AHRIM

ASSOCIATION DES
HOTELIERS ET
RESTAURATEURS
ILE MAURICE

# Annual Report

2022-2023

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"GLOBAL TOURISM IS ON TRACK TO RETURN TO PRE-PANDEMIC LEVELS BY THE END OF YEAR. BY INVESTING IN PEOPLE AND PROJECTS THAT MAKE A DIFFERENCE, WE CAN DELIVER ON THE SECTOR'S POTENTIAL TO DRIVE GROWTH AND OPPORTUNITY FOR ALL."

**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 |
| 2022/2023 | Mr. Désiré Elliah |

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# INTRODUCTION



## World economy at a glance 1.1

The world economy in 2022 and 2023 witnessed a period of cautious recovery following the unprecedented disruptions caused by the COVID-19 pandemic. While significant strides were made to stabilise economies, the path to full recovery remained fraught with challenges, uncertainties, and varying degrees of resilience across different regions. The global economy has showed signs of rebounding, supported by substantial fiscal and monetary interventions by governments and central banks.

Moving forward, the pandemic's long-term effects continued to shape economic landscapes. Supply chain disruptions and labour shortages posed substantial hurdles to industries worldwide. This situation resulted from a combination of factors, including geopolitical tensions, lingering COVID-19 outbreaks, and strained international relations. Governments and corporations increasingly focused on bolstering domestic manufacturing capabilities and diversifying supply chains to mitigate future risks.

Inflation emerged as a major concern in 2022/23. Rising commodity prices, transportation costs, and labour wages placed upward pressure on prices globally. Central banks responded with various measures, including interest rate adjustments to maintain price stability while supporting economic growth. Policymakers faced a delicate balancing act to avoid stifling the recovery while preventing runaway inflation.

Amid the ongoing recovery, environmental sustainability and climate change took centre stage. Governments and businesses prioritised green initiatives and sustainable practices to combat the climate crisis. Investments in renewable energy, clean technologies, and environmentally responsible infrastructure projects increased, signalling a shift towards a greener global economy.

While advanced economies displayed strong rebounds, disparities remained, and challenges such as inflation, supply chain disruptions, and environmental sustainability called for continued vigilance and collaborative efforts. By fostering innovation, addressing inequality, and promoting sustainable practices, the global community could lay the groundwork for a more resilient and prosperous future.

The COVID-19 pandemic reminded the world of the importance of global solidarity and cooperation. Multilateral organisations played critical roles in coordinating responses and fostering international collaboration. As the world slowly healed from the pandemic's wounds, building resilience against future crises became a top priority for governments, businesses, and individuals.

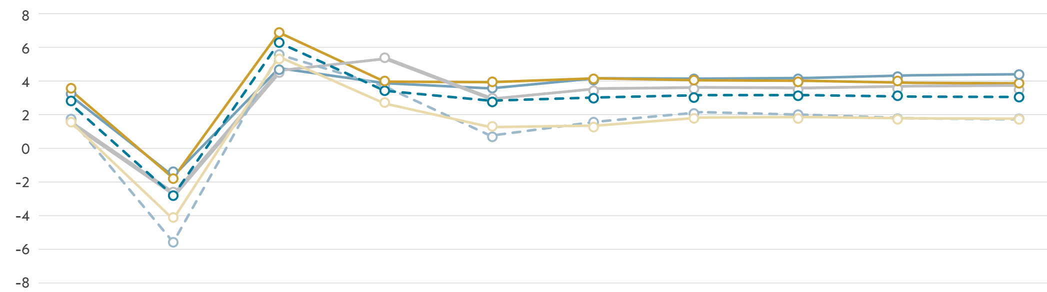
The repercussions of the on-going war between Russia and Ukraine continue to reverberate around the world with slower estimated economic recovery from the pandemic. The new geo-political environment will affect future corporate decision making and cost savings through globalisation will be more closely scrutinised against risk. The treat of de-globalisation is thus looming and its short-term impact will lead to increased prices, further adding to inflationary pressures.

## GDP growth forecasts 1.2

While the signs of optimism are apparent, the recent instability in the banking sector has intricately complicated efforts to address surging prices though moderate reductions in headline inflation rates was observed during the first months of 2023. This phenomenon is attributed to a variety of factors, ranging from stringent monetary policies to the stabilisation of commodity markets and the alleviation of supply-chain constraints. The pressure on cost of living has notably shot up in several developing economies, where domestic prices have been negatively impacted by the currency depreciation. Furthermore, the recent banking crisis has introduced an extra level of complexity to the present inflation dynamics. This has placed central banks under pressure to temper the rate at which they implement monetary tightening.

Amidst these uncertainties coupled with the negative fallouts of the war in Ukraine, the IMF has once again revised downwards the GDP growth forecasts to 2.83 percent in 2023 compared to an estimated 3.59 percent last year. Advanced economies and the European Union seemed to face the brunt of this slowdown (-1.1 pp and -1.76 pp respectively) with GDP growth reaching 1.26 percent and 0.75 percent respectively. Anaemic growth performance by the world's advanced economies over the medium term is thus foreseen. Emerging and developing countries and the Sub-Saharan Africa regions are expected to fare quite well with GDP growth above four percent during the next few years.

**Figure 1: GDP growth (constant prices) in selected country groupings, 2019 – 2028**




| | 2019 | 2020 | 2021 | 2022[e] | 2023[e] | 2024[e] | 2025[e] | 2026[e] | 2027[e] | 2028[e] |
|---|---|---|---|---|---|---|---|---|---|---|
| World | 2.81 | -2.81 | 6.28 | 3.42 | 2.83 | 3.02 | 3.16 | 3.16 | 3.07 | 3.05 |
| Advanced Economies | 1.74 | -4.21 | 5.44 | 2.66 | 1.26 | 1.35 | 1.83 | 1.86 | 1.78 | 1.76 |
| European Union | 1.98 | -5.58 | 5.57 | 3.68 | 0.75 | 1.58 | 2.15 | 1.99 | 1.78 | 1.72 |
| Emerging and developing economies | 3.61 | -1.77 | 6.88 | 3.96 | 3.93 | 4.16 | 4.04 | 4.01 | 3.89 | 3.86 |
| Middle East and Central Asia | 1.60 | -2.74 | 4.62 | 5.32 | 2.93 | 3.54 | 3.61 | 3.58 | 3.69 | 3.73 |
| Sub Saharan Africa | 3.26 | -1.65 | 4.76 | 3.87 | 3.56 | 4.16 | 4.14 | 4.18 | 4.34 | 4.40 |

*Source: International Monetary Fund*

# European Union 1.2.1

Numerous factors continue to weigh on the growth outlook for Europe, including weak business and consumer sentiment, and increasingly tight financial conditions. Analysts also believed that the war in Ukraine is having the greatest impact on Europe's economy. However, during the last quarter of 2022 and first quarter of 2023, the EU economy performed better than expected. The European Union effectively navigated through the energy crisis by swiftly broadening its supply sources and experiencing a significant reduction in consumption.

In 2023, the European Union is expected to witness a modest growth of 0.5 percent in private consumption. With inflation loosening its hold on household finances, private consumption is expected to recover to 1.8 percent by 2024. The household saving rate within the EU is predicted to decline from 13.2 percent in 2022 to 12.8 percent in 2024, aligning with its historical average.

Following a 5.0 percent growth in 2022, the yearly rise in compensation per employee is foreseen to improve to 5.9 percent in 2023, subsequently tapering off to 4.6 percent in 2024. Real wages are thus poised to undergo a drop this year with a marginal improvement anticipated as the year progresses. Looking ahead, households can expect a rise in their actual disposable income in 2024. Additionally, the decline in energy costs will enable governments to contain and reduce support measures.

## FRANCE 1.2.1.1

Following a robust economic rebound after the pandemic, France faced an energy shock caused by the Russian's incursion into Ukraine. This resulted in inflation and a deceleration in economic activities. Today, 2023 is poised to witness a deceleration in investment due to more stringent financial conditions while private consumption is anticipated to remain sluggish, mirroring subdued consumer confidence. Furthermore, social unrest triggered by the pension reform has cast a shadow over economic activity during semester 1 of 2023. Nevertheless, the easing of inflationary pressures and the reduction of social tensions will pave the way for a gradual recovery into the second half of the year, encouraging a slow rebound in private consumption. Net exports are predicted to make a slightly positive contribution to overall growth and as a result, the projection for GDP growth in 2023 stands at 0.7 percent.





Fuelled by energy and commodity prices, inflation reached 5.9 percent in 2022 though the most subdued rate within the EU due to government interventions. With a projected GDP growth of 1.3 percent in 2024 driven by a drop in energy prices, the French economy is poised to sustain its upward trajectory. Domestic demand, with a preserved household purchasing power resulting from government intervention, dynamic wage growth, and an exceptionally favourable labour market are all expected to contribute towards this recovery.

Indeed, the government made bold reforms to boost growth potential while reducing fiscal burdens. These reforms encompass a revamped unemployment benefits structure to raise labour supply, and a comprehensive pension reform to balance the pension system and increase the employment rate of older workers by aligning the effective retirement age closer with that of the European Union average.

**Table 1: Selected economic indicators in France, 2022 - 2026**

| INDICATOR | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|---|---|---|---|---|
| Gross domestic product, constant prices (%) | 2.61 | 0.70 | 1.25 | 1.90 | 1.76 |
| Gross national savings (% of GDP) | 23.98 | 23.18 | 23.62 | 23.64 | 23.70 |
| Inflation, average consumer prices (%) | 5.90 | 5.05 | 2.46 | 2.15 | 1.74 |
| Change in volume of exports of goods and services (%) | 9.07 | 1.35 | 0.69 | 4.04 | 3.85 |
| Unemployment rate (%) | 7.29 | 7.36 | 7.27 | 6.93 | 6.82 |

*Source: IMF*

## GERMANY 1.2.1.2

Germany's economy is undergoing a period of adjustment in response to the disruption in gas supplies from Russia and the resulting shock in energy prices. Despite increased production costs, the industrial sector has demonstrated resilience, and there are indications that investment will rebound as order books in the manufacturing and export sector are full. However, both investment and private consumption volumes remain below pre-pandemic levels.

The labour market is poised to maintain its robust performance, which will lead to an increase in real wages, thereby supporting consumer spending. Consequently, the projected GDP growth is anticipated to improve from a negative position (-0.1 percent) in 2023 to 1.1 percent in 2024.

**Table 2: Selected economic indicators in Germany, 2022 - 2026**

| INDICATOR | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|---|---|---|---|---|
| Gross domestic product, constant prices (%) | 1.78 | -0.11 | 1.10 | 2.04 | 1.85 |
| Gross national savings (% of GDP) | 29.03 | 28.42 | 28.82 | 29.59 | 29.80 |
| Inflation, average consumer prices (%) | 8.67 | 6.19 | 3.08 | 2.25 | 2.13 |
| Change in volume of exports of goods and services (%) | 6.12 | 2.80 | 3.69 | 3.70 | 3.42 |
| Unemployment rate (%) | 3.07 | 3.27 | 3.33 | 3.12 | 3.05 |

*Source: IMF*

## UK 1.2.2

Growth in the United Kingdom is projected to decline from 4.1 percent in 2022 to -0.3 percent in 2023, to then rise to 1.0 percent in 2024. The negative 2023 GDP growth has somewhat been contained by the stronger than expected consumption level, higher investment that resulted from the falling energy prices, reduced post-Brexit uncertainty (following the Windsor Framework agreement) and a strong financial sector as the global banking stress that prevailed in March subsides.

To contain inflation, the authorities have appropriately implemented stricter monetary measures, including a 50-basis-point increase in interest rates in June, alongside fiscal policies. Additionally, the nation is confronted with underlying obstacles, primarily centred around limited potential for growth. Additionally, though labour supply has recently reached pre-pandemic level, it is weaker than that of its peers. To boost growth potential, the Chancellor has come forward with the 4Es strategy (enterprise, education, employment and everywhere) that is focused on high-productivity growth in sectors like advanced manufacturing, life sciences, and clean energy.

**Table 3: Selected economic indicators in UK, 2022 - 2026**

| INDICATOR | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|---|---|---|---|---|
| Gross domestic product, constant prices (%) | 4.05 | -0.25 | 0.95 | 2.17 | 2.01 |
| Gross national savings (% of GDP) | 13.74 | 12.05 | 12.42 | 13.24 | 13.56 |
| Inflation, average consumer prices (%) | 9.07 | 6.84 | 2.98 | 1.80 | 2.00 |
| Change in volume of exports of goods and services (%) | 12.62 | 4.15 | 0.41 | 1.15 | 1.49 |
| Unemployment rate (%) | 3.70 | 4.15 | 4.68 | 4.35 | 4.20 |

*Source: IMF*

## South Africa 1.2.3

The country's feeble economic growth has been influenced by crippling power outages, unpredictable shifts in commodity prices, and a challenging external environment. GDP thus stagnated at 0.1 percent in 2023 and is expected to remain below the two percent threshold during the next few years. This growth pace is too weak to lower unemployment rate that, at 33.5 percent, remains at an historical peak.

The rolling blackouts, after years of mismanagement of the state-owned utility, Eskom, is still plaguing the country and has prompted the Government to facilitate the registration and licensing of private investors in the energy sector. Moreover, the capacity of the authorities to respond to shocks and address growing social and development needs are constrained by the high level of public debt, one of the highest among emerging markets. Persistently high energy and food prices are expected to maintain inflation rate in the 4.5 percent to 5.8 percent bracket between 2023 and 2026.

The IMF estimated that the outlook for South Africa will remain subdued in the coming years and reforms are urgently required to address the energy crisis and effectively combat structural unemployment.





**Table 4: Selected economic indicators in South Africa, 2022 - 2026**

| INDICATOR | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|---|---|---|---|---|
| Gross domestic product, constant prices (%) | 2.04 | 0.10 | 1.82 | 1.60 | 1.40 |
| Gross national savings (% of GDP) | 14.63 | 13.85 | 13.94 | 14.46 | 14.85 |
| Inflation, average consumer prices (%) | 6.87 | 5.75 | 4.80 | 4.50 | 4.50 |
| Change in volume of exports of goods and services (%) | 14.21 | 5.90 | 5.33 | 3.62 | 3.58 |
| Unemployment rate (%) | 33.50 | 34.72 | 34.70 | 34.83 | 35.11 |

*Source: IMF*

## Middle East and Central Asia 1.2.4

The countries in the Middle East and Central Asia region have shown their resilience in 2022 despite the different world shocks. Growth however is likely to stagnate in 2023 and 2024 as tight policies implemented in a bid to tame inflation, reduce vulnerabilities and rebuild reserves, are starting to negatively impact economic activity. Furthermore, economic growth in many oil exporting countries are being curbed following the agreed oil production reductions.

### INDIA 1.2.4.1

India continues to be one of the most rapidly expanding emerging economies with growth driven by both government and private investment push and buoyant private consumption especially among higher income earners.

While growth has slowed down in 2023 due to slower consumption and challenging external conditions, it is expected to pick up in 2024 and remain above the six percent threshold during the next few years. This strong performance will be maintained despite sluggish world demand and the tight monetary policies imposed to control inflation.

The expected reduction in inflation and the easing of monetary policy in the second half of 2024 are expected to boost household spending and overall, growth is expected to remain robust.

**Table 5: Selected economic indicators in India, 2022 - 2026**

| INDICATOR | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|---|---|---|---|---|
| Gross domestic product, constant prices (%) | 6.83 | 5.89 | 6.33 | 6.21 | 6.07 |
| Gross national savings (% of GDP) | 29.01 | 30.25 | 30.76 | 31.27 | 31.67 |
| Inflation, average consumer prices (%) | 6.67 | 4.95 | 4.43 | 4.09 | 4.09 |
| Change in volume of exports of goods and services (%) | 9.61 | 7.50 | 5.43 | 5.50 | 5.50 |

*Source: IMF*

## CHINA

1.2.4.2

China's borders have been reopening following the decision in late 2022 to unwind the country's stringent zero-COVID policies. This change has transformed the growth outlook not just for China but for its regional neighbours also. As life gets back to normal for consumers and businesses alike, consumer confidence has returned after three years of pandemic-related restrictions. The robust rebound in domestic consumption and exports have thus driven recent GDP growth that is expected to reach 5.2 percent in 2023 from 3.0 percent in 2022.

In an effort to stimulate demand within an economy where inflation has significantly evaporated, unlike in many other regions, the Chinese central bank has reduced borrowing rates several times. The potential threat could be on the real estate market whose growth momentum has dropped recently. This could potentially become problematic given that the sector is a major contributor in the Chinese overall GDP growth.

**Table 6: Selected economic indicators in China, 2022 – 2026**

| INDICATOR | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|---|---|---|---|---|
| Gross domestic product, constant prices (%) | 2.99 | 5.24 | 4.48 | 4.08 | 3.96 |
| Gross national savings (% of GDP) | 46.18 | 45.40 | 45.13 | 44.53 | 43.94 |
| Inflation, average consumer prices (%) | 1.88 | 1.99 | 2.19 | 2.20 | 2.20 |
| Change in volume of exports of goods and services (%) | -4.13 | 2.25 | 5.44 | 4.00 | 3.90 |
| Unemployment rate (%) | 4.20 | 4.10 | 3.90 | 3.80 | 3.70 |

*Source: IMF*





# 02

# AN INSIGHT INTO WORLD TOURISM



Before the pandemic, the Travel & Tourism sector, encompassing its direct, indirect, and induced effects, played a pivotal role by generating one out of every five new jobs worldwide. In 2019, it contributed to a staggering 10.3 percent of total employment (equivalent to 334 million jobs) and an equally substantial 10.4 percent of the global GDP, amounting to a remarkable USD 10 trillion. Concurrently, international visitors' expenditures reached an impressive USD 1.9 trillion in the same year.

## Resilience of the travel and tourism sector 2.1

After the deepest unprecedented crisis the sector has faced, Travel & Tourism is positively trending upwards. The sector has shown agility, determination and vision to weather this crisis and get the sector back on its feet. The recovery of tourism has not only been remarkably swift, but enterprises are also dedicating significant efforts towards reshaping it. They are striving to regain the trust of travellers through novel offerings, innovative technologies, and substantial commitments to sustainability.

The release of pent-up demand known as 'revenge travel' has led to many choosing to use accrued savings to spend more than they had before – even prior to lockdowns. A new trend has shown that travellers are overall happy to spend on accommodation – according to the Deloitte's Global State of the Consumer Tracker in July 2022, more than half (53 percent) of global consumers were planning to stay in a hotel over the coming three months, while 37 percent said they were likely to stay in private accommodation. Actually, the demand for accommodation has recovered so well that by September 2022, the hotel industry saw global demand for rooms return to more than 90 percent of 2019 levels.

The resilience of the sector is once more tested amid economic turbulence as the combined effect of rising inflation and interest rates, turbulent currency markets and global energy shocks has likely led to a squeeze on the cost of living for many consumers, as well as pushing up the prices of travel purchases. The potential impact of inflation on travel could potentially dampen the appetite for travel in the coming months. In September 2022, across markets globally, the intent to book travel declined year-on-year for the first time since the launch of Deloitte's Global State of the Consumer Tracker in April 2021. Moreover, the amount that travellers intended to spend on travel dropped as well, by more than 20 percent in some countries.

However, despite the potential economic challenges ahead, there is a positive outlook for the industry: the desire for travel remains strong as the majority of individuals continue to place holidays at the forefront of their discretionary spending priorities, opting to cut back on other expenses. According to a survey conducted by Skyscanner, a remarkable 86 percent of participants expressed their intention to maintain or increase their expenditure on international travel in 2022 when compared to the figures from 2019. The survey also revealed that a significant 41 percent of travellers on average said they intended to spend more in 2023 than in 2022 with a strong 31 percent to spend more on international travel.

## Strong rebound expected to continue despite headwinds 2.2

International tourism arrivals continue to regain lost ground as the revenge travelling phenomenon lingers to fuel demand. World international tourist arrivals reached 963 million in 2022 (+111 percent compared to 2021) though it is still below the pre-pandemic level (66 percent of 2019 level). Recovery will be consolidated in 2023 and for the first quarter of 2023, international arrivals reached 80 percent of the pre-pandemic levels, or a growth of 86 percent compared to quarter one of 2022.

Strong growths were recorded in all regions with the Asia and the Pacific enjoying the highest one (305 percent, though from a lower base). This growth is spurred by the gradual elimination of the pandemic-related restrictions in several Asian markets. The lifting of its strict COVID-19 travels restrictions late 2022 in China, the world's largest outbound market in 2019, was a significant milestone for the rebound of the tourism and travel sector in the world and especially in this region. However, growth may be constrained by the availability and cost of air travel, visa regulations and COVID-19 related restrictions in the destinations.

As the world's largest tourist destination, Europe, accounting for 62 percent of total international arrivals, recorded 596 million arrivals in 2022 or 80 percent of the pre-pandemic level. This performance was supported by robust intra-regional demand and the implementation of coordinated travel measures. As the risks of recession and gas shortages have dissipated, growth in Europe is sustained and as it enters 2023, European tourism demand is starting off on a strong foundation. Current year-to-date data reveals that nearly a third of the destinations report having exceeded the tourist arrival figures in 2019, and about a quarter are only slightly below by 10 percent.

The second largest tourist destination in 2022, the Americas, reached 71 percent of the 2019 level in terms of international arrivals. The robust travel demand from the United States, backed by a strong US dollar, will continue to benefit destinations in the region and beyond. Europe, in particular, will benefit, partly due to a weaker euro versus the US dollar. Recovery rate reached 86 percent in quarter one of 2023 compared to the same quater in 2022.

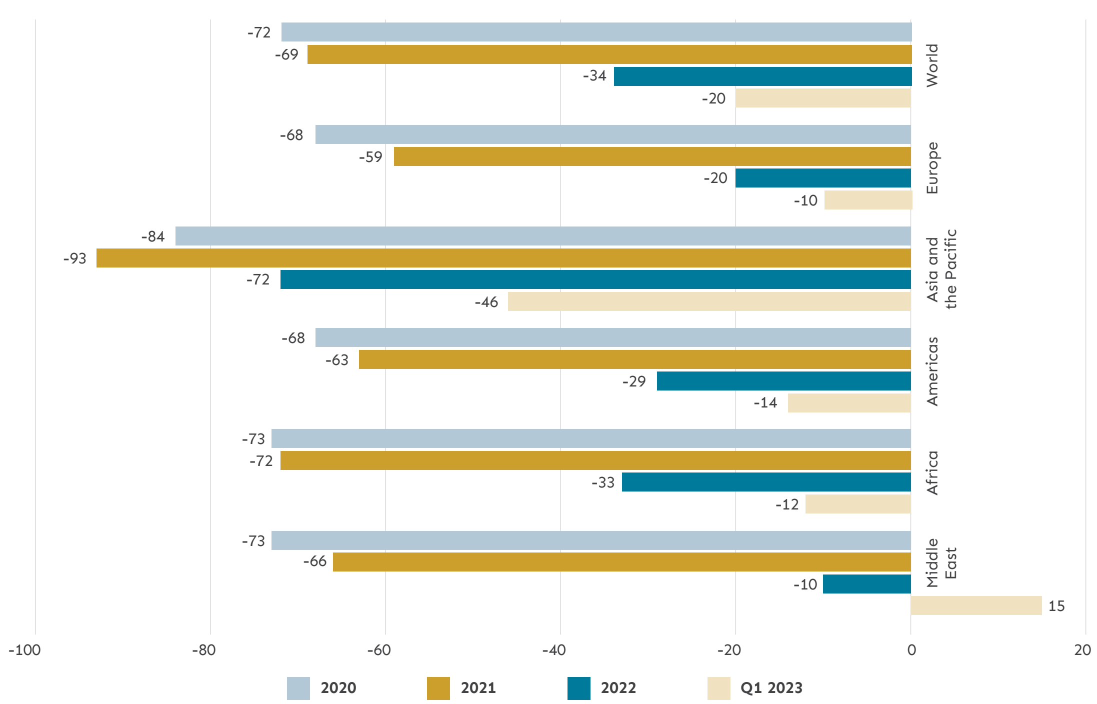
The Middle East has already attained 90 percent of the 2019 level and for the first quarter of 2023, it is the first region to recover totally its pre-pandemic numbers. The area played host to significant gatherings like Dubai Expo 2020 and the FIFA World Cup in Qatar, in addition to a heavily attended Hadj pilgrimage (re-opened to foreigners) in Saudi Arabia.

Africa recovered about 67 percent of its pre-pandemic visitors and this recovery reached 88 percent for the first quarter of 2023.

In several destinations, the rebound is fuelled by domestic tourism especially those with large domestic markets. For instance, in China, some 274 million domestic tourism trips were recorded during the Labour Day holidays, surpassing the 2019 level for the same holiday.

The challenges from 2022 are somewhat spilling into 2023 though in a more controlled way. The elevated food and jet fuel prices, higher operating costs for airlines and hospitality establishments and risks and uncertainty around Russia's war against Ukraine still remained and may weigh on the sustainability of the rebound.

**Figure 2: International tourist arrivals, performance against 2019 by region**




*Source: United Nations World Tourism Organisation (UNWTO)*





## Strong tourism spending recovery across many destinations 2.2.1

Solid rebound in international tourism receipts was recorded across most destinations and with higher growth rates than in arrivals in several cases. International tourism receipts reached USD 1 trillion in 2022, a growth of 50 percent in real terms versus 2021 and was mostly fuelled by the significant recovery in international tourist arrivals. Compared to 2019, international visitor spending reached 69 percent of pre-pandemic levels.

In fact, several destinations recorded tourism receipts above pre-pandemic levels in the first ten to twelve months of 2022. The increase in average spending per trip due to longer periods of stay, the willingness of travellers to spend more in their destinations, and higher travel costs partly due to inflation, were the different factors that contributed to this strong rebound.

Europe fared best with USD 550 billion receipts in 2022. This amount equates to 87 percent of pre-pandemic levels. Recovery to respective pre-pandemic levels was 75 percent for Africa, 70 percent for the Middle East and 68 percent for the Americas. With the prolonged sanitary measures in place, the recovery reached only 28 percent of the pre-pandemic levels in Asia.

**Table 7: Trend in international tourist arrivals and receipts, 2000 – 2022**

| YEAR | INTERNATIONAL TOURIST ARRIVALS | | INTERNATIONAL TOURISM RECEIPTS | |
|---|---|---|---|---|
| | 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% |
| **2019r** | 1,465 | 3.7% | 1,494 | 2.8% |
| **2020r (COVID-19 pandemic)** | 407 | -72.2% | 559 | -62.6% |
| **2021r** | 456 | 12.0% | 638 | 14.1% |
| **2022p** | 963 | 111.2% | 1,031 | 61.6% |

*Source: IMF*

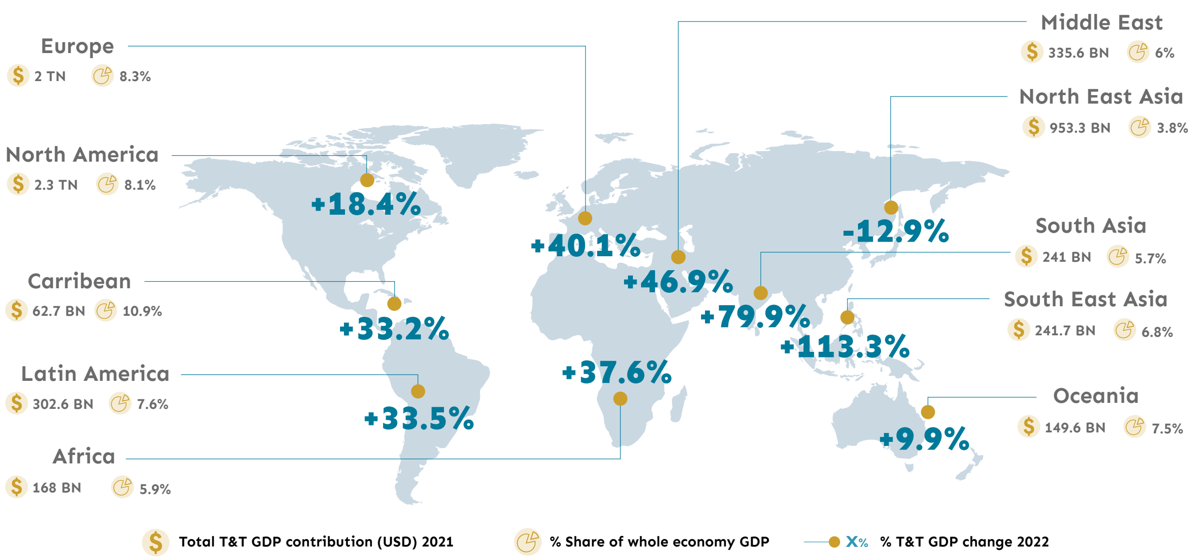
## Performance of travel and tourism by region 2.2.2

According to the World Travel and Tourism Council (WTTC), the Travel & Tourism sector used to account for one in every five new jobs and 10.4 percent of world GDP or some USD 10 trillion as total GDP contribution (including wider effects from investment, the supply chain and induced income impacts). This sector was employing some 334 million people in cities, islands and villages across the world. Also, before the words "lockdown" and "social distancing" were part of our vocabulary, the visitors were spending USD 1.86 trillion and the sector was producing 6.8 percent of global exports.

After the re-opening of most borders around the world, the sector reached USD 7.7 trillion in 2022 even if China was still mostly closed. Year-on-year, this represented a growth of 22 percent though it was still 23 percent behind 2019 level. By region in 2022, Travel and Tourism contributed USD 2.3 Tn or +18.4 percent yoy in North America followed by Europe with USD 2.0 Tn (+40.1 percent yoy) and North East Asia with USD 953.3 Bn (-12.9 percent yoy). With the easing of borders in South East Asia, the contribution of the sector leapfrogged by +113.3 percent compared to the previous year and reached USD 241.7 Bn.

As expected, Travel and Tourism has the highest share in total GDP in the Caribbean (10.9 percent) followed by Europe (8.3 percent) and North America (8.1 percent).

**Figure 3: Performance of travel and tourism by region, 2022**




*Source: WTTC*

In terms of employment, some 21.6 million new jobs were created in 2022 bringing the total to 295 million (including wider effects from investment, the supply chain and induced income impacts) or some nine percent of employment worldwide.

## 2022/2023 trends observed 2.2.3

A few overarching trends emerged in 2022 including the already observed shift towards online sources for travel inspiration. At the peak of the pandemic when face-to-face interactions were limited, the consumption of digital content and use of social media increased considerably resulting in a growing reliance on these tools. As such, many eager travellers find the immersive audio-visual experience of social media as a source of invaluable information. In fact, a recent Skyscanner survey showed that travel plans were inspired by social media content for around 50 percent of the respondents. Instagram was the most popular source of travel inspirations (cited by 40 percent of the participants), followed by Facebook and TikTok.

**Figure 4: Most popular source of travel ideas on social media**

40% 33% 25%

*Source: Skyscanner Horizons Report, Dec 2022*

The preference for traditional beach and city destinations is resurfacing with sales figures indicating that global revenue from sun and sea packages will likely reach around USD69 billion in 2022 or a significant 75 percent rise compared to 2021. Beach getaways accounted for 35 percent of the total worldwide offerings, a return to the same proportion they held back in 2019.

With the resurgence in the confidence of travellers in 2022, longer booking window is resurfacing. Based on a recent TripAdvisor survey, nearly 50 percent of respondents were planning trips three to six months before expected departure dates. This shift away from short lead time is also confirmed by ForwardKeys: in Europe, short flight booking windows (within two weeks of travel) accounted for 23 percent of all arrivals in 2022 compared to 30 percent in 2021. This proportion is even lower than the 2019 share of 27 percent.

## Rebound expected to continue into 2023 despite looming threats 2.2.4

According to the UNWTO's projection models for 2023, the number of international tourist arrivals this year could range between 80 percent to 95 percent of the levels observed before the pandemic.

Based on WTTC, in 2023, it is forecasted that the contribution of the Travel and Tourism sector will reach USD 9.5 Tn (only five percent short the 2019 level) or 9.2 percent of world GDP. Some 24 million new jobs will be created and the sector will be providing employment to some 320 million globally. In terms of spending, some USD 1.36 Tn is expected or 27 percent behind pre-pandemic level.

**Figure 5: World performance of the travel and tourism sector, 2019 and 2022-2023**

| | 2019 | | 2022 | | 2023 forecast | |
|---|---|---|---|---|---|---|
| TOTAL GDP CONTRIBUTION | 10 USD Tn | 10.4% As a % of world GDP | 7.7 (-23.0% vs 2019) USD Tn | 8.1% As a % of world GDP | 9.5 (-5.0% vs 2019) USD Tn | 9.2% As a % of world GDP |

| | 2019 | | 2022 | | 2023 forecast | |
|---|---|---|---|---|---|---|
| TOTAL TRAVEL & TOURISM JOBS | 334 Employment, Mn | 10.3% As a % of total emp | 295 (-11.7% vs 2019) Employment, Mn | 9.0% As a % of total emp | 320 (-4.2% vs 2019) Employment, Mn | 9.6% As a % of total emp |

*Source: WTTC*

The tourism sector in 2023 is influenced by variables such as the extent of potential economic slowdown, pent-up demand powered by the removal of the prolonged sanitary measures in the Asia-Pacific region, the developments related to the Russian offensive in Ukraine, other mounting geopolitical tensions and the sustained recovery of air connectivity, among various other factors. Inflation, another source of concern, is easing in most countries but remains high in many parts of the world.

