018 (MUR Mn)

Tourism and Other industries		Total output of tourism 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	46,073		**46,073**		3,607	49,679		83.3
	Tourism share	*37,779*		***37,779***		*3,607*		*41,386*	
Food and beverage serving industry	Output	10,138		**10,138**		718	10,856		60.8
	Tourism share	*5,880*		***5,880***		*718*		*6,598*	
Road passenger transport services	Output	7,390		**7,390**			7,390		40.0
	Tourism share	*2,956*		***2,956***				*2,956*	
Air and sea passenger transport services	Output	31,326		**31,326**		1,659	32,985		39.2
	Tourism share	*11,277*		***11,277***		*1,659*		12,937	
Transport equipment rental services	Output	7,566		**7,566**		201	7,767		19.5
	Tourism share	*1,312*		***1,312***		*201*		1,513	
Travel agencies and other reservation services	Output	4,711		**4,711**		611	5,322		86.7
	Tourism share	*4,005*		***4,005***		*611*		4,617	
Recreational, cultural services and sporting services	Output	25,149		**25,149**		276	25,425		12.9
	Tourism share	*2,993*		***2,993***		*276*		3,269	
Country specific tourism characteristics goods and services	Output	2,999	2,099	**5,098**	**900**		5,998		100.0
	Tourism share	*2,999*	*2,099*	***5,098***	***900***			5,998	
Total tourism industries	**Output**	**135,351**	**2,099**	**137,450**	**900**	**7,072**	**145,423**		**54.5**
	Tourism share	***69,203***	***2,099***	***71,302***	***900***	***7,072***		**79,274**	
OTHER CONSUMPTION PRODUCTS AND SERVICES									
Other industries	Output		614,185	**614,185**	**60,500**	**47,717**	726,549		0.1
	Tourism share		*1,065*	***1,065***				1,065	

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

Source: Tourism Satellite Account, 2018, Statistics Mauritius

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Table 33: Production Accounts of Tourism Industries and Other Industries (at basic prices), 2018 (MUR 000s)

Tourism and Other industries		Total output (at basic prices)	Total intermediate consumption (at purchaser's 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	**46,072,538**	19,350,466	**26,722,072**	9,675,233	889,953	16,156,886
	Tourism share	***37,779,481***	*15,867,382*	***21,912,099***	*7,933,691*	*729,762*	*13,248,646*
Food and beverage serving industry	Output	**10,137,669**	4,359,198	**5,778,471**	2,128,910	200,485	3,449,076
	Tourism share	***5,879,847***	*2,528,334*	***3,351,513***	*1,234,768*	*116,281*	*2,000,464*
Road passenger transport services	Output	**7,389,843**	2,586,445	**4,803,398**	1,551,867	118,954	3,132,577
	Tourism share	***2,955,937***	*1,034,578*	***1,921,359***	*620,747*	*47,582*	*1,253,031*
Air and sea passenger transport services	Output	**31,326,272**	24,591,124	**6,735,148**	5,325,466	1,130,978	278,704
	Tourism share	***11,277,458***	*8,852,805*	***2,424,653***	*1,917,168*	*407,152*	*100,334*
Transport equipment rental services industry	Output	**7,566,405**	2,496,914	**5,069,491**	1,134,961	114,836	3,819,694
	Tourism share	***1,312,338***	*433,072*	***879,266***	*196,851*	*19,918*	*662,498*
Travel agencies and other reservation services industry	Output	**4,710,842**	2,119,879	**2,590,963**	800,843	97,496	1,692,624
	Tourism share	***4,005,169***	*1,802,326*	***2,202,843***	*640,827*	*82,891*	*1,479,125*
Sports, cultural and recreational industry	Output	**25,148,554**	8,801,994	**16,346,560**	3,772,283	404,815	12,169,462
	Tourism share	***2,993,308***	*1,047,658*	***1,945,650***	*448,996*	*48,183*	*1,448,471*
Retail trade of country-specific goods	Output	**2,999,031**	749,758	**2,249,273**	479,845	34,482	1,734,946
	Tourism share	***2,999,031***	*749,758*	***2,249,273***	*479,845*	*34,482*	*1,734,946*
Total tourism industries	**Output**	135,351,154	65,055,776	70,295,378	24,869,409	2,992,000	42,433,969
	Tourism share	*69,202,569*	*32,315,912*	*36,886,657*	*13,472,892*	*1,486,251*	*21,927,514*
OTHER INDUSTRIES							
Other industries	Output	**616,284,146**	264,264,524	**352,019,622**	150,316,091	362,400	201,341,131
	Tourism share	***3,164,603***	*1,356,991*	***1,807,611***	*771,869*	*1,861*	*1,033,881*
Gross output at basic prices	**Output**	**751,635,300**	**329,320,300**	**422,315,000**	**175,185,500**	**3,354,400**	**243,775,100**
	Tourism share	***72,367,172***	***33,672,903***	***38,694,269***	***14,244,762***	***1,488,112***	***22,961,395***

