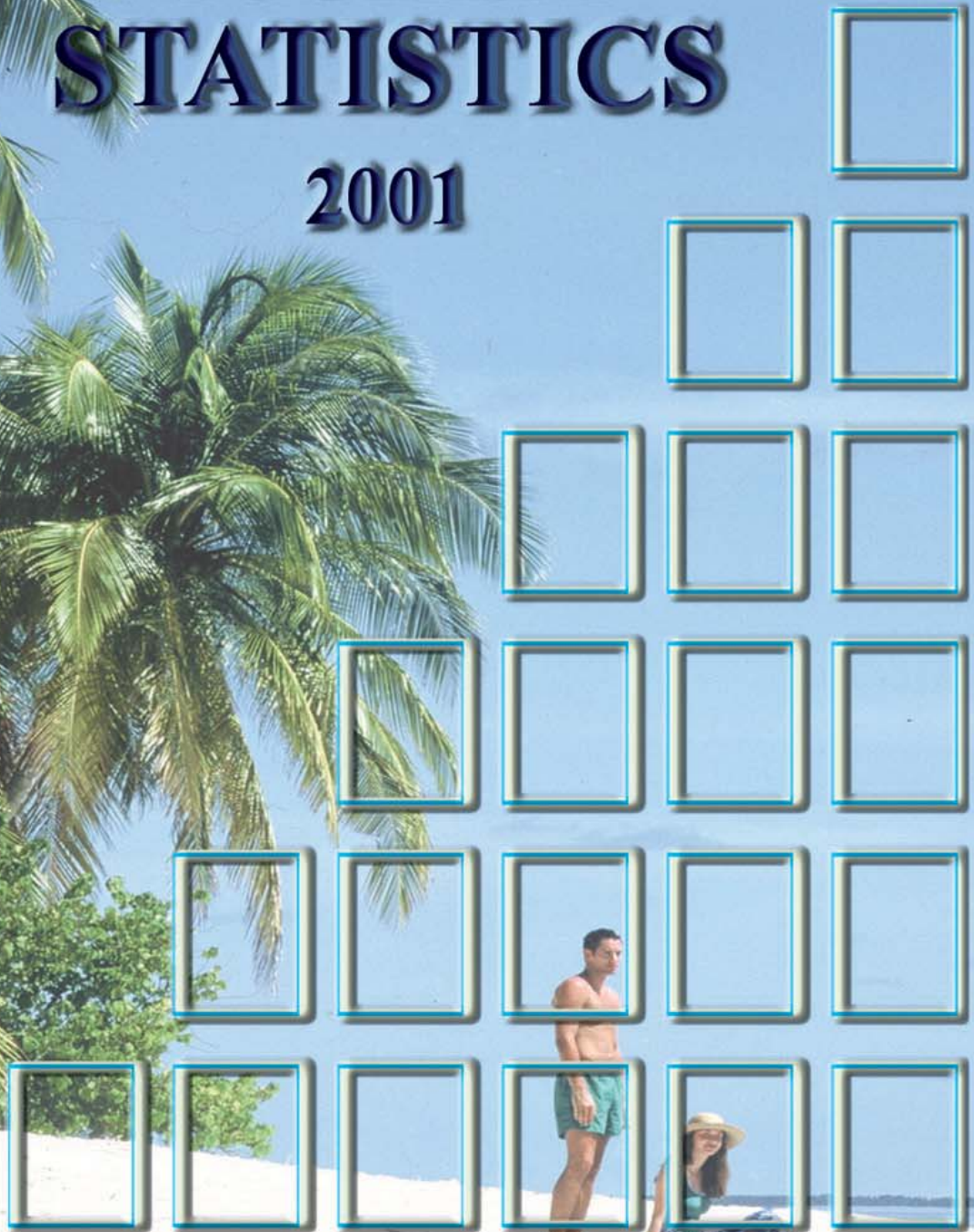




Ministry of Tourism  
Republic of Maldives

# TOURISM STATISTICS

## 2001



  
**Maldives**  
...the sunny side of life



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This publication is intended to provide accurate information and includes material from sources considered to be reliable. It should also be recognised that in this publication, the data used were accurate at the time of compilation and printing, some changes due to revision and changing collection may have occurred since then.

## **F o r e -**

The Tourism Statistics - 2001 is published with the object of providing comprehensive statistical information on various aspects of tourism development in the Maldives from 1996 -2000. The need for accurate and timely dissemination of tourism statistics is important as an economic tool with the rapidly growing industry. This publication is of valuable contribution towards future development and planning purposes not only for tourism industry but also for other tourism related activities.

Maldives will be celebrating 30 years of tourism development in 2002. While tourism has been the engine of growth of the nation it has been remarkably successful. During the period 1996 - 2000, Maldives tourism has experienced new dimensions and has performed well in its regional expansion and contribution towards better economic growth. As a result, under the first phase of Second Tourism Master Plan 14 islands were allocated and leased in six regions for tourism development out of which already 13 islands are under operation. Addu Atoll Villingili has also been leased for tourism development, totalling tourism resort developments in eleven atolls now. One of the additional policy measures under taken for tourism development was the enactment of the new Tourism Act (Law no: 2/99) which came into force in May 1999. This Law seeks to consolidate the existing laws and enunciate legislative changes to increase collateral values of resort islands, so as to enable procurement finance. Government has also given priority on diversification of markets and tourism products.

Efforts have also been made to widen the information and data covered in this issue and to include most recent updates of tourism indicators as well as up to date revisions of data published in the previous years. Tourism Statistics - 2001 publication is the result of coordinated efforts of various government offices, tourism industry, World Tourism Organization and various other sources. I acknowledge with gratitude the valuable contribution and support rendered by these institutions, agencies and in particular the staff of the Statistics and Research Section of the Ministry

Hassan Sobir  
**Minister of Tourism**

## Introduction

This publication briefly illustrates the development of tourism in the destination and covers the performance and trends of the main source markets to the country. In addition to all the available national tourism statistics for the past five years, the book also contains some important tourism statistics at a regional and global level and highlights the performance of some similar destinations. Explanatory notes are provided along with the figures, in order to make the data more comprehensive.

The information in this book is divided into three sections. **Section I** - tourism trends in the Maldives. In this section trends are presented for accommodation capacity, international tourist arrivals, economic importance of tourism and on recent statistical updates of tourism indicators. **Section II** - tourism trends in similar destinations to the Maldives, including Seychelles, Mauritius and the Caribbean. **Section III** - tourism trends in South Asia and global tourism results. This section includes major generating markets, top destinations, top spenders and top tourism earners in the world.

## **Acknowledge -**

**Tourism Statistics - 2001** has been prepared by the Statistics and Research Section of the Ministry of Tourism.

Except where otherwise indicated, data used in this publication has been collected from the World Tourism Organization (WTO), Government Offices and Tourism Industry. Ministry of Tourism wishes to express its gratitude to various Government Authorities, Tourism Industry, WTO Secretariate and all other sources which have been essential in providing its cooperation for the compilation of this book. Data provided by the World Tourism Organization has been valuable in giving an international perspective to this publication.

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## 1.1 Tourist Accommodation

The main tourist accommodation establishments in the Maldives that provide lodgings facilities for the visitors in the destination are resort islands, hotels, guest houses and safari vessels. There are a few hotels and guest houses in the capital city of Male' where accommodation is provided for visitors. These types of tourist establishments mainly cater for business travellers and transit passengers to the resort islands. The total bed capacity of all the tourist accommodations in the Maldives by the end of 2000 was 18,730 in 229 establishments.

Table: 1

**Bed Capacity and Number of Accommodation Establishments  
1996 - 2000**

CATEGORY	1996		1997		1998		1999		2000	
	No	Beds	No	Beds	No	Beds	No	Beds	No	Beds
Tourist Resorts	73	11,472	73	11,958	79	13,740	84	15,036	86	15,914
Hotels	4	312	3	276	5	418	7	466	9	744
Guest Houses	22	246	22	313	23	293	19	321	22	356
Safari Vessels	100	1,478	100	1,484	108	1,577	113	1,700	112	1,716
<b>TOTAL</b>	<b>199</b>	<b>13,508</b>	<b>198</b>	<b>14,031</b>	<b>215</b>	<b>16,028</b>	<b>223</b>	<b>17,523</b>	<b>229</b>	<b>18,730</b>

Source: Ministry of Tourism

At the inception of tourism in Maldives in 1972, the tourism industry contained a total of 280 beds. However, on completion of 28 years by the end of 2000, the total bed capacity has reached to 15914 in 86 resort islands. Under the first phase of Second Tourism Master Plan 14 islands were leased for resort development from 1998 - 2000, out of which 12 islands have already commenced its operation by the end of 2000. The 13th island, Royal Island (B.Atoll Horubadhoo) started its operation in February 2001 and the 14th island was leased for development in 2000 which is expected to start its operation by 2002.

Live a-board, where the tourists could move from one island to the other, by experiencing the beautiful nature of Maldives has gained immense popularity among some of our visitors. Hence, the number of floating beds has significantly increased in the recent past. Currently there are 112 registered safari vessels with 1,716 beds in the Maldives.



Table: 2

**Monthly Bed Occupancy in Resorts and Hotels, (1996 - 2000)  
(Percent)**

MONTH	1996	1997	1998	1999	2000
January	89.4	89.1	92.4	86.8	78.4
February	95.0	97.4	94.9	90.9	91.0
March	89.1	93.9	88.8	86.6	82.9
April	78.3	79.4	82.7	74.1	77.2
May	51.8	59.6	58.8	52.2	48.8
June	44.2	48.8	50.7	44.5	43.1
July	57.5	61.3	61.5	55.6	55.6
August	74.1	80.1	81.8	74.1	70.8
September	66.5	73.3	73.4	67.9	64.1
October	70.9	78.6	72.8	65.5	64.4
November	76.9	84.2	78.8	74.9	70.8
December	80.1	83.4	77.4	63.7	71.2
<b>Annual Average</b>	<b>72.8</b>	<b>77.4</b>	<b>76.2</b>	<b>69.7</b>	<b>68.2</b>

Source: Ministry of Tourism

The industry has demonstrated a significant increase in average bed occupancy of the resort islands over the past five years, except in 1999 and 2000 where the average occupancy rate has marginally declined (refer table:2) compared to the previous years. This drop in the occupancy rate is due to the release of large number of beds into the market during the later half of 1998 to 2000. As the demand catches up with the supply of available bed capacity in the market, it is expected to create a steady growth of occupancy in the years ahead. During the period under observation, the highest national occupancy rate for resorts and hotels stood at 77.4% in 1997 in the country.

Table: 3

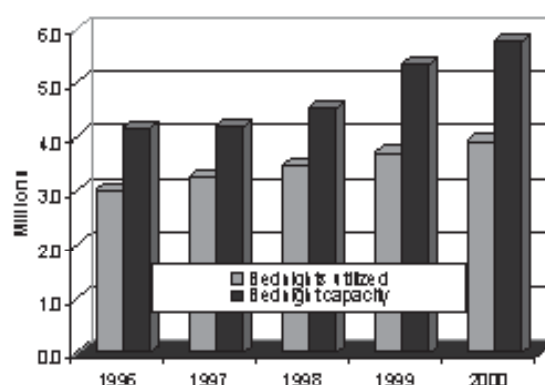
**Tourist Bed-nights and Average Duration of Stay  
(1996 - 2000)**

YEAR	Tourist Bed-Nights	Average Duration of Stay (days)
1996	3,038,698	9.0
1997	3,271,043	8.9
1998	3,466,549	8.8
1999	3,718,207	8.7
2000	3,936,741	8.4

Source: Ministry of Tourism

Figure: 1

**Bednights Utilized & Bednight Capacity  
1996 - 2000**



As given in (table: 3) and (figure:1) utilized number of tourist bed nights have demonstrated a significant increase during the period. However during the same period, the average duration of stay has recorded slight decline from 9.0 days to 8.4 days in 1996 and 2000 respectively. The average duration of stay is also likely to be effected by the different market segments into the country, considering the growth in the Japanese tourists who visits for a shorter holiday. Over the last five-year period, 1996 registered an average duration of 9.0 days which was the highest during the period.

### Distribution of Tourist Resorts in Atolls (1996 - 2000)

The first tourist resort in the Maldives, Kurumba Village in Kaafu Atoll, opened in 1972. Since the opening of its first tourist resort in Kaafu Atoll, tourism in the Atoll developed rapidly and contains the largest share of 49.3% (7,844) beds (refer table:4) in the tourism industry even today with 43 resort islands. The next atoll that opened to tourism was Vaavu Atoll with Alimatha Aquatic Resort in 1975. Today this Atoll consists a total of 294 beds.

Alifu Atoll opened its first tourist resort, Kuramathi Tourist Resort, in 1977 and has concentrated the highest number of beds (4,598) next to Kaafu Atoll with 26 resort islands. Alifu Atoll (North and South) now shares 28.9% of the total beds in the tourism industry. As given in table:4 below, by the end of 2000 tourism has been concentrated in ten atolls in order to expand the economic benefits to the community. In addition to the above at Addu Atoll, Villingili has been leased to a joint venture company formed with the government of Maldives for development of a 500 beds resort which is expected to be under operation by the year 2002.