However, as the unprecedented COVID-19 pandemic has left enduring memories, holidays, more than ever, have become an integral aspect of people's life. So much so that many would sacrifice other things rather than give up their holidays. For many, despite worries about an economic downturn on the horizon, **consumers refused to cut back on travel.**

# International travel by air and sea 2.3

## Air travel 2.3.1

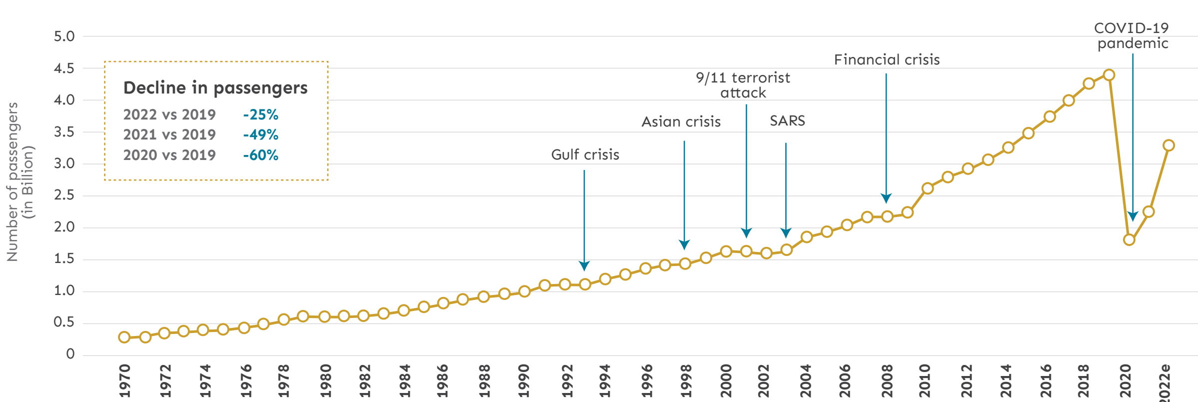
The number of air passengers carried in 2022 increased significantly by 47 percent compared to 2021 following the strong rebound on most international routes. The recovery stood at around 74 percent of pre-pandemic levels.

In terms of airlines' annual passenger revenues, keeping yield and exchange rates at 2019 levels, an estimated growth of 50 percent was observed by ICAO in 2022 compared to the previous year while revenue passenger kilometres increased by around 70 percent for the same period. The 2022 performance in terms of revenue was equivalent to 68 percent of 2019 levels.

In 2022, aircraft orders and deliveries by major manufacturers Airbus and Boeing grew by 53 percent and 20 percent respectively compared to the previous year. The number of orders in 2022 exceeded that in 2019, indicating a recovery in the demand for aircraft.

The strong momentum towards recovery in 2022 continued and based on IATA figures, both international seat capacity and passenger demand recovered by around 80 percent compared to 2019 levels through February 2023.

**Figure 6: World air passenger traffic evolution, 1970 – 2022**




*Source: WTTC*



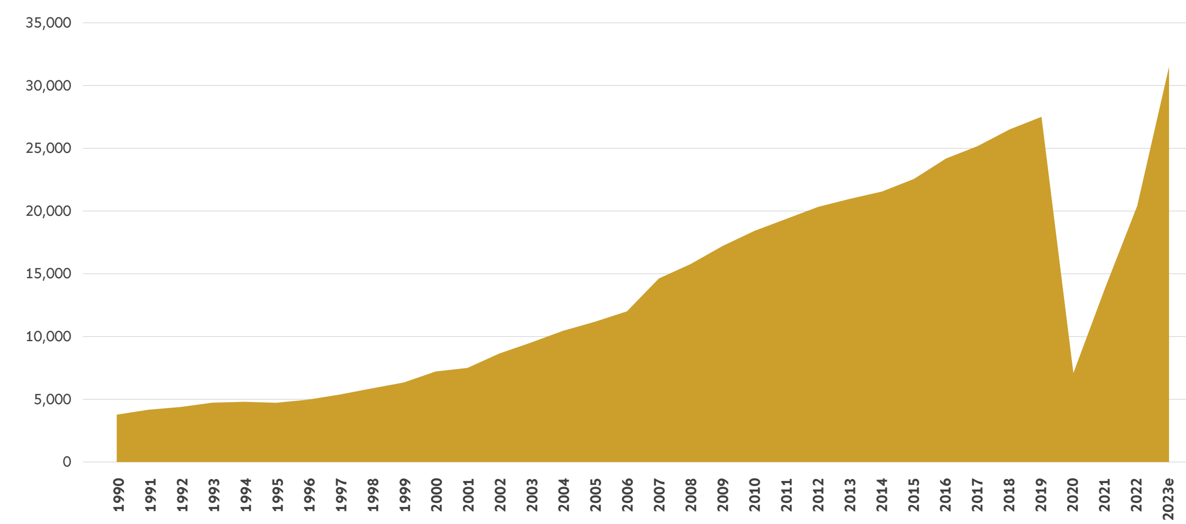


## Sea travel 2.3.2

Cruise shipping, a rapidly evolving segment of maritime transportation, witnessed a remarkable growth of over 60 percent in the last ten years. The sector saw a surge in passengers from some 17 million passengers worldwide in 2009 to a substantial 28 million in 2019. The industry was then severely struck by the pandemic, casting doubt on its potential for future recovery.

However, cruise booking has been slowly but steadily picking up after the COVID-19 pandemic left luxury liners high and dry. According to preliminary figures, the number of cruise passengers in 2022 reached 74 percent of the pre-pandemic levels and the rebound has raised hope of normalcy moving forward. Furthermore, major cruise lines are reporting over 80 percent occupancy levels and some are fast approaching the historic 100 percent or better occupancy than before the pandemic. However, prices have been heavily discounted and passengers were delaying bookings to secure the most favourable prices. These two factors are expected to continue to drive demand and for 2023, it is expected that the number of cruise passengers will surpass 2019 and will peak at 32 million.

**Figure 7: World cruise passenger evolution, 1990 - 2023**



*Source: Cruise Market Watch*

# 03

# INDUSTRY PERFORMANCE IN MAURITIUS 2022 - 2023



## Connectivity 3.1

Connectivity plays a pivotal role in the allure of island tourist destinations. A seamless network not only shrinks distances but also enhances accessibility, making a destination especially one like Mauritius that is located far from its main source markets, more attractive to travellers. In a world where time is precious, convenient air connections shorten journeys, making island getaways more feasible and appealing.

### Air connectivity 3.1.1

The Mauritius tourism industry with over 96 percent of its tourists (2019 figure) arriving by air is almost entirely dependent on air connectivity. During the FY 2022/23, the routes that were once again serviced included:

| AIRLINES | EMBARKATION POINT | MONTH |
|---|---|---|
| **Vistara (new)** | BOM (India) | **March 2022** |
| **Air Austral** | ZSE (Reunion) | **March 2022** |
| **Air Mauritius** | DEL (India) | **May 2022** |

| AIRLINES | EMBARKATION POINT | MONTH |
|---|---|---|
| Saudi A Airlines | **JED (Saudi Arabia)** | June 2023 |
| Air Mauritius | **KUL (Malaysia)** | November 2023 |
| Air Mauritius | **PER (Australia)** | November 2023 |
| Air Mauritius | **CPT (South Africa)** | December 2023 |

Since the full re-opening of our borders in October 2021, the number of airlines present has reached 21.

**Figure 8: Airlines with direct air connectivity with Mauritius, 2023**

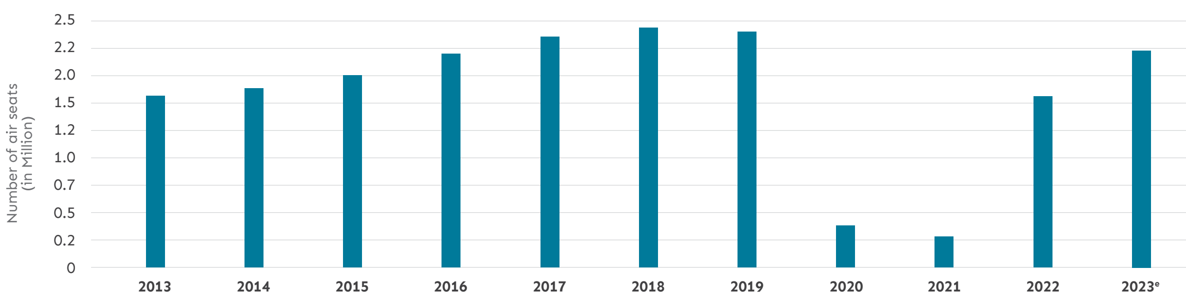

**AIRLINES PRESENT IN 2023**

AEROFLOT
AIR AUSTRAL
AIR BELGIUM
AIR FRANCE
AIR MAURITIUS
AIR SEYCHELLES
AUSTRIAN AIRLINES
BRITISH AIRWAYS
CONDOR
CORSAIR
EDELWEISS AA
EMIRATES
EVELOP - IBEROJET
EW DISCOVER
FLYSAFAIR
KENYA AIRWAYS
NEOS
SOUTH AFRICAN AIRWAYS
SAUDIA AIRLINES
TURKISH AIRLINES
VISTARA

*Sources: Mauritius Tourism Promotion Authority and Department of Civil Aviation*

Over time, air connectivity in Mauritius has witnessed steady growth, mirroring the sector's overall development. During the FY 2022/23, the recovery rate in terms of air seats available was 89 percent compared to 2019 (2.1 Mn v/s 2.3 Mn). For the year 2022, this recovery rate was 72.4 percent while for the first semester of 2023, it shoots up at 91.9 percent showing the steady rebound of the sector. In fact, in April and May 2023, the recovery rate was above 100 (102.1 and 106.3 percent respectively) – the recovery rate in terms of tourist arrivals during these two months followed the same trend (100.4 and 103.3 percent respectively).

**Figure 9: Number of air seats, 2013 – 2023**




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

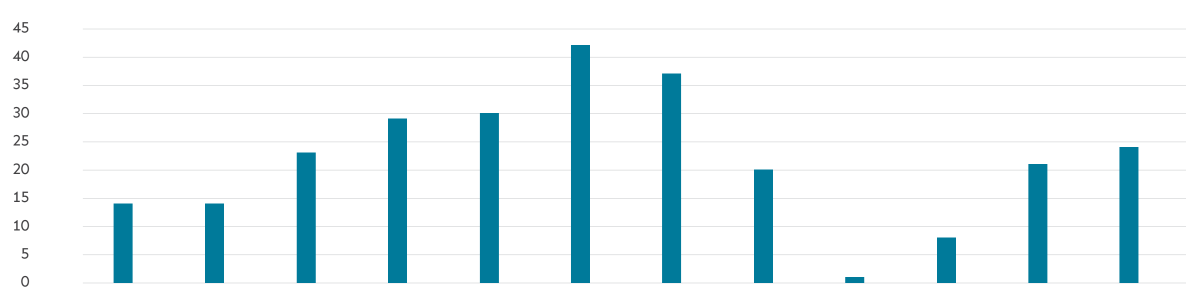
Air Mauritius accounted for 35.6 percent of total air seats available during FY 2022/23 followed by Emirates (20.2 percent), Air Austral (9.6 percent), Air France (5.7 percent) and Corsair (4.1 percent). As our main source market, 31.3 percent of seats were available on Europe (of which 52 percent from France). Seats available from main hubs (CDG, LHR, FRA, DXB and IST) totalled 44.0 percent of seats.

The average load factor of all airlines has oscillated between 74 percent and 77 percent between 2011 and 2019; in 2019, it reached 76 percent and in 2022, 72 percent. However, semester 1 of 2023 registered a load factor of 69 percent, three percentage point short of the rate for the same period in 2019.

## Sea connectivity 3.1.2

Cruise vessels are presently provided with berthing facilities in the 125-meter-long dedicated cruise jetty at Les Salines or the Multipurpose Terminal. For the cruise season 2023, 21 cruise vessel calls have been scheduled and 24 for that of 2024. During semester one of 2023, the country hosted 14 cruised ships.

**Figure 10: Number of cruise vessel calls, 2013 – 2024**




*Sources: Mauritius Ports Authority (MPA)*





**Table 8: Cruise timetable 2023**

| CRUISE VESSELS | EXPECTED TIME OF ARRIVAL AND DEPARTURE | | PAX CAPACITY |
|---|---|---|---|
| NIPPON MARU | Arr 05.01.2023 - 09:00 | Dep 08.01.2023 - 17:00 | 350 |
| MSC ORCHESTRA | Arr 05.01.2023 - 08:00 | Dep 05.01.2023 - 21:00 | 2550 |
| AIDAMAR (M) | Arr 18.01.2023 - 06:00 | Dep 19.01.2023 - 18:00 | 2050 |
| MS ARTANIA (M) | Arr 04.02.2023 - 08:00 | Dep 06.02.2023 - 18:00 | 1260 |
| COSTA DELIZIOSA | Arr 15.02.2023 - 07:00 | Dep 15.02.2023 - 18:00 | 2828 |
| CORALE GEOGRAPHER (M) | Arr 18.02.2023 - 08:00 | Dep 19.02.2023 - N/A | 120 |
| ZUIDERDAM (M) | Arr 02.03.2023 - 08:00 | Dep 02.03.2023 - 19:00 | 2272 |
| LE CHAMPLAIN | Arr 08.03.2023 - 08:00 | Dep 08.03.2023 - 19:00 | N/A |
| MSC SINFONIA | Arr 18.03.2023 - 09:00 | Dep 19.03.2023 - 19:00 | 2679 |
| LE BOUGAINVILLE | Arr 25.03.2023 - 08:00 | Dep 25.03.2023 - 19:00 | N/A |
| QUEEN MARY II | Arr 29.03.2023 - 08:00 | Dep 29.03.2023 - 18:00 | 2691 |
| SILVER SHADOW (M) | Arr 02.04.2023 - 08:00 | Dep 02.04.2023 - 18:00 | 392 |
| MS ISLAND SKY | Arr 24.04.2023 - 08:00 | Dep 24.04.2023 - 18:00 | 112 |
| MSC ORCHESTRA | Arr 25.04.2023 - 08:00 | Dep 25.04.2023 - 17:00 | 2550 |
| MS ISLAND SKY | Arr 11.05.2023 - 07:30 | Dep 11.05.2023 - 18:00 | 112 |
| MSC SPLENDIDA | Arr 17.11.2023 - 08:00 | Dep 18.11.2023 - 18:00 | 3900 |
| MS VASCO DA GAMMA (M) | Arr 18.11.2023 - 07:00 | Dep 18.11.2023 - 20:00 | 1258 |
| LE JACQUES CARTIER (M) | Arr 07.12.2023 - 08:00 | Dep 07.12.2023 - 19:00 | 184 |
| HEBRIDEAN SKY | Arr 19.12.2023 - 07:00 | Dep 19.12.2023 - 12:00 | N/A |
| LE JACQUES CARTIER | Arr 19.12.2023 - 08:00 | Dep 20.12.2023 - 19:00 | 184 |
| MSC SPLENDIDA (M) | Arr 31.12.2023 - 10:00 | Dep 02.01.2024 - 18:00 | 3900 |

*Source: MPA*

Table 9: Cruise timetable 2024

| CRUISE VESSELS | EXPECTED TIME OF ARRIVAL & DEPARTURE | |
|---|---|---|
| HEBRIDEAN SKY | Arr 05.01.2024 - 09:00 | Dep 05.01.2024 - 18:00 |
| THE ZENITH (M) | Arr 07.01.2024 - 07:00 | Dep 07.01.2024 - 18:30 |
| MS BOLETTE(M) | Arr 08.01.2024 - 08:00 | Dep 10.01.2024 - 18:00 |
| AIDABLU | Arr 08.01.2024 - 08:00 | Dep 10.01.2024 - 18:00 |
| AIDASOL | Arr 19.01.2024 - 06:00 | Dep 20.01.2024 - 18.00 |
| AIDABLU | Arr 22.01.2024 - 08:00 | Dep 24.01.2024 - 18:00 |
| HEBRIDEAN SKY | Arr 22.01.2024 - 09:00 | Dep 22.01.2024 - 18:00 |
| AIDABLU | Arr 05.02.2024 - 08:00 | Dep 07.02.2024 - 18:00 |
| QUEEN MARY II | Arr 07.02.2024 - 06:30 | Dep 07.02.2024 - 18:00 |
| MSC POESIA(M) | Arr 09.02.2024 - 08:00 | Dep 09.02.2024 - 18:00 |
| MS HAMBURG (M) | Arr 12.02.2024 - 08:00 | Dep 12.02.2024 - 18:30 |
| MS RENAISSANCE (M) | Arr 13.02.2024 - 07:00 | Dep 14.02.2024 - 17:00 |
| AIDABLU | Arr 19.02.2024 - 08:00 | Dep 21.02.2024 - 18:00 |
| MV PACIFIC WORLD (M) | Arr 09.03.2024 - 07:00 | Dep 09.03.2024 - 19:00 |
| QUEEN VICTORIA | Arr 03.04.2024 - 06:30 | Dep 03.04.2024 - 18:00 |
| AIDABLU | Arr 04.04.2024 - 08:00 | Dep 06.04.2024 - 18:00 |
| MSC SPLENDIDA | Arr 11.04.2024 - 07:00 | Dep 11.04.2024 - 12:00 |
| AMADEA | Arr 03.11.2024 - N/A | Dep 05.11.2024 - N/A |
| MSC SPLENDIDA | Arr 19.11.2024 - 07:00 | Dep 20.11.2024 - 18:00 |
| HEBRIDEAN SKY | Arr 02.12.2024 - 09:00 | Dep 03.12.2024 - 18:00 |
| HEBRIDEAN SKY | Arr 20.12.2024 - 09:00 | Dep 20.12.2024 - 18:00 |
| MV NORWEGIAN SKY | Arr 20.12.2024 - N/A | Dep 21.12 .2024 - N/A |
| PACIFIC WORLD | Arr 28.12.2024 - 07:00 | Dep 28.12.2024 - 18:00 |
| MSC SPLENDIDA | Arr 31.12.2024 - 10:00 | Dep 02.01.2025 - 18:00 |

*Source: MPA*

The 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. The new terminal is scheduled to be ready by end 2023.

## Airport activity 3.1.3

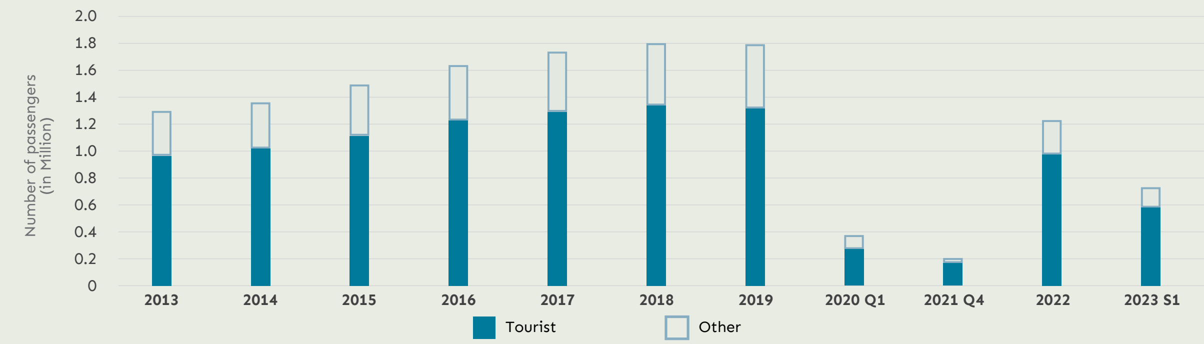
The number of international air passengers reached 1.3 million in 2022 representing 68.9 percent of the pre-pandemic level. The recovery rate climbed to 88.3 percent for semester one of 2023 with 746K passengers compared to 846K in 2019. The air seat per passenger ratio between 2011 and 2019 remained between 1.30 and 1.35 seat. It climbed to 1.39 in 2022 and further soared to 1.45 seats for first semester of 2023.

On average, tourists represent 73-75 percent of air passengers. In 2022 and the first semester of 2023, the proportion of tourist arriving by air among the passengers were higher at 79 percent.





Figure 11: Passenger arrivals by air by type, 2013 – 2023




*Sources: MTPA, airlines and Statistics Mauritius*

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 six to seven percent of total passenger arrivals by air during the pre-COVID era. In 2022, this proportion stood at 4.2 percent and for Semester 1 of 2023, direct transit stood at 4.8 percent.

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. In 2022, the number of excursionists (by air) was only around 3,700 and reached nearly 4,000 in semester one of 2023.

Table 10: Direct transits and excursionists, 2018 - 2023

| | | | | | | SEMESTER 1 | |
|---|---|---|---|---|---|---|---|
| DETAILS | 2018 | 2019 | 2020 | 2021 | 2022 | 2019 | 2023 |
| Direct transits | 130,514 | 132,660 | 28,882 | 6,657 | 58,028 | 56,008 | 39,448 |
| Excursionists | 21,650 | 20,670 | 5,243 | 500 | 3,706 | 10,526 | 3,936 |

*Source: Statistics Mauritius*

## Sea port activity 3.1.4

In 2019, a peak of nearly 84,000 sea passengers was reached of which 94 percent emanated from the cruise segment. In 2022, only 13,216 sea passengers were reported and this figure reached 24,261 for the first six months of 2023 representing less than 50 percent of the level for the same period in 2019. The majority of these sea passengers were cruise travellers (21,986 of which 5,280 were tourists, 9,204 were excursionists and 7,473 were crew members).

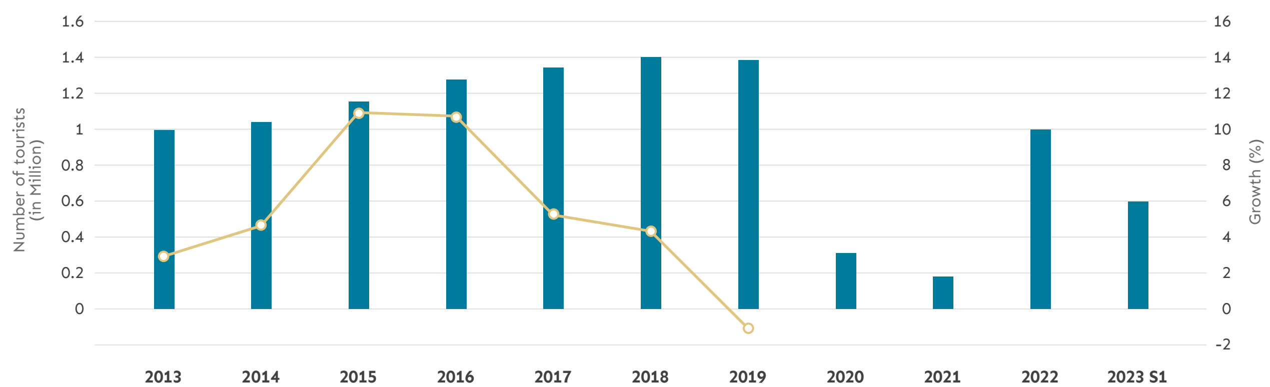
# Tourism in figures 3.2

Over 97 percent of tourists use the air mode of transport to Mauritius. This proportion peaked at 99 percent in 2022 and semester one of 2023 as the rebound of the cruise industry is slower. 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).

## Overall tourist arrivals and arrivals by month 3.2.1

The number of tourist arrivals in 2022 was nearly one million (997,290) or a recovery rate of 72.1% of the pre-pandemic level. During the first semester of 2023, Mauritius welcomed nearly 600K tourists representing a recovery rate of 91.8 percent compared to 2019. It is noteworthy to highlight that in April and May 2023, the number of tourist arrivals have surpassed that of 2019 for the same months and recovery rate was above 90 percent in March and July.

**Figure 12: Trend in tourist arrivals and growth in Mauritius, 2013 – 2023**

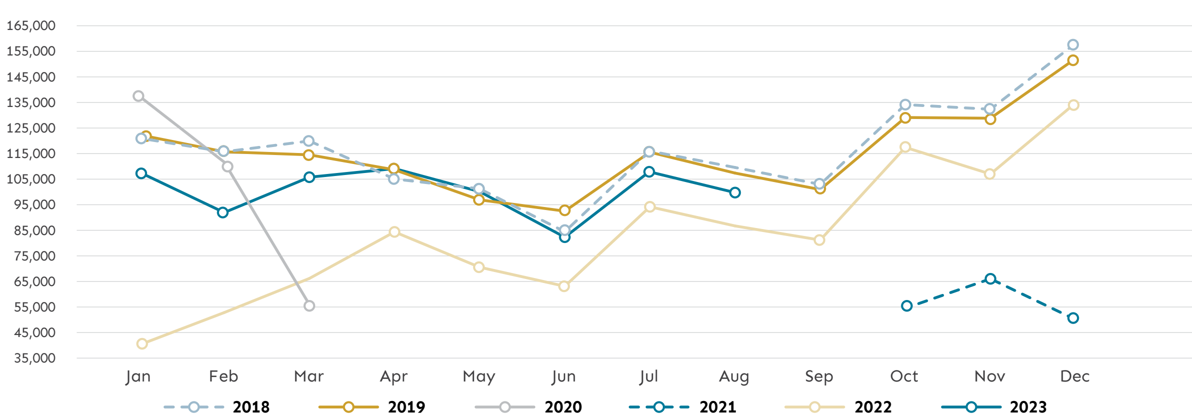



| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 S1 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Tourist arrivals | 993,106 | 1,038,968 | 1,151,723 | 1,275,227 | 1,341,860 | 1,399,408 | 1,383,488 | 308,980 | 179,780 | 997,290 | 596,466 |
| Growth | 2.9% | 4.6% | 10.9% | 10.7% | 5.2% | 4.3% | -1.1% | -77.7% | -41.8% | 454.7% | 58.4% |

*Source: Statistics Mauritius*

Seasonal variations play a significant role in Mauritius, where the highest influx of tourist arrivals occurs during the peak month of December, roughly double the number of arrivals compared to the "lowest" month of June. During the past few years, the ratio of arrivals between these two months has however followed a downward trend and since 2017, the rate has consistently remained below 2.0. In 2019, it reached a satisfactory rate of 1.65.

**Figure 13: Tourist arrivals by month, 2018 - 2023**




*Source: Statistics Mauritius*





## Tourist arrivals by port of last embarkation 3.2.2

An analysis of semester one of 2023 figures on air seats, passengers, tourist arrivals by last embarkation point gave the following insights:

- From France - there were 174,608 air seats available bringing 139,480 passengers of which 87 percent were tourists. Of these tourists, 71 percent were residing in France and four percent in Germany;
- From UK - there were 66,762 air seats available bringing 54,402 passengers of which 77 percent were tourists. Of these tourists, 90 percent were residing in UK and two percent in Canada;
- From Germany - there were 44,495 air seats available bringing 36,858 passengers of which 96 percent were tourists. Of these tourists, 73 percent were residing in Germany and nine percent in France;
- From India - there were 60,323 air seats available bringing 41,899 passengers of which 55 percent were tourists. Of these tourists, 95 percent were residing in India.

From the below hubs, the 2023 (semester one) figures were as follows:

- From Dubai - there were 209,036 air seats available and 140,910 passengers of which 72 percent were tourists. Of these tourists, 16 percent were residing in UK, 10 percent in France, 10 percent in Germany, seven percent in UAE;
- From Turkey - there were 37,540 air seats available and 31,438 passengers of which 84 percent were tourists. Of these tourists, 14 percent were residing in Germany, 9 percent in Turkey and 9 percent in France;
- From Saudi Arabia - there were 22,820 air seats available and 11,806 passengers of which 62 percent were tourists. Of these tourists, 72 percent were residing in Saudi Arabia, 5 percent in Indonesia and 5 percent in the Philippines.

**Table 11: Seats, Passengers and tourist arrivals by air by selected country of last embarkation, semester 1 of 2023**

| COUNTRY OF LAST EMBARKATION | SEATS | PASSENGERS | TOURISTS AS A % OF PASSENGERS | *OF WHICH TOURISTS FROM TOP MAIN COUNTRY OF RESIDENCE* | | | |
|---|---|---|---|---|---|---|---|
| **France** | 174,608 | 139,480 | 86.7% | *France 70.8%* | *Germany 4.2%* | *UK 3.1%* | *Poland 2.9%* |
| **UK** | 66,762 | 54,402 | 77.3% | *UK 90.3%* | *Canada 1.8%* | *France 1.4%* | |
| **Germany** | 44,495 | 36,858 | 95.6% | *Germany 73.0%* | *France 9.4%* | *Switzerland 2.3%* | |
| **India** | 60,323 | 41,899 | 54.9% | *India 94.5%* | *USA 0.7%* | | |
| **Dubai** | 209,036 | 140,910 | 72.2% | *UK 15.8%* | *France 10.2%* | *Germany 9.9%* | *UAE 7.4%* |
| **Turkey** | 37,540 | 31,438 | 84.0% | *Germany 13.9%* | *Turkey 9.1%* | *France 8.7%* | *Czech Rep. 6.6%* |
| **Saudi Arabia** | 22,820 | 11,806 | 61.7% | *S. Arabia 72.3%* | *Indonesia 5.2%* | *Philippines 5.0%* | |

*Sources: MTPA and Statistics Mauritius*

## Tourist arrivals by markets

3.2.3

France is by far our main source market and has ranked first since 1993 when it has overtaken Reunion. The latter, together with UK with the exception of a few years, has remained in the top three. Other important markets include South Africa and Germany while the share of Italy has dropped over the years. The share of India has hovered around five percent while China reached a peak at eight percent in 2015. The market share of Switzerland has remained around two percent over the years.

**Figure 14: Trend in the market share of the top eight markets, 2007, 2015 and semester one of 2023**

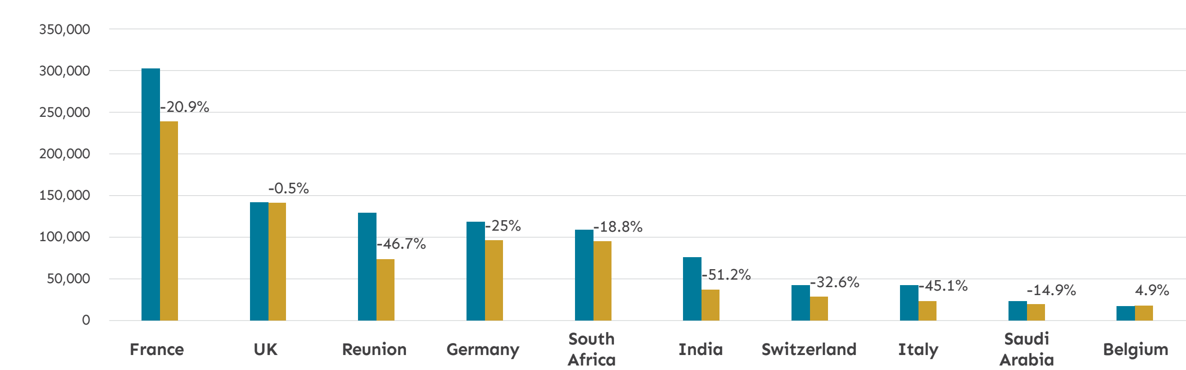
| 2007 | France | UK | Reunion | South Africa | Italy | Germany | India | Australia | Other |
|---|---|---|---|---|---|---|---|---|---|
| | 29% | 13% | 11% | 10% | 8% | 8% | 5% | 2% | 14% |

| 2015 | France | Reunion | UK | South Africa | China | Germany | India | Switzerland | Other |
|---|---|---|---|---|---|---|---|---|---|
| | 22% | 12% | 11% | 9% | 8% | 7 | 6% | 3 | 22% |

| S12023 | France | UK | Reunion | Germany | South Africa | India | Switzerland | Italy | Other |
|---|---|---|---|---|---|---|---|---|---|
| | 25% | 11% | 10% | 9% | 8% | 5% | 2% | 2% | 28% |

Compared to the pre-pandemic level, France has lagged behind by 20.9 percent in 2022. This rate was -25.0 percent for Germany, -18.8 percent for South Africa and -46.7 percent for Reunion. Among the top 10 markets, only the UK was mostly at par with the 2019 level.