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

Source: Tourism Satellite Account, 2018, Statistics Mauritius

Table 34: Gross Value Added by Selected Industry Group at Current Basic Prices, 2018 - 2022

Selected industry group	2018r	2019r	2020r	2021r	2022f
GROSS VALUE ADDED (MUR Mn)					
Accommodation and food service activities	31,648	31,714	11,633	10,574	32,356
Sugar sector	2,022	2,052	1,912	2,414	2,673
Textile	16,278	13,676	10,920	12,824	14,150
Wholesale and retail trade	50,503	52,465	47,054	48,701	52,398
Financial and insurance activities	53,478	55,178	55,561	59,064	62,419
Real estate activities	24,924	25,756	25,357	26,040	26,902
Total Gross Value Added (basic prices)	**435,377**	**445,603**	**393,869**	**424,888**	**477,143**
SHARE BY SELECTED INDUSTRY GROUP					
Accommodation and food service activities	7.3%	7.1%	3.0%	2.5%	6.8%
Sugar sector	0.5%	0.5%	0.5%	0.6%	0.6%
Textile	3.7%	3.1%	2.8%	3.0%	3.0%
Wholesale and retail trade	11.6%	11.8%	11.9%	11.5%	11.0%
Financial and insurance activities	12.3%	12.4%	14.1%	13.9%	13.1%
Real estate activities	5.7%	5.8%	6.4%	6.1%	5.6%
REAL GROWTH RATES OF SELECTED INDUSTRY GROUP (% OVER PREVIOUS YEAR)					
Accommodation and food service activities	+4.1	-1.1	-65.6	-12.1	+206.0
Sugar sector					
Sugarcane	*-9.1*	*+2.4*	*-18.1*	*-7.2*	*-2.3*
Sugar manufacturing	*-22.0*	*+9.3*	*-17.2*	*-5.1*	*-2.3*
Textile	-6.8	-5.4	-29.9	+8.8	+5.0
Wholesale and retail trade	+3.5	+3.5	-12.3	+4.1	+1.5
Financial and insurance activities	+7.1	+3.8	+4.0	+4.6	+3.4
Real estate activities	+3.3	+3.4	-1.8	+1.4	+1.6
Gross Value Added at basic prices	**+3.8**	**+2.9**	**-14.4**	**+4.2**	**+7.9**
CONTRIBUTION OF SELECTED INDUSTRY GROUP TO GROSS VALUE ADDED GROWTH AT BASIC PRICES					
Accommodation and food service activities	+0.3	-0.1	-4.7	-0.4	+5.1
Sugar sector					
Sugarcane	*-0.1*	*+0.0*	*-0.1*	*+0.0*	*+0.0*
Sugar manufacturing	*-0.1*	*+0.0*	*+0.0*	*+0.0*	*+0.0*
Textile	-0.3	-0.2	-0.9	+0.2	+0.2
Wholesale and retail trade	+0.4	+0.4	-1.4	+0.5	+0.2
Financial and insurance activities	+0.9	+0.5	+0.5	+0.7	+0.5
Real estate activities	+0.2	+0.2	-0.1	+0.1	+0.1
Gross Value Added Growth at basic prices	**+3.8**	**+2.9**	**-14.4**	**+4.2**	**+7.9**

Source: Statistics Mauritius

Table 35: Gross Value Added of Selected Sub-sectors at Current Basic Prices, 2018 - 2022