Table: 4

#### Distribution of Tourist Resort Beds by Atolls, 1996 - 2000

ATOLL	1996		1997		1998		1999		2000	
	Beds	%Share	Beds	%Share	Beds	%Share	Beds	%Share	Beds	%Share
Kaafu	7,004	61.1	7,358	61.6	7,542	64.9	7,672	51.0	7,844	49.3
Alifu (North & South)	3,658	31.0	3,664	30.6	4,512	32.8	4,570	30.4	4,598	28.9
Vaavu	226	2.0	242	2.0	294	2.1	294	2.0	294	1.8
Lhaviyani	600	5.2	600	5.0	690	5.0	1,090	7.2	1,090	6.8
Baa	84	0.7	84	0.7	516	3.8	716	4.8	724	4.5
Dhaak	0	0.0	0	0.0	186	1.4	304	2.0	304	1.9
Meemu	0	0.0	0	0.0	0	0.0	140	0.9	360	2.4
Faafu	0	0.0	0	0.0	0	0.0	250	1.7	250	1.6
Raa	0	0.0	0	0.0	0	0.0	0	0.0	430	2.7
<b>TOTAL</b>	<b>11,472</b>	<b>100.0</b>	<b>11,958</b>	<b>100.0</b>	<b>13,740</b>	<b>100.0</b>	<b>15,036</b>	<b>100.0</b>	<b>15,914</b>	<b>100.0</b>

Source: Ministry of Tourism

Table: 5

#### Tourist Resorts by Type of Ownership and Management (As at end December 2000)

OWNERSHIP \ MANAGEMENT	MANAGEMENT			Total
	Local	Foreign	Local and Foreign	
Local	39	17	4	60
Foreign	0	8	0	8
Local and Foreign	0	1	7	8
Government	6	1	1	8
Government and Foreign	0	2	0	2
<b>Total</b>	<b>45</b>	<b>29</b>	<b>12</b>	<b>86</b>

Source: Ministry of Tourism

**Table: 6**  
**Bed Capacity of Resorts and Distance from the Airport, 1996 - 2000**

Name of the Resort	Atoll	Year of Initial Operation	Airport Distance (Km)	Initial Bed Capacity	1996	1997	1998	1999	2000
1 ALIMATHA AQUATIC RESORT	Vaavu	1975	48.0	20	140	152	204	204	204
2 ANGAAGA ISLAND RESORT	South Aif	1989	85.0	100	100	100	100	100	100
3 ARI BEACH RESORT (Dhidhifolhi)	South Aif	1988	104.0	180	242	242	242	282	282
4 ASDHU SUN ISLAND	Kaafu	1981	32.0	36	60	60	60	60	60
5 ATHURUGAU ISLAND RESORT	South Aif	1990	90.0	79	84	84	92	92	92
6 BANDOS ISLAND RESORT	Kaafu	1972	8.0	220	442	450	450	450	450
7 BANYAN TREE (Vabbinan)	Kaafu	1977	12.0	24	96	96	96	96	96
8 BAROS HOLIDAY RESORT	Kaafu	1973	16.0	56	150	150	150	150	150
9 BATHALA ISLAND RESORT	North Aif	1983	48.3	20	74	74	90	90	90
10 BIYAADHU ISLAND RESORT	Kaafu	1982	18.0	192	192	192	192	192	192
11 BODUHITHI CORAL ISLAND	Kaafu	1979	29.0	50	174	174	174	206	206
12 CLUB MED (Fankolhithi)	Kaafu	1973	2.0	112	304	304	304	304	304
13 CLUB RANNALHI	Kaafu	1978	2.0	34	178	232	232	232	232
14 COCOA ISLAND (Makulhithi)	Kaafu	1981	30.0	12	16	16	16	16	16
15 COCOA PALM RESORT (Dhukolhi)	Baa	1998	124.0	192	-	-	192	192	200
16 DHIGGIRI TOURIST RESORT	Vaavu	1982	32.0	50	86	90	90	90	90
17 DHIGUFINOLHU TOURIST RESORT	Kaafu	1980	40.0	24	144	194	200	200	200
18 ELLAIDHU TOURIST RESORT	North Aif	1985	54.0	32	100	100	156	156	156
19 EMOODHU VILLAGE	Kaafu	1979	8.0	44	234	234	234	236	236
20 ERIYADHU ISLAND RESORT	Kaafu	1982	40.0	40	92	92	114	114	114
21 FESDHU FUN ISLAND	North Aif	1982	72.4	90	110	110	110	110	110
22 FIHALHOHI TOURIST RESORT	Kaafu	1981	28.0	90	150	194	138	184	256
23 FILITHEYO ISLAND RESORT	Faafu	1999	120.7	250	-	-	-	250	250
24 FOUR SEASONS RESORT MALDIVES AT KUDA HURAA	Kaafu	1977	12.9	32	114	212	212	212	212
25 FULLMOON BEACH RESORT (Firaavathhi)	Kaafu	1973	5.6	112	300	300	300	300	312
26 FUN ISLAND RESORT (Bodhifolhi)	Kaafu	1980	38.0	44	200	200	200	200	200
27 GANGEHI ISLAND RESORT	North Aif	1987	77.2	50	50	50	50	50	50
28 GASFINOLHU ISLAND RESORT	Kaafu	1980	23.0	18	80	80	80	80	80
29 GIRAAVARU TOURIST RESORT	Kaafu	1980	11.3	40	106	110	128	132	132
30 HAKURAA CLUB (Hakuraa Huraa)	Meemu	1999	128.7	72	-	-	-	140	140
31 HALAVELI HOLIDAY VILLAGE	North Aif	1982	36.0	30	112	112	112	112	112
32 HELENGELI TOURIST RESORT	Kaafu	1979	46.7	20	100	100	100	100	100
33 HILTON MALDIVES ON RANGALI ISLAND (Rangali Fiolhi)	South Aif	1992	96.6	80	200	260	260	260	260
34 HOLIDAY ISLAND (Dhithi)	South Aif	1994	93.0	284	284	284	284	284	284
35 HUDHUVELI BEACH RESORT (Lakavithi)	Kaafu	1980	9.7	12	88	88	88	88	88
36 IHURU TOURIST RESORT	Kaafu	1978	17.0	20	90	90	90	90	90
37 ISLAND OF BO LIFUSHI	Kaafu	1982	12.0	64	80	80	80	110	110
38 KANDOOMA TOURIST RESORT	Kaafu	1985	27.4	98	122	162	206	204	204
39 KANIFINOLHU TOURIST RESORT	Kaafu	1978	19.3	18	290	290	290	290	378
40 KANUHURAA BEACH AND SPA RESORT	Lhaufaa	1999	125.5	200	-	-	-	200	200
41 KIHAA DHUFFARU RESORT	Baa	1999	104.6	200	-	-	-	200	200
42 KOMANDO O ISLAND RESORT	Lhaufaa	1998	128.7	90	-	-	90	90	90
43 KUDAHITHI TOURIST RESORT	Kaafu	1991	88.5	50	14	14	14	14	14
44 KUDARAH ISLAND RESORT	South Aif	1984	27.4	12	60	60	60	60	60

Name of the Resort	Atoll	Year of Initial Operation	Airport Distance (Km)	Initial Bed Capacity	1996	1997	1998	1999	2000
45 KURAMATHI TOURIST RESORT	North Alif	1977	56.3	48	570	548	548	548	548
46 KUREDHDHU ISLAND RESORT	Lihaulya I	1978	128.7	18	600	600	600	600	600
47 KURUMBA VILLAGE (Mamaaaraafushi)	Kaafu	1972	3.2	60	336	340	340	342	342
48 LAGUNA B EACH RESORT (Velassani)	Kaafu	1974	11.3	90	224	258	258	258	258
49 LHO HIFUSHI TOURIST RESORT	Kaafu	1979	22.5	40	254	254	254	254	254
50 LILY BEACH RESORT (Huakaidi oo)	South Alif	1994	85.0	168	168	154	154	154	170
51 MAAVAFUSHI TOURIST RESORT	North Alif	1983	63.0	48	120	120	120	120	120
52 MACHCHAFUSHI ISLAND RESORT	South Alif	1992	95.0	96	96	96	96	116	128
53 MADOO GALI RESORT	North Alif	1989	77.2	70	100	100	100	100	100
54 MAKUNUDHU CLUB	Kaafu	1983	38.6	58	74	74	74	74	74
55 MEDHUFUSHI ISLAND RESORT	Meemu	2000	128.7	240	-	-	-	-	240
56 MEERU ISLAND RESORT (Meerukafushi)	Kaafu	1978	37.0	128	424	424	454	454	454
57 MIRIHI MARINA LUXURY RESORT	South Alif	1989	112.6	36	70	70	70	70	70
58 MOOFUSHI ISLAND RESORT	South Alif	1990	80.0	84	120	120	120	120	120
59 NAKATCHAFUSHI TOURIST RESORT	Kaafu	1979	25.7	80	102	102	102	102	102
60 NIKA HOTEL (Kidarukididhi)	North Alif	1983	69.2	30	54	54	54	56	56
61 OLHUVELIVIBW HOTEL	Kaafu	1979	51.5	36	290	290	250	250	290
62 PALM B EACH ISLAND (Madi Ingaadi oo)	Lihaulya I	1999	128.7	200	-	-	-	200	200
63 PALM TREE ISLAND (Velgaidi Hiraa)	Kaafu	1986	27.0	32	32	66	104	112	112
64 PARADISE ISLAND (Laikafukidhi)	Kaafu	1979	9.6	24	520	520	520	520	520
65 PEARL ISLAND RESORT (Meedhippari)	Raa	2000	130.3	430	-	-	-	-	430
66 RANVELI VILLAGE (Villigiluaru)	North Alif	1991	77.0	112	112	112	112	112	112
67 REETHI BEACH RESORT (Fonmagoodi oo)	Baa	1998	104.6	200	-	-	200	200	200
68 REETHI RAH RESORT (Medi rufukidhi)	Kaafu	1979	64.4	24	120	120	120	120	120
69 RIHMELI B EACH RESORT (Malaakarukidhi Hiraa)	Kaafu	1980	40.2	40	102	100	100	100	100
70 SONEVAFUSHI RESORT (Kafukadhi)	Baa	1983	104.6	50	84	84	124	124	124
71 SUMMER ISLAND VILLAGE (Ziyaraafushi)	Kaafu	1983	35.0	58	184	184	208	216	216
72 SUN ISLAND RESORT (Nalagurukidhi)	South Alif	1998	99.8	700	-	-	700	700	700
73 TAJ CORAL REEF RESORT (Hembadi oo)	Kaafu	1982	32.2	68	88	84	132	132	132
74 TAJ LAGOON RESORT (Embedi rufukidhi)	Kaafu	1983	12.9	20	128	128	128	128	128
75 TARI VILLAGE (Kafu rufu Hiraa)	Kaafu	1981	13.0	20	48	48	48	48	48
76 THULHAAGIRI ISLAND RESORT	Kaafu	1980	11.0	44	116	116	116	116	116
77 THUNDUFUSHI ISLAND RESORT	South Alif	1990	80.5	74	84	84	94	94	94
78 TWIN ISLAND (Maafushiyan)	South Alif	1991	54.7	60	76	76	76	76	76
79 VAADHU DIVING PARADISE	Kaafu	1978	8.0	18	66	66	66	66	66
80 VAKARUFALHI ISLAND RESORT	South Alif	1994	90.0	100	100	100	100	100	100
81 VELAVARU ISLAND RESORT	Dhaak	1998	125.0	50	-	-	50	168	168
82 VELIDHU ISLAND RESORT	North Alif	1989	80.5	22	162	162	200	200	200
83 VELIGANDU ISLAND	North Alif	1984	51.0	34	110	110	130	126	126
84 VILAMENDHU ISLAND RESORT	South Alif	1994	48.3	200	200	282	282	282	282
85 WILLVARU ISLAND RESORT	Kaafu	1981	29.0	120	120	120	120	120	120
86 VILLU REEF RESORT (Meedirufushi)	Dhaak	1998	128.7	136	-	-	136	136	136
Total					11,472	11,958	13,740	15,034	15,914

Source: Ministry of Tourism

## 1.2 Tourist Arrivals

Table: 7

### Tourist Arrivals by Month, 1996 - 2000

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1996	31,921	34,387	33,021	29,496	18,501	18,557	24,512	29,901	26,999	29,078	28,938	33,422	338,733
1997	33,290	36,013	36,417	30,522	21,392	18,969	25,818	30,380	30,520	31,549	33,194	37,499	365,563
1998	38,679	37,046	38,820	34,920	23,499	22,184	25,964	33,546	31,908	32,001	37,708	39,450	395,725
1999	42,603	43,732	45,170	35,817	26,390	22,639	30,188	36,738	34,450	33,755	39,923	36,251	429,666
2000	45,297	48,974	45,393	43,458	27,019	24,033	33,027	40,563	36,878	39,078	38,985	44,449	467,154

Source: Ministry of Tourism

The annual number of tourist arrivals into the country has shown dynamic increase over the years. Maldives received a total 467,154 tourists (refer table:7) to the country in year 2000. In the recent years the arrival growth rate has been maintained at a growth level of an average 8% (refer table:8) which is rather healthy for a destination like Maldives to sustain without widely fluctuating growth patterns that was experienced in the past. The arrival growth rate has steadily increased over the last five years. In 1996 the arrival growth rate stood at 7.6% whereas in 2000 it was 8.7%. Hence, during the review period arrival growth recorded an average of 8.2%.