**Figure 15: Tourist arrivals from our top 10 markets and recovery rate 2019 and 2022**




| | France | UK | Reunion | Germany | South Africa | India | Switzerland | Italy | Saudi Arabia | Belgium |
|---|---|---|---|---|---|---|---|---|---|---|
| 2019 | 302,038 | 141,520 | 137,570 | 129,100 | 118,556 | 75,673 | 42,045 | 41,991 | 22,788 | 16,959 |
| 2022 | 238,864 | 140,847 | 73,336 | 96,767 | 96,316 | 36,956 | 28,350 | 23,035 | 19,388 | 17,791 |

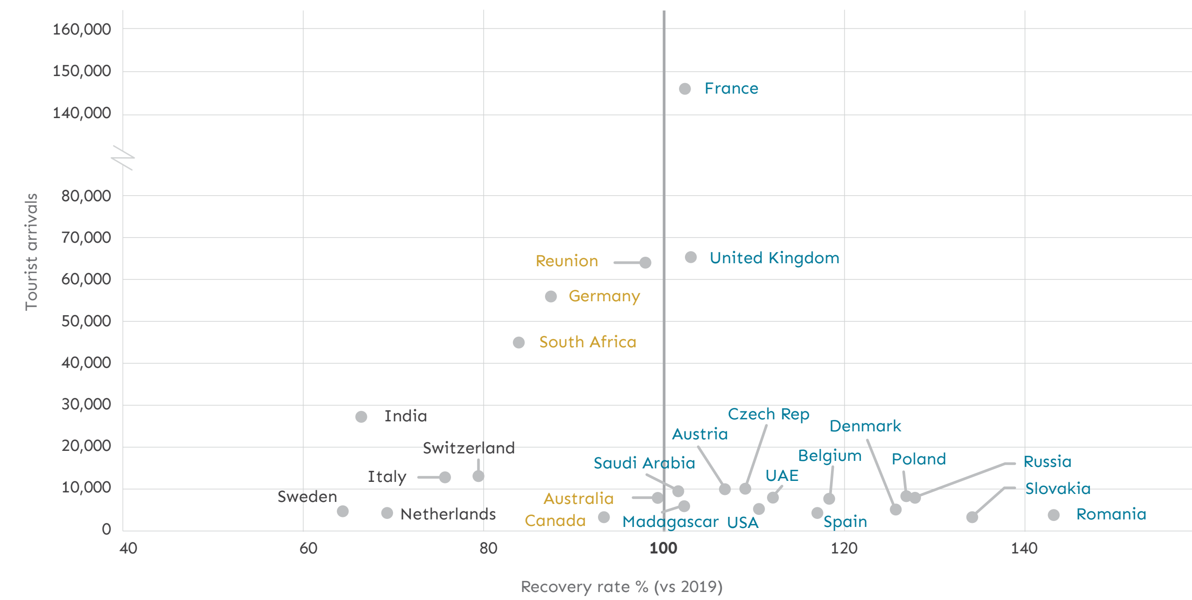
*Source: Statistics Mauritius*

For the first semester of 2023, among the Top 25 markets, many have already recovered and have even surpassed the level in 2019. These include France (102 percent), UK (103 percent), Czech Republic (109 percent), Austria (107 percent), Saudi Arabia (102 percent) and Russia (128 percent). Source markets with a recovery rate between 80 and 100 percent include Reunion (98 percent), Germany (87 percent) and South Africa (84 percent). Likewise, other major markets with a recovery rate between 60 and 80 percent include India (67 percent), Switzerland (79 percent), Italy (75 percent), Sweden (64 percent) and Netherlands (69 percent).





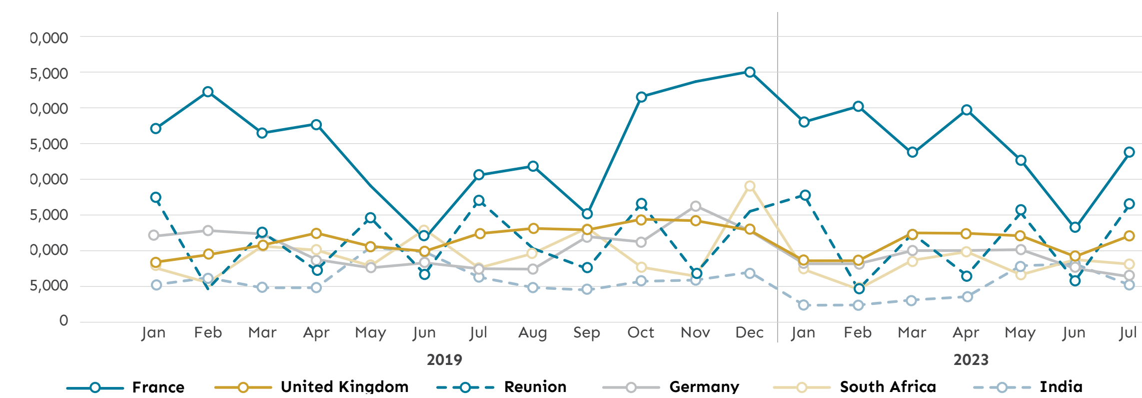
**Figure 16: Tourist arrivals and recovery rate of Top 25 markets for Semester 1 of 2023 vs 2019**




*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 17: Top 6 markets - tourist arrivals by month, 2019 and 2023**




*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; and
- 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 (at the time of writing this report, the survey results for semester one of 2023 were not yet available). 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 bolsters an impressive 32-34 percent **repeat rate** and the behaviour of repeat tourists is different from that 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. These two proportions stood at 95.1 percent and 2.7 percent respectively. 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.

2022 has somewhat confirmed the longer average stay trend observed in the post pandemic travel revenge era at 11.8 nights. For the first semester of 2023, this trend is maintained, albeit lower than in 2022, at 11.4 nights vs 10.6 in 2019. By selected source markets, the average stay during the first semester of 2023 was 12.2 nights vs 11.7 in 2019 for the same period for tourists from France, 11.9 nights vs 11.5 respectively for tourists from UK and respectively, 12.2 nights vs 10.1 for tourists from our third top source market, Germany.

Tourist nights totalled 11.4 million in 2022 compared to 14.5 million in 2019. For the first semester of 2023, it amounted to 7.09 million compared to 7.15 million for the same period in 2019 representing a recovery rate of 99.2 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



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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).

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 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 (MUR205 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.

**Table 12: Per capita per day expenditure by type and by category of tourists, 2017**

| | | | ACCOMMODATION | | 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*

Some key figures that illustrate the interplay between connectivity, tourism, and tourist's behaviour can be summarised below (based on the figures for semester 1 of 2023).

**Figure 18: Key figures illustrating the interplay between connectivity, tourism and tourist's behaviour**

**CONNECTIVITY (SEMESTER 1 OF 2023)**

| | |
|---|---|
| Total seats | 1,085,262 |
| Load factor | 72.9% |
| Total passengers by air | 791,022 |
| Total international arrivals by air | 828,977 |
| *Tourists by air* | 589,305 |
| *Direct transits* | 39,448 |
| *Excursionists* | 3,936 |
| *Mauritian residents* | 148,170 |
| *Other (incl crew)* | 48,118 |
| Total passengers by sea | 24,261 |

1,000 AIR SEATS

729 PASSENGERS

543 TOURISTS

137 RESIDENTS

36 DIRECT TRANSITS

4 EXCURSIONISTS

9 OTHERS

| TOP 8 SOURCE MARKETS (% OF TOTAL) | |
|---|---|
| France | 24.9 |
| United Kingdom | 10.7 |
| Reunion | 10.6 |
| Germany | 8.8 |
| South Africa | 7.7 |
| India | 4.6 |
| Switzerland | 2.4 |
| Italy | 2.2 |
| TOTAL TOURIST NIGHTS | 7,089,989 |
| AVERAGE LENGTH OF STAY | 11.4 nights |

**TOURIST PROFILE BASED ON SOT 2018**

| Indicators | Hotel tourists | Non-hotel tourists | All tourists |
|---|---|---|---|
| Accommodation facilities used | **Hotel:** 78% | **Non-Hotel:** 22% (Tourist Residence: 11% \| VFR: 5% Guest Houses: 5% \| Others: 1%) | 100% |
| Main purpose of visit | Holiday: 78.0<br>Honeymoon: 16.2 | Holiday: 84.1<br>VFR: 5.9 | Holiday: 13.1<br>Honeymoon: 16.2 |
| Average party size | 2.2 | 2.0 | 2.1 |
| Average stay (nights) | 9.0 | 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 a few 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.





## Mauritius and directly competing locations 3.2.5

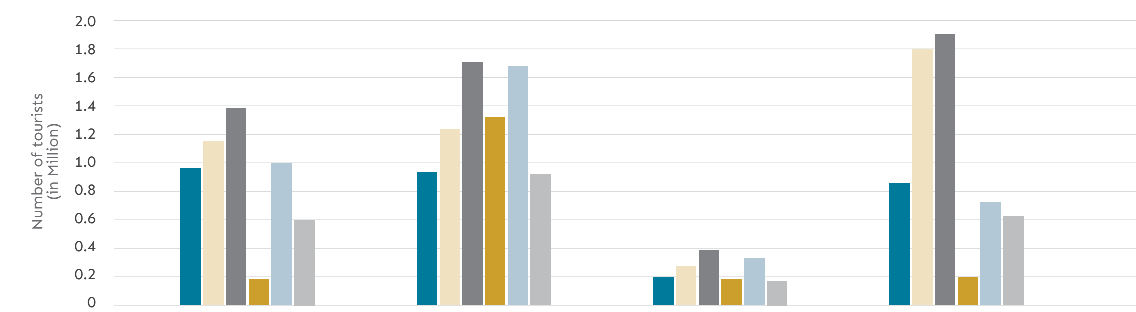
Having been closed for only a few months in 2020, Maldives have rebounded at an accelerated rate and in 2022, the recovery rate was 98.4 percent the pre-pandemic level. For the first semester of 2023, the number of tourist arrivals is above that in 2019 for the same period. For Seychelles, these two rates were 86.4 percent and 91.9 percent respectively compared to 72.1 percent and 91.8 percent for Mauritius.

The recovery in Sri Lanka has been more laborious as the political unrest in 2022 has plagued the early seeds of recovery and the recovery rate in 2022 was 30.9 percent and 53.7 percent for the first semester of 2023.

**Figure 19: Recovery rate, competing destinations vs 2019**

| | Mauritius | Maldives | Seychelles | Sri Lanka |
|---|---|---|---|---|
| 2021 | 13.0% | 77.6% | 47.6% | 8.3% |
| 2022 | 72.1% | 98.4% | 86.4% | 30.9% |
| 2023 S1 | 91.8% | 106.7% | 91.9% | 53.7% |

**Figure 20: Tourist arrivals in Mauritius, Maldives, Seychelles and Sri Lanka, 2011, 2015, 2019, 2021, 2022 and 2023 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 | 997,290 | 1,675,294 | 332,068 | 719,978 |
| 2023 S1 | 596,466 | 920,156 | 172,045 | 624,874 |

*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 especially for a major source market, China where the strict zero-COVID policy has been eased only as from late 2022. As from April 2023, Maldives has welcomed some 15K Chinese tourists on a monthly basis and this figure has doubled in July 2023. At the other end, despite the invasion in Ukraine, Russia has become an important source market for Maldives, Seychelles and Sri Lanka. In Mauritius, Reunion is fast catching up on UK and this market is further boosted with the Maurice Sans Passeport initiative that has been re-introduced since September 2022 for an initial period of nine months and has then been extended till June 2024.

**Table 13: Top Five Markets in Mauritius, Maldives, Seychelles and Sri Lanka, Semester 1 of 2019 and 2022**

| TOP 5 MARKETS, CUMULATIVE JANUARY TO JUNE 2019 & 2023 | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| MAURITIUS | | | | MALDIVES | | | | SEYCHELLES | | | | SRI LANKA | | | |
| 2019 | | 2023 | | 2019 | | 2023 | | 2019 | | 2023 | | 2019 | | 2023 | |
| Markets | Share | Markets | Share | Markets | Share | Markets | Share | Markets | Share | Markets | Share | Markets | Share | Markets | Share |
| France | 22.2% | France | 24.7% | China | 16.3% | India | 11.9% | Germany | 19.0% | Germany | 13.2% | India | 13.5% | India | 18.6% |
| Reunion | 9.8% | UK | 10.6% | India | 9.5% | Russia | 11.7% | France | 12.0% | France | 12.8% | UK | 10.1% | Russia | 17.6% |
| Germany | 9.5% | Reunion | 10.5% | Italy | 8.7% | UK | 8.7% | UK | 7.5% | Russia | 11.6% | China | 8.4% | UK | 8.1% |
| UK | 9.5% | Germany | 9.1% | Germany | 8.0% | Germany | 7.1% | Italy | 6.7% | UK | 5.6% | Germany | 7.1% | Germany | 7.2% |
| RSA | 8.4% | RSA | 7.7% | UK | 7.5% | Italy | 7.0% | UAE | 6.5% | Italy | 5.4% | France | 4.8% | France | 4.4% |

*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 14: Selected tourism-related indicators in competing island destinations in the region, 2018 – 2022**

| INDICATORS | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|
| **TOURIST ARRIVALS** | | | | | |
| Mauritius | 1,399,408 | 1,383,488 | 308,980 | 179,780 | 997,290 |
| Maldives | 1,484,274 | 1,702,887 | 555,494 | 1,321,937 | 1,675,294 |
| Seychelles | 361,844 | 384,204 | 114,858 | 182,849 | 332,068 |
| Sri Lanka | 2,333,796 | 1,903,702 | 507,704 | 194,495 | 719,978 |
| **ANNUAL GROWTH RATE IN TOURIST ARRIVALS** | | | | | |
| Mauritius | 4.3% | -1.1% | -77.7% | -41.8% | 454.7% |
| Maldives | 6.8% | 14.7% | -67.4% | 138.0% | 26.7% |
| Seychelles | 3.4% | 6.2% | -70.1% | 59.2% | 81.6% |
| Sri Lanka | 10.3% | -18.4% | -73.3% | -61.7% | 270.2% |
| **AVERAGE ROOM[1] OPERATIONAL CAPACITY** | | | | | |
| Mauritius | 13,523 | 14,108 | 13,865 | 13,801 | 13,017 |
| Maldives (beds) - registered | 41,887 | 47,274 | 21,446 | 48,960 | 57,254 |
| *Of which: Resorts/Marinas* | *29,400* | *33,440* | *21,446* | *36,320* | *39,797* |
| Seychelles | 2,648 | 2,796 | 1,677 | 2,887 | 2,990 |
| Sri Lanka (graded only) | 24,757 | 24,831 | 25,407 | 25,958 | 25,597 |
| **AVERAGE ROOM[1] OCCUPANCY RATE (%)** | | | | | |
| Mauritius | 75 | 73 | 24 | 21 | 62 |
| Maldives (beds) - registered | 61 | 62 | 62 | 26 | 56 |
| *Of which: Resorts/Marinas* | *75* | *74* | *29* | *65* | *56* |
| Seychelles | 74 | 73 | 46 | 40 | 64 |
| Sri Lanka (graded only) | 73 | 57 | 15 | 19 | 30 |
| **AVERAGE LENGTH OF STAY (NIGHTS)** | | | | | |
| Mauritius | 10.4 | 10.6 | 12.6 | 14.7 | 11.8 |
| Maldives | 6.4 | 6.3 | 18.5 | 8.8 | 8.0 |
| Seychelles | 10.1 | 9.9 | 8.8 | 9.8 | 9.9 |
| Sri Lanka | 10.8 | 10.4 | 8.5 | 15.1 | 9.3 |

*1 For Mauritius: Beds in Hotels only at end Dec; For Maldives: Beds in Resorts only; For Seychelles: Beds in hotels only; For Sri Lanka: Beds in graded establishments only.*

*Sources: Ministry of Tourism, Arts and Culture, Republic of Maldives; National Bureau of Statistics, Republic of Seychelles; Sri Lanka Tourism Development Authority; Statistics Mauritius.*





# Performance of tourism operators 3.3

## Inventory of tourist accommodation facilities 3.3.1

At end June 2023, the Tourism Authority had issued/renewed a total of 1,176 Tourism Accommodation Certificates (or Tourism Enterprise Licences – Accommodation) as follows:

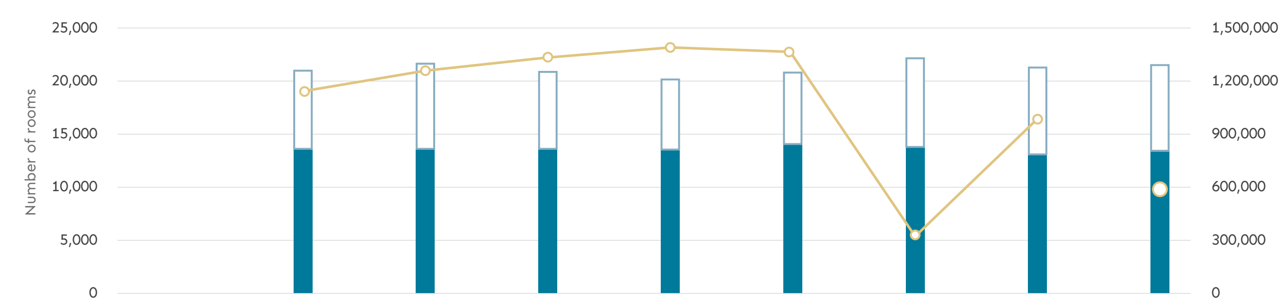
**Table 15: Accommodation facilities with operational licence, June 2022 and 2023**

| | JUNE 2022 | | JUNE 2023 | |
|---|---|---|---|---|
| TYPE OF FACILITY | NO. | ROOMS | NO. | ROOMS |
| Hotel | 111 | 13,740 | 108 | 13,377 |
| Guest House | 218 | 2,747 | 216 | 2,734 |
| Tourist Residence | 847 | 5,577 | 847 | 5,607 |
| Domaine | 5 | 16 | 5 | 16 |
| **Total** | **1,181** | **22,080** | **1,176** | **21,734** |

*Sources: Statistics Mauritius and Tourism Authority*

At end-June 2023, there were 101 operational hotels (12,426 rooms), seven were temporarily closed for renovation but had an operational license from the Tourism Authority (951 rooms), while two hotels were completely pulled down for reconstruction (opening scheduled Q4 of 2024). There were active licenses for 216 guest houses (2,734 rooms), 847 tourist residences (5,607 rooms) and five domaines (16 rooms). In all there were over 21,700 operational active rooms of which 62 percent were hotel rooms.

**Figure 21: Accommodation and tourist arrivals, 2015 – 2023 (excluding 2021)**




| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2022 | 2023 S1 |
|---|---|---|---|---|---|---|---|---|
| Non hotel rooms | 7,480 | 8,288 | 7,535 | 6,847 | 6,938 | 8,498 | 8,340 | 8,357 |
| Hotel rooms | 13,617 | 13,547 | 13,511 | 13,523 | 14,108 | 13,865 | 13,017 | 13,377 |
| Tourist arrivals | 1,151,252 | 1,275,227 | 1,341,860 | 1,399,408 | 1,383,488 | 308,980 | 997,290 | 596,466 |

*Sources: Statistics Mauritius and Mauritius Tourism Authority*

At the time of writing, Airbnb displayed Mauritius accommodation listings of over 1,000 "stays" for some 270 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.

It should be highlighted that accommodation grading is applicable to hotels only and based on the star-ratings by the Tourism Authority at June 2023, 44 percent of rooms were in the 5-Star and 5-Star Luxury category and 39 percent in the 4-Star and 4-Star Superior categories.

**Table 16: Number of hotels and rooms by star category, June 2023**

| STAR CATEGORY | HOTELS | ROOMS | |
|---|---|---|---|
| | | NO. | SHARE |
| 5 Star Luxury | 9 | 1,061 | 8% |
| 5 Star | 28 | 4,790 | 36% |
| 4 Star Superior | 7 | 1,489 | 11% |
| 4 Star | 24 | 3,717 | 28% |
| 3 Star Superior | 12 | 920 | 7% |
| 3 Star | 17 | 982 | 7% |
| 2 Star | 9 | 331 | 2% |
| In progress/new | 2 | 87 | 1% |
| **Total** | **108** | **13,377** | **100%** |

*Sources: Statistics Mauritius and 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.

Based on table 17 and using the official average hotel room occupancy level in 2018, one can derive that hotels capture around 68 percent of tourist nights. This proportion is supported by the tourist nights in hotels vs non-hotels results of the 2018 SIT (67.5 percent of tourist nights in hotels reported among those surveyed). 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 as well as unlicenced operators.

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

**Table 17: 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*

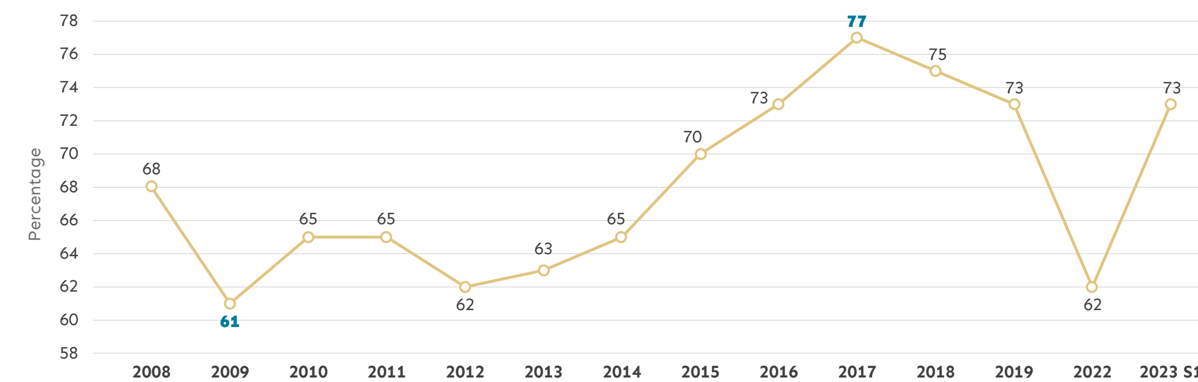




### HOTEL PERFORMANCE 3.3.2.1

The rebound in tourist arrivals is bringing healthy results for hotels after abysmal performances in 2020 and 2021. In 2022, a satisfactory 62 percent in room occupancy was reached – level that is slightly above the 61 percent back in 2009, year impacted by the financial crisis. A healthy 73 percent was achieved in semester one of 2023 which is four percent point higher than the rate achieved for the same period in 2019.

**Figure 22: Average hotel room occupancy rate, 2008 – 2023**

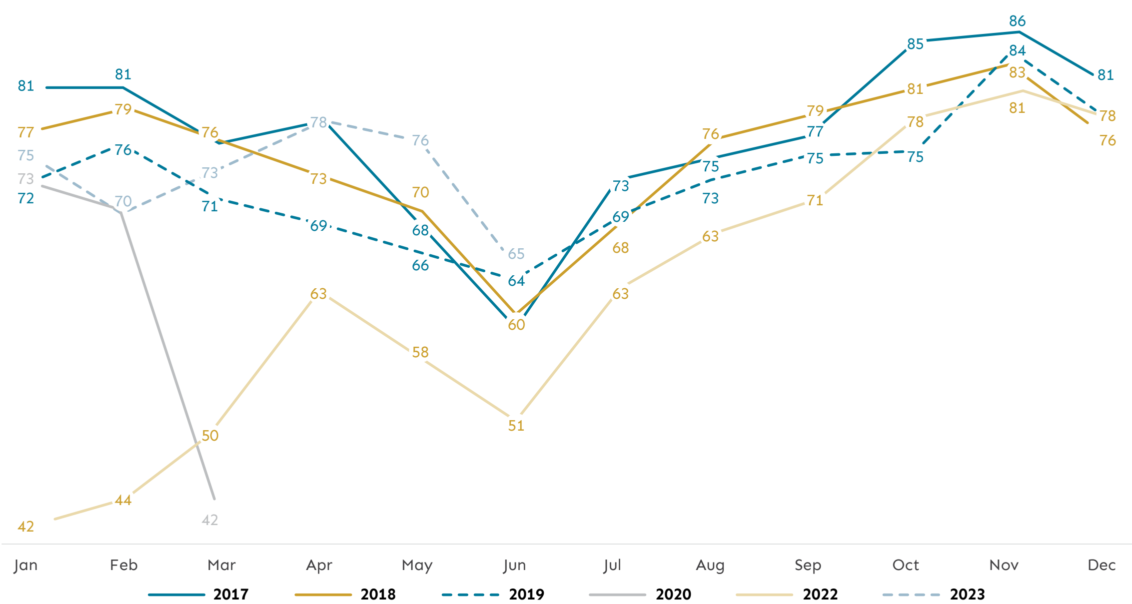



*Source: Statistics Mauritius*

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. The promotion of Mauritius as an all-year round destination has, during the last three years (pre-COVID), contributed to the substantial push upwards for the traditional lowest monthly occupancy rate, with a peak of 64 percent reached in June 2019.

As the revenge travelling phenomenon lingers, coupled with longer average lengths of stay, the room occupancy levels of hotels were better than expected especially during the low season. In fact, the monthly room occupancy reached in May (76 percent) and June 2023 (65 percent) were unprecedented peaks boosting the occupancy for the second quarter of 2023 to 73 percent, a performance never achieved before. The overall hotel room occupancy for semester one stood at a strong 73 percent and forward booking compared to pre-pandemic levels are ahead for the next coming months.

**Figure 23: Average hotel room occupancy rate by month, 2017 – 2023**




*Source: Statistics Mauritius*

**RESTAURANTS** 3.3.2.2

At end June 2023, the Tourism Authority had issued/renewed licences to a total of 794 restaurants. This can be compared to the 806 Restaurant licences issued at end June 2022, 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.



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## Other tourism operators 3.3.3

The following table displays the comprehensive details of licences (excluding Private Pleasure Craft Licence) issued by the Tourism Authority as at June 2022 compared to June 2023.

**Table 18: Licenses issued by the Tourism Authority to other tourism operators, at 30 June 2022 and 2023**

| ACTIVITY | JUNE 2022 | JUNE 2023 |
|---|---|---|
| Operating spa | 16 | 80 |
| - within hotel premises | 5 | 67 |
| - outside hotel premises | 11 | 13 |
| Operating health and fitness centre within hotel premises | 1 | 79 |
| Operating beauty parlour, including hairdressing, within hotel premises | 0 | 52 |
| Restaurant | 798 | 794 |
| Table d'Hôte | 23 | 24 |
| Operating golf course | 8 | 8 |
| Operating boat house | 74 | 73 |
| Operating pleasure craft for commercial purpose, other than by a pleasure craft licensee | 1,322 | 1,374 |
| Operating rental agency for jet ski | 0 | 0 |
| Operating rental agency for kite surf | 22 | 21 |
| Operating rental agency for windsurf | 2 | 2 |
| Operating scuba diving centre | 70 | 67 |
| Operating helmet diving centre | 10 | 10 |
| Providing non-motorised water sports such as pedaloes, canoes, kayaks and laser | 10 | 9 |
| Hawking on beaches facing hotels | 429 | 425 |
| Hawking in tourist sites | 16 | 16 |
| Eco-tourism activities* | 16 | 14 |
| Operating rental agency for bus, including minibus | 2 | 1 |
| Operating rental agency for motorcycle | 39 | 32 |
| Operating rental agency for bicycle | 20 | 22 |
| Operating rental agency for quad | 10 | 10 |
| Karting | 0 | 0 |
| Operating aquarium displaying fish or marine animals for public viewing | 1 | 1 |
| Providing tour operator service | 358 | 378 |
| Working as tourist guide, including tourist guide employed by a tour operator | 18 | 21 |
| Operating travel agency | 145 | 144 |
| Nightclub | 17 | 17 |
| Private club | 6 | 6 |
| Pub | 8 | 8 |

**nature-based tourism activities or adventure-related tourism activities, or both*

*Source: Tourism Authority*

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 such as car rentals mostly dedicated to visitors. Latest available data on the number of hotel taxis available dates back to 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.).

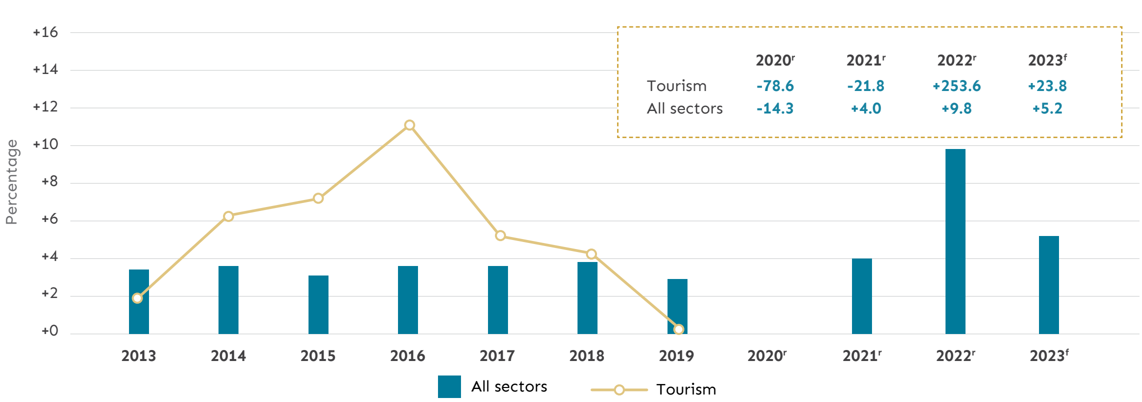
In 2019, AHRIM was invited to chair, under the authority of the Statistics Board, a Working Group on the Improvement of Tourism Statistics. Works are ongoing.

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 was true. With the recovery, the contribution of the tourism sector from a negative base, was arithmetically exceptionally high at +254 percent compared to 9.8 percent for the whole economy in 2022. For 2023, the forecasted growth for the sector is strong at 23.8 percent compared to 5.2 percent for the whole economy. Gross value addition for the Tourism sector is estimated to peak at MUR 44,412 Mn in 2023.

**Figure 24: Gross Value Added - real growth of tourism sector v/s national average 2013 – 2023^f**




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

*Source: Statistics Mauritius*





It should also be highlighted that, with the border closure, the gross value added for Accommodation and Food Service Activities was 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 both 2020 and 2021. In 2022, value addition in the Tourism Sector generated MUR 37,047 Mn as value-added, MUR 4.9 Bn more than that for Accommodation and Food Service Activities. The forecasted figures for 2023 are respectively Rs 44,412 Mn or Rs 5.9 Bn above the Accommodation and Food Service Activities sector.

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 revised in August 2023, gave a positive Balance of Trade for the tourism sector (+MUR 53,885 Mn) that contributes to reduce the overall trade balance deficit (-MUR 34,977 Mn). Additionally, the positive BOT balance for the sector is higher than that for the export-oriented enterprises (+MUR 16,452).

## Tourism and employment 3.4.2

Total direct employment in the sector (based on the results of the Continuous Multi-Purpose Household Survey) reached 40,900 in 2022 or some three thousand less compared to 2019. At the peak of the pandemic, employment in the sector reached 36,000 in 2021 or a total loss of some 8,000 jobs compared to 2019. Over the past three years, the proportion of employment in the sector was seven percent of total employment or one percentage point lower than the pre-pandemic level.

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 2023 revised 2018 Tourism Satellite Accounts (TSA), direct employment in the tourism sector in 2022 was over 68,000. In 2018, total employment was estimated at 76,860 and was distributed as follows: 35 percent in the accommodation sector, 20 percent in food and beverage services, 10 percent in transport and related services, 7 percent in recreational, cultural and sporting services and 9 percent in retail of country-specific goods. The share of total direct employment in the tourism sector represented 13.4 percent of total employment in 2018 and 12.4 percent in 2022.

The annual survey of large establishments (with 10 or more employees) showed a drop in the labour force of the sector with 21,809 people at end March 2022 (reduction of nearly 3,900 compared to 2019). Over 21,800 were employed in hotels, 3,000 in Food services and 2,700 in Travel and other services. The survey also revealed that expatriates in the sector totalled 1,017 at the same year end compared to 538 at end March 2021. As hotels are now running on full capacity, average monthly earnings have picked up and reached Rs 23,691 at the end of that period. It represented some Rs 2,900 increase compared to the pre-pandemic level back in 2019.

For many businesses around the world, one of the biggest obstacles to a full return to normal is the lack of staff. It is estimated that globally, some 60 million posts are vacant in the hospitality sector and the majority is expected to remain unfilled as millions of staff have moved on to other sectors, retrained or left the employment market altogether.

In Mauritius, it is estimated that the hotel sector is short of some 5,000 jobs and competing against other sectors to attract new talents in an already restricted labour market due to declining demographics.

### TOURISM AND THE CHALLENGE OF STAFF SHORTAGES 3.4.2.1

Since the rebound in the travel and tourism sector, it has been suffering from staff shortages especially as many employees who have left the industry during the COVID-19 pandemic, have opted not to return to the sector for different reasons. As the sector has picked up, demand for labour is rising while supply is scarce. Furthermore, the sector now has to compete against other sectors to fill vacancies.

According to a recent survey undertaken by Maurice Stratégie on labour shortage in five economic sectors including tourism, there is an immediate availability for nearly 4,200 in the sector. By educational qualifications, the requirements in the sector are: 23.2 percent with an HSC and 37.2 percent with a diploma to fill vacancies at operational levels (room attendants, waiters, guest relations and F&B). If extended to the whole population (of these five sectors), this would represent an additional 32,787 workers required.

The survey also showed that when recruiting local labour at managerial level, 56.6 percent do not find it difficult to recruit. At the other end, it was found difficult or very difficult to recruit labour at technical levels (80.0 percent) and for manual labour (83.3 percent).

Based on the survey, the national economic impact of this shortage of labour is up to 2.6 percent of total GDP with the highest blow to the tourism sector with 19.6 percent in terms of potential GDP loss.

The recovery and future growth of the sector will depend on our ability to address this labour shortage situation and to ensure that it does not become a long-term issue. Public-private-community partnerships and collaboration at all government levels, is essential. Actions/policies required could include:

- facilitating labour mobility and flexible and remote work;
- enabling decent work and providing competitive employee benefits;
- developing a skilled workforce and attracting and retaining talent by improving the perception of the sector; and
- promoting opportunities within the sector and adopting technological and digital solutions.