Selected sub-sector	2018[r]	2019[r]	2020[r]	2021[r]	2022[f]
GROSS VALUE ADDED (MUR Mn)					
Tourism[1]	36,619	35,836	9,099	8,311	28,603
ICT[2]	24,055	25,270	26,397	28,174	29,204
Global business[3]	29,582	32,115	32,399	36,431	40,171
Seafood[4]	5,347	5,486	5,230	5,529	6,268
Freeport[5]	2,738	2,229	1,868	2,338	2,546
SHARE (%)					
Tourism[1]	8.4	8.0	2.3	2.0	6.0
ICT[2]	5.5	5.7	6.7	6.6	6.1
Global business[3]	6.8	7.2	8.2	8.6	8.4
Seafood[4]	1.2	1.2	1.3	1.3	1.3
Freeport[5]	0.6	0.5	0.5	0.6	0.5
REAL GROWTH RATES (% OVER PREVIOUS YEAR)					
Tourism[1]	+4.3	+0.2	-78.6	-21.8	+219.1
ICT[2]	+5.3	+3.7	+1.5	+6.9	+2.3
Global business[3]	+7.5	+5.7	-3.6	+6.8	+4.3
Seafood[4]	+6.3	+1.7	-9.5	+3.0	+1.6
Freeport[5]	+2.4	-19.0	-18.0	+20.0	+10.0

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 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.).
4 Covers mainly the activities of “Fishing” and “Fish processing”.
5 Covers “Wholesale and retail trade” and “Storage” activities of the freeport operators.

Source: Statistics Mauritius

Table 36: Value Added and Employment Estimates Based on the Census of Economic Activities and Official Estimates by Selected Industry Group, 2018

Indicators	Accommodation and food service activities	Wholesale and retail trade; repair of motor vehicles and motorcycles	Information and communication	Financial and insurance	Real estate	All economic activities
VALLUE ADDED, MUR Mn						
Census of Economic Activities						
Small establishments	10,620	37,049	1,212	1,443	1,262	124,654
Large establishments	24,541	22,972	17,373	47,164	2,042	229,695
Sectors not covered by the Census						
General government	0	0	134	0	0	51,005
Others	0	0	0	4,112	22,642	52,989
Sub-total	35,161	60,021	18,718	52,719	25,946	458,353
FISIM[1]	1,201	1,290	232	1,746	1,043	9,054
Total less FISIM	**33,960**	**58,731**	**18,486**	**50,972**	**24,903**	**449,299**
Official estimates	**31,648**	**52,615**	**18,154**	**53,478**	**24,924**	**435,377**
EMPLOYMENT						
Census of Economic Activities						
Small establishments	35,159	105,081	1,814	695	1,770	329,630
Large establishments	30,364	29,222	11,055	13,855	1,244	221,707
Sectors not covered by the Census						
General government	0	0	261	0	0	78,286
Others	0	0	0	1,958	0	66,320
Total	**65,523**	**134,303**	**13,130**	**16,508**	**3,014**	**695,943**
Official estimates	**41,600**	**96,100**	**17,600**	**13,500**	**1,500**	**573,100**

1 Financial intermediation services indirectly measured (FISIM) is defined as the value of services charged by financial institutions (banks and similar institutions).

Source: Census of Economic Activities - Large Establishments, 2018, Statistics Mauritius

Table 37: Balance of Trade of Tourism Sector, Export-oriented Enterprises and Total Economy, 2014 - 2018 (MUR Mn)

Details	2014	2015	2016	2017	2022p
Total exports of goods and services	**200,198**	**200,007**	**193,835**	**193,495**	**188,576**
of which: Tourism sector	52,650	58,854	64,860	69,104	73,212
Export-oriented enterprises	49,069	48,487	44,422	43,027	43,311
Total imports of goods and services	**243,980**	**241,189**	**234,104**	**253,234**	**257,233**
of which: Tourism sector	15,408	21,810	23,217	25,251	24,531
Export-oriented enterprises	28,596	27,312	25,638	27,094	25,929
Balance of Trade (goods and services)	**-43,782**	**-41,182**	**-40,269**	**-59,739**	**-68,657**
of which: Tourism sector	37,242	37,044	41,643	43,853	48,681
Export-oriented enterprises	20,473	21,175	18,784	15,933	17,382

Source: Tourism Satellite Account, 2018, Statistics Mauritius

Table 38: Comparative Level of Employment in Selected Industry Group, 2017 - 2021 (000s)