Table: 8

### Growth Trends of Monthly Tourist Arrivals, 1996 - 2000 (Percent)

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1996	3.4	15.5	13.0	7.7	-4.5	11.5	-1.8	0.8	11.0	16.8	6.6	9.3	7.6
1997	4.3	4.7	10.3	3.5	15.6	2.2	5.3	1.6	13.0	8.5	14.7	12.2	7.9
1998	16.2	2.9	6.5	14.4	9.8	16.9	0.5	10.4	4.5	1.4	13.5	5.2	8.3
1999	10.1	18.0	16.4	2.5	12.3	2.1	16.3	15.5	8.0	5.5	5.9	-8.1	8.6
2000	6.3	12.0	0.5	21.3	2.4	6.2	9.4	4.7	7.0	15.8	-2.3	22.6	8.7

Source: Ministry of Tourism

Figure: 2

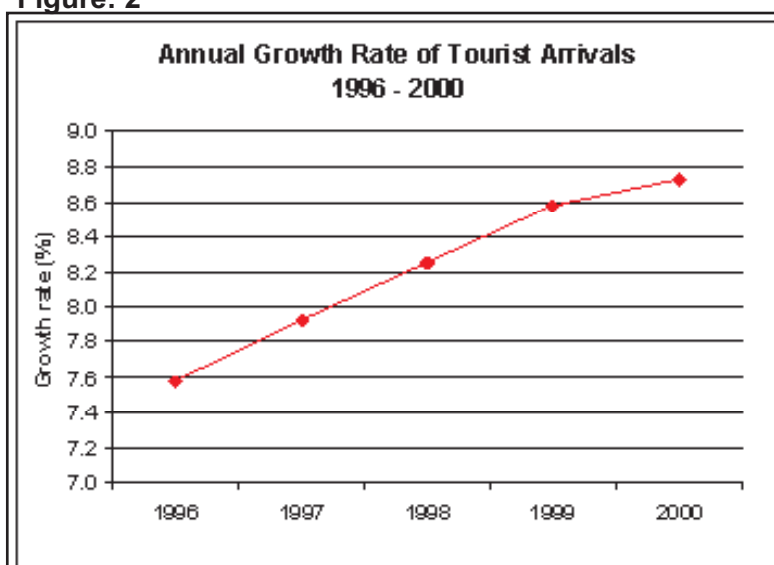


Table: 9

**Seasonal Variation of Tourist Arrivals, 1996 -2000**

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Seasonality Ratio 2/
1996	113	122	117	104	66	66	87	106	96	103	103	118	1.2
1997	109	118	120	100	70	62	85	100	100	104	109	123	1.2
1998	117	112	118	106	71	67	79	102	97	100	114	120	1.2
1999	119	122	126	100	74	63	84	108	96	94	111	101	1.3
2000	116	126	117	112	69	62	85	104	95	100	100	114	1.3

Source: Ministry of Tourism

The Maldivian tourism experiences two seasons, the high season during the European winter months and the low season during the European summer months. Traditionally, the low season was between April and October. However, these seasonal variations have been less defined in the recent years. In the recent past, the low season was experienced only in May, June and July and even during these months the variations have not been very prominent. Reference is made to table:9, where the seasonality ratio has varied between 1.2 and 1.3 over the years.

Table: 10

**Passenger Arrivals by Type of Carrier, 1996 - 2000**

Carrier	1996	% Share	1997	% Share	1998	% Share	1999	% Share	2000	% Share
Scheduled	249,375	62.3	276,267	61.8	329,855	70.5	376,872	73.7	387,226	67.8
Charter	150,925	37.7	170,743	38.2	137,992	29.5	134,667	26.3	184,109	32.2
TOTAL	400,300	100.0	447,010	100.0	467,847	100.0	511,539	100.0	571,335	100.0

Source:  
Ministry of Tourism  
Department of Civil Aviation

## 1.3 Major Markets

### 1. Europe

Table: 11

#### Tourist Arrivals and Market Share of Major Generating Markets of Europe, 1996 - 2000

	1996	1997	1998	1999	2000
<b>EUROPE</b>	253,525 (74.8)	272,918 (74.7)	304,905 (77.0)	340,469 (78.2)	362,196 (84.3)
Austria	12,388 (8.7)	13,758 (8.8)	14,775 (8.7)	13,550 (8.2)	11,725 (8.2)
Belgium	2,785 (0.8)	3,142 (0.8)	2,711 (0.7)	3,114 (0.7)	5,071 (1.2)
Denmark	998 (0.3)	1,006 (0.3)	837 (0.2)	715 (0.2)	772 (0.2)
Finland	618 (0.2)	349 (0.1)	548 (0.1)	526 (0.1)	350 (0.1)
France	17,042 (6.0)	17,263 (4.7)	20,439 (6.2)	23,832 (6.6)	27,517 (8.4)
Germany	74,688 (22.0)	76,073 (20.8)	76,317 (18.8)	86,497 (20.1)	77,642 (8.0)
Greece	497 (0.1)	412 (0.1)	1,272 (0.3)	2,128 (0.6)	1,776 (0.4)
Italy	53,932 (16.8)	55,443 (16.2)	79,301 (20.0)	88,897 (20.8)	106,451 (24.8)
Netherlands	5,239 (1.6)	9,547 (2.8)	9,382 (2.4)	9,315 (2.2)	7,275 (1.7)
Norway	393 (0.1)	708 (0.2)	715 (0.2)	750 (0.2)	945 (0.2)
Portugal	1,232 (0.4)	1,854 (0.6)	2,093 (0.6)	4,117 (1.0)	4,276 (1.0)
Russia	5,525 (1.8)	4,904 (1.8)	4,166 (1.1)	3,428 (0.8)	3,608 (0.8)
Spain	6,401 (1.8)	7,674 (2.1)	3,970 (1.0)	5,634 (1.2)	5,322 (1.2)
Sweden	1,809 (0.6)	2,687 (0.7)	2,541 (0.8)	2,226 (0.6)	2,236 (0.6)
Switzerland	20,467 (8.0)	21,167 (6.8)	22,514 (6.7)	22,856 (6.8)	24,528 (6.7)
United Kingdom	* 45,288 (18.4)	51,552 (14.1)	55,729 (14.1)	63,919 (14.8)	71,440 (18.8)
Other Countries	4,227 (1.2)	5,359 (1.6)	7,595 (1.8)	9,165 (2.1)	11,262 (2.8)
<b>GLOBAL TOTAL</b>	<b>338,733</b>	<b>365,068</b>	<b>395,725</b>	<b>428,666</b>	<b>467,154</b>

Note:

\* Revised Figures

Source: Ministry of Tourism

Throughout the history of Maldives tourism, Europe has been our major market generator. Similarly during the last five years as given in (table:11), market share of Europe has been maintained at the highest, growing over 74.8 percent in 1996 to 84.3 percent in 2000. The main European markets to the Maldives are Italy, Germany, United Kingdom and France. There are other potential and important markets in this region which also includes Switzerland, Austria, Netherlands, Spain, Russia, Belgium and Portugal.

Table: 12

#### Growth Trends of European Markets, 1996 - 2000 (Percent)

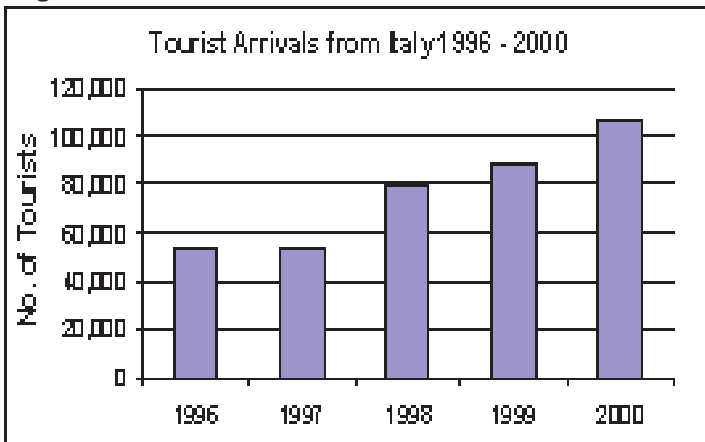
	1996	1997	1998	1999	2000
<b>EUROPE</b>	11.6	7.6	11.7	11.7	6.4
Austria	23.9	11.1	7.4	-8.3	-13.5
Belgium	47.4	12.8	-13.7	14.9	62.8
Denmark	12.3	0.8	-16.8	-14.6	8.0
Finland	4.2	-43.5	57.0	-4.0	-33.5
France	6.2	1.4	18.3	16.6	15.5
Germany	3.3	1.9	0.3	13.3	-10.2
Greece	-14.0	-17.1	208.7	67.3	-16.5
Italy	3.5	2.8	43.0	11.8	20.0
Netherlands	65.3	82.2	-1.7	-0.7	-21.9
Norway	-4.6	80.2	1.0	4.9	26.0
Portugal	37.5	50.5	12.9	96.7	3.9
Russia	104.6	-11.2	-15.0	-17.7	5.3
Spain	131.4	19.9	-48.3	41.9	-5.5
Sweden	-29.8	48.5	-6.4	-12.4	0.4
Switzerland	5.6	3.4	6.4	1.5	7.3
United Kingdom	20.2	13.8	8.1	14.7	11.8
Other Countries	31.6	26.8	41.7	20.7	22.9
<b>GLOBAL TOTAL</b>	<b>7.6</b>	<b>7.9</b>	<b>8.3</b>	<b>8.6</b>	<b>8.7</b>

Source: Ministry of Tourism

During the last five years, annual tourist arrival growth trend has recorded a healthy growth from 7.6% in 1996 to 8.7% in 2000 (refer table:12). However, the growth trend of European market in the year 2000 experienced a drastic fall to 6.4%. This is likely due to the millenium activities held at different destinations for tourist attraction.

## Italy

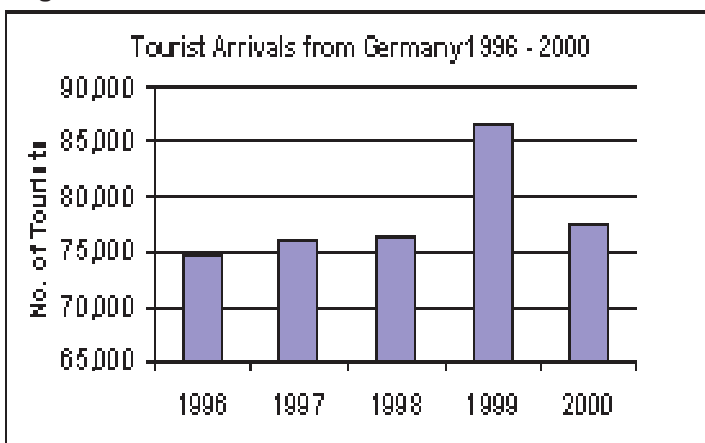
Figure: 3



Italian market has been one of the oldest markets to Maldives since long time. During the period under review as shown in (figure:3), the Italian market has been growing in its inbound volume. Although from 1996 to 1997 the growth rate has been slow, in 1998 the market has shown the most remarkable growth rate of 43.0 percent (refer table:12) and has taken over German market by being the number one major market to Maldives. Italy is now the leading market in Maldives with a market share of 24.8 per cent in 2000 with a total number of 106,451 tourists.

## Germany

Figure: 4

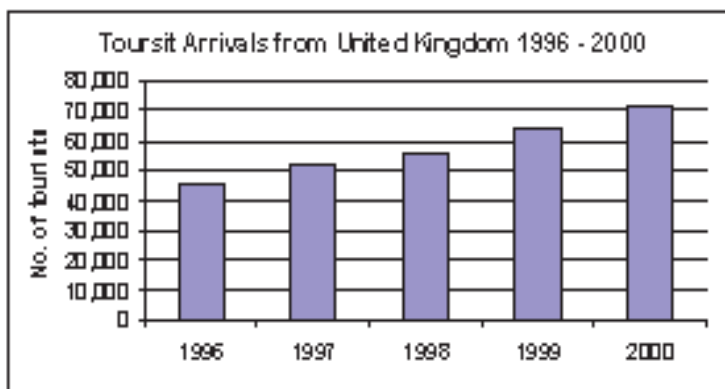


Since tourism started in Maldives in 1972, Germany has been the leading market in the country until 1998. However, since 1998 Germany was replaced by Italy as top market leader. With reference to (table:12) from 1996 to 1998, the growth rate of this market has gradually decreased with a dramatic increase of 13.0 percent in 1999. And German market drastically fell with a negative growth of 10.2 percent in 2000. As a result its inbound volume of tourists as shown in (figure:4) decreased to 77642 in the same year compare to the previous year. One of the main reasons for such a fall in German arrivals could be due to the unstable

economic conditions prevailing in the country and the weakening of German Mark against US Dollar which has made Maldives an expensive destination for the German tourists. The average annual growth rate of German market from 1996 to 2000 was 1.72 percent and it is still the second major market for the Maldives.

## United Kingdom

Figure: 5

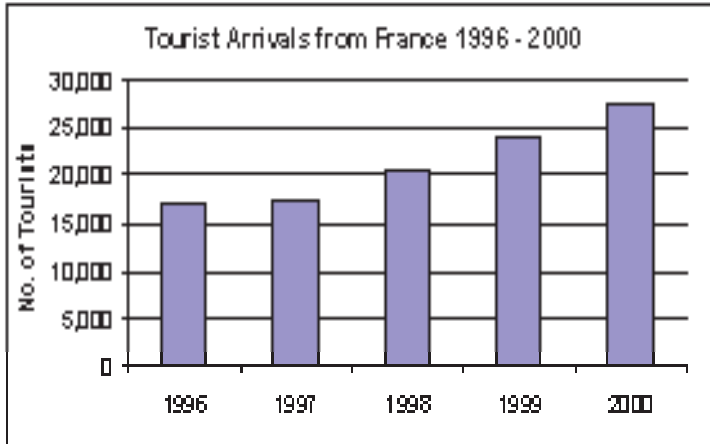


The arrival performance of United Kingdom stands significant next to Italian and German markets. This is the third European major market that generates highest number of tourist inflow to the country. Although the growth trend of United Kingdom has rather shown a fluctuating trend from 1996, the total number of tourist arrivals (refer figure:5) and the market share (refer table:11) of this segment has been steadily on the rise. The tourist arrival from United Kingdom in year 2000 was 71,440 and the market share was 16.6 percent even though the arrival growth has decreased to 11.8 percent in 2000 against 14.7 percent in the previous year.



## France

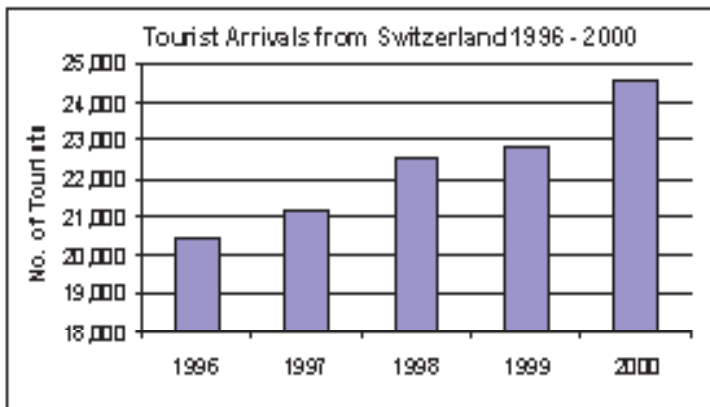
Figure: 6



At present, France has been counted as the fifth largest market on the list of our major markets. The French market has maintained remarkable growth since 1998 although its growth has declined to 6.2 percent in 1996 and 1.4 percent in 1997(refer table:12). However the total number of French tourists to the country has significantly increased since 1996 (refer figure:6) and market share of this segment was also on the rise since 1998.