## Tourism earnings 3.4.3

Tourist earnings is strongly catching up and since July 2022, earnings have consistently exceeded the monthly 2019 levels so that by the end of the year, in terms of earnings, the sector has fully recovered and reached MUR 64.8 Bn representing MUR 1.7 Bn above the pre-pandemic level. For the first semester of 2023, earnings reached MUR 41.7 Bn or 134.3 percent of the 2019 level.

Earnings per tourist thus skyrocketed to MUR 65,021 and per capita per diem expenditure reached MUR 5,707 in 2022 compared to MUR 45,614 and MUR 4,362 respectively in 2019. The factors that contributed towards these spectacular results include longer average length of stay, accrued budget available for holidays and the depreciation of the MUR versus the Euro and other major currencies.

According to Statistics Mauritius, it is estimated that the MUR has lost around 15.3 percent of its value in 2022 compared to 2019. The tourism earnings recorded in 2022 in constant 2019 value thus amount to around MUR 54.9 Bn.

In terms of the depreciation, the MUR has depreciated by 19-20 percent versus both the USD and the EUR between 2019 and 2022.

## Taxes and levies 3.4.4

The sum collected as passenger fee on air tickets is expected to pick up and reached MUR 2,779 Mn in FY2023/24 vs MUR 1,775 Mn in FY 2022/23. This increase follows an expected increase in the number of passengers and an increase in the rate of the tax that now ranges from USD 13 to USD 60 per paying passenger. The Tourist Enterprise License is forecasted at MUR 115 Mn while fees collected from the Environment Protection Fee (EPF) should reach MUR 638 Mn in FY 2023/24.

Tourist accommodation facilities is a major contributor (well over 75%) to the Environment Protection Fee and the total amount collected from the sector reached MUR 450 Mn as the sector picks up in FY 2022/23. The total EPF collected was MRU 565 Mn so that EPF collected from the tourist accommodation facilities reached a peak of 80 percent of this total. Estimated VAT collected by the accommodation and food service sector totalled MUR 6.5 Bn. Corporate taxes paid by the sector have increased to MUR 198 Mn while it contributed MRU 133 Mn as training levy during FY 2022/23.





## Debt 3.4.5

Hotels are continuing their debt restructuring efforts that have led to an actual drop in the level of bank loans to the accommodation and food service activities. After the significant increases in 2020 with a peak at MUR 56.3 Bn in June 2020, the level of debt of the accommodation and food services activities sector has stabilised in 2021 and is now moving downwards (MUR 48.8 Bn in June 2023). In terms of proportion of total bank loans, it has nearly returned to pre-pandemic level at around 10.3 percent.

## Investment 3.4.6

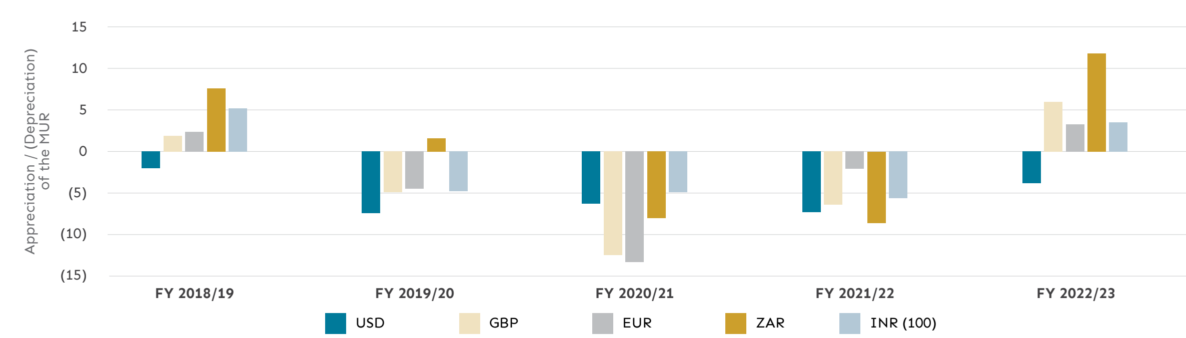
Gross Fixed Capital Formation (net increase in physical assets) in the Accommodation and Food Services Activities sector has picked up from the record low of MUR 3.9 Bn in 2020 and should reach MUR 6.6 Bn in 2023 or 5.2 percent of the total. The continuous investment in the existing facilities, even if it has reduced during the COVID-19 pandemic, illustrates the commitment of hoteliers to continuously invest and upgrade their offerings. Indeed, during the year, some 10 hotels were temporarily closed for renovation works and a few others opted to close only rooms being renovated.

Gross direct investment from abroad in the Accommodation and Food Services Activities stood at MUR 1.1 Bn or 4.0 percent of the total in 2022. For quarter one of 2023 alone, this figure in the sector reached MUR 1.3 Bn (5.2 percent of total gross direct investment).

## Rate of exchange 3.4.7

On average, for the year ending June 2023, the MUR continued to slide versus the USD (-3.8 percent) and reached MUR 45.42. However, for the first time after three consecutive years at the same year end, it appreciated versus the GBP (+6.0 percent), the EUR (+3.3 percent) and the INR (+3.5 percent). A significant 11.8 percent appreciation versus the ZAR at end June 2023 was also noted.

**Figure 25: Appreciation/depreciation* of the MUR against selected currencies FY 2018/19 - FY 2022/23**




**average for the 12 months ended June of each year.*

**Table 19: Exchange Rate of the MUR vis-a-vis Selected Hard Currencies, FY 2018/19 - FY 2022/23**

| INDICATIVE SELLING RATES[1] (AVERAGE FOR THE 12 MONTHS ENDING JUNE) | | | | | |
|---|---|---|---|---|---|
| CURRENCIES | FY 2018/19 | FY 2019/20 | FY 2020/21 | FY 2021/22 | FY 2022/23 |
| US Dollars - USD | 35.122 | 37.914 | 40.473 | 43.674 | 45.420 |
| Pound Sterling - GBP | 45.404 | 47.756 | 54.559 | 58.284 | 54.967 |
| Euro - EUR | 40.042 | 41.943 | 48.353 | 49.410 | 47.832 |
| South African Rand - ZAR | 2.510 | 2.470 | 2.684 | 2.937 | 2.628 |
| Indian Rupees (100) - INR | 50.517 | 53.080 | 55.813 | 59.099 | 57.074 |

*1 calculated on the basis of the daily average exchange rates for the period July to June. The daily average exchange rate of the MUR 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

### PAYMENT OF ANNUAL LAND LEASE RENTAL IN ARREARS 3.5.1.1

As from FY 2021/22, annual land lease rental for the tourism sector is payable in arrears. However, some hotels have received invoices with unchanged payment conditions; these cases have been referred to the relevant Ministry by AHRIM and the issue is being resolved following discussions with the various authorities involved.

Tourist accommodation facilities that were temporarily closed for renovation/reconstruction were granted 50 percent reduction in their respective annual land lease rental up to 30 June 2023.

However, this facility, introduced in 2013, has lapsed since 01 July 2023 and AHRIM is in discussion with the relevant authorities on the possibility to reconduct this incentive as hotel renovations is an important and regular feature of our sector in the light of fast-growing costs of infrastructure works.

### NEW REGULATIONS GOVERNING TOBACCO USAGE 3.5.1.2

The Public Health (Restriction on Tobacco Products) Regulations 2008 was revoked and replaced by the Public Health (Restriction on Tobacco Products) Regulations 2022. Same was later amended by the Public Health (Restrictions on Tobacco Products) (Amendment) Regulations 2022 and came in force on 01 June 2023. Through these amendments, the use of waterpipes commonly known as Shisha, is allowed under specific conditions in hotels which are classified at least as a four-star category.

However, these new regulations also had a serious impact and bearing on different tourism-related activities as the list of places (Public places) where the use of tobacco products were restricted was extended to include:

- Public beaches; and,
- Indoor areas AND outdoor premises of cafés, bars, nightclubs, hotels and restaurants.

AHRIM made representations to the Ministry of Health & Wellness to cater for the tourism sector and on 19 June 2023, the Public Health (Restrictions on Tobacco Products) (Amendment No. 2) Regulations 2023 came into force and the following changes were included:

- Hotels and public beaches; and,
- Outdoor premises of cafés, bars, nightclubs and restaurants

were removed from the scheduled list of “public places” whereby smoking of tobacco is prohibited.

However, to date, restrictions still exist for smoking in the airport area and on the usage of vaping products.

### VAT REFUND ON MICE – VAT EXEMPT ACCOMMODATION 3.5.1.3

To further encourage MICE and facilitate the implementation of the VAT refund scheme, event organisers are now exempted from the payment of VAT in respect of accommodation costs for qualifying events. With this change, the requirement to pay the VAT then applying for the refund is thus eliminated thus reducing the cost of events upfront and removing an administrative burden.

### REMOVAL OF THE LIMITATION ON THE NUMBER OF RESTAURANTS IN HOTELS 3.5.1.4

Through the Finance Act 2023, the limit on the number of restaurants a hotel can operate, was removed. Hotels are thus now free to operate any number of restaurants they wish to have within their resort. While the limit was quite high for the existing hotels (up to six restaurants), this change gives additional freedom to hotels in their respective marketing positioning on largely diversified markets.





### AMENDMENTS TO THE REGULATIONS ON ALCOHOLIC DRINKS 3.5.1.5

Following the amendment brought to the regulations governing the consumption, sponsorship and advertisement of alcoholic drinks back in 2021, the MCCI and AHRIM, in collaboration with the Economic Development Board, have been working on adjustments required for B2B and international events and a carve out for the tourism sector. However, until now, this file remains pending as the relevant authorities have remained unresponsive to our proposals.

## Budget 2023/24 3.5.2

As usual, AHRIM has prepared and submitted its Budgetary Proposals for 2023/24 which included the following proposals:

- Open our industry (and whole country) to foreign labour;
- Move the EHSGD (National Hotel School) to another level;
- Significantly enhance air connectivity;
- Propose Mauritius as an all-year round tourism destination; and
- Uplift and enhance our tourism promotion strategy.

**Additional budgetary proposals included:**

**Mauritius: a destination that is not be priced out**

- Tackle the higher airfare issue with better intelligence and resolve;
- Further improve the accommodation offering through re-investment by providing a specific package of incentives to encourage renovation;
- Reviewing the new CEB tariffs and adopting fresh electricity charge policies;
- Working out an enabling legal framework for the use of private water service providers and streamlining approval procedures for desalination plants; and,
- Revisiting the Environment Protection Fee (EPF) and the obligations of the various economic actors.

**Mauritius: a premium beach destination**

- Tackling the issue of beach erosion and unsuitable or non-existent solutions proposed by the authorities; and
- Ensuring quality and sustainability throughout the destination and not only in tourism.

**Business facilitation issues**

- Carry forward of operating losses; and
- Re-examining the latest restrictive laws on alcohol and tobacco sales and consumption.

## Mauritius Investment Corporation 3.5.3

The facilities offered by the Mauritius Investment Corporation (MIC) have been crucial in maintaining afloat many operators and retaining the majority of their employees. Based on figures available as at date, applications approved by the MIC totalled MUR 53,567 Mn of which 28.4 percent for the Accommodation and Food Service sector followed by 13.8 percent for the Agriculture, Forestry and Fishing sector. At end May 2023, MIC has disbursed MUR 49,419 Mn to a total of 50 entities.

## Correct targeting of new CEB tariffs for the financial and banking sector 3.5.4

Since February 2023, a new increased CEB tariff structure has been implemented. Furthermore, entities in the financial and banking sector, i.e., those licensed by the Bank of Mauritius and/or the Financial Services Commission (FSC) were henceforth charged with even higher electricity rates. While the intention was to target entities geared mainly towards the banking and financial sectors, some hotels, especially those listed on the Stock Exchange, were also being charged with the new rate as they required a license with the FSC for specific dealings with the Stock Exchange.

AHRIM thus liaised with the relevant authorities and the issue was resolved – the appropriate tariffs were charged and excess payments made were credited back.

## Labour-related issues 3.5.5

The travel and tourism sector in Mauritius, as in many other tourist destinations, is suffering from labour shortage. As at date, the loss in manpower for the membership can be estimate at 2,500 and hotels are struggling to fill these vacancies. At the same time, Government has adopted an explicit policy of exporting our local labour (promoting employment on cruise ships, advertising jobs including those in the hospitality in the Middle East and Northern America, signing more circular migration agreements, etc). Such factors, coupled with the country's strategy to host more foreign international students on our campuses while coping with the declining enrolment rates, call for an explicit policy towards opening up to more foreign labour.

The industry's preference for local labour is undisputed; operators want and prefer local labour in their establishments. However, the current situation has become unbearable, and foreign labour is required for the survival of the industry. Such business risk taken by employers is to be reckoned with and authorities are being invited to assist them better.

### NEED TO MOVE THE EHSGD TO ANOTHER LEVEL 3.5.5.1

Our National Hotel School, EHSGD, is faced with a number of challenges and is today a much-weakened institution not keeping pace with the industry and its growth requirements, both in terms of quantity and of quality. It is urgent to address this specific institutional issue in the wake of major developments around the nine-year schooling and the Government's Polytechnics strategy. Maintaining a status quo will impede growth and development of the industry, and country. It is thus urgent for EHSGD to benefit from additional resources from the National Training Fund to be able to up their standards and be in a better position to offer quality training courses in consultation with the private stakeholders, including the cruise sector.

Indeed, an explicit policy towards opening up to foreign labour should concomitantly integrate the issue of our stagnating Hotel School.

### ANNUAL WAGE COMPENSATION 3.5.5.2

AHRIM, together with Business Mauritius participated in the yearly tripartite exchange to discuss the quantum for salary compensation for the year 2023. The agreed compensation rate was then ratified in the Workers' Rights (Additional Remuneration) (2023) Regulations 2023 as follows: MUR 1,000 per month for full-time workers and for part-time workers the rate is 10 percent if the monthly basic wage or salary does not exceed MUR 10,000 per month or MUR 1,000 if it exceeds MUR 10,000.

### REVIEW OF THE SCARCITY LIST 3.5.5.3

Given the alarming situation in the labour market, AHRIM made several representations to the Ministry of Tourism to review the Scarcity List. New positions at operational levels have been included in the list. At time of writing this report, the approval of authorities is yet to be formally received to enable the recruitment of foreign workers based on the scarcity list.

### CHANGES IN THE WORKERS' RIGHTS ACT 3.5.5.4

For the second consecutive year, the national budget speech paved the way to a series of measures to promote and enhance the quality of employment of workers. The Workers' Rights Act was thereby amended through The Finance (Miscellaneous Provisions) Act 2023 and became effective as from 20th July 2023. The changes brought forward included:

- Cyclone allowance is now also payable to employees drawing a basic wage of more than MUR 600,000 per year;
- Compressed Hours is amended to allow a worker to complete his working week over a period of 4 days in a week upon agreement between the two parties;
- Notional calculation of basic hourly rate is amended to provide for a new formula for the notional calculation for basic hourly rate for the purposes of overtime pay;
- Payment of remuneration to part-time worker is amended to provide that the hourly basic wage of a part-time worker is not below the hourly rate of a comparable full-time worker;



INDUSTRY PERFORMANCE IN MAURITIUS, 2022 - 2023

- Payment of remuneration in other specific circumstances has been amended to require an employer to:
  - Pay full remuneration to workers who are absent from work when a safety bulletin has been issued under the Mauritius Meteorological Services (Warnings) Regulations 2023 as is the case for cyclone warnings class III and IV; and
  - Provide insurance policies in favour of the workers who are required to work while a cyclone warning class III or IV is in force or while an order has been issued by the National Crisis Committee during a period of extreme weather conditions to cover any injury, disease or death sustained by the workers in such circumstances, except where the workers are already covered in any such situation.
- Annual Leave has been amended to provide that:
  - A worker may, instead of any payment for outstanding annual leave at the end of the year, opt to have the remaining annual leave accumulated;
  - An employer shall refund the worker all his accumulated annual leave from previous years not taken when the worker ceases his employment, whether on ground of termination or otherwise; and
  - The number of accumulated leave should be specified in the payslip of a worker.
- Leave to care for child, parents and grandparents with healthcare related issues has been reviewed to:
  - Extend the option for a worker to use his full leaves entitlement (sick/accumulated sick leave/annual leave/vacation leave) to care for his child having any healthcare-related issues; and
  - Allow a worker to use up to 10 days of his sick/accumulated sick leave/annual leave/vacation leave to look after his parents or grandparents (including those of his spouse) having any healthcare-related issues.
- Leave to participate in international sport and cultural events has been amended to extend the leave on full pay to all workers to participate in international sport events as well as international cultural events;
- Maternity leave and other benefits have been amended to provide an additional five days' leave with pay to a female worker who has suffered a miscarriage in addition to the three weeks' leave with pay that she is already entitled to;
- Childcare facilities - requires an employer employing more than 250 workers to provide their workers with free childcare facilities, on the premises of his workplace or within a distance of one kilometre from the workplace, for their children, if any, aged not more than three years;
- Paternity Leave has been amended to extend the paternity leave to a male worker where he or his spouse adopts a child aged less than 12 months;
- Transport of workers has been amended to require an employer to ascertain that as from 1st July 2023, the fuel allowance granted to his eligible workers is at least MUR 1,000 more or 10% higher (up to a maximum of MUR 2,000) than the allowance paid in December 2021; and
- Other Sections of the WRA that have been amended are:
  - Section 64 - Protection against termination of agreement
  - Section 69A - Reinstatement
  - Section 75 - Organisation and sitting of Board
  - Section 90 - Eligibility to join Portable Retirement Gratuity Fund
  - Section 90A - Issue of certificate (private pension)
  - Section 95 - Contributions for past services
  - Section 95A - Contributions for past length of service in other circumstances
  - Section 96 - Shortfall or surplus of contributions
  - Section 98 - Circumstances in which gratuity may be granted
  - Section 100A - Computation of gratuity or lump sum
  - Section 108 - Surcharge and interests on late contributions
  - Section 109 - Gratuity on retirement

### CATERING AND TOURISM INDUSTRIES REMUNERATION ORDER (CTIRO) 3.5.5.5

After the first relativity adjustment of Remuneration Order (RO) wages brought in year 2019 following the introduction of the National Minimum Wage, a second relativity adjustment was brought through the Catering and Tourism Industries (Remuneration) (Amendment) Regulations 2022. The new RO Wages became effective as from 01 July 2023 with an overall increase of around MUR 390 to MUR 393.

#### SALARY REVIEW BY THE NRB 3.5.5.6

Following a referral from the Minister of Labour, Human Resource Development and Training to review the wages in respect of employees governed by the Catering and Tourism Industries (Remuneration) Regulations, the National Remuneration Board (NRB) has, through a public notice published on 30 September 2022, invited representations from interested parties. AHRIM submitted written representations in October 2022 and made oral representations on 22 August 2023. Business Mauritius concluded the oral representations of employers' representatives on 01 September 2023. At the time of writing, the outcome of the Board deliberations is pending.

#### HR INDICATORS SURVEY 3.5.5.7

Once again, the HR Indicators Survey was undertaken by AHRIM in October 2022 especially to assess the changes brought by COVID-19. A total of 40 hotel members participated in the survey and the results were circulated among participating members. The last HR Indicators survey was conducted in March 2019.

## Other files / projects 3.5.6

#### HOTELWORLD – BUYER SELLER MEETING 3.5.6.1

PubliPromo and AHRIM jointly organised a new version of the HotelWorld event. This time, the event was focused on the B2B segment only and was opened to professionals in the tourism and hospitality sector. It was scheduled to take place on one day only, on 15 June 2023 at the SVICC, Pailles.

Union des Artistes, National Women Entrepreneur Council and FoodWise were offered free tables by the organisers and the DPM and Minister of Tourism also visited the event.

The new Buyer-Seller meeting was also an ideal replacement of our past AHRIM Suppliers Directory. 134 suppliers were present to meet and showcase their products and services to some 560 buyers, professionals from hotels, restaurants and other tourism-related entities. A full detailed list of those suppliers is available on AHRIM website.

#### PARTICIPATION OF AHRIM MEMBERS IN THE GENEVA AIRPORT CONTEST WITH AIR MAURITIUS 3.5.6.2

With the announced return of the national airline to Geneva with two weekly flights as from 02 October 2023, the Geneva Airport in collaboration with Air Mauritius is organising a contest to promote this direct flight and the destination. The contest will be advertised in a special edition of the E-News of the Geneva Airport, banner on the landing page their web portal and their Facebook account. The four winners will each receive two MK tickets, accommodation in Mauritius for six nights and hotel transfers. AHRIM hotels were invited to participate and the following four prizes were delivered to Air Mauritius and the MTPA.

Accommodation for six nights for two guests at:

- LUX* Belle Mare
- Radisson Poste La Fayette
- Paradise Cove
- Veranda Grand Baie

#### LAUNCH OF THE GATWICK ROUTE BY AIR MAURITIUS 3.5.6.3

Air Mauritius will move operations from London Heathrow to London Gatwick Airport as from 28 October 2023. Furthermore, flights to Gatwick will be daily and lucky draws will be held to promote these changes. AHRIM hotels were once again invited to offer accommodation to the winners and the following hotels have expressed their interest to offer hotel stays:

- Long Beach Mauritius
- Anantara Iko Mauritius Resort & Villas
- Le Méridien Ile Maurice



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#### LA FÊTE DU PAIN 3.5.6.4

After two years of absence due to the pandemic, La Fête du Pain, an annual event by Les Moulins de la Concorde since 1992, staged its return. This year's theme was « Cassons la Croûte » as a token of friendship, unity, and celebration. As for previous years, several bakers and chefs from hotels and restaurants around the island participated into this contest. Three competitions were organised for hotel bakers - Les pièces artistiques; La restauration boulangère; and Le panier gourmand - while the Panier du Boulanger competition was opened to other bakers.

AHRIM members were invited to offer prizes to the winners of the various competitions and the following prizes were delivered to the organisers:

| ONE NIGHT STAY FOR TWO PAX | DINNER FOR TWO IN HOTEL RESTAURANT | OTHER PRIZES |
|---|---|---|
| Constance Belle Mare Plage | Royal Palm | Anahita Golf Club - Green Fee |
| LUX* Grand Gaube | Anahita Resort | Anahita Golf Club - Golf initiation |
| Heritage Le Telfair | Dinarobin | Heritage Resorts - Golf game |
| Le Preskil | Le Paradis | Coin de Mire - Spa for 2 |
| Le Victoria Beachcomber | Long Beach | Tamassa Bel Ombre - Day use for 2 |
| Radisson Blu | LUX* Grand Baie | |
| Ravenala Attitude | LUX* Le Morne | |
| Le Domaine de Grand Baie | Ambre | |
| | La Pirogue | |

#### GUINNESS WORLD RECORD OF THE WORLD LARGEST HUMAN IMAGE OF A WAVING FLAG 3.5.6.5

For the celebration of the 55th anniversary of the Independence of Mauritius, the Ministry of Arts and Cultural Heritage has organised a Guinness World Record attempt of the World Largest Human Image of a Waving Flag at Anjalay Stadium on Tuesday 24 January 2023. The event has enlisted the participation of some 8,000 students from public and private secondary schools around the island.

AHRIM and its members were invited to sponsor the event through the provision of 8,000 standard meal packs to be offered to the participants. AHRIM hotel and restaurant members who contributed to the success of this event included: Beachcomber, Sunlife, LUX*, Attitude, Rogers Hospitality, Constance Hotels, Southern Cross Hotels, Le Jadis, Le Suffren, Le Meridien, Hilton, Heritage Telfair and La Clef des Champs.

#### UNWTO GALA NIGHT HOSTED BY THE PRIVATE SECTOR 3.5.6.6

The 66th meeting of the UNWTO Commission for Africa was held in Mauritius from 25 to 28 July 2023 under the theme "Rethinking Tourism For Africa: Addressing Global Challenges and Promoting Investment and Partnerships". Delegations from 33 countries, including 22 Ministers of Tourism, two Deputy Ministers and four Ambassadors together with the UNWTO Secretary-General, Mr Zurab Pololikashvili, were present at the meeting.

A gala night organised by Business Mauritius and AHRIM for a total of 300 guests (of which 150 international) was hosted by the local private sector on 26 July. AHRIM hotel members who financially sponsored this event were: Attitude Hospitality Management, Beachcomber, Constance Hotels, LUX* Island Resorts and Sunlife Hotels.

#### MESSE DU TOURISME 2022 3.5.6.7

After a break of one year, the World Tourism Day was celebrated in Bali, Indonesia. It is commemorated each year on 27 September to foster awareness among the international community of the importance of tourism and its social, cultural, political and economic value. In line with this celebration, La Messe du Tourisme was held in Quartier des Serres, Domaine de Labourdonnais, Mapou around the theme "Repenser le tourisme – Dynamisons nos villages".

### 3RD BUSINESS PULSE SURVEY 3.5.6.8

Business Mauritius together with Statistics Mauritius and its nine partner associations including AHRIM, launched the third Business Pulse Survey with technical assistance from UNDP Mauritius. The main aim of the third leg of this survey is to understand the needs of businesses in Bouncing Back Better as they continue to operate in a volatile environment. It is expected that the results of the survey will contribute to re-assess the situation of businesses; understand the needs of businesses in terms of investment, staff, training, and sourcing access to new markets.

Over 3,200 companies were targeted and 504 completed questionnaires were received. The results of the third survey are expected to be published in October 2023.

### PETIT FUTÉ 3.5.6.9

AHRIM's subscription to Le Petit Futé website and guide was renewed for the 2023 edition with the support of MTPA. The two-page advertisement laid emphasis on the different offerings of both the small and medium hotel and restaurant members of AHRIM.

### WORLD FINALS OF THE BOCUSE D'OR 3.5.6.10

Mauritius qualified for the World Finals of the Bocuse d'Or which was held in Lyon in January 2023. AHRIM supports the Bocuse d'Or Academy in this venture and has provided a token financial contribution to the participation of the Mauritius team.

# Tourism and sustainability 3.6

A rising number of travellers are actively seeking methods to minimise their carbon footprint and endorse practices that promote sustainable tourism. According to a Trip.com survey, almost 60 percent of respondents have selected some form of sustainable travel in recent years and are also either already financially contributing to offset their carbon emission or saying they will do so at the right price.

## Coral gardening project by Reef Conservation 3.6.1

This project, financed by the Adaptation Fund of the UNDP is implemented in Mauritius by Reef Conservation in collaboration with the Ministry of Blue Economy, Marine Resources, Fisheries and Shipping, the Albion Fisheries Research Centre, the Mauritius Oceanography Institute and the Rodrigues Regional Assembly. AHRIM is collaborating with Reef Conservation on this project and a meeting was held early February 2023 to share this initiative with hotels interested in coral gardening projects. Reef Conservation proposed two types of partnerships with the hotels namely:

- Sharing of knowledge – five-day basic training for some 30 pax per hotel including a site visit at the nursery sites in Pointe D'Esny.

  This awareness raising and basic training is expected to start early next year and registration on on-going.

- Long-term partnership (two years) for a small-scale reef restoration project that included advanced training of participants in nursery construction, set-up, maintenance, monitoring and management and, pre-survey of the lagoon (technical parameters of the lagoon to ensure the lagoon is appropriate for coral restoration). The final objective is to culture around 1,800 – 2,000 coral fragments, with targeted transplantation of nursery grown colonies to coral gardens as from month 20.

  Hotels which have expressed interest and eventually been pre-selected in the long-term partnership for a small-scale reef restoration project include:

  - Heritage Le Telfair Golf & Wellness Resort at Bel Ombre;
  - Paradis Beachcomber Golf Resort & Spa at Le Morne; and
  - Trou Aux Biches Beachcomber Golf Resort & Spa.

  The relevant MoUs have already been signed and at time of writing, the clearance from the Ministry of Blue Economy to start implementation of the advanced training programme was yet to be obtained.

### THE ENVIRONMENT PROTECTION FEE (EPF) 3.6.2

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 450 Mn in 2022/23 out of the total of MUR 565 Mn for the country, i.e., 80 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.

### CATCH NEUTER AND RELEASE POLICY 3.6.3

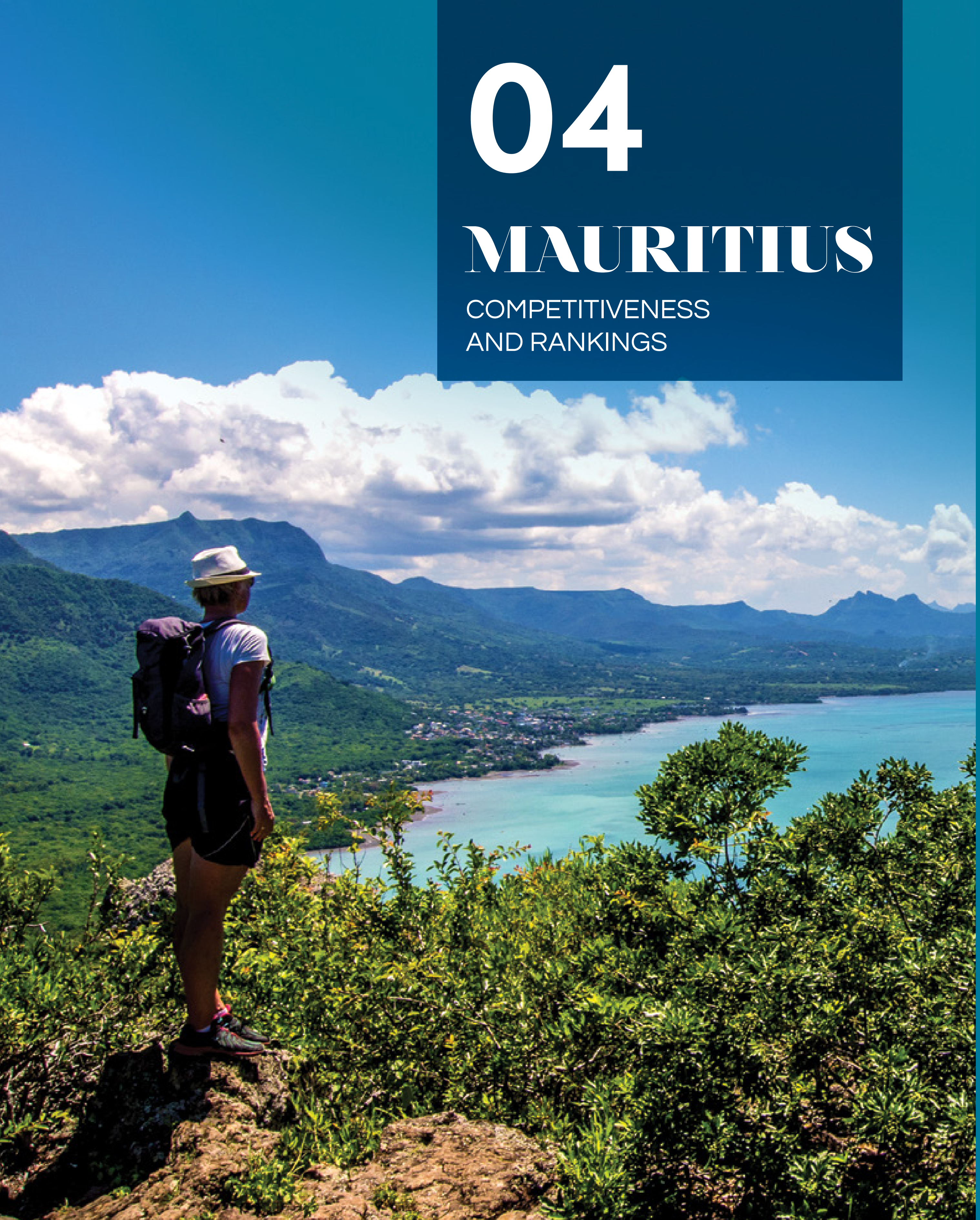
On 13 May 2022, Cabinet approved the proposal of the Ministry of Agro-Industry and Food Security to embark on a sustainable project for the dog population control in Mauritius, to be conducted by the Mauritius Society for Animal Welfare. The project includes the adoption of a new Catch-Neuter-Release approach, which will aim at curbing the growth of the dog population in a more humane, efficient and cost-effective manner.

Another central element to the above strategy is the setting up of appropriate dog shelters around the island, to be supported by joint public-private funding and NGO-management expertise under MSAW's technical supervision. Different pilot sites are being considered and AHRIM is facilitating processes involving its membership. The Tourism Authority as well as the Beach Authority are also involved.