Selected industry group	2017	2018	2019	2020	2021
LARGE ESTABLISHMENTS (EMPLOYING 10 OR MORE PERSONS)					
Agriculture, forestry and fishing	13.2	13.4	12.9	9.2	8.4
Manufacturing	72.1	72.8	69.2	63.0	55.6
Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities	4.4	4.4	4.4	4.8	4.7
Construction	12.4	12.5	15.6	17.1	17.5
Wholesale and retail trade; repair of motor vehicles and motorcycles	27.8	28.1	29.3	31.3	30.4
Transportation and storage	17.0	17.1	17.2	15.9	14.9
Accommodation and food service activities	27.1	27.3	28.5	29.8	25.6
Information and communication	11.7	11.8	11.5	11.6	11.9
Financial and insurance activities	12.9	13.0	13.4	14.2	13.5
Real estate activities	0.9	0.9	1.0	1.3	1.0
Professional, scientific and technical activities	7.2	7.3	8.2	11.4	11.7
Administrative and support service activities	16.0	16.2	16.5	19.2	17.7
Other industries	94.2	95.2	97.5	97.7	92.6
Total employment in large establishments	**316.9**	**320.0**	**325.2**	**326.5**	**305.5**
OTHER ESTABLISHMENTS					
Agriculture, forestry and fishing	28.0	27.6	27.4	26.2	20.9
Manufacturing	25.6	24.6	26.9	27.4	29.4
Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities	1.1	1.1	1.0	0.6	0.7
Construction	27.7	27.7	28.7	24.3	34.4
Wholesale and retail trade; repair of motor vehicles and motorcycles	68.3	68.0	67.0	57.7	58.7
Transportation and storage	22.4	22.3	22.4	21.3	22.3
Accommodation and food service activities	14.5	14.3	15.5	10.3	10.4
Information and communication	5.9	5.8	6.7	6.7	6.5
Financial and insurance activities	0.6	0.5	0.5	0.2	0.5
Real estate activities	0.6	0.6	0.5	0.1	0.1
Professional, scientific and technical activities	5.4	5.3	4.8	1.0	0.7
Administrative and support service activities	9.3	9.1	9.0	4.0	3.7
Other industries	47.2	46.3	46.6	43.4	20.6
Total employment in other establishments	**256.6**	**253.1**	**257.0**	**223.2**	**208.9**
ALL ESTABLISHMENTS					
Agriculture, forestry and fishing	41.2	41.0	40.3	35.4	29.3
Manufacturing	97.7	97.4	96.1	90.4	85.0
Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities	5.5	5.5	5.4	5.4	5.4
Construction	40.1	40.2	44.3	41.4	41.9
Wholesale and retail trade; repair of motor vehicles and motorcycles	96.1	96.1	96.3	89.0	89.1
Transportation and storage	39.4	39.4	39.6	37.2	37.2
Accommodation and food service activities	41.6	41.6	44.0	40.1	36.0
Information and communication	17.6	17.6	18.2	18.3	18.4
Financial and insurance activities	13.5	13.5	13.9	14.4	14.0
Real estate activities	1.5	1.5	1.5	1.4	1.1
Professional, scientific and technical activities	12.6	12.6	13.0	12.4	12.4
Administrative and support service activities	25.3	25.3	25.5	23.2	21.4
Other industries	141.4	141.5	144.1	141.1	123.2
Total employment	**573.5**	**573.1**	**582.2**	**549.7**	**514.4**

Note: The above figures have been worked out in order to give a set of comparable labour force estimates obtained from different sources. Users are cautioned in the use of these figures given that there are differences related to the reference period, coverage and methodology. The different sources from which these estimates have been obtained are as follows:
- CMPHS for Mauritian labour force estimates which are subject to sampling variability.
- The Annual Survey of Employment and Earnings (SEE) carried out in March of each year. Employment figures refer to jobs in large establishments employing 10 or more persons and include both Mauritians and foreign workers.
- Employment in 'other than large' establishments has been estimated after reconciling data from CMPHS, SEE and administrative sources.