## Switzerland

Figure: 7



As given in (figure:7) the Swiss market has been one of the rapidly growing markets in the recent years. The annual arrivals from Switzerland in 2000 accounted to 24,528 with a growth rate of 7.3 percent. Its market share has also been relatively consistent at 6 percent in 1996 and 5.7 percent in 2000. This market has shown better performance in later years which maybe due to the easy accessibility and increase of flight movements from Switzerland. Balair started its operation to Maldives from Zurich on 01st December 1981as chartered flight and later on 4th November 2000 it was listed as a regular scheduled flight which operated weekly.

Trans European Airlines also operated to Maldives from 19 September 1996 which was later discontinued on 27 April 1999. During the year 2000, Maldives Tourism Promotion Board(MTPB) participated for the first time in the TTW Montreux annual trade fair held in Switzerland.

## 2. Asia

Table: 13

### Tourist Arrivals and Market Share of Major Generating Markets of Asia, 1996 - 2000

	1996	1997	1998	1999	2000
<b>ASIA</b>	68,686 (20.8)	72,738 (18.8)	71,738 (18.1)	74,935 (17.4)	86,524 (20.1)
Bangladesh	496 (0.0)	322 (0.1)	240 (0.0)	237 (0.1)	321 (0.0)
China/Taiwan/Hong Kong	5,366 (1.9)	3,383 (0.9)	3,262 (0.9)	3,973 (0.9)	5,380 (1.3)
India	10,239 (3.0)	12,105 (3.3)	11,734 (3.0)	11,621 (2.7)	10,616 (2.5)
Japan	34,804 (10.3)	37,298 (10.2)	40,514 (11.2)	40,230 (9.4)	47,180 (11.0)
Korea	1,984 (0.9)	6,897 (1.9)	2,822 (0.7)	4,272 (1.0)	5,771 (1.3)
Malaysia	2,302 (0.7)	2,557 (0.7)	1,219 (0.3)	1,716 (0.4)	1,829 (0.4)
Pakistan	1,223 (0.4)	1,194 (0.3)	1,051 (0.3)	982 (0.2)	1,049 (0.2)
Philippines	241 (0.0)	820 (0.2)	215 (0.0)	291 (0.1)	317 (0.0)
Singapore	2,129 (0.9)	2,520 (0.7)	2,130 (0.9)	2,383 (0.6)	2,530 (0.9)
Sri Lanka	7,609 (2.2)	2,482 (0.7)	5,997 (1.9)	6,375 (1.5)	8,413 (2.0)
Thailand	729 (0.2)	860 (0.2)	790 (0.2)	1,083 (0.3)	1,007 (0.2)
Other Countries	1,564 (0.5)	2,300 (0.5)	1,764 (1.7)	1,772 (0.0)	2,111 (0.5)
<b>GLOBAL TOTAL</b>	<b>333,733</b>	<b>365,563</b>	<b>385,725</b>	<b>428,666</b>	<b>497,154</b>

Source: Ministry of Tourism

Asia generates the highest number of arrivals to the country next to Europe. Japan has been our fourth largest market generator over several years. Among other markets from this region while considering the total inbound volume in tourist arrivals from India, China, Sri Lanka and Singapore has been relatively significant, though the tourist arrivals from these country's does not maintain a continuous growth over the period under review. As per the observations made from (table:13), tourist arrival of 6897 from Korea in 1997 showed tremendous increase with a drop of 2822 tourists in 1998 which has been regaining its potentiality gradually. The performance of total inbound volume from Malaysian market has also improved in the recent years. Due to economic and political instability in the region the market share percentage of the Asian market segment has been quiet unpredictable in the past few years. However, this region has picked up by 20.1 percent market share in 2000 with a total increase of 86524 tourist arrivals from the region in the same year.

Table: 14

### Growth Trends of Asian Markets, 1996 - 2000 (Percent)

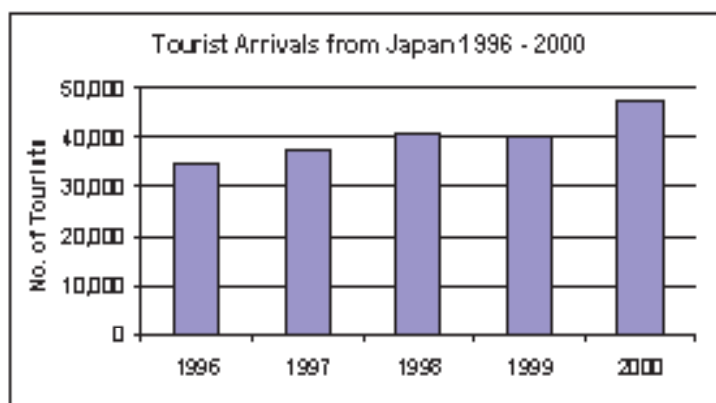
	1996	1997	1998	1999	2000
<b>ASIA</b>	-4.3	5.9	-1.4	4.5	15.5
Bangladesh	-62.9	-35.1	-25.5	-1.3	35.4
China/Taiwan/Hong Kong	-42.7	-37.0	-3.6	21.8	35.4
India	-19.1	18.2	-3.1	-1.0	-8.6
Japan	15.7	7.2	8.6	-0.7	17.3
Korea	144.9	247.6	-69.1	51.4	35.1
Malaysia	45.2	11.1	-62.3	40.8	6.6
Pakistan	6.5	-2.4	-12.0	-6.6	6.8
Philippines	-13.0	240.2	-73.8	35.3	8.9
Singapore	20.3	18.4	-15.5	11.9	6.2
Sri Lanka	-31.6	-67.4	141.6	6.3	32.0
Thailand	25.0	18.0	-8.1	37.1	-7.0
Other Countries	18.0	47.1	-23.3	0.5	19.1
<b>GLOBAL TOTAL</b>	<b>7.6</b>	<b>7.9</b>	<b>8.3</b>	<b>8.6</b>	<b>8.7</b>

Source: Ministry of Tourism

## Japan

Japan is the fourth largest market generator to the Maldives next to United Kingdom. Figure:8 depicts that Japanese market has maintained a significant increase in its inbound volume of tourists over the years. Japan's market share was quite consistent since 1996 although there was a marginal fall of 9.4 percent in 1999 over the previous year. However in 2000 its market share was raised to 11.0 percent (refer table:13). It's total volume of inbound travel is very prominent and important to the Maldives

Figure: 8



## 3. Africa

Table: 15

Tourist Arrivals and Market Share of Africa, 1996 - 2000

	1996	1997	1998	1999	2000
AFRICA	7,674 (2.8)	8,075 (2.2)	7,168 (1.8)	1,846 (0.4)	2,311 (0.6)
South Africa	7,103 (2.0)	6,767 (1.9)	6,583 (1.7)	1,437 (0.3)	1,767 (0.4)
Other countries	571 (0.2)	1,308 (0.4)	585 (0.1)	409 (0.0)	544 (0.0)
GLOBAL TOTAL	338,733	365,563	395,725	429,666	467,154

Source: Ministry of Tourism

Our main market from this region has been South Africa. The performance of total volume of inbound travel from African region (refer table:15) was relatively consistent from 1994 till the end of 1998 although the observation is made for the period under-review. In 1999 the total arrival growth from this region had largely dropped by 74.2 percent and comparatively by the end of 2000 its growth (refer table:16) had improved by 25.2 percent. The cause for this drop in the recent years was mainly due to the discontinuation of the South African chartered flight to the Maldives, which was operated from March 1996 to March 1999 on a weekly basis. Through out 1994 – 1995 Impala Air and Phoenix Air, two South African chartered airlines were also operated to Maldives which later discontinued its operation

Table: 16

Growth Trends of African Markets, 1996 - 2000  
(Percent)

	1996	1997	1998	1999	2000
AFRICA	4.3	5.2	-11.2	-74.2	25.2
South Africa	7.9	4.7	-2.7	-78.2	23.0
Other Countries	20.0	129.1	-65.3	-30.1	33.0
GLOBAL TOTAL	7.6	7.9	8.3	8.6	8.7

Source: Ministry of Tourism

#### 4. Americas

Table: 17

#### Tourist Arrivals and Market share of Major Generating Markets of America, 1996 - 2000

	1996	1997	1998	1999	2000
<b>AMERICAS</b>	4,154 (12)	6,101 (17)	6,120 (16)	6,082 (14)	7,108 (17)
Argentina	232 (0.1)	431 (0.1)	323 (0.1)	199 (0.0)	176 (0.0)
Canada	819 (0.2)	1,492 (0.4)	1,110 (0.3)	1,165 (0.3)	1,316 (0.3)
U.S.A	2,455 * (0.7)	3,379 (0.9)	3,770 (1.0)	4,103 (1.0)	4,795 (1.1)
Other Countries	658 * (0.2)	799 (0.2)	917 (0.2)	615 (0.1)	821 (0.2)
<b>GLOBAL TOTAL</b>	<b>338,733</b>	<b>365,563</b>	<b>395,725</b>	<b>429,666</b>	<b>467,154</b>

Note:

\* Revised Figures

Source: Ministry of Tourism

Over the years United States has been our main market generator from this region. United States is a rich and prosperous destination with diverse products. It is the world's second top tourism destination, which is also proudly listed among the world's top earners and world's top spenders as the number one destination in the year 2000. Maldives being a tropical destination rich in underwater sea life, our target is to attract their dive market. In spite of Americas being a long haul destination the total volume of arrivals from United States and Canada has been progressively improved since 1996. United States tourist arrival growth was increased by 23.7 percent in 1996 (refer table:17) and continued with better growth rates though there was a decrease from 1998 to 1999 and it picked up by a remarkable 16.9 (refer table:18) percent growth in the year 2000.

Table: 18

#### Growth Trends of American Markets, 1996 - 2000 (Percent)

	1996	1997	1998	1999	2000
<b>AMERICAS</b>	15.6	45.5	0.3	-0.6	16.9
Argentina	-69.2	85.8	-25.1	-38.4	-11.6
Canada	19.0	82.2	-25.6	5.0	13.0
U.S.A	23.7	37.6	11.6	8.8	16.9
Other Countries	77.8	16.1	14.8	-32.9	33.5
<b>GLOBAL TOTAL</b>	<b>7.9</b>	<b>7.9</b>	<b>8.3</b>	<b>8.6</b>	<b>8.7</b>

Source: Ministry of Tourism

## 5. Oceania

Table: 19

**Tourist Arrivals and Market Share of Major Generating Markets  
of Oceania, 1996 - 2000**

	1996	1997	1998	1999	2000
<b>OCEANIA</b>	4,842 (1.4)	5,730 (1.8)	5,794 (1.6)	6,334 (1.6)	8,015 (2.1)
Australia	4,284 (1.3)	5,284 (1.4)	5,261 (1.3)	5,784 (1.3)	8,090 (1.9)
New Zealand	332 (0.1)	427 (0.1)	519 (0.0)	541 (0.1)	910 (0.2)
Other Countries	358 (0.1)	446 (0.1)	533 (0.0)	550 (0.1)	925 (0.2)
<b>GLOBAL TOTAL</b>	<b>338,733</b>	<b>365,563</b>	<b>395,725</b>	<b>429,666</b>	<b>467,154</b>

Source: Ministry of Tourism

Australia is the main market generator from Oceania. Australia has been relatively a mature market for us since long time. Though the annual volume of arrival (refer table 19) was on the rise over the years, its arrival growth (refer table: 20) was not exceptionally favourable, as it was unable to maintain a steady growth trend. From 1996 onwards, its market share was maintained at 1.3 and 1.4 percent with a rise in 2000 by 1.9 percent.

Table: 20

**Growth Trends of Oceania Markets, 1996 - 2000  
(Percent)**

	1996	1997	1998	1999	2000
<b>OCEANIA</b>	14.3	23.4	1.1	9.3	42.3
Australia	16.6	23.3	-0.4	9.9	39.9
New Zealand	-15.1	28.6	21.5	4.2	68.2
Other Countries	-8.2	24.6	19.5	3.2	68.2
<b>GLOBAL TOTAL</b>	<b>7.6</b>	<b>7.9</b>	<b>8.3</b>	<b>8.6</b>	<b>8.7</b>

Source: Ministry of Tourism

## 1.4 Importance of Tourism to the Maldivian Economy

**Table: 21**  
**Government Expenditure on Tourism, 1996 - 2000**  
(Million Rufiyya)

Year	Government Expenditure	Tourism Expenditure	% Share of Tourism Expenditure
1996	1,694.8	17.7	1.0
1997	1,938.1	23.9	1.2
1998	2,115.9	15.8	0.7
1999	2,508.2	22.9	0.9
2000	2,819.9	26.0	0.9

Note:

\* Provisional

Source:

Ministry of Tourism

Ministry of Finance and Treasury / MMA

During the period under review (table:21) shows that the government expenditure has increased gradually. At the same time tourism expenditure has also increased steadily since 1996 from Rf.17.7 million and in 2000 the tourism expenditure was Rf.26.0 million. As given in table:21 it shows that the share of tourism expenditure has not exceeded more than 1% by the government.