# 04

# MAURITIUS

## COMPETITIVENESS AND RANKINGS





## International 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 policymakers, 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 realization of sector potential and growth. Furthermore, it serves as a platform for multistakeholder 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 26: The Travel & Tourism Development Index framework**

| Enabling Environment | Travel and Tourism Policy and Enabling Conditions | Infrastructure | Travel and Tourism Demand Drivers | Travel and Tourism Sustainability |
|---|---|---|---|---|
| Business Environment | Prioritisation of Travel and Tourism | Air Transport Infrastructure | Natural Resources | Environmental Sustainability |
| Safety and Security | International Openness | Ground and Port Infrastructure | Cultural Resources | Socioeconomic Resilience and Conditions |
| Health and Hygiene | Price Competitiveness | Tourist Service Infrastructure | Non-Leisure Resources | Travel and Tourism Demand Pressure and Impact |
| Human Resources and Labour Market | | | | |
| ICT Readiness | | | | |

*Source: Travel & Tourism Development Index Report 2021*

**Figure 27: Travel & Tourism Development Index 2021 overall rankings**

| 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 | C™te 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:

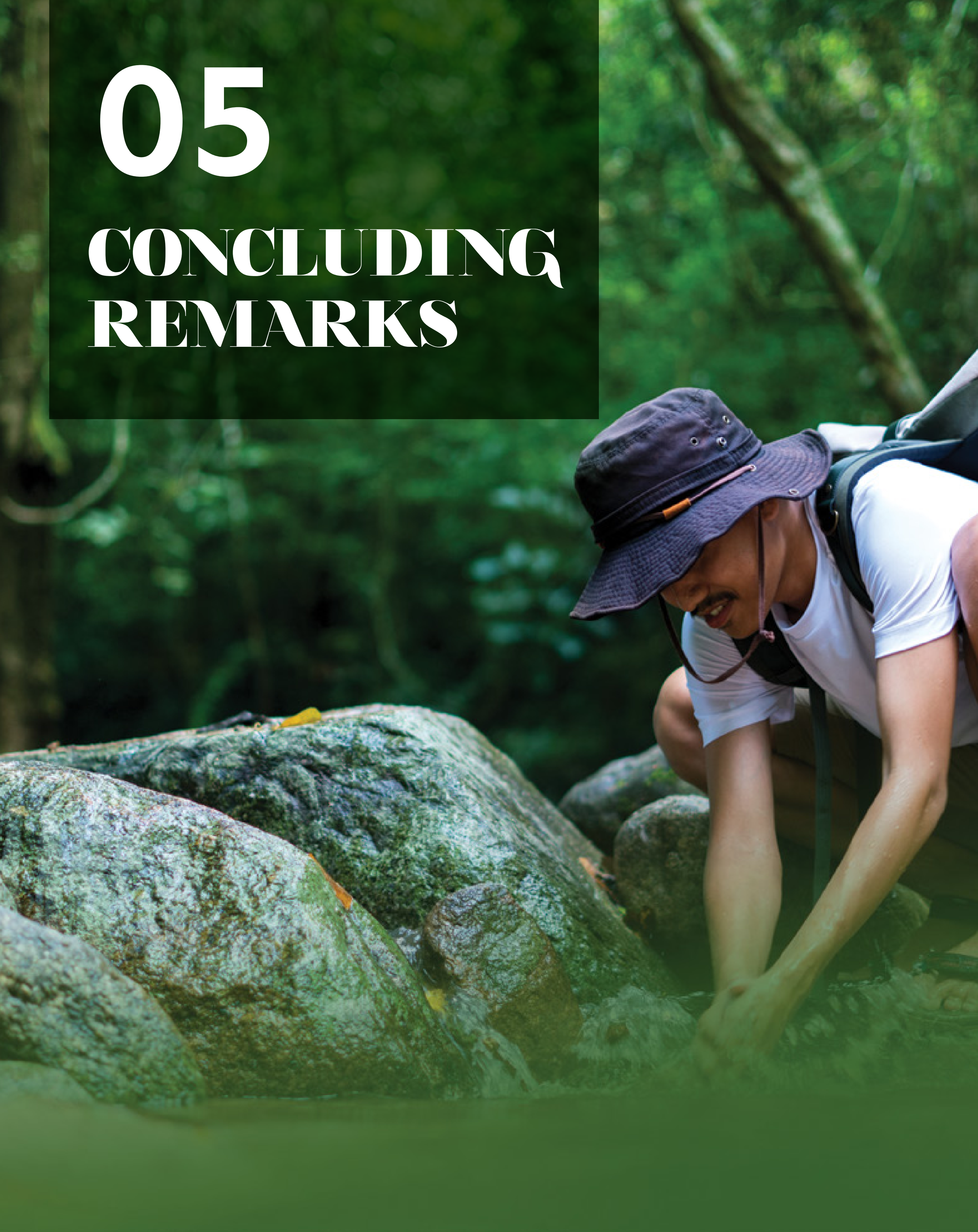
**Table 20: Performance of Mauritius in selected international rankings**

| INDICES | ORGANISATION | YEAR | RANK | YEAR | RANK |
|---|---|---|---|---|---|
| **African Index on Economic Transformation** | African Centre for Economic Transformation | | N/A | 2014 | 1 out of 83 |
| **Ibrahim Index of African Governance** | Mo Ibrahim Foundation | 2021 | 1 out of 54 | 2014 | 1 out of 52 |
| **Economic Freedom Index** | The Heritage Foundation | 2023 | 26 out of 178 | 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 | 2021 | 63 out of 191 | 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 | 2022 | 45 out of 132 | 2013 | 53 out of 142 |
| **International Property Rights Index** | Americans for Tax Reform's Property Rights Alliance | 2022 | 41 out of 129 | 2013 | 40 out of 131 |
| **Democracy Index** | Economist Intelligence Unit | 2022 | 21 out of 167 | 2012 | 18 out of 167 |
| **Corruption Perceptions Index** | Transparency International | 2022 | 57 out of 180 | 2013 | 52 out of 175 |
| **Global Peace Index** | Institute for Economics and Peace | 2023 | 23 out of 163 | 2014 | 24 out of 162 |
| **Global Terrorism Index** | Institute for Economics and Peace | 2022 | 93 out of 93 (no risk) | 2012 | 116 out of 116 (no risk) |
| **Press Freedom Index** | Reporters Without Borders | 2023 | 63 out of 180 | 2014 | 70 out of 180 |
| **Networked Readiness Index** | World Economic Forum | 2022 | 72 out of 131 | 2014 | 48 out of 148 |
| **E-government Readiness** | United Nations | | 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 | 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 | 2023 | 98 out of 146 | 2014 | 106 out of 142 |
| **Social Progress Index** | Social Progress Imperative | 2022 | 47 out of 169 | 2014 | 34 out of 132 |
| **Mercer Quality of Living Survey** | Mercer | | N/A | 2014 | 82 out of 223 |

With an air quality value of 10.5 $PM_{2.5}$, Mauritius is ranked 128 out of 153 in the global listing of countries with worst air quality. Finland ranked 153 with a value 5.5 $PM_{2.5}$, had the cleanest air while Kuwait with a score of 64.1 $PM_{2.5}$ was at the other end of the ranking according to World Economics.

# 05

# CONCLUDING REMARKS





Tourism has long been a cornerstone of the Mauritian economy, contributing significantly to its GDP, foreign exchange earnings, and employment. In fact, the sector played a pivotal role in the country's economic development.

The COVID-19 pandemic had a devastating impact on the tourism sector as international travel restrictions and lockdowns led to a significant drop in tourist arrivals. It resulted in revenue losses and job cuts and the government took various measures to mitigate these effects. Fortunately, the tourism sector has once again demonstrated resilience and adaptability as the destination is fast catching up to pre-pandemic levels in terms of connectivity and tourist arrivals.

**Table 21a: Recovery percentages – connectivity and tourist arrivals, FY 2022/23 v/s 2019**

| | Air seats | | | Air passengers | | | Load factor, % | | | Tourist arrivals | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | FY 22/23 | 2019 | % | FY 22/23 | 2019 | % | FY 22/23 | 2019 | % | FY 22/23 | 2019 | % |
| July | 160,280 | 202,858 | 79.0 | 121,905 | 161,426 | 75.5 | 76 | 80 | 95.6 | 94,084 | 115,448 | 81.5 |
| August | 159,488 | 197,482 | 80.8 | 115,638 | 156,658 | 73.8 | 73 | 79 | 91.4 | 86,605 | 107,275 | 80.7 |
| September | 141,925 | 179,814 | 78.9 | 103,567 | 136,083 | 76.1 | 73 | 76 | 96.4 | 81,087 | 100,837 | 80.4 |
| October | 181,364 | 206,538 | 87.8 | 141,722 | 165,148 | 85.8 | 78 | 80 | 97.7 | 117,323 | 129,018 | 90.9 |
| November | 193,227 | 204,955 | 94.3 | 133,322 | 160,009 | 83.3 | 69 | 78 | 88.4 | 106,905 | 128,730 | 83.0 |
| December | 212,501 | 224,954 | 94.5 | 169,352 | 194,407 | 87.1 | 80 | 86 | 92.2 | 134,730 | 152,098 | 88.6 |
| January | 209,386 | 247,881 | 84.5 | 142,022 | 164,129 | 86.5 | 68 | 66 | 102.4 | 107,684 | 122,273 | 88.1 |
| February | 151,920 | 191,860 | 79.2 | 112,182 | 136,784 | 82.0 | 74 | 71 | 103.6 | 91,850 | 115,613 | 79.4 |
| March | 186,967 | 214,836 | 87.0 | 127,273 | 148,255 | 85.8 | 68 | 69 | 98.6 | 105,663 | 114,419 | 92.3 |
| April | 185,793 | 182,026 | 102.1 | 134,240 | 144,880 | 92.7 | 72 | 80 | 90.8 | 109,031 | 108,565 | 100.4 |
| May | 186,318 | 175,213 | 106.3 | 124,979 | 126,114 | 99.1 | 67 | 72 | 93.2 | 100,030 | 96,814 | 103.3 |
| June | 164,878 | 168,870 | 97.6 | 107,413 | 125,442 | 85.6 | 65 | 74 | 87.5 | 82,208 | 92,398 | 89.0 |
| **Total** | **2,134,047** | **2,397,287** | **89.0** | **1,533,615** | **1,819,335** | **84.3** | **72** | **76** | **94.7** | **1,217,200** | **1,383,488** | **88.0** |
| Jul - Sep | 461,693 | 580,154 | 79.6 | 341,110 | 454,167 | 75.1 | 74 | 78 | 94.4 | 261,776 | 323,560 | 80.9 |
| Oct - Dec | 587,092 | 636,447 | 92.2 | 444,396 | 519,564 | 85.5 | 76 | 82 | 92.7 | 358,958 | 409,846 | 87.6 |
| Jan - Mar | 548,273 | 654,577 | 83.8 | 381,477 | 449,168 | 84.9 | 70 | 69 | 101.4 | 305,197 | 352,305 | 86.6 |
| Apr - Jun | 536,989 | 526,109 | 102.1 | 366,632 | 396,436 | 92.5 | 68 | 75 | 90.6 | 291,269 | 297,777 | 97.8 |
| **Total** | **2,134,047** | **2,397,287** | **89.0** | **1,533,615** | **1,819,335** | **84.3** | **72** | **76** | **94.7** | **1,217,200** | **1,383,488** | **88.0** |
| Jul - Dec | 1,048,785 | 1,216,601 | 86.2 | 785,506 | 973,731 | 80.7 | 75 | 80 | 93.6 | 620,734 | 733,406 | 84.6 |
| Jan - Jun | 1,085,262 | 1,180,686 | 91.9 | 748,109 | 845,604 | 88.5 | 69 | 72 | 96.2 | 596,466 | 650,082 | 91.8 |
| **Total** | **2,134,047** | **2,397,287** | **89.0** | **1,533,615** | **1,819,335** | **84.3** | **72** | **76** | **94.7** | **1,217,200** | **1,383,488** | **88.0** |

The strong Euro and USD helping, tourism earnings are reaching new heights. The improved average length of stay and cumulated holiday budget also contributed to the MRU 81.3 Bn tourism earnings reached and the 75% hotel room occupancy rate in FY 2022/23.

**Table 21b: Recovery percentages – tourist nights, tourism earnings and room occupancy, FY 2022/23 v/s 2019**

| | TOURIST NIGHTS | | | TOURISM EARNINGS, Rs Mn | | | NATIONAL ROOM OCCUPANCY RATE | | |
|---|---|---|---|---|---|---|---|---|---|
| | FY 22/23 | 2019 | % | FY 22/23 | 2019 | % | FY 22/23 | 2019 | % |
| July | 959,972 | 1,365,811 | 70.3 | 5,128 | 4,937 | 103.9 | 63% | 69% | 91.3 |
| August | 1,235,265 | 1,365,811 | 90.4 | 5,892 | 4,753 | 124.0 | 68% | 73% | 93.2 |
| September | 909,441 | 1,108,441 | 82.0 | 5,315 | 4,362 | 121.8 | 71% | 75% | 94.7 |
| October | 1,102,675 | 1,172,012 | 94.1 | 6,676 | 5,434 | 122.9 | 78% | 75% | 104.0 |
| November | 1,164,058 | 1,254,028 | 92.8 | 7,834 | 5,964 | 131.4 | 81% | 84% | 96.4 |
| December | 1,271,764 | 1,293,993 | 98.3 | 8,728 | 6,605 | 132.1 | 78% | 78% | 100.0 |
| January | 1,556,545 | 1,688,416 | 92.2 | 8,441 | 6,178 | 136.6 | 75% | 72% | 104.2 |
| February | 1,086,958 | 1,138,567 | 95.5 | 6,452 | 5,140 | 125.5 | 70% | 76% | 92.1 |
| March | 1,264,000 | 1,290,876 | 97.9 | 7,388 | 5,200 | 142.1 | 73% | 71% | 102.8 |
| April | 1,213,288 | 1,104,716 | 109.8 | 6,632 | 5,450 | 121.7 | 78% | 69% | 113.0 |
| May | 1,110,811 | 994,978 | 111.6 | 6,900 | 4,915 | 140.4 | 76% | 66% | 115.2 |
| June | 858,387 | 928,336 | 92.5 | 5,888 | 4,169 | 141.2 | 65% | 64% | 101.6 |
| **Total** | **13,733,164** | **14,705,985** | **93.4** | **81,274** | **63,107** | **128.8** | **73%** | **73%** | **100.0** |
| Jul - Sep | 3,104,678 | 3,840,063 | 80.8 | 16,335 | 14,052 | 116.2 | 68% | 72% | 94.4 |
| Oct - Dec | 3,538,497 | 3,720,033 | 95.1 | 23,238 | 18,003 | 129.1 | 79% | 79% | 100.0 |
| Jan - Mar | 3,907,503 | 4,117,859 | 94.9 | 22,281 | 16,518 | 134.9 | 73% | 73% | 100.0 |
| Apr - Jun | 3,182,486 | 3,028,030 | 105.1 | 19,420 | 14,534 | 133.6 | 73% | 66% | 110.6 |
| **Total** | **13,733,164** | **14,705,985** | **93.4** | **81,274** | **63,107** | **128.8** | **73%** | **73%** | **100.0** |
| Jul - Dec | 6,643,175 | 7,560,096 | 87.9 | 39,573 | 32,055 | 123.5 | 73% | 76% | 96.1 |
| Jan - Jun | 7,089,989 | 7,145,889 | 99.2 | 41,701 | 31,052 | 134.3 | 73% | 69% | 105.8 |
| **Total** | **13,733,164** | **14,705,985** | **93.4** | **81,274** | **63,107** | **128.8** | **73%** | **73%** | **100.0** |

*Sources: MTPA, Statistics Mauritius and Bank of Mauritius*

The results of the monthly AHRIM forward booking survey are indicating continued positive results for the next five months which augurs well for the sector. However, further growth will be hindered by the labour shortage issue presently being faced by not only the tourism sectors but also other sectors of the economy. Indeed, labour force participation overall has not quite caught up to pre-pandemic levels and the tourism sector is grappling with a severe shortage of trained labour, posing a substantial threat to its further recovery and growth – it is being increasingly difficult for hotels to meet rising demand and this situation can lead to compromised customer service.

Therefore, attracting and retaining talent has become a priority, with efforts to offer competitive wages, better working conditions, and opportunities for career development. Nonetheless, this issue remains a significant challenge for the tourism sector given the restricted labour market size.

Addressing labour shortages often requires a combination of strategies, including education and training programs to develop needed skills, labour market reforms, immigration policies, and workforce development initiatives. Policymakers and businesses alike must work together to find sustainable solutions.





# 06

## OVERVIEW OF AHRIM



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 88 hotels or 84 percent of hotel rooms and 18 tourist residences/guest houses), 25 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 6.1

- 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 6.2

### Our members. 2022 - 2023 (as at 30 June) 6.2.1

#### HOTELS

NORTH WEST / NORTH

| NAME | 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 |

| NAME | 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 | 45 |
| 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 |
| The Address Boutique Hotel | 42 |

## EAST

| NAME | 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 | 50 |
| Tropical Attitude | 69 |
| Shangri-La's Le Touessrok Resort & Spa Mauritius | 303 |
| Four Seasons Resort Mauritius @ Anahita | 136 |

## SOUTH EAST

| NAME | 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

| NAME | 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

| NAME | 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

| NAME | NO. OF ROOMS |
|---|---|
| Hennessy Park Hotel | 108 |
| Voila Bagatelle | 118 |
| Gold Crest Business Hotel | 55 |



OVERVIEW OF AHRIM

# GUESTHOUSES AND TOURIST RESIDENCES

## NORTH

| NAME | 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 |

## WEST / CENTRE

| NAME | NO. OF ROOMS |
|---|---|
| Villa Salines | 12 |
| The Bay | 12 |
| Lakaz Chamarel Exclusive Lodge | 20 |
| Les Chalets en Champagne | 3 |

## SOUTH

| NAME | 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 |

## RODRIGUES

| NAME | NO. OF ROOMS |
|---|---|
| Bakwa Lodge | 7 |

# RESTAURANTS

| PORT LOUIS |
|---|
| Le Courtyard Restaurant |
| Indra Restaurant |
| L'Artista |

| 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 |
| S'Arrastu |
| 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** 6.2.1.1

AHRIM welcomed three new members during the year 2022-2023.

| Hotel | Restaurants |
|---|---|
| The Address Boutique Hotel | L'Artista |
| | S'Arrastu |

## Our Executive Council for 2022 – 2023 6.2.2

The AHRIM Executive Council comprises of 18 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 Nicolas Staub | Beachcomber Resorts & Hotels | Secretary |
| Mr Tommy Wong | Sunlife Hotel Management Ltd | Treasurer |
| Mr Fabio Meo | Southern Cross Hotels | Member & Vice-Treasurer |
| Mr Thierry Arekion (from May 2023)<br>Mr Stephan Mackay (up to April 2023) | Tamarina Golf & Spa Boutique Hotel | Member |
| Mr Jacques Brune | Hilton Mauritius Resort & Spa | Member |
| Ms Karine Curé | Beachcomber Resorts & Hotels | Member |
| Mr François Eynaud | Sunlife Hotel Management Ltd | Member |
| Mr Daniel Guimaraes | Club Med | Member |
| Mr Guillaume Hugnin | Bakwa Lodge | Member & SMH representative |
| Mr Bruno Lebreux | AIOM | Member & AIOM representative |
| Mr David Martial | Alteo Properties | Member & IRS Representative |
| Mr Clifford Ng | Ocean Villas | Member & SMH representative |
| Mr Oscar Olsen | Flying Dodo Brewing Co Ltd | Member & Restaurant representative |
| Mr Jean Michel Pitot | Attitude Resorts | Member |
| 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:
- 27 September 2022
- 19 January 2023
- 29 March 2023
- 14 June 2023





## Our Commissions 6.2.3

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 6.2.4

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
Web site: http://www.ahrim.mu
Auditors: Kemp Chatteris
Legal Advisers: ENSAfrica (Mauritius)

## Representation on boards and committees. 2022 - 2023 6.2.5

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
Joint Working Group on tourism
Sub-Committees on:

- Talent Management
- Product Development and Customer Experience
- Air Connectivity
- Destination Marketing
- Technical Sub-Committee on MauritiusNow initiative (MTPA and AHRIM)

**Public Sector - General**
National Tripartite Forum / Commission
Human Resource Development Council
National Wage Consultative Council
Lodging Accommodation Committee
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 Sustainable Tourism - MSB
Sub-Committee on Engagement with the Private Sector for the Restoration, Preservation, Promotion and Management of National Heritage Sites
Sub Committee on the Implementation of the CaDRI Report and National Disaster Risk Reduction Management Action Plan

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

# 07

2022/2023
STATISTICAL BRIEF ON
# MAURITIUS TOURISM



## Factsheet

| LAND AND SEA | UNIT | MAURITIUS | RODRIGUES |
|---|---|---|---|
| Total land area | Km² | 1,868 | 108 |
| Forest area (2021) | Hectares | 47,006 | 3460 |
| Pas Géométriques | " | 588 | |
| Lagoon area | Km² | 243 | 200 |
| Offshore islets | Unit | 49 | 18 |
| Coastline length | Km | 322 | 80 |
| Length of protective coral reef | " | 150 | 90 |
| Area of coral reefs | Km² | 300 | |
| Public beaches | Unit | 134 | 12 |
| Total sea frontage of public beaches | Km | 48.233 | 2.92 |

| CULTURE AND SPORTS | UNIT | MAURITIUS | RODRIGUES |
|---|---|---|---|
| Museums | " | 19 | |
| 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 | 1 (25 ha) |
| Nature Reserves | 7 | 200.3 | 3 (79.5 ha) |
| Ramsar Sites (wetlands of International importance) | 2 | 48.4 | |
| National Protected Area | 1 | 275.0 | |
| Islet National Parks | 8 | 134.4 | |
| Islet Nature Reserves | 7 | 601.9 | 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 | " | | 1 (4,300) |
| Mangrove covered area | Km² | 1.45 | 0.4 |
| Botanical/Endemic gardens | Unit | 3 | 1 |
| 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 m²
- 6 baggage claim conveyors
- 32 check-in counters

**PORT LOUIS HARBOUR**

- 125-metre-long dedicated cruise jetty
- ISO 14001 Environmental Management System implemented
- New Cruise Terminal Building under construction with a floor area of around 7,325m² and a capacity of 4,000 passengers

## LIST OF TABLES





### Table 1: Air Seats, Passengers, Load Factor and Tourist Arrivals by Air 2019, 2022 and 2023

| Month | 2019 | | | | 2022 | | | | 2023 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 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 | 247,881 | 164,129 | 66.2 | 113,660 | 106,172 | 51,338 | 48.4 | 39,734 | 209,386 | 142,022 | 67.8 | 105,563 |
| Feb | 191,860 | 136,784 | 71.3 | 107,145 | 88,391 | 62,724 | 71.0 | 52,402 | 151,920 | 112,182 | 73.8 | 90,012 |
| Mar | 214,836 | 148,255 | 69.0 | 107,959 | 113,783 | 80,832 | 71.0 | 65,872 | 186,967 | 127,273 | 68.1 | 103,507 |
| Apr | 182,026 | 144,880 | 79.6 | 108,265 | 130,897 | 99,602 | 76.1 | 84,177 | 181,338 | 134,240 | 74.0 | 108,705 |
| May | 175,213 | 126,114 | 72.0 | 96,510 | 126,018 | 89,426 | 71.0 | 70,372 | 186,318 | 124,979 | 67.1 | 99,788 |
| Jun | 168,870 | 125,442 | 74.3 | 92,155 | 122,182 | 83,929 | 68.7 | 62,689 | 164,878 | 107,413 | 65.1 | 81,730 |
| Jul | 202,858 | 161,426 | 79.6 | 115,092 | 160,280 | 121,905 | 76.1 | 93,862 | 181,557 | 138,946 | 76.5 | 107,580 |
| Aug | 197,482 | 156,658 | 79.3 | 107,007 | 159,488 | 115,638 | 72.5 | 86,349 | 176,009 | 131,656 | 74.8 | 98,990 |
| Sep | 179,814 | 136,083 | 75.7 | 100,468 | 141,925 | 103,567 | 73.0 | 80,719 | | | | |
| Oct | 206,538 | 165,148 | 80.0 | 126,845 | 181,364 | 141,722 | 78.1 | 117,067 | | | | |
| Nov | 204,955 | 160,009 | 78.1 | 119,335 | 193,227 | 133,322 | 69.0 | 104,399 | | | | |
| Dec | 224,954 | 194,407 | 86.4 | 143,794 | 212,501 | 169,352 | 79.7 | 132,457 | | | | |
| ***Year*** | ***2,397,287*** | ***1,819,335*** | ***75.9*** | ***1,338,235*** | ***1,736,228*** | ***1,253,357*** | ***72.2*** | ***990,099*** | | | | |

| Quarter | 2019 | | | | 2022 | | | | 2023 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 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 | 654,577 | 449,168 | 68.6 | 328,764 | 308,346 | 194,894 | 63.2 | 158,008 | 548,273 | 381,477 | 69.6 | 299,082 |
| Quarter 2 | 526,109 | 396,436 | 75.4 | 296,930 | 379,097 | 272,957 | 72.0 | 217,238 | 532,534 | 366,632 | 68.8 | 290,223 |
| Quarter 3 | 580,154 | 454,167 | 78.3 | 322,567 | 461,693 | 341,110 | 73.9 | 260,930 | | | | |
| Quarter 4 | 636,447 | 519,564 | 81.6 | 389,974 | 587,092 | 444,396 | 75.7 | 353,923 | | | | |
| ***Year*** | ***2,397,287*** | ***1,819,335*** | ***75.9*** | ***1,338,235*** | ***1,736,228*** | ***1,253,357*** | ***72.2*** | ***990,099*** | | | | |

| Semester | 2019 | | | | 2022 | | | | 2023 | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 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 | 1,180,686 | 845,604 | 71.6 | 625,694 | 687,443 | 467,851 | 68.1 | 375,246 | 1,080,807 | 748,109 | 69.2 | 589,305 |
| Semester 2 | 1,216,601 | 973,731 | 80.0 | 712,541 | 1,048,785 | 785,506 | 74.9 | 614,853 | | | | |
| ***Year*** | ***2,397,287*** | ***1,819,335*** | ***75.9*** | ***1,338,235*** | ***1,736,228*** | ***1,253,357*** | ***72.2*** | ***990,099*** | | | | |

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 2023**

| Source market/Airline | 2019 | | | January - June 2023 | | |
|---|---|---|---|---|---|---|
| | Seats | Passengers[1] | Load factor | Seats | Passengers[1] | Load factor |
| **France** | 311,631 | 257,867 | 83% | 174,608 | 139,489 | 80% |
| Air Mauritius | 122,780 | 114,763 | 93% | 69,764 | 59,082 | 85% |
| Air France | 127,764 | 109,499 | 86% | 58,604 | 52,451 | 90% |
| Corsair | 61,087 | 33,605 | 55% | 46,240 | 27,956 | 60% |
| **U.K** | 128,929 | 103,456 | 80% | 66,762 | 54,402 | 81% |
| Air Mauritius | 51,219 | 41,460 | 81% | 40,816 | 32,414 | 79% |
| British Airways | 63,262 | 48,308 | 76% | 25,946 | 21,988 | 85% |
| Thomson Airways | 14,448 | 13,688 | 95% | | | |
| **Germany** | 81,405 | 66,774 | 82% | 44,495 | 36,858 | 83% |
| Condor - Frankfurt | 49,290 | 40,850 | 83% | 24,597 | 22,261 | 91% |
| Condor - Munich | 2,385 | 2,041 | 86% | 288 | 266 | 92% |
| Lufthansa | 22,910 | 18,675 | 82% | | | |
| Eurowings - Cologne | 1,550 | 1,193 | 77% | | | |
| Euro Wings - Munich | 4,340 | 3,112 | 72% | | | |
| Euro Wings - Dusseldorf | 930 | 903 | 97% | | | |
| Euro Wings - Frankfurt | | | | 19,610 | 14,331 | 73% |
| **Switzerland** | 38,465 | 33,440 | 87% | 15,595 | 9,959 | 64% |
| Air Mauritius | 9,170 | 6,940 | 76% | | | |
| Edelweiss | 29,295 | 26,500 | 90% | 15,595 | 9,959 | 64% |
| **Austria** | 18,912 | 15,984 | 85% | 16,167 | 14,523 | 90% |
| Austrian Airlines | 18,912 | 15,984 | 85% | 16,167 | 14,523 | 90% |
| **Spain** | 5,435 | 4,368 | 80% | 1,270 | 1,268 | 100% |
| Evelop | 5,435 | 4,368 | 80% | 1,270 | 1,268 | 100% |
| **Belgium** | | | | 10,738 | 5,205 | 48% |
| Air Belgium | | | | 10,738 | 5,205 | 48% |
| **Denmark** | 1,240 | 1,147 | 93% | | | |
| Thomson Airways | 1,240 | 1,147 | 93% | | | |
| **Norway** | 620 | 389 | 63% | | | |
| Thomson Airways | 620 | 389 | 63% | | | |
| **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% | 6,683 | 4,769 | 71% |
| Alitalia | 18,425 | 13,614 | 74% | | | |
| Neos | | | | 6,683 | 4,769 | 71% |
| **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% | 37,540 | 31,438 | 84% |
| Turkish Airlines | 71,136 | 53,458 | 75% | 37,540 | 31,438 | 84% |



**Table 2: Number of Air Seats, Passengers and Load Factor by Source Market and Airline, 2019 and 2023 (Cont'd)**

| Source market/Airline | 2019 | | | January - June 2023 | | |
|---|---|---|---|---|---|---|
| | Seats | Passengers[1] | Load factor | Seats | Passengers[1] | Load factor |
| **Dubai** | 423,825 | 338,303 | 80% | 209,036 | 140,933 | 67% |
| Emirates Airlines | 423,473 | 338,223 | 80% | 209,036 | 140,933 | 67% |
| Other | 352 | 80 | 23% | | | |
| **Saudi Arabia** | 44,700 | 26,116 | 58% | 22,820 | 12,042 | 53% |
| Saudi Airlines | 44,700 | 26,116 | 58% | 22,820 | 12,042 | 53% |
| **India** | 127,701 | 109,037 | 85% | 60,232 | 41,899 | 70% |
| Air Mauritius - Mumbai | 70,130 | 58,802 | 84% | 4,703 | 3,893 | 83% |
| Air Mauritius - Delhi | 32,428 | 29,228 | 90% | 43,407 | 29,961 | 69% |
| Air Mauritius - Chen/Bang | 25,143 | 21,007 | 84% | | | |
| Vistara | | | | 12,122 | 8,045 | 66% |
| **China** | 60,882 | 48,317 | 79% | | | |
| Air Mauritius - Hong Kong | 31,681 | 26,490 | 84% | | | |
| Air Mauritius - Shanghai | 29,201 | 21,827 | 75% | | | |
| Malaysia/Singapore | 47,954 | 45,100 | 94% | 13,374 | 9,523 | |
| Air Mauritius | 47,954 | 45,100 | 94% | 13,374 | 9,523 | 71% |
| **Australia** | 30,276 | 25,759 | 85% | 14,976 | 11,489 | |
| Air Mauritius | 30,276 | 25,759 | 85% | 14,976 | 11,489 | 77% |
| **South Africa** | 258,633 | 208,741 | 81% | 113,812 | 73,840 | 65% |
| Air Mauritius - Johannesburg | 105,999 | 82,697 | 78% | 55,112 | 38,019 | 69% |
| Air Mauritius - Cape Town | 30,862 | 24,366 | 79% | 10,447 | 7,088 | 68% |
| Air Mauritius - Durban | 21,482 | 17,473 | 81% | | | |
| South African Airways | 90,935 | 76,423 | 84% | 35,925 | 20,212 | 56% |
| British Airways / Comair | 9,355 | 7,782 | 83% | | | |
| Flysafair | | | | 12,328 | 8,521 | 69% |
| **Kenya** | 52,825 | 32,130 | 61% | 25,300 | 13,643 | 54% |
| Air Mauritius | 15,004 | 6,629 | 44% | | | |
| Kenya Airways | 37,821 | 25,501 | 67% | 25,300 | 13,643 | 54% |
| **Tanzania** | 924 | 617 | 67% | | | |
| Air Mauritius | 924 | 617 | 67% | | | |
| **Reunion** | 474,624 | 317,495 | 67% | 207,542 | 124,020 | 60% |
| Air Mauritius - St Denis | 203,380 | 136,241 | 67% | 102,948 | 51,516 | 50% |
| Air Mauritius - St Pierre | 54,516 | 39,289 | 72% | | | |
| Air Austral - St Denis | 195,122 | 131,123 | 67% | 100,667 | 69,929 | 69% |
| Air Austral - St Pierre | 21,606 | 10,842 | 50% | 3,927 | 2,575 | 66% |
| **Madagascar** | 99,349 | 56,852 | 57% | 33,556 | 14,920 | 44% |
| Air Mauritius | 88,169 | 51,662 | 59% | 33,556 | 14,920 | 44% |
| Air Madagascar | 11,180 | 5,190 | 46% | | | |
| **Seychelles** | 58,464 | 24,990 | 43% | 10,458 | 6,016 | 58% |
| Air Seychelles | 52,920 | 21,854 | 41% | 10,458 | 6,016 | 58% |
| Air Mauritius | 5,544 | 3,136 | 57% | | | |
| **One-off special flights** | 571 | 530 | 93% | 298 | 179 | 60% |
| **TOTAL** | **2,397,287** | **1,819,335** | **76%** | **1,085,262** | **746,415** | **69%** |

1 Includes direct transfers (ie 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | 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 Airlines* | *423,473* | *79.9%* | *338,223* | | | | | | | | | |
| *Other* | *352* | *22.7%* | *80* | | | | | | | | | |

**Country of last embarkation: TURKEY**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| *Saudi 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | of which | | |
| | | | | | | UAE | Turkey | Saudi Arabia | Others | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | of which | | |
| | | | | | | UAE | Turkey | Saudi Arabia | Others | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | of which | | |
| | | | | | | UAE | Turkey | Saudi Arabia | Others | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | of which | | |
| | | | | | | UAE | Turkey | Saudi Arabia | Others | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | of which | | |
| | | | | | | UAE | Turkey | Saudi Arabia | Others | 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 Airlines* | *423,473* | *79.9%* | *338,223* | | | | | | | | | |
| *Other* | *352* | *22.7%* | *80* | | | | | | | | | |