Source: Digest of Labour Statistics, Statistics Mauritius

Table 39: Estimated Direct Employment in the Tourism-related Industries, 2015 - 2019

Tourism-related industries	2015r		2016r		2017r		2018r		2019r	
	No.	%	No.	%	No.	%	No.	%	No.	%
Accommodation services for visitors[1]	21,382	31.9	22,374	31.7	22,855	31.2	23,342	30.7	22,893	29.6
Food and beverage serving services	16,243	24.3	17,135	24.3	17,855	24.4	18,814	24.8	19,747	25.5
Road passenger transport services	6,211	9.3	6,592	9.3	7,089	9.7	7,309	9.6	7,488	9.7
Air and sea passenger transport services	2,451	3.7	2,449	3.5	2,388	3.3	2,337	3.1	2,276	2.9
Transport equipment rental services	1,891	2.8	2,059	2.9	2,237	3.1	2,448	3.2	2,653	3.4
Travel agencies and other reservation services	2,221	3.3	2,357	3.3	2,322	3.2	2,221	2.9	2,205	2.8
Recreational, cultural services and sporting services	4,647	6.9	4,991	7.1	5,349	7.3	5,770	7.6	6,014	7.8
Country-specific tourism characteristics goods and services	3,693	5.5	3,952	5.6	4,149	5.7	4,357	5.7	4,574	5.9
Other services	8,216	12.3	8,610	12.2	9,000	12.3	9,336	12.3	9,594	12.4
Total employment in Tourism industry	**66,955**	**100.0**	**70,519**	**100.0**	**73,244**	**100.0**	**75,934**	**100.0**	**77,444**	**100.0**
Total employment	**566,600**		**567,200**		**573,500**		**573,100**		**582,000**	
Share of total employment	***11.8%***		***12.4%***		***12.8%***		***13.2%***		***13.3%***	

Note: Employment estimates are based on benchmark data available from the 2007, 2013 and 2018 Census of Economic Activities for small establishments, the annual survey of Employment and Earnings from large establishments supplemented by estimates from the Continuous Multipurpose Household Survey for other than large establishments conducted by Statistics Mauritius and licence statistics.

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

Source: Tourism Satellite Account, 2018, Statistics Mauritius

Table 40: Direct Employment in Large Establishments in the Tourism Industry, 2018 - 2022 (at end-March)

Type of establishment	2018	2019	2020	2021	2022p
Hotels	24,412	24,510	25,039	21,693	21,809
Food Service	3,351	3,526	3,662	3,463	3,081
Travel & Other Services[1]	3,604	3,514	3,552	2,702	2,736
Total	***31,367***	***31,550***	***32,253***	***27,858***	***27,626***

1 Travel and other services include air transport services, tour operators, travel agencies and car rental.

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

Table 41: Foreign Workers Employed in Large Establishments by Industrial Group, March 2018 - March 2022

Industrial group	2018	2019r	2020r	2021r	2022p
Agriculture, forestry and fishing	47	99	119	107	95
Mining and quarrying	16	26	0	1	1
Manufacturing	24,294	22,886	22,279	19,662	17,765
Electricity, gas, steam and air conditioning supply & Water Supply, sewerage, waste management and remediation activities	24	27	17	21	23
Construction	2,757	5,865	7,272	6,928	6,761
Wholesale and retail trade; repair of motor vehicles and motorcycles	521	741	1,091	1,130	1,073
Transportation and storage	120	107	156	81	89
Accommodation and food service activities	359	345	632	538	1,017
Information and communication	399	440	451	385	348
Financial and insurance activities	199	219	212	210	196
Real estate activities	12	12	9	11	8
Professional, scientific and technical activities	216	223	250	245	229
Administrative and support service activities	199	195	207	306	280
Public administration and defence; compulsory social security	29	42	204	44	70
Education	203	192	229	200	193
Human health and social work activities	200	119	135	131	143
Arts, entertainment and recreation	27	31	23	25	25
Other service activities	86	75	90	19	37
Total	**29,708**	**31,644**	**33,376**	**30,044**	**28,353**

Source: Statistics Mauritius

Table 42: Labour, Capital and Multifactor Productivity by Selected Industry Groups, 2016 - 2020