**Table: 22**  
**Tourism Revenue and Tax, 1996 - 2000**  
(Million Rufiyya)

Year	Government Revenue	Tourism Revenue	% Share of Tourism Revenue	Tourism Tax	% Share of Tourism Tax to Tourism Revenue
1996	1351.50	400.86	29.7	215.75	53.8
1997	1701.63	505.48	29.7	256.98	50.8
1998	1830.50	525.17	28.7	257.72	49.1
1999	2128.44	627.83	29.5	275.96	44.0
2000	2258.97	693.28	30.7	276.61	39.9

Source:

Ministry of Tourism

Department of Inland Revenue

The Tourism revenue shown in (table:22) is the direct income received by the government from the tourism industry. Tourism revenue includes lease rent from the tourist resorts and bed tax of US\$6 charged from all tourist-accommodating establishments for every night spent by a tourist. Tourism

revenue certainly has been increasing and it is one of the major contributions to the government revenue and to the economy. Tourism revenue in 2000 was 700.6 million Rufiyaa of which 294 million Rufiyaa was generated through tourism tax.

**Tourism Receipts in Relation to Exports and Imports, 1996 - 2000**  
(Million U.S Dollars)

**Table: 23**

Year	Tourism Receipts (1)	Exports, FOB (2)		Imports, CIF (3)	
		FOB (2)	% (1)/(2)	(3)	% (1)/(3)
1996	265.6	59.4	447.1	303.0	87.7
1997	286.0	70.2	407.4	350.3	81.6
1998	303.0	74.6	406.2	354.0	85.6
1999	313.5	64.0	489.8	402.2	77.9
2000	320.7	76.2	420.9	388.6	82.5

Source:

Ministry of Tourism

Maldives Monetary Authority

Maldives Customs Service

The major source of foreign currency earnings into the country is through tourism. International tourism receipts in the Maldives has been growing rapidly due to expansion of tourism and other economic activities in the country. In 1996 Maldives received 265.6 million US dollars from tourism receipts compared to the 362.4 million US dollars received from exports and imports in the same year whereas in the year 2000 it has shown significant increase of receipts by 320.7 million US dollars and 464.4 million US dollars was received as exports and imports.

Table: 24

**Tourism Contribution to Gross Domestic Product, 1996 - 2000**  
(Million Rufiyaa, at 1995 constant prices)

Year	GDP	Tourism Contribution	% Share of Tourism Contribution
1996	4,679.3	1,632.6	34.9
1997	5,154.5	1,753.1	34.0
1998	5,575.9	1,853.4	33.2
1999	5,989.1	1,981.2	33.1
2000	6,278.3	2,093.4	33.3

Source:

Ministry of Tourism  
Ministry of Planning & National Development

The annual tourism contribution to Gross Domestic Product (GDP) (refer table:24) has continuously grown in the past even though the share of tourism contribution to GDP has remained almost constant between 33 percent and 35 percent during the same period. The tourism contribution to GDP in 1996 was 1632.6 million Rufiyaa. This was 35 percent of tourism share to the country's GDP. Whereas in the year 2000 tourism contribution to GDP was 2093.4 million Rufiyaa which was 33.3 percent share of tourism contribution.

Figure: 9

**Tourist Arrivals and Tourism Receipts in the Maldives**  
1996 - 2000

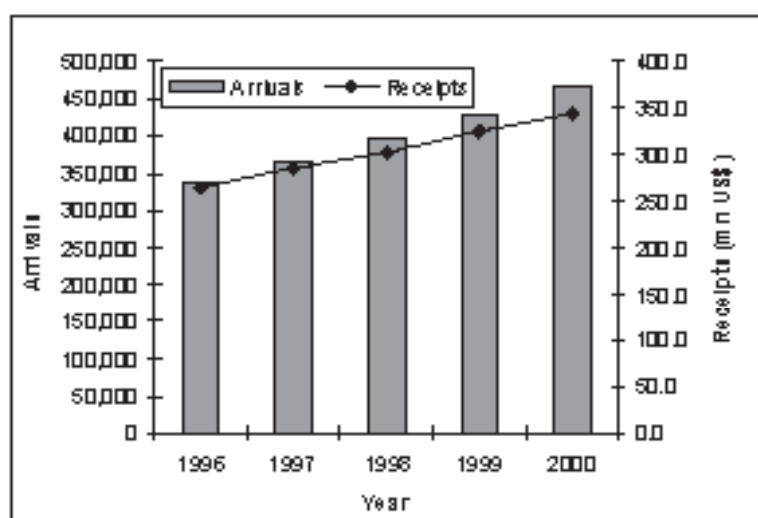


Table: 25

**Out Bound Travel From Maldives, 1996 - 2000**  
(Maldivians)

YEAR	Arrivals	% change	Departure	% change
1996	32,502	3.0	31,975	1.0
1997	32,487	0.0	32,987	3.2
1998	36,939	13.7	36,521	10.7
1999	42,746	15.7	42,322	15.9
2000	42,624	-0.3	42,332	0.0

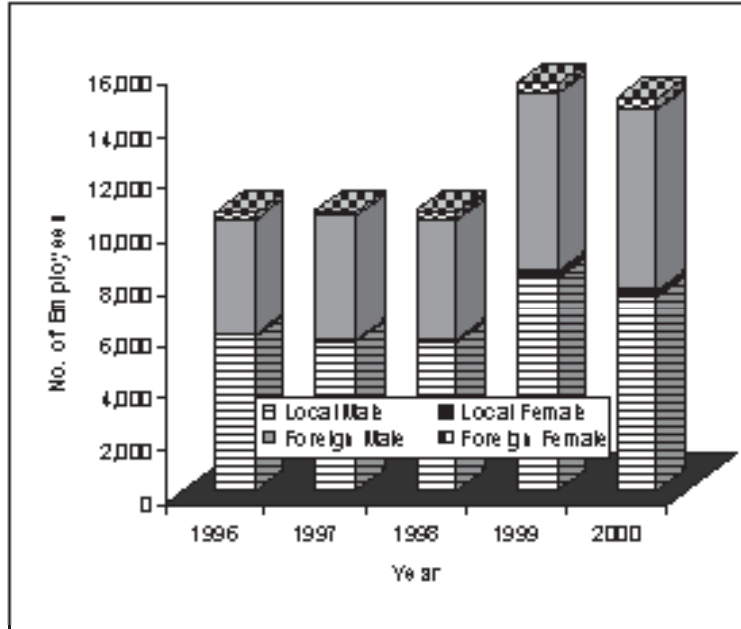
Source:

Ministry of Tourism  
Department of Immigration and Emigration

## 1.5 Tourism Sector Employment

Figure: 10

### Tourism Sector Employment by Gender 1996 - 2000



Tourism sector needs to absorb a staff to bed ratio of 1:1 therefore a high proportion of expatriate workforce is employed in the industry. With the expansion of the industry and operation of new tourist establishments the need for expatriate labour force has increased in the sector due to insufficient number of professional and skilled locals. From the total direct employment in the tourist resorts and hotels which is shown in (figure:10), where 44% (4644) expatriate labour force in 1996 was increased to 49% (7268) in 2000. As a measure of gradual replacement of expatriates the resort/hotel establishments are allowed to employ not more than 50% expatriates under the regulation of Ministry of Human Resources Employment and Labour. To keep phased reduction of expatriates by locals and emphasis on gradual reduction of expatriates by substituting locals through human resources development is one of the priorities given by the Government.



Table: 26 Direct Employment in the Tourism Sector, 1996- 2000

CATEGORY	1996			1997			1998			1999			2000		
	LOCAL	FOREIGN	TOTAL	LOCAL	FOREIGN	TOTAL	LOCAL	FOREIGN	TOTAL	LOCAL	FOREIGN	TOTAL	LOCAL	FOREIGN	TOTAL
<b>FRONT OFFICE</b>															
General Manager	19	23	42	14	19	33	19	22	41	23	28	51	24	30	54
Manager	36	12	47	37	14	51	25	16	41	44	23	67	36	20	56
Asst Manager	37	6	43	34	3	37	40	9	49	62	6	68	51	8	59
Reservation/ Front Office Manager	47	16	63	26	20	46	37	21	57	55	29	84	47	32	79
Receptionist	208	21	229	214	28	242	221	47	268	329	44	373	290	56	346
Accountant	4	58	62	6	64	70	7	81	88	12	101	113	12	101	113
Cashier	39	18	57	67	33	99	78	13	91	68	26	94	76	23	99
Accounting Clerk	46	42	88	23	96	79	36	36	74	55	52	107	45	37	82
Billing Clerk	81	9	90	96	26	122	71	13	84	131	19	150	85	16	101
Night Auditor	2	9	11	5	19	24	3	15	18	5	16	21	14	25	39
Store Keeper	33	53	86	25	76	101	29	57	87	50	83	132	34	91	125
Storekeeping Helper	-	4	4	2	16	18	3	4	7	7	20	27	0	12	12
Office Boy	51	35	86	42	54	96	32	46	78	49	68	117	33	79	112
Waiter	88	58	146	43	88	131	84	88	172	69	157	226	41	140	181
Others	102	135	237	160	107	267	109	74	183	243	254	497	358	313	671
<b>PUBLIC RELATIONS</b>															
Tour Guide	23	69	92	22	45	67	21	71	91	32	102	134	26	76	102
Airport Representative	44	-	44	34	3	37	57	3	60	83	12	95	43	6	49
Animator	-	34	34	2	51	53	4	74	78	5	80	85	14	79	93
Others	16	20	46	26	22	48	29	29	59	11	35	47	34	91	125
<b>FOOD AND BEVERAGE</b>															
F & B Manager/ Controller	14	30	44	14	31	45	16	24	40	22	42	64	23	36	59
F & B Supervisor	9	9	18	22	19	41	3	6	9	28	26	54	14	19	33
Chef	40	67	107	36	57	93	53	66	119	60	97	157	51	71	122
Cook	110	222	332	101	321	422	72	279	351	103	401	505	100	320	420
Asst Cook	48	63	111	33	66	99	36	90	126	62	162	224	64	132	196
Kitchen Helper	53	250	303	104	209	313	86	271	357	114	418	532	205	379	584
Waiter	866	85	941	855	101	957	818	111	928	1,143	140	1,282	865	187	1,052
Party Boys	58	109	167	37	192	230	43	196	239	62	255	317	58	217	275
Barman	-	242	242	-	245	245	0	248	248	0	366	366	0	278	278
Bar Helper	14	89	103	16	93	109	22	94	116	30	97	127	32	129	161
Others	181	244	425	144	194	338	91	159	251	253	315	569	305	600	905
<b>STAFF MESS</b>															
Cook	46	109	155	47	107	154	36	81	119	61	114	175	43	109	152
Assistant Cook	14	33	47	11	40	51	13	32	45	18	57	74	20	51	71
Kitchen Helper	7	107	114	6	121	127	4	125	130	28	183	211	9	124	133
Waiter	36	98	133	12	154	166	22	130	152	29	212	241	14	173	187
Others	21	37	57	9	47	56	7	31	38	8	37	45	36	117	151

<b>HOUSE KEEPING</b>															
Supervisor	43	21	64	67	23	90	49	12	60	71	9	81	40	13	53
Head Room Boy	90	2	92	99	3	102	75	3	78	74	9	84	70	7	77
House Keeper	-	-	-	-	-	-	-	-	-	64	14	79	39	12	51
Room Boy/Maid	758	17	775	686	37	723	744	19	763	1,031	66	1,097	812	43	855
Tailor	12	17	29	5	14	19	6	16	22	8	36	44	69	32	101
Lanidhy Boy	188	127	315	172	156	327	217	127	343	230	220	450	182	178	360
Island Cleaner	-	-	-	-	-	-	12	16	28	39	6	46	59	23	82
Others	27	46	73	76	66	141	59	55	113	68	75	144	220	191	411
<b>MAINTENANCE</b>															
Foreman	60	14	74	51	17	68	49	16	65	48	16	63	35	12	47
Supervisor	-	-	-	-	-	-	-	-	-	53	10	63	43	14	57
Carpenter	67	102	169	54	112	166	50	111	161	83	132	215	62	113	175
Electrician	-	14	14	2	3	5	1	1	3	0	10	10	14	17	31
Aircon Mechanic	-	18	18	2	11	13	0	1	1	3	13	17	11	28	39
Plumber	12	26	38	19	29	48	16	46	62	26	50	75	39	51	84
Painter	12	28	40	14	14	28	4	3	7	6	28	34	21	43	64
Laborer	233	744	977	115	541	696	106	678	784	187	634	821	131	603	734
Generator	37	126	163	29	216	245	19	171	190	47	225	272	18	213	231
Mason	14	77	91	9	57	66	19	74	93	19	104	123	17	94	111
General Worker	51	65	116	50	191	241	88	105	190	60	246	306	52	196	208
Others	60	102	162	48	99	147	87	103	190	183	158	341	205	344	549
<b>TRANSPORT</b>															
Manager	26	2	28	26	-	26	29	0	29	43	1	44	21	0	21
Captain	340	-	340	320	3	323	336	0	335	497	1	498	319	14	333
Driver	-	-	-	6	5	11	74	15	88	9	10	20	30	16	46
Crew	714	14	728	645	8	653	691	9	600	1,038	48	1,086	688	19	677
Others	60	4	64	43	6	39	84	10	94	129	9	139	421	34	455
<b>POWER HOUSE</b>															
Mechanic	47	47	94	39	51	90	44	31	75	66	61	127	40	30	70
Electrician	42	37	79	40	56	96	36	68	103	66	93	159	39	65	98
Generator Attendant	56	39	134	107	50	157	91	49	140	109	80	188	67	52	119
Others	71	63	134	40	17	57	46	37	83	77	50	126	128	119	247
<b>DIVING BASE PERSONNEL</b>															
Diving Instructor	6	392	398	5	141	146	9	224	233	9	208	217	6	121	127
Assistant Instructor	7	49	56	9	43	52	15	37	52	13	61	74	7	51	58
Diving Guide	2	23	25	9	12	21	10	6	16	16	13	29	17	17	34
Compressor Boy	68	2	70	60	3	63	53	16	69	53	14	67	25	14	39
Welding Instructor	18	23	41	16	25	41	31	24	55	25	22	48	17	17	34
Assistant Diving Instructor	9	2	11	17	2	19	21	4	25	25	7	32	12	43	55
Others	40	27	67	33	19	62	25	24	49	46	36	82	63	35	98
<b>MALE OFFICE</b>															
Manager	39	2	41	36	8	44	53	1	55	62	3	65	65	6	61
Accountant	11	30	41	5	19	23	9	32	41	7	47	54	9	34	43
Procurement Officer	51	2	53	42	-	42	62	0	62	68	6	74	67	5	72
Clerk	74	2	76	39	-	39	49	3	52	79	3	82	47	4	51
Office Boy	27	16	43	39	6	45	40	19	59	42	31	73	36	19	54
Others	82	30	112	93	14	107	128	36	164	65	25	90	121	20	141
<b>OTHERS</b>															
	41	60	101	47	75	120	43	57	83	47	150	222	244	173	388
<b>TOTAL</b>	<b>5,945</b>	<b>4,828</b>	<b>10,613</b>	<b>5,537</b>	<b>4,860</b>	<b>10,387</b>	<b>5,709</b>	<b>4,815</b>	<b>10,624</b>	<b>8,372</b>	<b>7,112</b>	<b>15,464</b>	<b>7,631</b>	<b>7,268</b>	<b>14,919</b>