**Country of last embarkation: TURKEY**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | of which | | |
| | | | | | | UAE | Turkey | Saudi Arabia | Others | 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**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | of which | | |
| | | | | | | UAE | Turkey | Saudi Arabia | Others | Philippines | Indonesia | Pakistan |
| *Saudi 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 2023

**Country of last embarkation: FRANCE**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| **Total** | **174,608** | **79.9%** | **139,489** | **69** | **120,981** | 85,669 | 3,744 | 5,070 | 2,364 | 2,023 | 21 | 44 |
| *Air Mauritius* | *69,764* | *84.7%* | *59,082* | | | | | | | | | |
| *Air France* | *58,604* | *89.5%* | *52,451* | | | | | | | | | |
| *Corsair* | *46,240* | *60.5%* | *27,956* | | | | | | | | | |

**Country of last embarkation: UNITED KINGDOM**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| **Total** | **66,762** | **81.5%** | **54,402** | **63** | **42,065** | 606 | 37,982 | 73 | 72 | 98 | 17 | 57 |
| *Air Mauritius* | *40,816* | *79.4%* | *32,414* | | | | | | | | | |
| *British Airways* | *25,946* | *84.7%* | *21,988* | | | | | | | | | |

**Country of last embarkation: GERMANY**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| **Total** | **44,495** | **82.8%** | **36,858** | **79** | **35,231** | 3,302 | 253 | 25,727 | 804 | 198 | 6 | 6 |
| *Condor* | *24,885* | *90.5%* | *22,527* | | | | | | | | | |
| *Eurowings* | *19,610* | *73.1%* | *14,331* | | | | | | | | | |

**Country of last embarkation: SWITZERLAND**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| *Edelweiss* | *15,595* | *63.9%* | *9,959* | *64* | 10,033 | 1,604 | 191 | 1,857 | 3,886 | 140 | 5 | - |

**Country of last embarkation: DUBAI**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| *Emirates Airlines* | *209,036* | *67.4%* | *140,933* | *49* | 101,685 | 10,420 | 16,084 | 10,106 | 4,400 | 3,251 | 3,858 | 1,531 |

**Country of last embarkation: TURKEY**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| *Turkish Airlines* | *37,540* | *83.7%* | *31,438* | *70* | 26,411 | 2,303 | 675 | 3,682 | 1,140 | 1,621 | 10 | 58 |

**Country of last embarkation: SAUDI ARABIA**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | France | UK | Germany | Switzerland | Italy | India | China |
| *Saudi Airlines* | *22,820* | *52.8%* | *12,042* | *32* | 7,286 | 202 | 79 | 126 | 21 | 36 | 156 | 64 |



## Table 3B: Air Lift Indicators by Selected Country of Last Embarkation, Main Airports and Hubs, Semester 1 2023 (Cont'd)

**Country of last embarkation: FRANCE**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | UAE | Turkey | Saudi Arabia | Others | of which | | |
| | | | | | | | | | | Poland | Czech Rep | Sweden |
| **Total** | **174,608** | **79.9%** | **139,489** | **69** | **120,981** | 7 | 2 | 5 | 22,032 | 3,513 | 2,016 | 1,646 |
| *Air Mauritius* | *69,764* | *84.7%* | *59,082* | | | | | | | | | |
| *Air France* | *58,604* | *89.5%* | *52,451* | | | | | | | | | |
| *Corsair* | *46,240* | *60.5%* | *27,956* | | | | | | | | | |

**Country of last embarkation: UNITED KINGDOM**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | UAE | Turkey | Saudi Arabia | Others | of which | | |
| | | | | | | | | | | Canada | USA | Sweden |
| **Total** | **66,762** | **81.5%** | **54,402** | **63** | **42,065** | 47 | 5 | 9 | 3,099 | 763 | 308 | 224 |
| *Air Mauritius* | *40,816* | *79.4%* | *32,414* | | | | | | | | | |
| *British Airways* | *25,946* | *84.7%* | *21,988* | | | | | | | | | |

**Country of last embarkation: GERMANY**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | UAE | Turkey | Saudi Arabia | Others | of which | | |
| | | | | | | | | | | Austria | Czech Rep | Denmark |
| **Total** | **44,495** | **82.8%** | **36,858** | **79** | **35,231** | 3 | 9 | - | 4,923 | 536 | 474 | 457 |
| *Condor* | *24,885* | *90.5%* | *22,527* | | | | | | | | | |
| *Eurowings* | *19,610* | *73.1%* | *14,331* | | | | | | | | | |

**Country of last embarkation: SWITZERLAND**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | UAE | Turkey | Saudi Arabia | Others | of which | | |
| | | | | | | | | | | Czech Rep | Austria | Denmark |
| *Edelweiss* | *15,595* | *63.9%* | *9,959* | *64* | 10,033 | - | 3 | - | 2,347 | 381 | 310 | 192 |

**Country of last embarkation: DUBAI**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | UAE | Turkey | Saudi Arabia | Others | of which | | |
| | | | | | | | | | | Russia | India | Czech Rep |
| *Emirates Airlines* | *209,036* | *67.4%* | *140,933* | *49* | 101,685 | 7,542 | 120 | 4,063 | 40,310 | 6,947 | 3,858 | 3,459 |

**Country of last embarkation: TURKEY**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | UAE | Turkey | Saudi Arabia | Others | of which | | |
| | | | | | | | | | | Czech Rep | Romania | Austria |
| *Turkish Airlines* | *37,540* | *83.7%* | *31,438* | *70* | 26,411 | 5 | 2,392 | 2 | 14,523 | 1,747 | 1,264 | 1,007 |

**Country of last embarkation: SAUDI ARABIA**

| Airlines | Seats | LF | Pax | Tourist per 100 seats | Tourist arrivals by air* | of which, arrivals from selected country of residence | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | UAE | Turkey | Saudi Arabia | Others | of which | | |
| | | | | | | | | | | Indonesia | Philippines | USA |
| *Saudi Airlines* | *22,820* | *52.8%* | *12,042* | *32* | 7,286 | 49 | 6 | 5,271 | 1,276 | 380 | 363 | 62 |

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

*Source: Statistics Mauritius*

### Table 4: International Arrivals by Type and Mode of Transport, 2019, 2022 and Semester 1 of 2023

| Details | 2019 | 2022 | Semester 1 | |
|---|---|---|---|---|
| | | | 2019 | 2023 |
| **International arrivals[1] by type** | | | | |
| Tourists | 1,383,488 | 997,290 | 650,082 | 596,466 |
| Interlining passengers (direct transit) | 132,660 | 58,028 | 56,008 | 39,448 |
| Excursionists[2] | 34,808 | 5,851 | 21,204 | 13,484 |
| Mauritian residents | 330,637 | 234,449 | 151,816 | 148,200 |
| Other (crew, foreign workers, etc) | 127,803 | 89,792 | 64,685 | 55,640 |
| **TOTAL** | **2,009,396** | **1,385,410** | **943,795** | **853,238** |
| **International arrivals[1] by air and by type** | | | | |
| Tourists | 1,338,235 | 990,099 | 625,694 | 589,305 |
| Excursionists[2] | 20,670 | 3,706 | 10,117 | 3,936 |
| Interlining passengers (direct transit) | 132,660 | 58,028 | 56,008 | 39,448 |
| Mauritian residents | 329,417 | 234,439 | 151,419 | 148,170 |
| Other (including crew) | 104,441 | 85,922 | 51,047 | 48,118 |
| **TOTAL** | **1,925,423** | **1,372,194** | **894,285** | **828,977** |
| *of which international arrivals directly in Rodrigues* | *1,968* | *405* | *752* | *1,247* |
| **International arrivals[1] by sea and by type** | | | | |
| Cruise travellers | 79,225 | 9,602 | 47,277 | 21,986 |
| *- Tourists* | *41,829* | *4,003* | *22,794* | 5,280 |
| *- Excursionists[2]* | *13,218* | *1,786* | *10,678* | 9,204 |
| *- Mauritian residents* | *1,186* | *3* | *365* | 29 |
| *- Crew members* | *22,992* | *3,810* | *13,440* | 7,473 |
| Other | 4,748 | 3,614 | 2,233 | 2,275 |
| *of which tourists* | 3,424 | 3,188 | 1,594 | 1,881 |
| **TOTAL** | **83,973** | **13,216** | **49,510** | **24,261** |

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, 2019 - 2023

| MONTH | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|
| January | 122,273 | 137,419 | 1,232 | 40,028 | 107,684 |
| February | 115,613 | 111,560 | 1,229 | 52,724 | 91,850 |
| March | 114,419 | 55,863 | 311 | 66,066 | 105,663 |
| April | 108,565 | 10 | 58 | 84,268 | 109,031 |
| May | 96,814 | 20 | 115 | 70,462 | 100,030 |
| June | 92,398 | 9 | 280 | 63,008 | 82,208 |
| July | 115,448 | 45 | 1,242 | 94,084 | 107,832 |
| August | 107,275 | 317 | 2,499 | 86,605 | 98,990 |
| September | 100,837 | 369 | 2,494 | 81,087 | |
| October | 129,018 | 1,149 | 54,434 | 117,323 | |
| November | 128,730 | 1,177 | 65,922 | 106,905 | |
| December | 152,098 | 1,042 | 49,964 | 134,730 | |
| **TOTAL** | **1,383,488** | **308,980** | **179,780** | **997,290** | |
| **BY QUARTER** | | | | | |
| Quarter 1 | 352,305 | 304,842 | 2,772 | 158,818 | 305,197 |
| Quarter 2 | 297,777 | 39 | 453 | 217,738 | 291,269 |
| Quarter 3 | 323,560 | 731 | 6,235 | 261,776 | |
| Quarter 4 | 409,846 | 3,368 | 170,320 | 358,958 | |
| **TOTAL** | **1,383,488** | **308,980** | **179,780** | **997,290** | |
| **BY SEMESTER** | | | | | |
| Semester 1 | 650,082 | 304,881 | 3,225 | 376,556 | 596,466 |
| Semester 2 | 733,406 | 4,099 | 176,555 | 620,734 | |
| **TOTAL** | **1,383,488** | **308,980** | **179,780** | **997,290** | |
| **Year on year growth rate** | | | | | |
| **MONTH** | **2019** | **2020** | **2021** | **2022** | **2023** |
| January | 1.1% | 12.4% | -99.1% | 3149.0% | 169.0% |
| February | 0.0% | -3.5% | -98.9% | 4190.0% | 74.2% |
| March | -4.5% | -51.2% | -99.4% | 21143.1% | 59.9% |
| April | 3.4% | -100.0% | 480.0% | 145189.7% | 29.4% |
| May | -4.3% | -100.0% | 475.0% | 61171.3% | 42.0% |
| June | 9.5% | -100.0% | 3011.1% | 22402.9% | 30.5% |
| July | -0.4% | -100.0% | 2660.0% | 7475.2% | 14.6% |
| August | -2.0% | -99.7% | 688.3% | 3365.6% | 14.3% |
| September | -2.0% | -99.6% | 575.9% | 3151.3% | |
| October | -3.8% | -99.1% | 4637.5% | 115.5% | |
| November | -2.7% | -99.1% | 5500.8% | 62.2% | |
| December | -3.8% | -99.3% | 4695.0% | 169.7% | |
| **TOTAL** | **-1.1%** | **-77.7%** | **-41.8%** | **454.7%** | |
| **BY QUARTER** | | | | | |
| Quarter 1 | -1.2% | -13.5% | -99.1% | 5629.4% | 92.2% |
| Quarter 2 | 2.5% | -100.0% | 1061.5% | 47965.8% | 33.8% |
| Quarter 3 | -1.4% | -99.8% | 752.9% | 4098.5% | |
| Quarter 4 | -3.4% | -99.2% | 4957.0% | 110.8% | |
| **TOTAL** | **-1.1%** | **-77.7%** | **-41.8%** | **454.7%** | |
| **BY SEMESTER** | | | | | |
| Semester 1 | 0.5% | -53.1% | -98.9% | 11576.2% | |
| Semester 2 | -2.5% | -99.4% | 4207.3% | 251.6% | |
| **TOTAL** | **-1.1%** | **-77.7%** | **-41.8%** | **454.7%** | |

*Source: Statistics Mauritius*

**Table 6: Tourist Arrivals and Share by Selected Markets, 2019 - 2023**

| Continent / country of residence | 2019 | 2020 | 2021 | 2022 | 2023 S1 |
|---|---|---|---|---|---|
| **CONTINENT** | | | | | |
| Europe | 835,946 | 207,641 | 145,812 | 674,511 | 388,153 |
| Africa | 310,928 | 58,917 | 17,303 | 207,010 | 129,507 |
| Asia | 189,849 | 32,339 | 13,526 | 90,960 | 59,478 |
| Oceania | 20,804 | 3,500 | 440 | 7,794 | 8,739 |
| America | 25,379 | 6,392 | 2,575 | 16,530 | 10,345 |
| Others & Not Stated | 582 | 191 | 124 | 485 | 244 |
| **TOTAL** | **1,383,488** | **308,980** | **179,780** | **997,290** | **596,466** |
| **TOP 10 MARKETS IN 2019** | | | | | |
| France | 302,038 | 79,510 | 51,525 | 238,864 | 147,325 |
| United Kingdom | 141,520 | 22,687 | 34,194 | 140,847 | 63,424 |
| Reunion Island | 137,570 | 30,581 | 5,288 | 73,336 | 62,440 |
| Germany | 129,100 | 36,047 | 18,605 | 96,767 | 54,085 |
| South Africa | 118,556 | 19,370 | 8,061 | 96,316 | 45,908 |
| India | 75,673 | 12,781 | 2,845 | 36,956 | 27,522 |
| China | 42,740 | 5,189 | 499 | 1,734 | 2,706 |
| Switzerland | 42,045 | 7,328 | 7,011 | 28,350 | 14,110 |
| Italy | 41,991 | 7,567 | 3,954 | 23,035 | 12,932 |
| Saudi Arabia | 22,788 | 4,982 | 4,028 | 19,388 | 9,420 |
| **TOTAL TOP 10** | **1,054,021** | **226,042** | **136,010** | **755,593** | **439,872** |
| **Market share by continent / country of residence as a proportion of total arrivals** | | | | | |
| **CONTINENT** | | | | | |
| Europe | 60.4% | 67.2% | 81.1% | 67.6% | 65.1% |
| Africa | 22.5% | 19.1% | 9.6% | 20.8% | 21.7% |
| Asia | 13.7% | 10.5% | 7.5% | 9.1% | 10.0% |
| Oceania | 1.5% | 1.1% | 0.2% | 0.8% | 1.5% |
| America | 1.8% | 2.1% | 1.4% | 1.7% | 1.7% |
| Others & Not Stated | 0.0% | 0.1% | 0.1% | 0.0% | 0.0% |
| **TOTAL** | **100.0%** | **100.0%** | **100.0%** | **100.0%** | **100.0%** |
| **TOP 10 MARKETS IN 2019** | | | | | |
| France | 21.8% | 25.7% | 28.7% | 24.0% | 24.7% |
| United Kingdom | 10.2% | 7.3% | 19.0% | 14.1% | 10.6% |
| Reunion Island | 9.9% | 9.9% | 2.9% | 7.4% | 10.5% |
| Germany | 9.3% | 11.7% | 10.3% | 9.7% | 9.1% |
| South Africa | 8.6% | 6.3% | 4.5% | 9.7% | 7.7% |
| India | 5.5% | 4.1% | 1.6% | 3.7% | 4.6% |
| China | 3.1% | 1.7% | 0.3% | 0.2% | 0.5% |
| Switzerland | 3.0% | 2.4% | 3.9% | 2.8% | 2.4% |
| Italy | 3.0% | 2.4% | 2.2% | 2.3% | 2.2% |
| Saudi Arabia | 2.3% | 1.6% | 2.2% | 1.9% | 1.6% |
| **TOTAL TOP 10** | **76.2%** | **73.2%** | **75.7%** | **75.8%** | **73.7%** |

*Source: Statistics Mauritius*

**Table 7: Tourist Arrivals by Selected Country of Residence, 2019 - 2023**

| Selected country of residence | 2019 | 2020 | 2021 | 2022 | January to June | |
|---|---|---|---|---|---|---|
| | | | | | 2022 | 2023 |
| **Europe** | **835,946** | **207,641** | **145,812** | **674,511** | **267,237** | **388,153** |
| Austria | 18,390 | 6,343 | 4,111 | 16,491 | 7,161 | 9,991 |
| Belgium | 16,959 | 2,310 | 4,817 | 17,791 | 5,765 | 7,668 |
| Czech Republic | 14,729 | 6,066 | 2,561 | 12,455 | 7,492 | 2,025 |
| Denmark | 7,388 | 2,434 | 1,720 | 8,192 | 3,591 | 10,131 |
| France | 302,038 | 79,510 | 51,525 | 238,864 | 93,446 | 147,325 |
| Germany | 129,100 | 36,047 | 18,605 | 96,767 | 39,834 | 54,085 |
| Italy | 41,991 | 7,567 | 3,954 | 23,035 | 6,854 | 12,932 |
| Netherlands | 16,814 | 2,206 | 1,212 | 9,166 | 2,863 | 4,962 |
| Poland | 11,411 | 4,146 | 1,955 | 8,197 | 3,106 | 7,688 |
| Spain | 14,307 | 1,523 | 1,457 | 11,645 | 2,838 | 4,517 |
| Sweden | 13,215 | 5,732 | 1,784 | 7,032 | 2,437 | 5,038 |
| Switzerland | 42,045 | 7,328 | 7,011 | 28,350 | 9,130 | 14,110 |
| UK | 141,520 | 22,687 | 34,194 | 140,847 | 55,717 | 63,424 |
| CIS | 16,242 | 7,263 | 3,556 | 12,059 | 6,613 | 10,428 |
| *- Russia* | 11,191 | 5,191 | 2,686 | 8,831 | 4,453 | 8,157 |
| Other European | 49,797 | 16,479 | 7,350 | 43,620 | 20,390 | 33,829 |
| **Africa** | **310,928** | **58,917** | **17,303** | **207,010** | **70,760** | **129,507** |
| Kenya | 4,887 | 746 | 541 | 2,937 | 1,102 | 1,407 |
| Madagascar | 15,979 | 2,553 | 753 | 10,752 | 2,907 | 6,395 |
| Reunion Is | 137,570 | 30,581 | 5,288 | 73,336 | 16,490 | 62,440 |
| Seychelles | 6,838 | 1,093 | 483 | 3,406 | 974 | 2,151 |
| South Africa | 118,556 | 19,370 | 8,061 | 96,316 | 42,022 | 45,908 |
| Zimbabwe | 3,021 | 355 | 167 | 2,078 | 734 | 1,126 |
| Other African | 24,077 | 4,219 | 2,010 | 18,185 | 6,531 | 10,080 |
| **Asia** | **189,849** | **32,339** | **13,526** | **90,960** | **31,061** | **59,478** |
| China, PR | 42,740 | 5,189 | 499 | 1,734 | 594 | 2,706 |
| India | 75,673 | 12,781 | 2,845 | 36,956 | 15,059 | 27,522 |
| Korea Republic | 7,072 | 776 | 136 | 1,171 | 207 | 1,626 |
| Saudi Arabia | 22,788 | 4,982 | 4,028 | 19,388 | 4,013 | 9,420 |
| United Arab Emirates | 13,999 | 1,587 | 1,931 | 14,416 | 4,398 | 7,932 |
| Other Asian | 27,577 | 7,024 | 4,087 | 17,295 | 6,790 | 10,272 |
| **Oceania** | **20,804** | **3,500** | **440** | **7,794** | **1,722** | **8,739** |
| Australia | 18,997 | 3,073 | 321 | 6,986 | 1,465 | 8,094 |
| Other Oceania | 1,807 | 427 | 119 | 808 | 257 | 645 |
| **America** | **25,379** | **6,392** | **2,575** | **16,530** | **5,583** | **10,345** |
| Canada | 8,011 | 1,804 | 993 | 6,250 | 2,089 | 3,689 |
| USA | 10,407 | 2,651 | 1,328 | 8,357 | 2,867 | 5,285 |
| Other American | 6,961 | 1,937 | 254 | 1,923 | 627 | 1,371 |
| **Others & Not Stated** | **582** | **191** | **124** | **485** | **193** | **244** |
| **ALL COUNTRIES** | **1,383,488** | **308,980** | **179,780** | **997,290** | **376,556** | **596,466** |

*Source: Statistics Mauritius*

**Table 8: Tourist Arrivals by Mode of Transport and by Selected Country of Residence, Semester 1 of 2022 and 2023**

| Continent / country of residence | January - June 2022 | | | January - June 2023 | | |
|---|---|---|---|---|---|---|
| | Air | Ship | Total | Air | Ship | Total |
| **CONTINENT** | | | | | | |
| Europe | 267,022 | 215 | 267,237 | 384,160 | 3,993 | 388,153 |
| Africa | 70,675 | 85 | 70,760 | 129,103 | 404 | 129,507 |
| Asia | 30,094 | 967 | 31,061 | 57,857 | 1,621 | 59,478 |
| Oceania | 5,569 | 14 | 5,583 | 8,036 | 703 | 8,739 |
| America | 1,695 | 27 | 1,722 | 9,910 | 435 | 10,345 |
| Others & Not Stated | 191 | 2 | 193 | 239 | 5 | 244 |
| **TOTAL** | **375,246** | **1,310** | **376,556** | **589,305** | **7,161** | **596,466** |
| **TOP 15 MARKETS IN S1 2019** | | | | | | |
| France | 93,413 | 33 | 93,446 | 146,998 | 327 | 147,325 |
| Germany | 39,834 | 0 | 39,834 | 51,810 | 2,275 | 54,085 |
| United Kingdom | 55,709 | 8 | 55,717 | 63,104 | 320 | 63,424 |
| South Africa | 42,014 | 8 | 42,022 | 45,616 | 292 | 45,908 |
| India | 15,024 | 35 | 15,059 | 27,384 | 138 | 27,522 |
| China | 593 | 1 | 594 | 2,617 | 89 | 2,706 |
| Switzerland | 9,130 | 0 | 9,130 | 14,012 | 98 | 14,110 |
| Italy | 6,854 | 0 | 6,854 | 12,788 | 144 | 12,932 |
| Austria | 7,161 | 0 | 7,161 | 9,881 | 110 | 9,991 |
| Czech Republic | 7,492 | 0 | 7,492 | 10,123 | 8 | 10,131 |
| Saudi Arabia | 4,013 | 0 | 4,013 | 9,419 | 1 | 9,420 |
| Australia | 1,452 | 13 | 1,465 | 7,545 | 549 | 8,094 |
| Sweden | 2,437 | 0 | 2,437 | 5,024 | 14 | 5,038 |
| Netherlands | 2,863 | 0 | 2,863 | 4,781 | 181 | 4,962 |
| United Arab Emirates | 4,398 | 0 | 4,398 | 7,932 | 0 | 7,932 |
| **TOTAL TOP 15** | **292,387** | **98** | **292,485** | **419,034** | **4,546** | **423,580** |

*Source: Statistics Mauritius*

**Table 9: Tourist Arrivals per Month and by Country of Residence, January to June 2023**

| Selected country of residence | Jan | Feb | Mar | Apr | May | Jun | Semester 1 | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | Air | Sea | Total |
| **Europe** | **70,235** | **70,848** | **69,232** | **75,858** | **58,435** | **43,545** | **384,160** | **3,993** | **388,153** |
| Austria | 2,356 | 2,376 | 2,113 | 1,588 | 995 | 563 | 9,881 | 110 | 9,991 |
| Belgium | 1,006 | 1,120 | 904 | 1,733 | 1,764 | 1,141 | 7,633 | 35 | 7,668 |
| Bulgaria | 417 | 585 | 418 | 428 | 138 | 39 | 2,012 | 13 | 2,025 |
| Czech Republic | 1,837 | 2,802 | 2,982 | 1,501 | 552 | 457 | 10,123 | 8 | 10,131 |
| Croatia | 161 | 100 | 70 | 66 | 60 | 89 | 532 | 14 | 546 |
| Denmark | 1,217 | 1,457 | 954 | 616 | 318 | 264 | 4,788 | 38 | 4,826 |
| Estonia | 304 | 240 | 190 | 67 | 13 | 11 | 825 | 0 | 825 |
| Finland | 707 | 530 | 385 | 162 | 86 | 114 | 1,966 | 18 | 1,984 |
| France | 28,022 | 30,211 | 23,589 | 29,716 | 22,664 | 13,123 | 146,998 | 327 | 147,325 |
| Germany | 8,177 | 8,176 | 10,017 | 10,032 | 10,162 | 7,521 | 51,810 | 2,275 | 54,085 |
| Greece | 112 | 88 | 88 | 71 | 51 | 65 | 435 | 40 | 475 |
| Hungary | 1,035 | 703 | 520 | 347 | 162 | 153 | 2,918 | 2 | 2,920 |
| Ireland | 268 | 134 | 291 | 284 | 210 | 295 | 1,476 | 6 | 1,482 |
| Italy | 2,856 | 1,890 | 2,377 | 2,649 | 1,410 | 1,750 | 12,788 | 144 | 12,932 |
| Latvia | 160 | 95 | 117 | 35 | 37 | 19 | 456 | 7 | 463 |
| Lithuania | 248 | 251 | 190 | 168 | 56 | 88 | 1,000 | 1 | 1,001 |
| Luxembourg | 138 | 147 | 176 | 411 | 153 | 79 | 1,095 | 9 | 1,104 |
| Netherlands | 846 | 642 | 687 | 1,140 | 824 | 823 | 4,781 | 181 | 4,962 |
| Norway | 348 | 524 | 409 | 333 | 173 | 355 | 2,118 | 24 | 2,142 |
| Poland | 1,401 | 1,396 | 1,614 | 1,031 | 892 | 1,354 | 7,667 | 21 | 7,688 |
| Portugal | 266 | 410 | 366 | 685 | 338 | 438 | 2,485 | 18 | 2,503 |
| Romania | 910 | 682 | 730 | 809 | 400 | 381 | 3,876 | 36 | 3,912 |
| Serbia | 176 | 136 | 151 | 135 | 73 | 68 | 734 | 5 | 739 |
| Slovakia | 707 | 1,218 | 955 | 515 | 190 | 116 | 3,693 | 8 | 3,701 |
| Slovenia | 363 | 269 | 219 | 332 | 76 | 80 | 1,336 | 3 | 1,339 |
| Spain | 455 | 323 | 634 | 671 | 686 | 1,748 | 4,443 | 74 | 4,517 |
| Sweden | 1,762 | 1,396 | 728 | 647 | 219 | 286 | 5,024 | 14 | 5,038 |
| Switzerland | 2,123 | 2,172 | 2,225 | 4,694 | 1,863 | 1,033 | 14,012 | 98 | 14,110 |
| Turkey | 818 | 244 | 346 | 415 | 253 | 559 | 2,614 | 21 | 2,635 |
| United Kingdom | 8,595 | 8,608 | 12,496 | 12,438 | 12,094 | 9,193 | 63,104 | 320 | 63,424 |
| CIS[1] countries | 2,216 | 1,695 | 2,108 | 1,856 | 1,377 | 1,176 | 10,314 | 114 | 10,428 |
| *- Belarus* | *88* | *68* | *129* | *44* | *30* | *24* | *382* | *1* | *383* |
| *- Kazakhstan* | *103* | *67* | *94* | *26* | *13* | *26* | *327* | *2* | *329* |
| *- Russia* | *1,593* | *1,280* | *1,539* | *1,592* | *1,157* | *996* | *8,102* | *55* | *8,157* |
| *- Ukraine* | *332* | *217* | *214* | *122* | *148* | *99* | *1,077* | *55* | *1,132* |
| *- Other CIS* | *100* | *63* | *132* | *72* | *29* | *31* | *426* | *1* | *427* |
| Other European | 228 | 228 | 183 | 283 | 146 | 164 | 1,223 | 9 | 1,232 |

### Table 9: Tourist Arrivals per Month and by Country of Residence, January to June 2023[p] (Cont'd)

| Selected country of residence | Jan | Feb | Mar | Apr | May | Jun | Semester 1 | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | Air | Sea | Total |
| **Africa** | **28,408** | **12,491** | **24,245** | **20,541** | **25,751** | **18,071** | **129,103** | **404** | **129,507** |
| IOC[2] countries | 19,267 | 5,856 | 13,815 | 8,256 | 16,943 | 7,263 | 71,383 | 17 | 71,400 |
| *- Comoros* | *67* | *82* | *76* | *69* | *62* | *58* | *412* | *2* | *414* |
| *- Madagascar* | *1,056* | *841* | *1,099* | *1,160* | *1,172* | *1,067* | *6,381* | *14* | *6,395* |
| *- Reunion* | *17,778* | *4,616* | *12,385* | *6,557* | *15,309* | *5,795* | *62,439* | *1* | *62,440* |
| *- Seychelles* | *366* | *317* | *255* | *470* | *400* | *343* | *2,151* | *0* | *2,151* |
| Algeria | 44 | 13 | 21 | 9 | 27 | 27 | 141 | 0 | 141 |
| Angola | 24 | 27 | 16 | 50 | 35 | 13 | 157 | 8 | 165 |
| Benin | 1 | 3 | 6 | 6 | 3 | 0 | 19 | 0 | 19 |
| Botswana | 80 | 56 | 55 | 95 | 86 | 46 | 418 | 0 | 418 |
| Burundi | 7 | 8 | 4 | 8 | 6 | 25 | 58 | 0 | 58 |
| Cameroon | 32 | 38 | 37 | 53 | 36 | 42 | 238 | 0 | 238 |
| Congo | 14 | 20 | 25 | 12 | 13 | 32 | 116 | 0 | 116 |
| Egypt | 44 | 55 | 27 | 76 | 86 | 74 | 361 | 1 | 362 |
| Ethiopia | 23 | 42 | 7 | 9 | 9 | 15 | 104 | 1 | 105 |
| Gabon | 2 | 5 | 2 | 18 | 6 | 5 | 38 | 0 | 38 |
| Ghana | 56 | 97 | 86 | 69 | 93 | 126 | 515 | 12 | 527 |
| Ivory Coast | 25 | 43 | 40 | 22 | 34 | 49 | 203 | 10 | 213 |
| Kenya | 146 | 258 | 235 | 252 | 290 | 226 | 1,404 | 3 | 1,407 |
| Lesotho | 3 | 7 | 5 | 20 | 32 | 23 | 90 | 0 | 90 |
| Malawi | 17 | 27 | 17 | 41 | 67 | 46 | 215 | 0 | 215 |
| Mayotte | 52 | 181 | 72 | 168 | 69 | 30 | 572 | 0 | 572 |
| Morocco | 49 | 85 | 57 | 43 | 70 | 78 | 382 | 0 | 382 |
| Mozambique | 85 | 43 | 27 | 54 | 75 | 45 | 328 | 1 | 329 |
| Namibia | 89 | 41 | 101 | 121 | 188 | 150 | 689 | 1 | 690 |
| Niger | 5 | 6 | 2 | 2 | 8 | 5 | 26 | 2 | 28 |
| Nigeria | 313 | 369 | 341 | 326 | 272 | 216 | 1,810 | 27 | 1,837 |
| Rwanda | 18 | 34 | 16 | 28 | 16 | 23 | 135 | 0 | 135 |
| Senegal | 14 | 18 | 7 | 24 | 11 | 46 | 108 | 12 | 120 |
| South Africa | 7,363 | 4,615 | 8,675 | 9,857 | 6,641 | 8,757 | 45,616 | 292 | 45,908 |
| Sudan | 5 | 6 | 6 | 2 | 8 | 2 | 29 | 0 | 29 |
| Eswatini[3] | 40 | 25 | 18 | 28 | 23 | 21 | 155 | 0 | 155 |
| Tanzania | 53 | 36 | 41 | 85 | 53 | 67 | 331 | 4 | 335 |
| Togo | 2 | 1 | 4 | 4 | 4 | 8 | 23 | 0 | 23 |
| Tunisia | 35 | 19 | 39 | 18 | 43 | 37 | 188 | 3 | 191 |
| Uganda | 62 | 79 | 40 | 43 | 60 | 89 | 373 | 0 | 373 |
| Zimbabwe | 103 | 139 | 129 | 428 | 159 | 168 | 1,125 | 1 | 1,126 |
| Zambia | 75 | 55 | 59 | 147 | 99 | 80 | 515 | 0 | 515 |
| Other African | 260 | 184 | 213 | 167 | 186 | 237 | 1,238 | 9 | 1,247 |