Selected industrial sector	2016	2017	2018	2019r	2020p
LABOUR PRODUCTIVITY					
Accommodation and food service activities	105.4	108.1	112.6	105.2	39.5
Construction	94.7	100.6	109.8	108.9	85.9
Information and communication	182.6	190.4	200.9	204.9	215.9
Wholesale and retail trade	99.6	100.4	104.0	107.5	102.2
Financial and insurance activities	114.9	121.2	127.7	130.5	127.2
Real estate activities (other)	89.1	87.4	91.2	95.5	86.3
Export-oriented manufacturing enterprises	134.1	135.3	135.2	144.1	123.1
Total economy	**124.6**	**127.6**	**132.3**	**134.4**	**121.3**
CAPITAL PRODUCTIVITY					
Accommodation and food service activities	90.7	93.5	97.8	97.1	33.8
Construction	45.0	48.6	47.6	47.0	33.4
Information and communication	197.4	208.6	213.3	217.2	225.9
Wholesale and retail trade	80.8	82.1	84.0	85.4	76.0
Financial and insurance activities	102.4	104.9	111.7	117.4	121.5
Real estate activities (other)	101.9	97.4	86.6	80.6	63.0
Export-oriented manufacturing enterprises	145.3	146.6	143.0	141.6	117.5
Total economy	**98.3**	**99.2**	**99.6**	**99.3**	**83.9**
MULTIFACTOR PRODUCTIVITY					
Accommodation and food service activities	94.9	97.7	102.1	99.6	37.9
Construction	60.7	64.8	65.0	64.1	47.3
Information and communication	190.6	200.2	207.7	211.7	221.4
Wholesale and retail trade	85.3	86.5	88.8	90.6	81.9
Financial and insurance activities	105.7	109.8	116.7	121.4	123.4
Real estate activities (other)	99.6	95.6	87.4	82.8	66.1
Export-oriented manufacturing enterprises	138.1	139.3	137.8	143.3	121.4
Total economy	**107.6**	**109.3**	**111.0**	**111.4**	**97.1**
INDEX - AVERAGE MONTHLY EARNINGS[1] (LARGE ESTABLISHMENTS)					
Accommodation and food service activities	181.1	189.7	195.4	202.9	195.8
Construction	177.2	182.2	194.8	189.4	285.0
Information and communication	180.2	198.6	188.0	192.5	183.5
Wholesale and retail trade	154.6	159.2	162.5	174.0	173.5
Financial and insurance activities	173.8	181.9	203.3	214.3	211.0
Real estate activities (other)	168.7	166.3	172.2	183.4	193.1
Export-oriented manufacturing enterprises	214.3	214.5	222.3	237.3	228.3
Total economy	**206.3**	**219.8**	**229.7**	**237.5**	**248.3**

Note: Labour productivity is the ratio of real output to labour input;
Capital productivity is the ratio of real output to stock of fixed capital used in the production process;
Multifactor productivity takes into account the simultaneous influences of several factors on production, including qualitative factors such as better management, improved quality of inputs and higher quality of goods;
Base: 2007=100

1 Earnings of daily, hourly and piece rate workers have been converted to a monthly basis.

Source: Digest of Productivity & Competitiveness Statistics 2020, Statistics Mauritius

Table 43: Average Monthly Earnings in the Hotel and Restaurant Sector, 2017 - 2022

(In large establishments, as at March)

Year	Average monthly earnings (MUR)	Per cent change
2017	19,623	1.9
2018	20,787	5.9
2019	20,791	0.0
2020	20,963	0.8
2021r	20,502	-2.2
2022p	23,691	15.6

Source: Statistics Mauritius

Table 44: Wage Rate Index in Selected Industry Groups, 2017 - 2021

Selected industrial group	Weight	2017	2018	2019	2020r	2021p
Accommodation and food service activities	65	103.1	105.7	108.5	110.3	112.0
Wholesale & retail trade; repair of motor vehicles and motorcycles	73	104.0	109.9	116.4	114.5	116.5
Financial and insurance activities	75	104.8	113.0	119.6	119.1	131.3
Real estate activities	4	103.1	105.7	109.8	113.6	116.5
All sectors	**1,000**	**103.8**	**108.4**	**112.9**	**113.9**	**117.4**

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 2017: Q4 of 2016=100

Source: Statistics Mauritius

Table 45: GFCF[1] in the Accommodation and Food Service Activities Sector, 2018 - 2022

Indicator	2018r	2019r	2020r	2021r	2022f
GFCF in Accommodation and food service activities (MUR Mn)	4,735	4,970	3,865	4,646	4,847
As a proportion of total private sector GFCF (%)	6.9	7.0	6.6	6.3	6.0
Total private sector GFCF (MUR Mn)	**68,368**	**71,113**	**58,478**	**74,042**	**80,143**
Annual Real Growth Rates, %					
Accommodation and food service activities	-31.0	1.6	-26.3	12.4	-3.3
Total private sector GFCF	10.4	0.4	-22.7	18.3	0.3

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 46: Gross Direct Investment Flows from Abroad in the Accommodation & Food Service Activities Sector, 2015 - 2021