Source: Ministry of Tourism

Table: 27 Salary in Resorts and Hotels, 1996 - 2000 (Maldivian Ruffiya)

CATEGORY	1996		1997		1998		1999		2000			
	LOCAL	AVERAGE SALARY	LOCAL	AVERAGE SALARY	LOCAL	AVERAGE SALARY	LOCAL	AVERAGE SALARY	LOCAL	AVERAGE SALARY		
<b>FRONT OFFICE</b>												
General Manager	10,475.45	24,206.50	17,340.96	15,721.25	28,814.54	22,267.89	15,732.50	34,846.14	25,289.32	16,750.00	28,760.56	22,755.28
Manager	7,475.39	10,976.00	9,225.69	12,883.68	7,612.89	10,148.29	10,375.00	14,213.50	12,294.25	10,781.92	13,081.61	11,931.77
Asst. Manager	4,488.25	7,451.60	5,969.93	8,384.09	6,519.25	11,077.55	5,769.03	8,645.83	7,207.43	6,300.42	12,878.71	9,889.57
Reservation/ Front Office Manager	3,942.65	4,448.70	4,196.67	4,871.43	4,430.27	5,250.17	4,736.11	8,051.73	6,393.92	5,013.50	7,098.60	6,056.05
Receptionist	1,949.89	3,336.43	2,643.16	2,021.25	3,259.85	2,953.48	1,988.75	2,183.71	2,091.23	2,024.76	2,676.90	2,350.83
Accountant	3,667.00	5,776.81	4,721.90	7,360.00	5,417.62	6,689.57	3,475.00	6,725.16	5,100.08	7,946.80	6,446.13	7,196.47
Cashier	2,928.85	2,460.91	2,694.88	3,249.69	2,456.95	2,853.32	3,226.33	3,964.30	3,886.32	3,133.64	3,604.44	3,369.04
Accountant Clerk	2,468.15	2,925.11	2,696.63	2,245.21	2,685.07	2,450.14	2,696.93	3,355.20	3,026.07	2,606.88	3,305.39	2,956.14
Billing Clerk	1,418.50	2,875.33	2,146.92	1,805.10	1,772.71	1,788.91	1,758.37	3,097.88	2,428.12	1,924.49	2,183.73	2,054.11
Night Auditor	2,500.00	2,631.67	2,586.83	1,833.33	2,846.29	2,339.81	3,310.00	4,156.10	3,733.05	3,025.00	2,700.00	2,862.51
Store Keeper	2,716.13	2,414.18	2,586.15	3,260.62	2,768.56	3,014.59	2,708.79	2,749.11	2,728.95	2,845.56	3,096.61	2,971.09
Storekeeping Helper	2,085.00	1,348.20	1,716.60	-	-	-	-	-	-	1,500.00	1,639.93	1,569.96
Office Boy	1,240.39	968.56	1,104.48	1,240.42	1,096.76	1,168.59	1,261.66	1,031.57	1,146.61	1,344.13	1,163.61	1,253.82
Waiter	1,566.45	1,497.60	1,532.03	1,672.10	1,790.82	1,907.26	1,882.77	1,668.72	1,775.74	1,969.50	1,622.01	1,795.75
<b>PUBLIC RELATIONS</b>												
Tour Guide	2,883.33	5,929.50	4,406.42	2,710.45	5,242.13	3,976.29	2,925.74	6,672.40	4,799.07	4,067.72	5,661.02	4,859.37
Airport Representative	2,621.27	0.00	1,260.63	3,136.31	4,728.00	3,932.15	2,969.91	4,379.00	3,674.46	3,398.53	5,615.67	4,507.10
Airline Pilot	-	5,503.57	27,517.79	3,875.00	5,542.00	4,708.50	3,072.50	5,910.15	4,461.33	4,500.00	6,468.89	5,484.45
<b>FOOD AND BEVERAGE</b>												
F & B Manager/ Controller	3,762.50	12,629.83	8,196.17	4,316.67	8,096.79	6,176.73	5,638.89	10,652.37	8,145.63	5,231.54	10,434.27	7,692.91
F&B Supervisor	-	-	-	3,700.00	4,148.67	3,924.33	5,437.5	6,476.667	5,967.053	3,481.75	3,609.29	3,545.52
Chef	5,365.38	12,033.86	8,659.62	5,509.86	13,329.33	9,419.69	6,034.16	10,968.29	8,511.22	6,111.41	11,949.82	9,030.61
Cook	3,087.95	4,028.31	3,563.13	3,232.93	3,406.47	3,658.34	3,302.87	3,209.09	3,255.98	3,732.00	3,540.64	3,636.32
Asst. Cook	2,407.69	2,072.73	2,240.21	2,734.38	2,717.60	2,725.99	2,726.40	2,328.39	2,527.40	2,725.85	3,246.40	2,966.12
Kitchen Helper	1,449.94	1,831.07	1,640.51	1,639.29	1,585.12	1,722.34	1,587.67	1,165.20	1,366.43	1,707.76	1,268.41	1,488.06
Waiter	1,232.90	1,433.82	1,333.36	1,229.96	1,411.29	1,320.63	1,198.26	1,403.80	1,301.03	1,822.12	1,439.24	1,630.68
Pastry Boys	1,388.89	1,065.40	1,227.14	1,244.29	1,384.30	1,314.29	1,579.66	997.25	1,288.40	1,447.35	1,161.87	1,304.61
Barman	-	2,570.67	1,286.33	-	2,361.87	1,269.31	3,344	2,422.72	2,883.36	0	2,561.96	1,280.96
Bar Helper	1,166.67	1,296.51	1,226.59	1,469.50	1,252.17	1,370.84	1,449.18	1,278.44	1,363.81	1,796.95	1,310.04	1,552.80
<b>STAFF MESS</b>												
Cook	2,613.64	2,172.18	2,352.91	2,727.62	2,079.09	2,403.35	3,047.36	2,323.72	2,686.54	3,364.01	2,438.27	2,901.14
Assistant Cook	1,438.50	1,227.66	1,333.06	2,287.50	1,503.55	1,967.06	2,133.33	1,470.14	1,801.74	2,439.17	1,629.41	2,034.29
Kitchen Helper	1,725.00	1,147.40	1,436.20	1,300.00	1,075.91	1,265.31	1,872.40	1,154.44	1,513.42	1,549.59	1,181.85	1,365.72
Waiter	1,221.43	1,070.02	1,145.72	1,339.29	1,100.96	1,220.12	1,273.83	1,098.66	1,186.25	1,469.35	1,146.59	1,307.97

<b>HOUSE KEEPING</b>															
Sweeper	3,014.93	6,848.84	4,931.88	3,059.38	3,707.00	3,368.19	3,276.82	4,395.00	3,835.91	2,867.81	3,962.66	3,415.19	3,295.86	3,572.11	3,434.48
Head Room Boy	5,351.15	5,501.00	5,426.08	2,418.17	2,947.50	2,682.83	2,556.93	2,214.33	2,365.53	3,385.36	4,859.75	3,623.06	2,163.38	2,788.25	2,470.81
House Keeper										2,405.51	2,471.93	2,439.22	3,412.03	3,810.18	3,611.10
Room Boy/Head	1,192.30	1,262.63	1,227.47	1,149.42	1,141.23	1,249.97	1,214.62	1,328.03	1,271.33	1,494.15	1,674.26	1,594.21	1,629.54	1,407.11	1,518.32
Tailor	1,566.67	1,735.43	1,651.05	2,320.00	1,646.30	1,563.15	2,159.13	2,092.82	2,125.97	1,690.19	1,424.64	1,557.42	2,095.29	1,963.06	2,029.17
Lavatory Boy	1,245.73	1,165.96	1,205.84	1,262.86	1,122.49	1,291.42	1,280.33	1,228.74	1,254.54	1,445.71	1,407.09	1,426.40	1470.97	1628.84	1549.911
Hand Cleaner							1570	960	1265	1500.00	0.00	750.00	1591.75	1,313.39	1,452.57
<b>MAINTENANCE</b>															
Foreman	3,079.82	3,843.45	3,461.64	3,173.60	3,087.02	3,130.31	3,303.33	4,054.01	3,693.67	3,509.78	2,747.13	3,128.45	3,833.46	5,361.91	4,592.68
Sweeper	3,123.82	2,265.31	2,694.57	3,235.17	2,278.52	2,756.84	3,730.05	2,131.52	2,930.79	3,193.08	2,399.83	2,766.45	3,207.90	2,838.30	3,023.10
Carpenter	1,500.00	1,760.00	1,630.00		3,442.50	1,721.25	2,800.00	2,718.50	2,759.25	0.00	3,049.10	1,524.55	2,943.33	3,097.01	3,020.17
Electrician		2,723.20	1,361.60	1,775.50	2,363.40	2,069.45	0.00	2,892.43	1,446.21	2,767.43	1,965.50	2,376.46	3,541.67	3,182.07	3,361.87
Alcohol Mechanic	3,192.67	2,241.76	2,717.21	2,660.62	2,417.84	2,489.23	3,694.36	2,164.62	2,929.49	3,359.27	2,159.26	2,759.27	3,158.83	2,474.45	2,816.64
Plumber	2,260.50	1,664.24	1,962.37	2,806.00	1,750.75	2,278.38	2,375.00	2,350.00	1,305.00	2,287.50	1,231.03	1,759.26	2,771.46	2,029.82	2,400.64
Painter	1,314.32	987.58	1,155.95	1,302.83	1,094.60	1,213.72	1,369.99	1,055.56	1,227.77	1,548.09	1,858.43	1,708.26	1,734.02	2,086.55	1,910.28
Laborer	1,616.00	1,462.85	1,539.42	1,925.60	1,560.47	1,753.29	1,756.50	1,473.51	1,615.01	2,188.36	1,708.61	1,948.48	2,235.27	1,454.53	1,859.90
Gardener	2,298.75	1,845.75	2,072.25	2,820.33	2,114.73	2,317.53	2,718.00	1,905.57	2,312.29	2,405.88	2,057.07	2,236.48	3,115.33	2,238.75	2,677.54
Mason	1,839.78	1,571.73	1,705.76	1,555.95	1,221.94	1,389.45	1,592.49	1,407.36	1,499.92	1,587.36	1,151.60	1,369.48	1,834.70	1,445.07	1,539.88
General Worker	2,796.15	5,906.00	4,267.08	3,855.88	-	1,927.94	3,589.26	8,274.00	5,931.63	3,247.98	5,023.00	4,135.50	3,707.04	0.00	1,853.52
<b>TRANSPORT (Launch Section)</b>															
Manager	2,310.41	1,154.60	1,732.50	2,485.48	1,200.00	1,842.74	2,636.60	1,250.00	1,943.30	2,683.05	2,687.00	2,695.02	3,321.16	3,962.67	3,441.91
Captain	1,800.00		900.00	2,166.67	1,228.30	1,687.48	2,180.00	1,505.93	1,842.97	1,617.71	1,168.14	1,292.93	2,985.00	1,859.01	2,422.01
Driver	1,839.86	1,000.00	1,419.93	1,444.31	1,048.00	1,246.16	1,570.94	1,373.60	1,472.27	1,592.59	1,525.00	1,559.30	2,207.99	2,279.12	2,243.55
Crew															
POWER HOUSE															
Mechanic	3,945.44	3,422.18	3,683.81	3,769.68	3,246.59	3,508.14	3,593.39	3,171.17	3,552.28	3,830.49	2,884.11	3,357.30	4,050.53	3,300.11	3,575.32
Electrician	2,780.54	2,585.09	2,683.31	2,664.53	2,400.62	2,532.57	3,194.72	2,547.49	2,871.11	2,756.49	2,393.81	2,545.15	3,150.66	3,034.42	3,092.54
Generator Attendant	1,549.18	1,272.62	1,410.85	1,902.67	1,227.96	1,565.26	1,960.86	1,676.28	1,818.57	1,953.21	1,686.29	1,819.75	2,125.50	2,271.95	2,198.73
<b>DIVING BASE PERSONNEL</b>															
Diving Instructor	10,000.00	10,101.64	10,050.82	5,800.00	11,342.31	8,571.16	5,256.67	10,303.32	7,780.00	8,768.24	9,084.24	8,926.24	7,960.67	8,549.71	8,255.19
Assistant Instructor	3,875.00	6,169.00	5,022.00	5,657.60	9,677.33	7,667.47	6,162.60	8,870.42	7,516.51	5,807.30	7,811.94	6,809.62	5,965.75	7,428.12	6,696.93
Diving Guide	3,000.00	5,372.67	4,186.33	4,468.83	3,000.00	3,734.42	4,013.30	7,610.00	5,811.67	2,737.61	5,265.92	4,001.77	4,209.73	5,419.67	4,814.70
Compressor Boy	2,021.26	1,341.00	1,681.13	2,252.54	4,172.00	3,212.27	2,271.12	2,914.72	2,582.92	2,961.63	2,372.64	2,667.13	2,292.29	3,542.42	2,917.35
Welding Instructor	3,833.00	8,316.25	6,074.63	4,584.00	8,250.92	6,422.46	4,175.09	5,665.88	4,915.98	3,680.89	4,858.38	4,259.64	3,466.26	5,044.85	4,255.55
Assistant Welding Instructor	2,565.00	3,500.00	3,032.50	2,701.75	4,728.00	3,714.88	2,450.14	6,000.00	4,225.07	2,870.00	3,648.00	3,259.00	2,431.40	3,889.23	3,165.32
<b>MALE OFFICE</b>															
Manager	5,042.50		2,521.25	5,498.66	10,000.00	7,749.33	6,178.40	0.00	3,089.20	5,948.00	5,665.35	5,806.68	6,665.43	5,875.00	6,270.21
Accountant	3,251.33	5,087.94	4,179.63	3,808.25	4,565.81	4,087.03	5,013.40	5,710.53	5,361.96	3,623.08	6,018.83	4,820.96	4,823.11	6,500.31	5,661.71
Payable Officer	3,106.58		1,553.29	3,006.38		1,503.19	3,570.65	0.00	1,785.32	3,329.50	1,865.80	2,897.85	3,460.79	5,407.36	4,434.08
Clerk	1,905.00	1,900.00	1,702.50	2,057.36		1,028.68	2,216.78	2,783.50	2,500.14	1,880.50	2,065.49	1,973.49	2,362.33	2,700.00	2,541.17
Office Boy	1,435.00	1,184.15	1,304.88	1,529.42	1,093.25	1,311.33	1,674.22	1,350.22	1,511.22	1,505.25	1,591.00	1,718.63	1,754.40	2,617.32	2,185.85