### Table 9: Tourist Arrivals per Month and by Country of Residence, January to June 2023[p] (Cont'd)

| Selected country of residence | Jan | Feb | Mar | Apr | May | Jun | Semester 1 | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | Air | Sea | Total |
| **Asia** | **6,030** | **6,228** | **8,303** | **9,207** | **12,642** | **17,068** | **57,857** | **1,621** | **59,478** |
| Afghanistan | 13 | 16 | 18 | 19 | 11 | 10 | 87 | 0 | 87 |
| Bangladesh | 53 | 37 | 30 | 37 | 47 | 56 | 257 | 3 | 260 |
| Hong Kong SAR[4] | 23 | 15 | 40 | 44 | 31 | 75 | 225 | 3 | 228 |
| India | 2,374 | 2,407 | 3,116 | 3,566 | 7,910 | 8,149 | 27,384 | 138 | 27,522 |
| Indonesia | 129 | 385 | 360 | 136 | 46 | 167 | 818 | 405 | 1,223 |
| Israel | 293 | 275 | 320 | 752 | 202 | 215 | 2,054 | 3 | 2,057 |
| Japan | 316 | 48 | 60 | 64 | 70 | 80 | 384 | 254 | 638 |
| Korea Republic | 189 | 222 | 239 | 273 | 379 | 324 | 1,547 | 79 | 1,626 |
| Malaysia | 74 | 41 | 68 | 94 | 68 | 192 | 527 | 10 | 537 |
| Maldives | 3 | 2 | 1 | 6 | 4 | 8 | 24 | 0 | 24 |
| Nepal | 33 | 59 | 17 | 20 | 33 | 54 | 212 | 4 | 216 |
| Pakistan | 47 | 45 | 57 | 51 | 37 | 73 | 301 | 9 | 310 |
| China | 337 | 240 | 396 | 516 | 492 | 725 | 2,617 | 89 | 2,706 |
| Philippines | 264 | 339 | 277 | 148 | 182 | 236 | 957 | 489 | 1,446 |
| Singapore | 61 | 55 | 116 | 123 | 93 | 182 | 629 | 1 | 630 |
| Sri Lanka | 15 | 49 | 107 | 62 | 88 | 64 | 359 | 26 | 385 |
| Taiwan, China | 42 | 143 | 74 | 46 | 82 | 87 | 441 | 33 | 474 |
| Thailand | 14 | 10 | 50 | 58 | 27 | 45 | 200 | 4 | 204 |
| Vietnam | 29 | 100 | 21 | 37 | 17 | 15 | 166 | 53 | 219 |
| Middle East countries | 1,711 | 1,720 | 2,915 | 3,139 | 2,809 | 6,291 | 18,583 | 2 | 18,585 |
| *- Bahrain* | *10* | *12* | *30* | *51* | *18* | *33* | *154* | *0* | *154* |
| *- Iran* | *13* | *5* | *91* | *10* | *7* | *22* | *148* | *0* | *148* |
| *- Jordan* | *12* | *14* | *17* | *33* | *25* | *38* | *139* | *0* | *139* |
| *- Kuwait* | *38* | *25* | *25* | *44* | *58* | *134* | *324* | *0* | *324* |
| *- Lebanon* | *15* | *12* | *33* | *62* | *14* | *25* | *161* | *0* | *161* |
| *- Oman* | *11* | *5* | *20* | *21* | *16* | *30* | *102* | *1* | *103* |
| *- Qatar* | *12* | *14* | *13* | *50* | *27* | *50* | *166* | *0* | *166* |
| *- Saudi Arabia* | *1,015* | *853* | *1,295* | *1,340* | *1,570* | *3,347* | *9,419* | *1* | *9,420* |
| *- UAE* | *576* | *779* | *1,382* | *1,525* | *1,068* | *2,602* | *7,932* | *0* | *7,932* |
| *- Other Middle East* | *9* | *1* | *9* | *3* | *6* | *10* | *38* | *0* | *38* |
| Other Asian | 10 | 20 | 21 | 16 | 14 | 20 | 85 | 16 | 101 |
| **Oceania** | **1,283** | **959** | **1,780** | **1,820** | **1,424** | **1,473** | **8,036** | **703** | **8,739** |
| Australia | 1,189 | 922 | 1,549 | 1,724 | 1,324 | 1,386 | 7,545 | 549 | 8,094 |
| New Zealand | 60 | 25 | 195 | 71 | 52 | 67 | 327 | 143 | 470 |
| Other Oceanian | 34 | 12 | 36 | 25 | 48 | 20 | 164 | 11 | 175 |
| **America** | **1,675** | **1,285** | **2,069** | **1,543** | **1,744** | **2,029** | **9,910** | **435** | **10,345** |
| Brazil | 52 | 55 | 145 | 58 | 73 | 75 | 354 | 104 | 458 |
| Canada | 684 | 471 | 656 | 512 | 649 | 717 | 3,630 | 59 | 3,689 |
| USA | 777 | 621 | 1,101 | 846 | 865 | 1,075 | 5,063 | 222 | 5,285 |
| Other American | 162 | 138 | 167 | 127 | 157 | 162 | 863 | 50 | 913 |
| **Others & not stated** | **53** | **39** | **34** | **62** | **34** | **22** | **239** | **5** | **244** |
| **ALL COUNTRIES** | **107,684** | **91,850** | **105,663** | **109,031** | **100,030** | **82,208** | **589,305** | **7,161** | **596,466** |

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 2023

| Country of last embarkation | Total tourist arrivals | of which, arrivals from selected country of residence | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | France | UK | Germany | Switzerland | Italy | Russia | Reunion | RSA | India |
| **EUROPE** | **259,649** | **94,525** | **43,062** | **38,763** | **8,548** | **8,676** | **521** | **95** | **94** | **63** |
| France | 120,981 | 85,669 | 3,744 | 5,070 | 2,364 | 2,032 | 36 | 76 | 31 | 21 |
| Germany | 35,231 | 3,302 | 253 | 25,727 | 804 | 198 | 27 | 4 | 5 | 6 |
| Italy | 4,554 | 8 | 1 | 5 | 51 | 4,441 | 2 | 0 | 1 | 0 |
| Switzerland | 10,033 | 1,604 | 191 | 1,857 | 3,886 | 140 | 16 | 0 | 2 | 5 |
| Turkey | 26,411 | 2,303 | 675 | 3,682 | 1,140 | 1,621 | 407 | 11 | 12 | 10 |
| UK | 42,065 | 606 | 37,982 | 73 | 72 | 98 | 11 | 3 | 40 | 17 |
| **AFRICA** | **188,118** | **41,423** | **3,534** | **2,744** | **1,016** | **802** | **531** | **61,423** | **44,475** | **1,540** |
| Kenya | 9,122 | 2,210 | 673 | 98 | 43 | 50 | 63 | 20 | 131 | 324 |
| Madagascar | 8,639 | 657 | 100 | 71 | 38 | 33 | 67 | 467 | 110 | 440 |
| Reunion | 106,581 | 37,918 | 441 | 1,234 | 521 | 125 | 62 | 60,791 | 830 | 277 |
| Seychelles | 3,803 | 165 | 75 | 84 | 30 | 6 | 122 | 10 | 29 | 33 |
| South Africa | 59,491 | 464 | 2,244 | 1,255 | 379 | 586 | 217 | 133 | 43,362 | 465 |
| **ASIA** | **134,970** | **10,881** | **16,348** | **10,272** | **4,437** | **3,301** | **7,050** | **805** | **269** | **25,775** |
| Hong Kong | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| India | 23,007 | 62 | 142 | 16 | 6 | 10 | 33 | 35 | 52 | 21,748 |
| Malaysia | 2,807 | 197 | 43 | 23 | 10 | 4 | 41 | 427 | 40 | 13 |
| Saudi Arabia | 7,286 | 202 | 79 | 126 | 21 | 36 | 28 | 36 | 2 | 156 |
| UAE | 101,685 | 10,420 | 16,084 | 10,106 | 4,400 | 3,251 | 6,947 | 307 | 175 | 3,858 |
| **Arrivals by air** | **589,305** | **146,998** | **63,104** | **51,810** | **14,012** | **12,788** | **8,102** | **62,439** | **45,616** | **27,384** |

| of which: | France | UK | Germany | Switzerland | Italy | Russia | Reunion | RSA | India |
|---|---|---|---|---|---|---|---|---|---|
| Direct[1] | 58.3% | 60.2% | 49.7% | 27.7% | 34.7% | N/A | 97.4% | 95.1% | 79.4% |
| From UAE | 7.1% | 25.5% | 19.5% | 31.4% | 25.4% | 85.7% | 0.5% | 0.4% | 14.1% |
| From Turkey | 1.6% | 1.1% | 7.1% | 8.1% | 12.7% | 5.0% | 0.0% | 0.0% | 0.0% |
| From France | | 5.9% | 9.8% | 16.9% | 15.9% | 0.4% | 0.1% | 0.1% | 0.1% |
| From Reunion | 25.8% | 0.7% | 2.4% | 3.7% | 1.0% | 0.8% | | 1.8% | 1.0% |
| From South Africa | 0.3% | 3.6% | 2.4% | 2.7% | 4.6% | 2.7% | 0.2% | | 1.7% |

1 Direct from own country of residence

*Source: Statistics Mauritius*

### Table 11: Tourist Arrivals by Main Purpose of Visit, 2019 - 2023

| Purpose of Visit | 2019 | 2020 | 2021 | 2022 | Semester 1 of 2023 | |
|---|---|---|---|---|---|---|
| | | | | | Number | As a % of total |
| Holiday | 1,294,160 | 289,175 | 168,246 | 948,818 | 566,413 | 95.0 |
| Business | 50,543 | 10,187 | 6,504 | 27,261 | 16,666 | 2.8 |
| Transit | 28,387 | 8,599 | 4,304 | 15,840 | 10,960 | 1.8 |
| Conference | 5,507 | 510 | 308 | 1,308 | 654 | 0.1 |
| Sports | 3,736 | 166 | 34 | 2,713 | 1,115 | 0.2 |
| Other & not stated | 1,155 | 343 | 384 | 1,350 | 658 | 0.1 |
| **TOTAL** | **1,383,488** | **308,980** | **179,780** | **997,290** | **596,466** | **100** |

*Source: Statistics Mauritius*



### Table 12: Tourist Arrivals by Age and Sex for Selected Markets, Semester 1 of 2019 and 2023

| Age group (years) | Market: France | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Semester 1 of 2019 | | | Semester 1 of 2023 | | | Share by age group | |
| | Male | Female | Total | Male | Female | Total | 2019 | 2022[1] |
| Under 15 | 10,206 | 10,170 | 20,376 | 9,654 | 9,627 | 19,281 | 14.1% | 13.1% |
| 15 - 24 | 3,863 | 5,528 | 9,391 | 4,509 | 6,583 | 11,092 | 6.5% | 7.5% |
| 25 - 34 | 9,668 | 11,728 | 21,396 | 10,220 | 13,336 | 23,556 | 14.8% | 16.0% |
| 35 - 44 | 11,544 | 12,395 | 23,939 | 11,546 | 12,215 | 23,761 | 16.6% | 16.1% |
| 45 - 54 | 14,014 | 14,405 | 28,419 | 12,669 | 13,676 | 26,345 | 19.7% | 17.9% |
| 55 - 64 | 11,729 | 11,444 | 23,173 | 12,856 | 12,713 | 25,569 | 16.1% | 17.4% |
| 65 & over | 9,069 | 8,426 | 17,495 | 9,163 | 8,558 | 17,721 | 12.1% | 12.0% |
| **TOTAL** | **70,093** | **74,096** | **144,189** | **70,617** | **76,708** | **147,325** | **100.0%** | **100.0%** |

| Age group (years) | Market: Reunion | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Semester 1 of 2019 | | | Semester 1 of 2023 | | | Share by age group | |
| | Male | Female | Total | Male | Female | Total | 2019 | 2022[1] |
| Under 15 | 6,108 | 6,068 | 12,176 | 5,802 | 5,891 | 11,693 | 19.1% | 18.7% |
| 15 - 24 | 2,389 | 2,903 | 5,292 | 2,537 | 3,398 | 5,935 | 8.3% | 9.5% |
| 25 - 34 | 4,247 | 5,286 | 9,533 | 3,932 | 5,265 | 9,197 | 15.0% | 14.7% |
| 35 - 44 | 5,305 | 5,662 | 10,967 | 5,134 | 5,746 | 10,880 | 17.2% | 17.4% |
| 45 - 54 | 5,650 | 5,630 | 11,280 | 4,718 | 5,025 | 9,743 | 17.7% | 15.6% |
| 55 - 64 | 4,487 | 4,430 | 8,917 | 4,366 | 4,464 | 8,830 | 14.0% | 14.1% |
| 65 & over | 2,772 | 2,810 | 5,582 | 2,981 | 3,181 | 6,162 | 8.8% | 9.9% |
| **TOTAL** | **30,958** | **32,789** | **63,747** | **29,470** | **32,970** | **62,440** | **100.0%** | **100.0%** |

| Age group (years) | Market: United Kingdom | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Semester 1 of 2019 | | | Semester 1 of 2023 | | | Share by age group | |
| | Male | Female | Total | Male | Female | Total | 2019 | 2022[1] |
| Under 15 | 3,564 | 3,648 | 7,212 | 3,632 | 3,556 | 7,188 | 11.7% | 11.3% |
| 15 - 24 | 1,307 | 1,996 | 3,303 | 1,607 | 2,046 | 3,653 | 5.4% | 5.8% |
| 25 - 34 | 5,432 | 6,698 | 12,130 | 5,286 | 6,751 | 12,037 | 19.7% | 19.0% |
| 35 - 44 | 5,274 | 5,084 | 10,358 | 5,307 | 5,496 | 10,803 | 16.8% | 17.0% |
| 45 - 54 | 4,986 | 5,311 | 10,297 | 4,629 | 5,146 | 9,775 | 16.7% | 15.4% |
| 55 - 64 | 5,056 | 5,149 | 10,205 | 5,641 | 5,924 | 11,565 | 16.6% | 18.2% |
| 65 & over | 4,408 | 3,694 | 8,102 | 4,447 | 3,956 | 8,403 | 13.2% | 13.2% |
| **TOTAL** | **30,027** | **31,580** | **61,607** | **30,549** | **32,875** | **63,424** | **100.0%** | **100.0%** |

### Table 12: Tourist Arrivals by Age and Sex for Selected Markets, Semester 1 of 2019 and 2023 (Cont'd)

| Age group (years) | Market: Germany | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Semester 1 of 2019 | | | Semester 1 of 2023 | | | Share by age group | |
| | Male | Female | Total | Male | Female | Total | 2019 | 2022[1] |
| Under 15 | 1,842 | 1,847 | 3,689 | 2,485 | 2,520 | 5,005 | 6.0% | 9.3% |
| 15 - 24 | 1,187 | 2,142 | 3,329 | 1,296 | 2,003 | 3,299 | 5.4% | 6.1% |
| 25 - 34 | 5,252 | 6,584 | 11,836 | 5,053 | 6,407 | 11,460 | 19.1% | 21.2% |
| 35 - 44 | 3,912 | 3,994 | 7,906 | 4,173 | 4,242 | 8,415 | 12.8% | 15.6% |
| 45 - 54 | 6,122 | 6,877 | 12,999 | 4,039 | 4,592 | 8,631 | 21.0% | 16.0% |
| 55 - 64 | 6,944 | 6,880 | 13,824 | 5,507 | 5,474 | 10,981 | 22.3% | 20.3% |
| 65 & over | 4,482 | 3,836 | 8,318 | 3,427 | 2,867 | 6,294 | 13.4% | 11.6% |
| **TOTAL** | **29,741** | **32,160** | **61,901** | **25,980** | **28,105** | **54,085** | **100.0%** | **100.0%** |

| Age group (years) | Market: South Africa | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Semester 1 of 2019 | | | Semester 1 of 2023 | | | Share by age group | |
| | Male | Female | Total | Male | Female | Total | 2019 | 2022[1] |
| Under 15 | 4,091 | 4,111 | 8,202 | 3,487 | 3,600 | 7,087 | 15.0% | 15.4% |
| 15 - 24 | 1,581 | 2,022 | 3,603 | 1,456 | 1,797 | 3,253 | 6.6% | 7.1% |
| 25 - 34 | 4,369 | 5,138 | 9,507 | 3,008 | 3,853 | 6,861 | 17.4% | 14.9% |
| 35 - 44 | 6,164 | 5,953 | 12,117 | 4,749 | 5,097 | 9,846 | 22.1% | 21.4% |
| 45 - 54 | 5,372 | 4,704 | 10,076 | 4,344 | 4,031 | 8,375 | 18.4% | 18.2% |
| 55 - 64 | 3,512 | 3,395 | 6,907 | 3,038 | 3,095 | 6,133 | 12.6% | 13.4% |
| 65 & over | 2,215 | 2,155 | 4,370 | 2,195 | 2,158 | 4,353 | 8.0% | 9.5% |
| **TOTAL** | **27,304** | **27,478** | **54,782** | **22,277** | **23,631** | **45,908** | **100.0%** | **100.0%** |

| Age group (years) | All markets | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Semester 1 of 2019 | | | Semester 1 of 2023 | | | Share by age group | |
| | Male | Female | Total | Male | Female | Total | 2019 | 2022[1] |
| Under 15 | 39,711 | 39,620 | 79,331 | 38,444 | 38,315 | 76,759 | 12.2% | 12.9% |
| 15 - 24 | 18,812 | 26,936 | 45,748 | 18,595 | 25,124 | 43,719 | 7.0% | 7.3% |
| 25 - 34 | 64,555 | 71,824 | 136,379 | 51,733 | 62,526 | 114,259 | 21.0% | 19.2% |
| 35 - 44 | 60,322 | 56,420 | 116,742 | 55,940 | 55,140 | 111,080 | 18.0% | 18.6% |
| 45 - 54 | 59,066 | 56,715 | 115,781 | 50,533 | 50,377 | 100,910 | 17.8% | 16.9% |
| 55 - 64 | 47,745 | 45,602 | 93,347 | 45,682 | 44,651 | 90,333 | 14.4% | 15.1% |
| 65 & over | 33,134 | 29,620 | 62,754 | 31,088 | 28,318 | 59,406 | 9.7% | 10.0% |
| **TOTAL** | **323,345** | **326,737** | **650,082** | **292,015** | **304,451** | **596,466** | **87.8%** | **87.1%** |

*Source: Statistics Mauritius*

### Table 13: Tourist Arrivals, Nights and Average Length of Stay by Quarter, 2019 - 2023

| Year | | Tourist arrivals | Tourist nights | Average length of stay |
|---|---|---|---|---|
| 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** |
| 2022 | 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*** |
| | 3rd Quarter | 261,776 | 3,104,678 | 12.2 |
| | 4th Quarter | 358,958 | 3,538,497 | 10.9 |
| | ***Semester 2*** | ***620,734*** | ***6,643,175*** | ***11.5*** |
| | **Year** | **997,290** | **11,363,042** | **12.6** |
| 2023 | 1st Quarter | 305,197 | 3,907,503 | 11.9 |
| | 2nd Quarter | 291,269 | 3,182,486 | 10.9 |
| | ***Semester 1*** | ***596,466*** | ***7,089,989*** | ***11.4*** |

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 2023**

| Country of residence | Tourist nights | | Average length of stay (days) | |
|---|---|---|---|---|
| | S1 2019 | S1 2023 | S1 2019 | S1 2023 |
| France | 1,820,428 | 1,900,970 | 11.7 | 12.2 |
| United Kingdom | 728,896 | 781,306 | 11.5 | 11.9 |
| Germany | 592,478 | 658,470 | 10.1 | 12.2 |
| Reunion | 489,203 | 482,023 | 7.0 | 7.1 |
| South Africa | 476,932 | 467,226 | 8.0 | 9.9 |
| India | 443,124 | 361,660 | 11.1 | 13.9 |
| China | 227,583 | 43,701 | 10.8 | 18.2 |
| Switzerland | 224,367 | 204,465 | 11.8 | 12.9 |
| Italy | 184,365 | 146,550 | 9.9 | 10.2 |
| Australia | 125,444 | 149,631 | 14.0 | 16.4 |
| Belgium | 90,852 | 113,375 | 13.0 | 13.6 |
| Austria | 104,617 | 124,963 | 10.7 | 11.3 |
| Sweden | 107,881 | 66,594 | 11.6 | 10.9 |
| Russia | 100,717 | 162,546 | 13.9 | 18.3 |
| Netherlands | 71,750 | 54,405 | 9.7 | 10.8 |
| Spain | 35,317 | 42,500 | 9.3 | 9.7 |
| ***Sub-total*** | ***5,823,954*** | ***5,760,385*** | ***10.4*** | ***11.4*** |
| **ALL MARKETS** | **7,145,889** | **7,089,989** | **10.6** | **11.4** |

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 and 2015 - 2018**

| Indicators | 2013 | 2015 | 2016 | 2017 | 2018 |
|---|---|---|---|---|---|
| **1. 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 |
| **2. Average party size** | **2.2** | **2.2** | **2.1** | **2.1** | **2.1** |
| **3. 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 |
| **4. 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 |
| **5. 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 |
| **6. 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 |
| **7. Evaluation of visit (%)** | | | | | |
| Beyond expectation | 26.0 | 35.0 | 34.0 | 21.9 | N/A |
| As expected | 70.0 | 63.0 | 63.0 | 75.6 | |
| Below expectation | 3.0 | 3.0 | 3.0 | 2.3 | |
| Highly enjoyable | n/a | n/a | n/a | n/a | |
| No response | 2.0 | n/a | 0.0 | 0.1 | |
| **8. Per capita expenditure (MUR)** | **42,168** | **43,986** | **44,660** | **45,518** | **46,500** |
| **9. Per capita per diem expenditure (MUR)** | **4,647** | **4,154** | **4,290** | **4,409** | **4,500** |
| Package | 5,644 | 4,904 | 4,923 | 5,158 | 5,200 |
| Non-package | 3,321 | 3,244 | 3,410 | 3,537 | 3,600 |
| **10. 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: Tourist Expenditure by Selected Country of Residence and by Type, 2013 - 2018

| Indicators | 2013 | 2015 | 2016 | 2017 | 2018 |
|---|---|---|---|---|---|
| **EXPENDITURE PER TOURIST BY SELECTED COUNTRY OF RESIDENCE (MUR)** | | | | | |
| France | 44,900 | 41,900 | 43,000 | 44,500 | 46,200 |
| Germany | 53,000 | 48,200 | 47,400 | 47,000 | 46,400 |
| Italy | 44,300 | 42,500 | 40,500 | 41,900 | 43,300 |
| Switzerland | 61,600 | 56,500 | 58,700 | 64,300 | 59,800 |
| United Kingdom | 49,200 | 52,800 | 48,900 | 48,200 | 53,300 |
| Reunion Island | 24,300 | 22,800 | 24,700 | 22,800 | 22,800 |
| South Africa | 37,100 | 31,400 | 32,300 | 34,600 | 33,900 |
| China | 48,500 | 52,500 | 55,000 | 55,600 | 56,200 |
| India | 31,200 | 33,800 | 40,900 | 36,900 | 47,700 |
| **ALL COUNTRIES** | **42,200** | **44,000** | **44,700** | **45,500** | **46,500** |
| **TOTAL EXPENDITURE BY TYPE (MUR Mn)** | | | | | |
| 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; Survey of Inbound Tourism was not carried out during the years 2014 and 2019

*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 |
| **TOTAL** | **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 |
| **TOTAL** | **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** | **97.3** | **98.7** | **97.2** |
| Accommodation[2] services for visitors | 55.1 | 14.9 | 51.5 | 27.3 |
| Food and beverage serving services | 8.0 | 10.6 | 8.2 | 12.9 |
| Road passenger transport services | 3.8 | 3.4 | 3.7 | 4.7 |
| Air and sea passenger transport services | 12.5 | 51.0 | 16.1 | 11.3 |
| Transport equipment rental services | 1.8 | 2.1 | 1.9 | 0.4 |
| Travel agencies and other reservation services | 6.1 | 2.1 | 5.7 | 4.2 |
| Recreational, cultural services and sporting services | 4.4 | 0.9 | 4.1 | 0.8 |
| Country specific tourism characteristics goods and services | 7.0 | 12.2 | 7.5 | 35.6 |
| **Other consumption products and services** | **1.2** | **2.7** | **1.3** | **2.8** |
| **Total** | **100.0** | **100.0** | **100.0** | **100.0** |
| **TOTAL TOURISM EXPENDITURE (MUR Mn)** | **73,212** | **7,417** | **80,629** | **24,488** |

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 (revised, September 2023), Statistics Mauritius*

**Table 22: Number of Tourist Accommodation Facilities, Air Seats Capacity and Tourist Arrivals, 2019 - 2023**

| Details | 2019 | 2020 | 2021 | 2022 | 2023 S1 |
|---|---|---|---|---|---|
| **Built hotel capacity** | | | | | |
| Number of hotels | 114 | 113 | 112 | 109 | 108 |
| Number of hotel rooms | 13,676 | 13,451 | 13,921 | 13,828 | 13,377 |
| **Operational tourist accommdation facilities** | | | | | |
| Hotel | 112 | 113 | 112 | 105 | 101 |
| Guesthouse | 199 | 222 | 210 | 219 | 216 |
| Tourist residence | 756 | 871 | 847 | 857 | 847 |
| Domaine | | N/A | | 5 | 5 |
| **Operational rooms** | | | | | |
| Hotel | 14,108 | 13,865 | 13,801 | 13,017 | 13,377 |
| Guesthouse | 2,124 | 2,629 | 2,633 | 2,778 | 2,734 |
| Tourist residence | 4,814 | 5,869 | 5,858 | 5,562 | 5,607 |
| Domaine | | N/A | | 16 | 16 |
| **TOTAL OPERATIONAL ROOMS** | **21,046** | **22,363** | **22,292** | **21,373** | **21,734** |
| **Air seats and tourist arrivals** | | | | | |
| Total air seats | 2,397,287 | n/a | n/a | 1,736,228 | 1,085,262 |
| Total tourist arrivals | 1,383,488 | 308,980 | 179,780 | 997,290 | 596,466 |

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

**Table 23: Number of Licenses[1] Issued by the Tourism Authority as at 30 June 2022 and 2023**

| Activity | June 2022 | | June 2023 | |
|---|---|---|---|---|
| | No. | Rooms | No. | Rooms |
| Hotel | 111 | 13,740 | 108 | 13,377 |
| Guest house | 218 | 2,747 | 216 | 2,734 |
| Tourist residence | 847 | 5,577 | 847 | 5,607 |
| Domaine | 5 | 16 | 5 | 16 |
| Operating spa | | | | |
| *- within hotel premises*[2] | *5* | | 67 | |
| *- outside hotel premises* | *11* | | 13 | |
| Operating health and fitness centre within hotel premises[2] | 1 | | 79 | |
| Operating beauty parlour, including hairdressing, within hotel premises[2] | 0 | | 52 | |
| Restaurant | 798 | | 794 | |
| Table d'hôte | 23 | | 24 | |
| Operating golf course | 8 | | 8 | |
| Operating boat house | 74 | | 73 | |
| Operating pleasure craft for commercial purpose, other than by a pleasure craft licensee | 1,322 | | 1,374 | |
| Operating rental agency for jet ski | 0 | | 0 | |
| Operating rental agency for kite surf | 22 | | 21 | |
| Operating rental agency for windsurf | 2 | | 2 | |
| Operating scuba diving centre | 70 | | 67 | |
| Operating helmet diving centre | 10 | | 10 | |
| Providing non-motorised water sports such as pedaloes, canoes, kayaks and laser | 10 | | 9 | |
| Hawking on beaches facing hotels | 429 | | 425 | |
| Hawking in tourist sites | 16 | | 16 | |
| Eco-tourism activities (nature-based tourism activities or adventure-related tourism activities, or both) | 16 | | 14 | |
| Operating rental agency for bus, including minibus | 2 | | 1 | |
| Operating rental agency for motorcycle | 39 | | 32 | |
| Operating rental agency for bicycle | 20 | | 22 | |
| Operating rental agency for quad | 10 | | 10 | |
| Karting | 0 | | 0 | |
| Operating aquarium displaying fish or marine animals for public viewing | 1 | | 1 | |
| Providing tour operator service | 358 | | 378 | |
| Working as tourist guide, including tourist guide employed by a tour operator | 18 | | 21 | |
| Operating travel agency | 145 | | 144 | |
| Nightclub | 17 | | 17 | |
| Private club | 6 | | 6 | |
| Pub | 8 | | 8 | |
| **TOTAL** | **4,616** | | **4,666** | |

1 Excludes private pleasure craft licence
2 Already included in the hotel licence 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 establishement, MUR '000 | 430,143 | 87,977 | 35,818 | 284,718 | 63,513 | 200,848 |
| Gross output per persons 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[1] | 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 establishement, MUR '000 | 200,848 | 83,005 | 278,073 | 618,590 | 94,647 | 188,547 |
| Gross output per persons 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 |

1 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 gender** | | | | | | |
| 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, 2019 - 2023 (%)**

| Large hotels[1] | | | | | |
|---|---|---|---|---|---|
| Month | 2019 | 2020[2] | 2021[2] | 2022 | 2023 |
| January | 74 | 75 | 18 | 44 | 76 |
| February | 77 | 72 | 14 | 46 | 71 |
| March | 72 | 43 | 9 | 52 | 74 |
| April | 71 | 0 | 1 | 67 | 80 |
| May | 67 | 0 | 3 | 61 | 78 |
| June | 65 | 1 | 6 | 53 | 67 |
| July | 70 | 1 | 8 | 67 | |
| August | 75 | 5 | 16 | 72 | |
| September | 77 | 8 | 11 | 75 | |
| October | 76 | 16 | 38 | 81 | |
| November | 85 | 17 | 59 | 83 | |
| December | 79 | 21 | 42 | 80 | |
| **Whole Year** | **74** | **24** | **21** | **65** | |
| **QUARTER** | | | | | |
| Quarter 1 | 74 | 64 | 14 | 47 | 74 |
| Quarter 2 | 68 | 0 | 3 | 60 | 75 |
| Quarter 3 | 74 | 4 | 12 | 71 | |
| Quarter 4 | 80 | 18 | 46 | 82 | |
| **Whole Year** | **74** | **24** | **21** | **65** | |
| **SEMESTER** | | | | | |
| Semester 1 | 71 | 35 | 9 | 54 | 75 |
| Semester 2 | 77 | 12 | 32 | 76 | |
| **Whole Year** | **74** | **24** | **21** | **65** | |

**Table 28: Hotel Room Occupancy Rate, 2019 - 2023 (%) (Cont'd)**

| All hotels | | | | | |
|---|---|---|---|---|---|
| Month | 2019 | 2020[2] | 2021[2] | 2022 | 2023 |
| January | 72 | 73 | 18 | 42 | 75 |
| February | 76 | 70 | 15 | 44 | 70 |
| March | 71 | 42 2 | 8 | 50 | 73 |
| April | 69 | 1 | 2 | 63 | 78 |
| May | 66 | 0 | 3 | 58 | 76 |
| June | 64 | 1 | 6 | 51 | 65 |
| July | 69 | 2 | 8 | 63 | |
| August | 73 | 5 | 16 | 68 | |
| September | 75 | 9 | 12 | 71 | |
| October | 75 | 16 | 37 | 78 | |
| November | 84 | 17 | 57 | 81 | |
| December | 78 | 21 | 40 | 78 | |
| **Whole Year** | **73** | **24** | **21** | **62** | |
| **QUARTER** | | | | | |
| Quarter 1 | 73 | 63 | 14 | 45 | 73 |
| Quarter 2 | 66 | 1 | 3 | 57 | 73 |
| Quarter 3 | 72 | 5 | 12 | 68 | |
| Quarter 4 | 79 | 18 | 45 | 79 | |
| **Whole Year** | **73** | **24** | **21** | **62** | |
| **SEMESTER** | | | | | |
| Semester 1 | 69 | 34 | 9 | 51 | 73 |
| Semester 2 | 76 | 12 | 31 | 73 | |
| **Whole Year** | **73** | **24** | **21** | **62** | |

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

2 For the periods March 2020 to end of September 2020 and March 2021 to end of December 2021, occupancy rate excludes number of nights spent in hotels which were used as quarantine centres

*Source: Statistics Mauritius*

### Table 29: Tourism Earnings and Tourist Arrivals by Quarter and Semester, 2018 - 2023

| Quarter/Semester | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|---|
| **Tourism earnings by quarter (MUR Mn)** | | | | | | |
| Quarter 1 | 18,483 | 16,518 | 14,144 | 522 | 12,539 | 22,281 |
| Quarter 2 | 14,977 | 14,534 | 1,939 | 385 | 12,733 | 19,420 |
| Quarter 3 | 12,797 | 14,052 | 824 | 1,704 | 16,335 | |
| Quarter 4 | 17,781 | 18,003 | 757 | 12,642 | 23,238 | |
| **TOTAL** | **64,037** | **63,107** | **17,664** | **15,253** | **64,845** | |
| **Tourism earnings by semester (MUR Mn)** | | | | | | |
| Semester 1 | 33,460 | 31,052 | 16,083 | 907 | 25,272 | 41,701 |
| Semester 2 | 30,578 | 32,055 | 1,581 | 14,346 | 39,573 | |
| **TOTAL** | **64,037** | **63,107** | **17,664** | **15,253** | **64,845** | |
| **Tourist arrivals by quarter** | | | | | | |
| Quarter 1 | 356,415 | 352,305 | 304,842 | 2,772 | 158,818 | 305,197 |
| Quarter 2 | 290,450 | 297,777 | 39 | 453 | 217,738 | 291,269 |
| Quarter 3 | 328,201 | 323,560 | 731 | 6,235 | 261,776 | |
| Quarter 4 | 424,342 | 409,846 | 3,368 | 170,320 | 358,958 | |
| **TOTAL** | **1,399,408** | **1,383,488** | **308,980** | **179,780** | **997,290** | |
| **Tourist arrivals by semester** | | | | | | |
| Semester 1 | 646,865 | 650,082 | 304,881 | 3,225 | 376,556 | 596,466 |
| Semester 2 | 752,543 | 733,406 | 4,099 | 176,555 | 620,734 | |
| **TOTAL** | **1,399,408** | **1,383,488** | **308,980** | **179,780** | **997,290** | |