Indicator	2017	2018	2019	2020[r]	2021[e]
Flows from Abroad in the Accommodation and Food Service Activities sector (MUR Mn)	1,867	1,211	1,498	1,017	958
As a proportion of total (%)	8.4	6.0	6.7	6.0	6.2
Total Gross Direct Investment Flows (MUR Mn)	**22,342**	**20,045**	**22,289**	**16,944**	**15,417**
YEAR ON YEAR GROWTH					
Accommodation and food service activities	26.3%	-35.1%	23.7%	-32.1%	-5.8%
Total Flows	23.0%	-10.3%	11.2%	-24.0%	-9.0%

e: Preliminary estimates. The data would be revised in the wake of the results from future FALS (Foreign Assets and Liabilities Survey) and are therefore not strictly comparable with prior years' data.

Source: Bank of Mauritius

Table 47: Bank Loans to the Accommodation and Food Service Activities, June 2019 to December 2021 (MUR Mn)

Details	Jun-19	Dec-19	Jun-20	Dec-20	Jun-21	Dec-21
Bank loans in MRU						
Accommodation and food service activities	**16,202**	**16,782**	**17,213**	**20,489**	**22,269**	**22,202**
Accommodation	15,407	15,993	16,369	19,438	21,163	21,132
- Resort Hotels	13,582	14,102	14,373	17,341	18,595	18,105
- Hotels other than Resort	1,278	1,417	1,554	1,649	2,093	2,608
- Bungalows	164	153	142	150	152	89
- Guest Houses	183	152	151	155	176	178
- Holiday Homes	20	20	18	17	42	26
- Other accommodation	180	148	130	126	105	128
Food and beverage service activities	794	790	844	1,051	1,106	1,070
Grand total - Bank loans[1] the private sector	**247,981**	**250,995**	**255,952**	**255,567**	**261,133**	**263,571**
Accommodation as a proportion of grand total	6.2%	6.4%	6.4%	7.6%	8.1%	8.0%
Bank loans taken in foreign currencies[2]						
Accommodation and food service activities	**21,375**	**22,455**	**24,605**	**30,661**	**34,030**	**32,684**
Accommodation	21,375	22,406	24,599	30,654	34,023	32,679
- Resort Hotels	18,300	19,137	21,384	27,401	30,418	29,050
- Hotels other than Resort	2,487	2,692	2,828	2,853	3,291	3,330
- Bungalows	196	171	201	207	57	5
- Guest Houses	75	73	79	86	90	127
- Holiday Homes	0	0	0	0	62	67
- Other accommodation	316	334	107	107	106	101
Food and beverage service activities	0	48	7	7	7	4
Grand total - Bank loans[1] the private sector	**121,599**	**130,070**	**143,619**	**132,550**	**131,331**	**132,562**
Accommodation as a proportion of grand total	17.6%	17.2%	17.1%	23.1%	25.9%	24.7%
Total bank loans						
Accommodation and food service activities	**37,577**	**39,237**	**41,819**	**51,149**	**56,299**	**54,886**
Accommodation	36,782	38,399	40,968	50,091	55,186	53,811
- Resort Hotels	31,882	33,239	35,757	44,741	49,013	47,154
- Hotels other than Resort	3,765	4,109	4,382	4,502	5,384	5,937
- Bungalows	360	323	343	356	209	94
- Guest Houses	258	225	230	241	266	305
- Holiday Homes	20	20	18	17	103	92
- Other accommodation	496	482	237	233	211	228
Food and beverage service activities	795	838	851	1,058	1,113	1,075
Grand total - Bank loans[1] the private sector	**369,581**	**381,065**	**399,571**	**388,117**	**392,463**	**396,133**
Accommodation as a proportion of grand total	10.0%	10.1%	10.3%	12.9%	14.4%	13.6%

1 As from October 2018, bank loans include only facilities provided by banks in the form of loans, overdrafts and finance leases.

2 Refers to the rupee equivalent of loans in foreign currency.

Source: Bank of Mauritius

NOTES

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AHRIM

ASSOCIATION DES HOTELIERS ET RESTAURATEURS ILE MAURICE

Suite 83, Level 2, Médine Mews, La Chaussée, Port Louis 11328, Mauritius
Tel: (230) 208 8181 | Fax: (230) 208 8282
secretariat@ahrim.mu | **ahrim.mu**