Sources: Ministry of Tourism

Table: 28

### Graduates from Faculty of Hospitality and Tourism Studies 1996 - 2000

Year	Full Time Courses			Other Courses			Total
	Male	Female	Total	Male	Female	Total	
1996	27	9	36	105	19	124	160
1997	21	4	25	85	65	150	175
1998	58	13	71	135	105	240	311
1999	35	7	42	160	37	197	239
2000	20	4	24	193	20	213	237
<b>Total</b>	<b>161</b>	<b>37</b>	<b>198</b>	<b>678</b>	<b>246</b>	<b>924</b>	<b>1,122</b>

Source: Faculty of Hospitality & Tourism Studies

Tourism is the fastest growing industry in the Maldives, which cannot be separated from Hospitality Industry. It demands a wide variety of different levels of skilled and professional people. As a result in 1987 School of Hotel and Catering Services was established with the object to meet the urgent need of skilled Maldivian workforce for the growing tourism industry. This is still the first Institute offering formal specialized hospitality training in the country. This school, initially manned by expatriates, was a UNDP and European Economic Union (EEC) funded project. But today the Faculty is completely staffed by Maldivians except for two foreign language staff.

From 1992 the School was operating under the guidance of Ministry of Tourism and later in 1994 it was renamed as Institute of Hotel and Catering Services (IHCS), until it came into being under the umbrellas of Maldives College of Higher Education as Faculty of Hospitality and Tourism Studies (FHTS) in January 1999.

The first batch of students, which was less than 50 persons with an initial capacity of 50 full time students, was available to the industry in 1988. Since establishment of this School in 1987, it has trained (including short courses) between 230-240 persons per year. To date 426 full-time students have graduated from the Faculty and 4574 short-term participants have been trained and certified producing a total number of over 5000 people in various disciplines for the tourism industry by the end of year 2000. However, there has been always a shortage on formally trained persons with the expansion of the industry.

FHTS offers varied courses ranging from short-term Certificate courses, internationally recognized Diplomas to mobile in-house job training received through industry assistance and guidance. As a step to move forward in hospitality field, since last year FHTS has also started offering block mode Bachelor of Philosophy in Hospitality Management and Master of Arts in Hospitality and Management from Birmingham University.

## 1.6 Statistical Updates

Table: 29

### Tourist Arrivals by Nationality, January - November 2001

COUNTRY	Jan-Nov '00	Jan-Nov '01	% Change '01/'00 (Jan-Nov)	% Share '01 (Jan-Nov)
<b>EUROPE</b>	327,241	332,679	1.7	79.1
Austria	10,588	9,824	-7.2	2.3
Belgium	4,766	3,517	-26.2	0.8
Czech Republic	1,024	985	-3.8	0.2
Denmark	644	979	52.0	0.2
Finland	319	254	-20.4	0.1
France	24,296	27,787	14.4	6.6
Germany	70,879	60,974	-14.0	14.5
Greece	1,646	1,595	-3.1	0.4
Italy	95,342	106,378	11.6	25.3
Netherlands	6,828	3,851	-43.6	0.9
Norway	885	527	-40.5	0.1
Poland	1,122	1,187	5.8	0.3
Portugal	4,065	3,430	-15.6	0.8
Russia	3,032	3,308	9.1	0.8
Spain	5,024	4,047	-19.4	1.0
Sweden	1,998	1,830	-8.4	0.4
Switzerland	21,686	25,378	17.0	6.0
Turkey	1,125	840	-25.3	0.2
United Kingdom	65,173	69,360	6.4	16.5
Other Countries	6,799	6,628	-2.5	1.6
<b>ASIA</b>	78,646	73,575	-6.4	17.5
Bangladesh	285	312	9.5	0.1
China	4,930	6,707	36.0	1.6
India	9,750	7,526	-22.8	1.8
Indonesia	310	298	-3.9	0.1
Japan	42,549	38,449	-9.6	9.1
Korea	5,330	6,140	15.2	1.5
Malaysia	1,635	1,236	-24.4	0.3
Pakistan	967	924	-4.4	0.2
Philippines	281	300	6.8	0.1
Singapore	2,182	1,852	-15.1	0.4
Sri Lanka	7,892	6,370	-19.3	1.5
Thailand	889	1,197	34.6	0.3
Other Countries	1,646	2,264	37.5	0.5
<b>AFRICA</b>	2,102	1,915	-8.9	0.5
South Africa	1,599	1,171	-26.8	0.3
Other Countries	503	744	47.9	0.2
<b>AMERICAS</b>	6,320	5,927	-6.2	1.4
Argentina	151	138	-8.6	0.0
Brazil	293	314	7.2	0.1
Canada	1,153	1,244	7.9	0.3
U.S.A.	4,246	3,813	-10.2	0.9
Other Countries	477	418	-12.4	0.1
<b>OCEANIA</b>	8,396	6,541	-22.1	1.6
Australia	7,525	5,860	-22.1	1.4
New Zealand	858	621	-27.6	0.1
Other Countries	13	60	361.5	0.0
<b>STATELESS/NOT STATED</b>	0	0	0.0	0.0
<b>TOTAL TOURIST ARRIVALS</b>	422,705	420,637	-0.5	100.0
<b>TOURIST ARRIVALS BY SURFACE</b>	6,554	4,158	-36.6	-

Source: Statistics Section

Date: 06/12/01

Ministry of Tourism

Table: 30 Tourism Growth, (January - November 2001)

	Year	January	February	March	April	May	June	July	August	September	October	November	Jan - Nov
<b>TOURIST ARRIVALS</b>													
FRO WATER ARRIVALS	2000	45,297	48,274	45,393	43,458	27,019	24,033	33,027	40,563	36,878	39,078	38,985	422,705
	2001	50,538	48,987	50,488	48,100	29,450	26,593	35,461	38,744	31,726	31,209	30,341	420,637
Growth %		11.6	0.0	11.2	10.7	9.0	6.5	7.4	4.5	-14.0	-9.1	-22.2	-0.5
<b>SURFACE ARRIVALS</b>													
	2000	156	2,041	1,617	860	41	20	39	6	16	483	1,275	6,554
	2001	373	2,341	1,02	458	46	666	5	0	17	4	146	4,158
Growth %		139.1	14.7	-93.7	-46.7	12.2	3230.0	-97.2	-100.0	6.3	-99.2	-88.5	-36.6
<b>SEDMIGHTS</b>													
RESD RTE	2000	373,517	405,376	396,004	365,525	237,419	199,486	265,592	347,929	303,368	313,644	303,962	3,530,411
	2001	425,757	400,126	417,910	372,428	259,778	206,977	286,652	352,238	292,837	272,067	272,237	3,559,007
Growth %		14.0	-1.3	5.8	4.8	9.4	3.8	7.9	1.2	-3.5	-13.3	-18.4	0.8
HOTELS	2000	4,394	4,999	4,578	4,275	3,988	3,087	3,653	4,106	4,919	4,730	6,564	49,253
	2001	7,087	6,560	7,025	6,311	4,948	4,303	5,472	6,701	6,090	5,260	4,897	63,654
Growth %		61.3	31.2	53.5	47.6	25.0	39.4	49.8	36.8	23.8	11.2	-25.3	29.2
TOTAL	2000	377,911	410,375	399,582	369,800	241,377	202,572	269,245	352,035	308,277	318,374	340,116	3,579,664
	2001	432,844	406,686	424,935	378,739	264,726	211,280	292,124	358,939	298,927	277,327	277,134	3,622,661
Growth %		14.5	-0.9	6.3	5.3	9.7	4.3	8.6	1.7	-3.0	-12.9	-18.5	1.2
<b>RED CAPACITY RATES IN OVERSEAS</b>													
RESD RTE	2000	15,092	15,076	15,076	15,076	15,496	15,188	15,180	15,400	15,400	15,400	15,272	15,240
	2001	15,432	15,472	15,776	15,776	15,888	15,854	15,728	15,854	15,944	15,944	15,964	15,786
Growth %		2.3	2.6	4.6	4.6	2.5	4.4	3.7	2.9	3.5	3.5	4.5	3.6
HOTELS	2000	466	466	466	466	466	466	466	466	462	462	744	539
	2001	688	688	688	688	688	688	688	670	670	670	670	681
Growth %		47.6	47.6	47.6	47.6	47.6	47.6	47.6	4.4	4.4	4.4	-9.9	26.4
TOTAL	2000	15,558	15,542	15,542	15,542	15,964	15,654	15,646	16,042	16,042	16,042	16,016	15,779
	2001	16,120	16,160	16,464	16,464	16,576	16,542	16,416	16,524	16,614	16,614	16,634	16,466
Growth %		3.6	4.0	5.9	5.9	3.8	5.7	5.1	3.0	3.6	3.6	3.9	4.4
<b>OCCUPANCY RATE %</b>													
RESD RTE	2000	79.8	92.7	84.5	78.6	49.4	43.8	56.5	72.9	65.7	65.7	72.8	69.3
	2001	89.0	92.4	85.5	78.7	52.7	43.5	58.8	71.7	61.2	55.0	56.8	67.8
Change		9.2	-0.4	0.9	0.1	3.3	-0.3	2.3	-1.2	-4.4	-10.7	-16.0	-1.6
HOTELS	2000	30.4	37.0	31.7	30.6	27.4	22.1	25.3	20.6	25.5	23.8	29.4	27.6
	2001	33.2	34.1	32.9	30.6	23.2	20.8	26.7	27.4	30.3	25.3	24.4	28.0
Change		2.8	-2.9	1.2	0.0	-4.2	-1.2	0.4	6.8	4.8	1.6	-5.0	0.4
TOTAL	2000	78.4	91.0	82.9	77.2	48.8	48.1	55.6	70.8	64.1	64.0	70.8	67.9
	2001	86.6	89.9	83.3	76.7	51.5	42.6	57.4	69.9	60.0	53.8	55.5	66.1
Change		8.2	-1.2	0.3	-0.5	2.7	-0.6	1.8	-0.9	-4.1	-10.2	-14.3	-1.8
Avg. Duration of Stay (Days)	2000	8.3	8.4	8.2	8.3	8.9	8.4	8.2	8.7	8.4	8.1	8.7	8.5
	2001	8.6	8.3	8.4	7.9	9.0	8.3	8.2	9.2	9.4	8.9	9.1	8.6
Change		0.2	-0.1	-0.4	-0.4	0.1	-0.2	0.1	0.6	1.1	0.7	0.4	0.1

Source: Statistics Section, Ministry of Tourism  
 Note: \* Figures in brackets are not available unless otherwise stated in the text of the report.