1 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*

### Table 30: Monthly Gross Tourism Earnings, 2019 - 2023 (MUR Mn)

| Month | 2019 | 2020 | 2021 | 2022 | 2023 |
|---|---|---|---|---|---|
| January | 6,178 | 5,995 | 243 | 4,343 | 8,441 |
| February | 5,140 | 4,899 | 176 | 3,556 | 6,452 |
| March | 5,200 | 3,250 | 103 | 4,640 | 7,388 |
| April | 5,450 | 808 | 90 | 4,296 | 6,632 |
| May | 4,915 | 748 | 124 | 4,309 | 6,900 |
| June | 4,169 | 383 | 171 | 4,128 | 5,888 |
| July | 4,937 | 414 | 370 | 5,128 | 6,440 |
| August | 4,753 | 195 | 577 | 5,892 | |
| September | 4,362 | 215 | 757 | 5,315 | |
| October | 5,434 | 222 | 3,044 | 6,676 | |
| November | 5,964 | 254 | 4,962 | 7,834 | |
| December | 6,605 | 281 | 4,636 | 8,728 | |
| **TOTAL** | **63,107** | **17,664** | **15,253** | **64,845** | |
| **Average Expenditure Based on Tourism Earnings published by the Bank of Mauritius (MUR)** | | | | | |
| Per capita | 45,614 | Not comparable - COVID-19 pandemic | | 65,021 | 69,913 (S1) |
| Per capita per diem[2] | 4,362 | | | 5,707 | 5,882 (S1) |

1 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

2 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, 2019/20 - 2023/24 (MUR Mn)

| Details | 2019/20 | 2020/21[r] | 2021/22[r] | 2022/23[r] | 2023/24 |
|---|---|---|---|---|---|
| Passenger Fee on Air Tickets[1] | 1,264 | 26 | 613 | 1,755 | **2779** |
| Contribution in respect of Tourism Development Projects on State Lands | 6 | 0 | 24 | 35 | 35 |
| Tourist Enterprise Licenses | 73 | 24 | 49 | 110 | 115 |
| Environment Protection Fee | 330 | 89 | 326 | 565 | 638 |
| *- of which by tourist accommodation facilities* | *248* | *14* | *237* | *450* | |
| Estimated VAT paid by hotels and restaurants | 4,121 | 873 | 3,115 | 6,542 | |
| Corporate Tax paid by the accommodation sector | 250 | -26 | 17 | 198 | n/a |
| CSR paid to the MRA by the Accommodation And Food Service Activities | 27 | 20 | 10 | 10 | |
| Training levy paid by the Accommodation And Food Service Activities | 94 | 61 | 93 | 133 | |

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 indus-tries | 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*

**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, 2019 - 2023

| Selected industry group | 2019 | 2020[r] | 2021[r] | 2022[f] | 2023[f] |
|---|---|---|---|---|---|
| **Gross Value Added (MUR Mn)** | | | | | |
| Accommodation and food service activities | 31,714 | 11,633 | 10,719 | 32,082 | 38,550 |
| Sugar sector | 2,052 | 1,912 | 2,414 | 2,677 | 2,673 |
| Textile | 13,676 | 10,920 | 12,824 | 15,359 | 15,735 |
| Wholesale and retail trade | 52,465 | 47,053 | 48,706 | 54,750 | 60,391 |
| Financial and insurance activities | 55,178 | 55,562 | 58,829 | 67,711 | 73,870 |
| Real estate activities | 25,756 | 25,357 | 26,042 | 27,515 | 28,470 |
| **Total Gross Value Added (basic prices)** | **445,603** | **394,248** | **423,482** | **499,837** | **548,944** |
| **Share by selected industry group** | | | | | |
| Accommodation and food service activities | 7.1% | 3.0% | 2.5% | 6.4% | 7.0% |
| Sugar sector | 0.5% | 0.5% | 0.6% | 0.5% | 0.5% |
| Textile | 3.1% | 2.8% | 3.0% | 3.1% | 2.9% |
| Wholesale and retail trade | 11.8% | 11.9% | 11.5% | 11.0% | 11.0% |
| Financial and insurance activities | 12.4% | 14.1% | 13.9% | 13.5% | 13.5% |
| Real estate activities | 5.8% | 6.4% | 6.1% | 5.5% | 5.2% |
| **Real growth rates of selected industry group (% over previous year)** | | | | | |
| Accommodation and food service activities | -1.1 | -65.6 | -13.7 | +200.8 | +25.7 |
| Sugar sector | | | | | |
| *Sugarcane* | *+2.4* | *-18.1* | *-7.2* | *-10.9* | *-7.1* |
| *Sugar manufacturing* | *+9.3* | *-17.2* | *-5.1* | *-8.4* | *-5.4* |
| Textile | -5.4 | -29.0 | +8.9 | +6.7 | +0.8 |
| Wholesale and retail trade | +3.5 | -11.7 | +4.1 | +3.0 | +3.0 |
| Financial and insurance activities | +3.8 | +4.0 | +4.2 | +4.2 | +3.9 |
| Real estate activities | +3.4 | -1.8 | +1.4 | +1.5 | +1.8 |
| **Gross Value Added at basic prices** | **+2.9** | **-14.3** | **+4.0** | **+9.8** | **+5.2** |
| **Contribution of selected industry group to Gross Value Added Growth at Basic Prices** | | | | | |
| Accommodation and food service activities | -0.1 | -4.7 | -0.4 | +5.1 | +1.7 |
| Sugar sector | | | | | |
| *Sugarcane* | *0.0* | *-0.1* | *0.0* | *0.0* | *0.0* |
| *Sugar manufacturing* | *0.0* | *0.0* | *0.0* | *0.0* | *0.0* |
| Textile | -0.2 | -0.9 | +0.2 | +0.2 | 0.0 |
| Wholesale and retail trade | +0.4 | -1.4 | +0.5 | +0.3 | +0.3 |
| Financial and insurance activities | +0.5 | +0.5 | +0.6 | +0.6 | +0.5 |
| Real estate activities | +0.2 | -0.1 | +0.1 | +0.1 | +0.1 |
| **Gross Value Added Growth at basic prices** | **+2.9** | **-14.3** | **+4.0** | **+9.8** | **+5.2** |

*Source: Statistics Mauritius*

### Table 35: Gross Value Added of Selected Sub-sectors at Current Basic Prices, 2019 - 2023

| Selected sub-sector | 2019[r] | 2020[r] | 2021[r] | 2022[f] | 2023[f] |
|---|---|---|---|---|---|
| **Gross Value Added (MUR Mn)** | | | | | |
| Tourism[1] | 35,836 | 9,099 | 8,311 | 37,047 | 44,412 |
| ICT[2] | 25,270 | 26,398 | 28,177 | 29,553 | 31,242 |
| Seafood[3] | 5,486 | 5,693 | 6,076 | 7,387 | 7,758 |
| Freeport[4] | 2,229 | 1,868 | 2,338 | 2,880 | 3,329 |
| Global business[5] | 32,115 | 32,399 | 36,431 | 42,246 | 46,603 |
| **Share (%)** | | | | | |
| Tourism[1] | 8.0 | 2.3 | 2.0 | 7.4 | 8.1 |
| ICT[2] | 5.7 | 6.7 | 6.7 | 5.9 | 5.7 |
| Seafood[3] | 1.2 | 1.4 | 1.4 | 1.5 | 1.4 |
| Freeport[4] | 0.5 | 0.5 | 0.6 | 0.6 | 0.6 |
| Global business[5] | 7.2 | 8.2 | 8.6 | 8.5 | 8.5 |
| **Real growth rates (% over previous year)** | | | | | |
| Tourism[1] | +0.2 | -78.6 | -21.8 | +253.6 | +23.8 |
| ICT[2] | +3.7 | +1.5 | +6.9 | +1.8 | +3.6 |
| Seafood[3] | +1.7 | -9.7 | +3.0 | +15.5 | +2.0 |
| Freeport[4] | -19.0 | -18.0 | +20.0 | +12.0 | +8.0 |
| Global business[5] | +5.7 | -3.6 | +6.8 | +3.3 | +3.7 |

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

2 covers components of “Manufacturing”, “Wholesale and retail trade”, “Information & communication” and “Call centres”, related to ICT

3 covers mainly the activities of "Fishing" and "Fish processing"

4 covers "Wholesale and retail trade" and "Storage" activities of the freeport operators

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

*Source: Statistics Mauritius*

### Table 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 |
|---|---|---|---|---|---|---|
| **Value 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, 2018 - 2022 (MUR Mn)

| Details | 2018 | 2019 | 2020 | 2021 | 2022[p] |
|---|---|---|---|---|---|
| **Total exports of goods and services** | **230,503** | **228,749** | **176,631** | **211,641** | **324,181** |
| of which: Tourism sector | 73,212 | 71,821 | 19,598 | 16,449 | 73,060 |
| Export-oriented enterprises | 43,311 | 42,319 | 37,289 | 42,657 | 49,918 |
| **Total imports of goods and services** | **259,979** | **265,399** | **208,640** | **257,590** | **359,158** |
| of which: Tourism sector | 22,488 | 23,298 | 8,560 | 5,982 | 19,175 |
| Export-oriented enterprises | 25,929 | 24,645 | 19,629 | 25,673 | 33,466 |
| **Balance of Trade (goods and services)** | **-29,476** | **-36,650** | **-32,009** | **-45,949** | **-34,977** |
| of which: Tourism sector | 50,724 | 48,523 | 11,038 | 10,467 | 53,885 |
| Export-oriented enterprises | 17,382 | 17,674 | 17,660 | 16,984 | 16,452 |

*Source: Tourism Satellite Account, 2018 (revised, August 2023), Statistics Mauritius*

### Table 38: Comparative Level of Employment in Selected Industry Group, 2018 - 2022 (000s)

| Selected industry group | 2018 | 2019 | 2020 | 2021 | 2022 |
|---|---|---|---|---|---|
| **Large establishments (employing 10 or more persons)** | | | | | |
| Agriculture, forestry and fishing | 13.4 | 12.9 | 9.2 | 8.4 | 8.4 |
| Manufacturing | 72.8 | 69.2 | 63.0 | 55.6 | 53.5 |
| Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities | 4.4 | 4.4 | 4.8 | 4.7 | 4.9 |
| Construction | 12.5 | 15.6 | 17.1 | 17.5 | 16.6 |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 28.1 | 29.3 | 31.3 | 30.4 | 30.6 |
| Transportation and storage | 17.1 | 17.2 | 15.9 | 14.9 | 14.8 |
| Accommodation and food service activities | 27.3 | 28.5 | 29.8 | 25.6 | 25.6 |
| Information and communication | 11.8 | 11.5 | 11.6 | 11.9 | 12.0 |
| Financial and insurance activities | 13.0 | 13.4 | 14.2 | 13.5 | 14.7 |
| Real estate activities | 0.9 | 1.0 | 1.3 | 1.0 | 1.0 |
| Professional, scientific and technical activities | 7.3 | 8.2 | 11.4 | 11.7 | 10.9 |
| Administrative and support service activities | 16.2 | 16.5 | 19.2 | 17.7 | 17.9 |
| Other industries | 95.2 | 97.5 | 97.7 | 92.6 | |
| ***Total employment in large establishments*** | **320.0** | **325.2** | **326.5** | **305.5** | **304.1** |
| **Other establishments** | | | | | |
| Agriculture, forestry and fishing | 27.6 | 27.4 | 26.2 | 20.9 | 22.5 |
| Manufacturing | 24.6 | 26.9 | 27.4 | 29.4 | 29.4 |
| Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities | 1.1 | 1.0 | 0.6 | 0.7 | 0.6 |
| Construction | 27.7 | 28.7 | 24.3 | 24.4 | 28.4 |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 68.0 | 67.0 | 57.7 | 58.7 | 65.9 |
| Transportation and storage | 22.3 | 22.4 | 21.3 | 22.3 | 24.4 |
| Accommodation and food service activities | 14.3 | 15.5 | 10.3 | 10.4 | 15.3 |
| Information and communication | 5.8 | 6.7 | 6.7 | 6.5 | 6.7 |
| Financial and insurance activities | 0.5 | 0.5 | 0.2 | 0.5 | 0.6 |
| Real estate activities | 0.6 | 0.5 | 0.1 | 0.1 | 0.5 |
| Professional, scientific and technical activities | 5.3 | 4.8 | 1.0 | 0.7 | 2.4 |
| Administrative and support service activities | 9.1 | 9.0 | 4.0 | 3.7 | 7.0 |
| Other industries | 46.3 | 46.6 | 43.4 | 30.6 | 40.1 |
| ***Total employment in other establishments*** | **253.1** | **257.0** | **223.2** | **208.9** | **243.8** |
| **All establishments** | | | | | |
| Agriculture, forestry and fishing | 41.0 | 40.3 | 35.4 | 29.3 | 30.9 |
| Manufacturing | 97.4 | 96.1 | 90.4 | 85.0 | 82.9 |
| Electricity, gas, steam and air conditioning supply & Water supply; sewerage, waste management and remediation activities | 5.5 | 5.4 | 5.4 | 5.4 | 5.5 |
| Construction | 40.2 | 44.3 | 41.4 | 41.9 | 45.0 |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 96.1 | 96.3 | 89.0 | 89.1 | 96.5 |
| Transportation and storage | 39.4 | 39.6 | 37.2 | 37.2 | 39.2 |
| Accommodation and food service activities | 41.6 | 44.0 | 40.1 | 36.0 | 40.9 |
| Information and communication | 17.6 | 18.2 | 18.3 | 18.4 | 18.7 |
| Financial and insurance activities | 13.5 | 13.9 | 14.4 | 14.0 | 15.3 |
| Real estate activities | 1.5 | 1.5 | 1.4 | 1.1 | 1.5 |
| Professional, scientific and technical activities | 12.6 | 13.0 | 12.4 | 12.4 | 13.3 |
| Administrative and support service activities | 25.3 | 25.5 | 23.2 | 21.4 | 24.9 |
| Other industries | 141.5 | 144.1 | 141.1 | 123.2 | 133.3 |
| **Total employment** | **573.1** | **582.2** | **549.7** | **514.4** | **547.9** |

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: 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[1] in the Tourism-related Industries, 2015 - 2019

| Tourism-related industries | 2015r | | 2016r | | 2017r | | 2018r | | 2019r | |
|---|---|---|---|---|---|---|---|---|---|---|
| | No. | % | No. | % | No. | % | No. | % | No. | % |
| Accommodation services for visitors[2] | 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%*** | |

1 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 license statistics.

2 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 | 2022 |
|---|---|---|---|---|---|
| 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 2019 - March 2023

| Industrial group | 2019 | 2020 | 2021r | 2022r | 2023p |
|---|---|---|---|---|---|
| Agriculture, forestry and fishing | 99 | 119 | 62 | 59 | 74 |
| Mining and quarrying | 26 | 0 | 1 | 1 | 1 |
| Manufacturing | 22,886 | 22,286 | 19,254 | 16,921 | 17,740 |
| Electricity, gas, steam and air conditioning supply & water Supply, sewerage, waste management and remediation activities | 27 | 17 | 21 | 23 | 30 |
| Construction | 5,865 | 7,216 | 6,682 | 6,383 | 5,231 |
| Wholesale and retail trade; repair of motor vehicles and motorcycles | 741 | 1,090 | 1,124 | 1,016 | 1,180 |
| Transportation and storage | 107 | 156 | 81 | 89 | 83 |
| Accommodation and food service activities | 345 | 632 | 335 | 363 | 537 |
| Information and communication | 440 | 451 | 378 | 344 | 464 |
| Financial and insurance activities | 219 | 209 | 210 | 192 | 214 |
| Real estate activities | 12 | 9 | 11 | 6 | 7 |
| Professional, scientific and technical activities | 223 | 251 | 248 | 232 | 226 |
| Administrative and support service activities | 195 | 207 | 306 | 280 | 407 |
| Public administration and defence; compulsory social security | 42 | 204 | 44 | 73 | 35 |
| Education | 192 | 228 | 198 | 191 | 190 |
| Human health and social work activities | 119 | 135 | 131 | 144 | 151 |
| Arts, entertainment and recreation | 31 | 23 | 27 | 27 | 25 |
| Other service activities | 75 | 90 | 19 | 37 | 63 |
| **Total** | **31,644** | **33,323** | **29,132** | **26,381** | **26,658** |

*Source: Statistics Mauritius*

### Table 42: Labour, Capital and Multifactor Productivity for Selected Industry Groups, 2018 - 2022

| Selected industrial sector | 2018 | 2019 | 2020[r] | 2021[r] | 2022 |
|---|---|---|---|---|---|
| **Labour productivity** | | | | | |
| Export-oriented manufacturing enterprises | 100.0 | 109.3 | 92.8 | 112.3 | 127.0 |
| Construction | 100.0 | 96.8 | 74.1 | 89.8 | 84.7 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 100.0 | 103.4 | 98.5 | 102.4 | 97.4 |
| Accommodation and food service activities | 100.0 | 93.5 | 35.3 | 33.9 | 89.7 |
| Information and communication | 100.0 | 102.1 | 107.6 | 114.8 | 117.4 |
| Financial and insurance activities | 100.0 | 100.8 | 101.2 | 108.4 | 103.4 |
| Real estate activities (other) | 100.0 | 104.7 | 95.6 | 126.0 | 96.2 |
| **Total economy** | **100.0** | **101.4** | **92.0** | **102.2** | **105.4** |
| **Capital productivity** | | | | | |
| Export-oriented manufacturing enterprises | 100.0 | 101.8 | 83.9 | 93.8 | 107.7 |
| Construction | 100.0 | 96.4 | 66.4 | 78.5 | 74.9 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 100.0 | 101.7 | 90.6 | 92.5 | 93.6 |
| Accommodation and food service activities | 100.0 | 99.4 | 34.7 | 30.3 | 91.9 |
| Information and communication | 100.0 | 102.2 | 106.5 | 112.7 | 114.4 |
| Financial and insurance activities | 100.0 | 103.8 | 110.7 | 117.4 | 123.5 |
| Real estate activities (other) | 100.0 | 93.1 | 73.7 | 67.1 | 62.5 |
| **Total economy** | **100.0** | **99.6** | **84.6** | **86.6** | **93.1** |
| **Multifactor productivity** | | | | | |
| Export-oriented manufacturing enterprises | 100.0 | 105.0 | 87.5 | 101.1 | 115.2 |
| Construction | 100.0 | 96.6 | 70.0 | 83.6 | 79.4 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 100.0 | 102.2 | 92.8 | 95.2 | 94.7 |
| Accommodation and food service activities | 100.0 | 97.3 | 35.1 | 32.8 | 91.1 |
| Information and communication | 100.0 | 102.2 | 106.9 | 113.4 | 115.5 |
| Financial and insurance activities | 100.0 | 102.6 | 106.6 | 113.2 | 114.1 |
| Real estate activities (other) | 100.0 | 96.9 | 80.1 | 80.3 | 71.3 |
| **Total economy** | **100.0** | **100.3** | **87.6** | **92.8** | **97.9** |
| **Index - Average monthly earnings[1] (large establishments)** | | | | | |
| Export-oriented manufacturing enterprises | 100.0 | 106.8 | 109.2 | 121.0 | 118.0 |
| Construction | 100.0 | 99.5 | 113.6 | 111.5 | 121.3 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 100.0 | 103.7 | 110.3 | 119.7 | 120.0 |
| Accommodation and food service activities | 100.0 | 97.8 | 100.8 | 98.6 | 114.0 |
| Information and communication | 100.0 | 102.6 | 116.5 | 113.9 | 131.9 |
| Financial and insurance activities | 100.0 | 105.4 | 107.0 | 107.4 | 112.5 |
| Real estate activities (other) | 100.0 | 107.5 | 113.6 | 115.8 | 132.4 |
| **Total economy** | **100.0** | **103.4** | **109.1** | **109.8** | **121.8** |

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: 2018=100

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

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

### Table 43: Economic Productivity based on Gross Output/Value Added for Selected Industry Groups, 2019 - 2022

| Selected industrial sector | 2019 | 2020 | 2021[r] | 2022 |
|---|---|---|---|---|
| **Productivity of Intermediate consumption, $Z^1$ (Gross Output/Intermediate Consumption)** | | | | |
| Export-oriented manufacturing enterprises | 1.588 | 1.575 | 1.614 | 1.592 |
| Construction | 1.617 | 1.574 | 1.607 | 1.604 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 3.200 | 3.201 | 3.200 | 3.199 |
| Accommodation and food service activities | 2.187 | 2.187 | 1.887 | 2.187 |
| Information and communication | 3.147 | 3.381 | 3.750 | 3.677 |
| Financial and insurance activities | 2.260 | 2.058 | 1.779 | 1.771 |
| Real estate, renting and business activities (excl. owner occupied dwellings) | 5.550 | 5.272 | 5.727 | 5.470 |
| **Total economy** | **2.397** | **2.412** | **2.301** | **2.263** |
| **Factor Productivity Measure of "Compensation of employees" (Gross Output/Compensation of Employees)** | | | | |
| Export-oriented manufacturing enterprises | 6.082 | 6.300 | 5.995 | 6.123 |
| Construction | 5.395 | 5.648 | 5.448 | 5.469 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 4.981 | 4.981 | 4.981 | 4.981 |
| Accommodation and food service activities | 5.437 | 2.351 | 2.930 | 5.424 |
| Information and communication | 4.111 | 3.982 | 3.822 | 3.850 |
| Financial and insurance activities | 4.718 | 4.842 | 5.040 | 5.401 |
| Real estate, renting and business activities (excl. owner occupied dwellings) | 17.379 | 19.783 | 18.488 | 17.163 |
| **Total economy** | **4.223** | **3.980** | **4.041** | **4.289** |
| **Total Productivity Measure (Gross Output/All Input Resources[1])** | | | | |
| Export-oriented manufacturing enterprises | 1.257 | 1.254 | 1.269 | 1.260 |
| Construction | 1.242 | 1.229 | 1.239 | 1.238 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 1.934 | 1.934 | 1.933 | 1.934 |
| Accommodation and food service activities | 1.547 | 1.126 | 1.142 | 1.550 |
| Information and communication | 1.767 | 1.811 | 1.874 | 1.863 |
| Financial and insurance activities | 1.506 | 1.427 | 1.302 | 1.322 |
| Real estate, renting and business activities (excl. owner occupied dwellings) | 4.034 | 3.997 | 4.189 | 4.055 |
| **Total economy** | **1.482** | **1.492** | **1.457** | **1.474** |
| **Productivity of Intermediate consumption, $Z^2$ (Value Added/Intermedaite Consumption)** | | | | |
| Export-oriented manufacturing enterprises | 0.588 | 0.575 | 0.614 | 0.592 |
| Construction | 0.617 | 0.574 | 0.607 | 0.604 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 2.200 | 2.201 | 2.200 | 2.199 |
| Accommodation and food service activities | 1.187 | 1.187 | 0.887 | 1.187 |
| Information and communication | 2.147 | 2.381 | 2.750 | 2.677 |
| Financial and insurance activities | 1.260 | 1.058 | 0.779 | 0.771 |
| Real estate, renting and business activities (excl. owner occupied dwell-ings) | 4.550 | 4.272 | 4.727 | 4.470 |
| **Total economy** | **1.397** | **1.412** | **1.301** | **1.263** |

### Table 43: Economic Productivity based on Gross Output/Value Added for Selected Industry Groups, 2019 - 2022 (Cont'd)

| Selected industrial sector | 2019 | 2020 | 2021r | 2022 |
|---|---|---|---|---|
| **Factor Productivity Measure[VA] of "Compensation of employees" (Value Added/Compensation fo Employees)** | | | | |
| Export-oriented manufacturing enterprises | 2.251 | 2.299 | 2.280 | 2.277 |
| Construction | 2.059 | 2.059 | 2.059 | 2.059 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 3.424 | 3.425 | 3.424 | 3.424 |
| Accommodation and food service activities | 2.950 | 1.276 | 1.377 | 2.943 |
| Information and communication | 2.805 | 2.804 | 2.803 | 2.803 |
| Financial and insurance activities | 2.630 | 2.489 | 2.206 | 2.351 |
| Real estate, renting and business activities (excl. owner occupied dwellings) | 14.248 | 16.030 | 15.260 | 14.025 |
| **Total economy** | **2.461** | **2.330** | **2.284** | **2.394** |
| **Overall Productivity Measure (Value Added/All Input Resources[1])** | | | | |
| Export-oriented manufacturing enterprises | 0.465 | 0.458 | 0.483 | 0.468 |
| Construction | 0.474 | 0.448 | 0.468 | 0.466 |
| Wholesale and retail trade; repair of motor vehicles, motorcycles | 1.330 | 1.330 | 1.329 | 1.330 |
| Accommodation and food service activities | 0.839 | 0.611 | 0.537 | 0.841 |
| Information and communication | 1.206 | 1.276 | 1.374 | 1.356 |
| Financial and insurance activities | 0.839 | 0.734 | 0.570 | 0.575 |
| Real estate, renting and business activities (excl. owner occupied dwellings) | 3.307 | 3.239 | 3.457 | 3.313 |
| **Total economy** | **0.885** | **0.873** | **0.824** | **0.822** |

1 All Input Resources= Intermediate Consumption + Compensation of Employees + Other Taxes

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

### Table 44: Average Monthly Earnings in the Hotel and Restaurant Sector, 2017 - 2023

***(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 | 20,474 | -2.3 |
| 2022r | 24,409 | 19.2 |
| 2023p | 27,706 | 13.5 |

*Source: Statistics Mauritius*

### Table 45: Wage Rate Index in Selected Industry Groups, 2017 - 2021

| Selected industrial group | Weight | 2017 | 2018 | 2019 | 2020 | 2021 | 2022p |
|---|---|---|---|---|---|---|---|
| Accommodation and food service activities | 65 | 103.1 | 105.7 | 108.5 | 110.3 | 112.0 | 114.4 |
| Wholesale & retail trade; repair of motor vehicles and motorcycles | 73 | 104.0 | 109.9 | 116.4 | 114.5 | 116.5 | 119.7 |
| Financial and insurance activities | 75 | 104.8 | 113.0 | 119.6 | 119.1 | 131.3 | 132.5 |
| Real estate activities | 4 | 103.1 | 105.7 | 109.8 | 113.6 | 116.5 | 120.0 |
| **All sectors** | **1,000** | **103.8** | **108.4** | **112.9** | **113.9** | **117.4** | **123.4** |

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 46: GFCF[1] in the Accommodation and Food Service Activities Sector, 2019 - 2023

| Indicator | 2019 | 2020r | 2021r | 2022r | 2023f |
|---|---|---|---|---|---|
| GFCF in Accommodation and food service activities (MUR Mn) | 4,970 | 3,865 | 4,646 | 5,902 | 6,697 |
| As a proportion of total private sector GFCF (%) | 7.0 | 5.0 | 5.0 | 5.2 | 5.2 |
| **Total private sector GFCF (MUR Mn)** | **71,113** | **76,916** | **93,820** | **112,806** | **129,617** |
| **Annual Real Growth Rates, %** | | | | | |
| Accommodation and food service activities | 1.6 | -26.3 | 12.4 | 14.1 | 6.2 |
| Total private sector GFCF | 0.4 | -25.8 | 14.0 | 7.8 | 7.6 |

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 47: Gross Direct Investment Flows from Abroad in the Accommodation & Food Service Activities Sector, 2019 - 2023

| Indicator | 2019 | 2020 | 2021 | 2022e | 2023Q1e |
|---|---|---|---|---|---|
| Flows from abroad in the Accommodation and Food Service Activities sector (MUR Mn) | 1,498 | 1,017 | 2,368 | 1,109 | **1,276** |
| *As a proportion of total (%)* | 6.7 | 6.0 | 12.8 | 4.0 | **17.6** |
| Total gross direct investment flows (MUR Mn) | 22,289 | 16,944 | 18,469 | 27,658 | **7,236** |
| **Year on year growth** | | | | | |
| Accommodation and food service activities | 23.7% | -32.1% | 132.8% | -53.2% | **84.7%** |
| Total flows | 11.2% | -24.0% | 9.0% | 49.8% | **-73.8%** |

[e]preliminary estimates. The data would be revised in the wake of the results from future FALS and are therefore not strictly comparable with prior years' data.

The data for 2019 to 2021 have been supplemented with the results from the annual Foreign Assets and Liabilities Survey (FALS) and therefore also include reinvested earnings and shareholders' loans.

*Source: Bank of Mauritius*

**Table 48: Bank Loans[1] to the Accommodation and Food Service Activities, June 2020 to June 2023 (MUR Mn)**

| Details | Jun-20 | Dec-20 | Jun-21 | Dec-21 | Jun-22 | Dec-22 | Jun-23 |
|---|---|---|---|---|---|---|---|
| **BANK LOANS IN MRU** | | | | | | | |
| **Accommodation and food service activities** | **17,213** | **20,489** | **22,269** | **22,202** | **21,877** | **20,388** | **19,051** |
| Accommodation | 16,369 | 19,438 | 21,163 | 21,132 | 20,826 | 19,669 | 18,521 |
| *- Resort Hotels* | *14,373* | *17,341* | *18,595* | *18,105* | *18,065* | *16,310* | 15,172 |
| *- Hotels other than Resort* | *1,554* | *1,649* | *2,093* | *2,608* | *2,313* | *2,922* | 2,877 |
| *- Bungalows* | *142* | *150* | *152* | *89* | *83* | *64* | 87 |
| *- Guest Houses* | *151* | *155* | *176* | *178* | *213* | *222* | 251 |
| *- Holiday Homes* | *18* | *17* | *42* | *26* | *17* | *30* | 29 |
| *- Other* | *130* | *126* | *105* | *128* | *134* | *121* | 106 |
| Food and beverage service activities | 844 | 1,051 | 1,106 | 1,070 | 1,051 | 718 | 530 |
| **Grand total** | **255,952** | **255,567** | **261,133** | **263,571** | **279,460** | **303,850** | **310,720** |
| Share of Accommodation | 6.4% | 7.6% | 8.1% | 8.0% | 7.5% | 6.5% | 6.0% |
| **BANK LOANS TAKEN IN FOREIGN CURRENCIES[2]** | | | | | | | |
| **Accommodation and food service activities** | **24,605** | **30,661** | **34,030** | **32,684** | **29,933** | **29,269** | **29,784** |
| Accommodation | 24,599 | 30,654 | 34,023 | 32,679 | 29,931 | 29,269 | 29,772 |
| *- Resort Hotels* | *21,384* | *27,401* | *30,418* | *29,050* | *26,500* | *25,689* | 26,724 |
| *- Hotels other than Resort* | *2,828* | *2,853* | *3,291* | *3,330* | *3,181* | *3,341* | 2,824 |
| *- Bungalows* | *201* | *207* | *57* | *5* | *5* | *5* | 4 |
| *- Guest Houses* | *79* | *86* | *90* | *127* | *123* | *124* | 127 |
| *- Holiday Homes* | *0* | *0* | *62* | *67* | *26* | *18* | 17 |
| *- Other* | *107* | *107* | *106* | *101* | *95* | *92* | 75 |
| Food and beverage service activities | 7 | 7 | 7 | 4 | 2 | 0 | 12 |
| **Grand total** | **143,619** | **132,550** | **131,331** | **132,562** | **142,706** | **147,591** | **156,457** |
| Share of Accommodation | 17.1% | 23.1% | 25.9% | 24.7% | 21.0% | 19.8% | 19.0% |
| **TOTAL BANK LOANS** | | | | | | | |
| **Accommodation and food service activities** | **41,819** | **51,149** | **56,299** | **54,886** | **51,810** | **49,657** | **48,835** |
| Accommodation | 40,968 | 50,091 | 55,186 | 53,811 | 50,757 | 48,939 | 48,292 |
| *- Resort Hotels* | *35,757* | *44,741* | *49,013* | *47,154* | *44,565* | *41,999* | 41,896 |
| *- Hotels other than Resort* | *4,382* | *4,502* | *5,384* | *5,937* | *5,494* | *6,263* | 5,701 |
| *- Bungalows* | *343* | *356* | *209* | *94* | *88* | *68* | 91 |
| *- Guest Houses* | *230* | *241* | *266* | *305* | *336* | *346* | 378 |
| *- Holiday Homes* | *18* | *17* | *103* | *92* | *44* | *49* | 46 |
| *- Other* | *237* | *233* | *211* | *228* | *230* | *213* | 181 |
| Food and beverage service activities | 851 | 1,058 | 1,113 | 1,075 | 1,053 | 718 | 542 |
| **Grand total** | **399,571** | **388,117** | **392,463** | **396,133** | **422,166** | **451,441** | **467,177** |
| Share of Accommodation | 10.3% | 12.9% | 14.4% | 13.6% | 12.0% | 10.8% | 10.3% |

1 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 currencies

*Source: Bank of Mauritius*

50 years

AHRIM

ASSOCIATION DES HOTELIERS ET RESTAURATEURS ILE MAURICE

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