Table: 31

**Winter 2001/2002 Flight Schedule (28 October 2001 - 30 March 2002)  
Male' International Airport**

Name of Airline	Originating Sector	Aircraft Type	Capacity Seats	Frequency per Week	Capacity per Week	Remarks
<b>Schedule Flight Operators</b>						
1 Srilankan Airlines	CMB	A330	294	6	1764	
	CMB	A331	375	5	1875	
	CMB/NRT	A340	375	2	750	
	CMB/NRT	A330	294	1	294	
	CMB/LHR	A340	375	2	750	
	CMB/CDG	A340	375	1	375	
	CMB/ZRH	A330	294	2	588	
2 Austrian Airlines	VIE	B 737	184	2	368	
3 Air Europe	MXP/FCO	B 777	339	1	339	
	FCO/MXP	B 767	260	3	780	
	MXP	B 777	339	1	339	
4 Qatar Airways	DOH	A 320	144	3	432	
5 Lanza Air Italy	MXP/CMB	767-300	258	1	258	
	MXP/FCO	767-300	258	1	258	
	MXP	767-300	258	2	516	
6 Condor	FRA	B 767	269	2	538	Forbidden
	MUC	B 767	269	1	269	Forbidden
7 Emirates	CMB	A 330	294	4	1176	
	DXB/CMB	A 330	294	2	588	
	DXB	A 330	294	6	1764	
8 Indian Air Lines	TRV	A 320	150	7	1050	
9 LTU International Airways	DUS	B 767	262	2	524	
	MUC	B 767	262	2	524	
	FRA	B 767	262	1	262	
10 Malaysia Airlines	KUL	A 330	294	2	588	
11 Singapore Airlines	SIN	A 310	221	7	1547	
12 Etihad	MXP	B767 - 300	259	2	518	
	MXP/FCO	B767 - 300	259	1	259	
13 Air Seychelles	SEY/BOM	B737-700	126	1	126	
	BOM/SEY	B737-701	126	1	126	
<b>Total Schedule Flights</b>				<b>74</b>	<b>19545</b>	
<b>Charter (Passenger) Flight Operators</b>						
1 Airbus International Airways	MAN/LGW (BAH)	B767-300	315	1	315	
2 Monarch Airlines	LGW/BAH	A 330	374	1	374	
3 Corse Air	ORY	A 330	355	2	710	
4 Belair	ZRH	B757	209	1	209	
5 Air 2000	LGW	B767-300	312	1	312	
6 Edelweiss	ZRH	A 330	313	2	626	
<b>Total Charter Flights</b>				<b>8</b>	<b>2548</b>	
<b>Grand Total</b>				<b>82</b>	<b>22093</b>	

Source: Department of Civil Aviation



## 2.1 Seychelles

Table: 32

### Tourism Trends in Seychelles, 1996 - 2000

	1996	1997	1998	1999	2000
Arrivals at Frontier (thousands)	131	130	128	125	130
Bed Capacity	4,490	4,600	4,730	4,780	5,000
Tourist Bed nights (thousands)(H&S)	939	944	920	915	946
Tourism Expenditure (mn US\$)	30	30	26	21	NA
Tourism Receipts (mn US\$)	107	122	111	112	110

Source: World Tourism Organization (WTO)  
Seychelles Tourism Marketing Authority (STMA)

A group of 115 islands covering an area of 453 sq. km., the Seychelles archipelago is geographically located in Africa, only four degrees from the equator. The population of the country is 72,000.

Tourism is one of the main industries in the country. Although

though Seychelles has a lot of similarities to the Maldives in terms of its beaches, the marine environment, and its attractive diving, it is a different product and is marketed quite differently from the Maldives. However, Europe being one of its major markets, Seychelles captures a significant share of this market with its warm climate, and the beautiful marine environment.

## 2.2 Mauritius

Table: 33

### Tourism Trends in Mauritius, 1996 - 2000

	1996	1997	1998	1999	2000
Arrivals at Frontier - overnight visitors (thousands)	487	536	558	578	NA
Bed Capacity	13,833	14,126	14,995	16,947	NA
Tourist Bed nights (thousands)(H&S)	4,958	5,451	5,568	5,729	NA
Tourism Expenditure (mn US\$)	179	173	185	187	NA
Tourism Receipts (mn US\$)	452	485	503	545	NA

Source: World Tourism Organization (WTO)

TTT Destination Mauritius, September 2000

Mauritius is a volcanic island about 10 million years old approximately covering an area of 1,865-square kilometres. The coastline of 330 kilometres is almost entirely surrounded by one

of the largest unbroken coral reefs in the world. It is situated in the South West Indian Ocean, easily accessible from Africa, Australia, and India.

Mauritius is also one of the popular beach destinations, which also has a tropical climate similar to Maldives. It offers a wide variety of products, has different cultures, religions and people. Previously Mauritius was targeting for honeymoon segments however now their focus is changing towards attracting families & children and to convention markets. It has also emerged as a spa destination in addition to branding their products as a destination filled with love, peace, mysticism and tranquillity.

Mauritius now aims at 6 to 7 percent arrival growth over the next few years and focuses on keeping high standards and their target market is high spenders. India is one of their major target markets, which generated a growth of 7.5 percent in 1999. As a major tourist destination it has air connections with most of the major European, African, Asian, and Australian cities. Air Mauritius serves 22 different destinations.

The estimated population in 1994 was 1,082,998. Its economy is based on the export of sugarcane, textiles and tourism. The monetary unit of Mauritius is the Rupee and the indicative exchange rate against 1US Dollar is about Rs. 20.

## 2.3 Caribbean

### Tourism Trends in Caribbean, 1996 - 2000

Table: 34

	1996	1997	1998	1999	2000
Tourists overnight Visitors(' 000)	14,333	15,272	15,951	16,129	17,334
Bed Capacity (Hotels and similar establishments)	91,219	94,284	87,831	86,304	NA
Tourist Bed nights (Hotels and similar establishments) (' 000)	10,328	11,305	11,215	11,251	NA
Tourism Expenditure (mn US\$) (Excluding international transport)	2,123	2,276	2,100	1,979	NA
Tourism Receipts (mn US\$) (Excluding international transport)	12,993	13,968	14,955	15,760	17,158

Source: World Tourism Organization (WTO)

The Caribbean with its many different countries captures a large share of outbound travellers from all around the world. The Caribbean consists of tropical islands with warm climates, beautiful beaches and an attractive underwater world, an ideal holiday destination for many market segments. The Caribbean also has an image of being a lively and 'fun' destination and for having happy, carefree, and friendly people. All of these are essential ingredients that keep attracting millions of visitors to this region every year. The main market for the Caribbean are North Americans due to their proximity to the destination. However, the Caribbean also attracts a large number of European and Japanese visitors. The main attractions of this region are its beaches, diving and nightlife.

### 3.1 Tourism Trends in South Asia

Table: 35

#### International Tourist Arrivals in South Asia 1996 - 2000

COUNTRY	Tourist arrivals (000)					% Change				% of total South Asia				
	1996	1997	1998	1999	2000*	97/96	97/98	98/99	99/00	1996	1997	1998	1999	2000
Afghanistan	4	4	4			0.0	0.0			0.1	0.1	0.1	0.0	0.0
Bangladesh	166	182	172	173	200	9.6	-5.5	0.6	15.6	3.7	3.8	3.3	3.0	3.1
Bhutan	5	5	6	7		0.0	20.0	16.7	-100.0	0.1	0.1	0.1	0.1	0.0
India	2,288	2,374	2,359	2,482	2,641	3.8	-0.6	5.2	6.4	51.6	49.1	45.2	43.0	41.2
Iran	567	740	1,008	1,321	1,700	30.5	36.2	31.1	28.7	12.8	15.3	19.3	22.9	26.5
Maldives	339	366	396	430	467	8.0	8.2	8.6	8.6	7.6	7.6	7.6	7.4	7.3
Nepal	394	422	464	492	451	7.1	10.0	6.0	-8.3	8.9	8.7	8.9	8.5	7.0
Pakistan	369	375	429	432	543	1.6	14.4	0.7	25.7	8.3	7.8	8.2	7.5	8.5
Sri Lanka	302	366	381	436	400	21.2	4.1	14.4	-8.3	6.8	7.6	7.3	7.5	6.2
Total South Asia	4,434	4,834	5,219	5,777	6,415	9.0	8.0	10.7	11.0	100.0	100.0	100.0	100.0	100.0

Source: Adapted from Tourism Market Trends-South Asia, 1996, 2000 Edition & Tourism Market Trends-Asia 2001 Edition  
World Tourism Organisation (WTO)

\* Data as collected by WTO August 2001

Table: 36

#### International Tourism Receipts in South Asia 1996 - 2000

COUNTRY	Tourism receipts (US\$ mn)					% Change				% of total South Asia				
	1996	1997	1998	1999	2000	97/96	97/98	98/99	99/00	1996	1997	1998	1999	2000
Afghanistan	1	1	1			0.0	0.0			0.0	0.0	0.0	0.0	0.0
Bangladesh	34	59	51	50	59	73.5	-13.6	-2.0	18.0	0.9	1.5	1.2	1.1	1.2
Bhutan	6	6	8	9	9	0.0	33.3	12.5	0.0	0.2	0.1	0.2	0.2	0.2
India	2,963	2,913	2,948	3,009	3,296	-1.7	1.2	2.1	9.5	74.2	72.1	69.0	65.8	64.8
Iran	244	327	477	662	850	34.0	45.9	38.8	28.4	6.1	8.1	11.2	14.5	16.7
Maldives	266	286	303	325	344	7.5	5.9	7.3	5.8	6.7	7.1	7.1	7.1	6.8
Nepal	161	116	153	168		-28.0	31.9	9.8		4.0	2.9	3.6	3.7	0.0
Pakistan	146	117	98	76	86	-19.9	-16.2	-22.4	13.2	3.7	2.9	2.3	1.7	1.7
Sri Lanka	173	216	231	275	253	24.9	6.9	19.0	-8.0	4.3	5.3	5.4	6.0	5.0
Total South Asia	3,994	4,041	4,270	4,575	5,085	1.2	5.7	7.1	11.1	100.0	100.0	100.0	100.0	100.0

Source: Adapted from Tourism Market Trends-South Asia, 1996, 2000 Edition & Tourism Market Trends-Asia 2001 Edition  
World Tourism Organisation (WTO)

\* Data as collected by WTO August 2001

## 3.2 World Tourism Trends

According to results in 2000 an estimated number of 699 million international tourist arrivals were recorded. Spurred on by a strong global economy and special events held to commemorate the new millenium, world tourism grew by an estimated 7.4 percent in 2000 - its highest growth rate in nearly a decade and almost double the increase of 1999. Nearly 50 million more arrivals were recorded, the same number of new tourists as major destinations such as Spain or the United States receive in the entire year.

Table: 37

International Tourist Arrivals by Region 1999 - 2000

	International Tourist Arrivals (Million)		Growth rate(%)		Market share (%)	
	1999	2000*	1999 /	2000* /	1999	2000*
			1998	1999		
World	650.4	698.8	3.8	7.4	100.0	100.0
Africa	26.5	27.6	6.4	4.4	4.1	4.0
Americas	122.2	129.0	2.3	5.5	18.8	18.5
East Asia and the Pacific	97.6	111.9	10.8	14.7	15.0	16.0
Europe	380.2	403.3	1.7	6.1	58.5	57.7
Middle East	18.2	20.6	20.3	12.9	2.8	2.9
South Asia	5.8	6.4	10.7	11.0	0.9	0.9

Source: Adapted from World Overview & Tourism Topics - 2001

\* Data as collected by WTO August 2001

World Tourism Organisation (WTO)

Table: 38

World's Top 15 Tourism Destinations 2000

Rank	International Tourist Arrivals (Million)		% Change	Market Share (%)
	1999	2000*	2000*/1999	2000*
1 France	73.0	75.5	3.4	10.8
2 United States	48.5	50.9	4.9	7.3
3 Spain	46.8	48.2	3.0	6.9
4 Italy	36.5	41.2	12.8	5.9
5 China	27.0	31.2	15.5	4.5
6 United Kingdom	25.4	25.2	-0.8	3.6
7 Russian Federation	18.5	21.1	14.5	3.0
8 Mexico	19.0	20.6	8.4	3.0
9 Canada	19.5	20.4	4.9	2.9
10 Germany	17.1	19.0	10.9	2.7
11 Austria	17.5	18.0	2.9	2.6
12 Poland	18.0	17.4	-3.1	2.5
13 Hungary	14.4	15.6	8.1	2.2
14 Hong Kong (China)	11.3	13.1	15.3	1.9
15 Greece	12.2	12.5	2.8	1.8

Source: Adapted from World Overview & Tourism Topics - 2001

\* Data as collected by WTO August 2001

World Tourism Organisation (WTO)

Table: 39 International Tourism Receipts by Region 1999 - 2000

	International Tourist Arrivals (Million)		Growth rate(%)		Market share (%)	
	1999	2000*	1999/1998	2000*/1999	1999	2000*
	World	455.4	475.8	2.9	4.5	100.0
Africa	10.3	10.7	3.6	3.7	2.3	2.2
Americas	122.4	136.4	4.4	11.5	26.9	28.7
East Asia and the Pacific	75.2	82.5	6.4	9.6	16.5	17.3
Europe	233.1	231.5	0.6	-0.7	51.2	48.6
Middle East	9.8	9.7	12.4	-1.6	2.2	2.0
South Asia	4.6	5.1	7.1	11.1	1.0	1.1

Source: Adapted from World Overview &amp; Tourism Topics - 2001

\* Data as collected by WTO August 2001

World Tourism Organisation (WTO)

Table: 40 World's Top 15 Tourism Earners 2000

Rank		International Tourist Arrivals (Million)		% Change	Market Share (%)
		1999	2000*	2000*/1999	2000*
1	United States	74.9	85.2	1.7	17.9
2	Spain	32.4	31.0	-4.3	6.5
3	France	31.5	29.9	-5.1	6.3
4	Italy	28.4	27.4	-0.3	5.8
5	United Kingdom	20.2	19.5	-0.3	4.1
6	Germany	16.7	17.8	6.5	3.7
7	China	14.1	16.2	15.1	3.4
8	Austria	12.5	11.4	-8.7	2.4
9	Canada	10.2	10.8	5.9	2.3
10	Greece	8.8	9.2	5.0	1.9
11	Australia	8.0	8.4	5.3	1.8
12	Mexico	7.2	8.3	14.8	1.7
13	Hong Kong (China)	7.2	7.9	9.4	1.7
14	Turkey	5.2	7.6	46.8	1.6
15	Russian Federation	7.5	-	-	-

Source: Adapted from World Overview &amp; Tourism Topics - 2001

\* Data as collected by WTO August 2001

World Tourism Organisation (WTO)

Table: 41

## World's Top 15 Tourism Spenders 2000

Rank		International Tourist Arrivals (Million)		% Change	Market Share (%)
		1999	2000*	2000*/1999	2000*
1	United States	59.4	65.0	9.6	13.7
2	Germany	48.5	47.6	-1.8	10.0
3	United Kingdom	35.6	36.6	2.6	7.7
4	Japan	32.8	31.5	-4.0	6.6
5	France	18.6	17.2	-7.9	3.6
6	Italy	16.9	15.5	-8.6	3.2
7	Canada	11.3	12.4	9.4	2.6
8	Netherlands	11.4	11.8	4.0	2.5
9	China	10.9	-	-	-
10	Belgium/Luxembourg	10.1	-	-	-
11	Austria	9.8	9.3	-5.6	1.9
12	Sweden	7.6	-	-	-
13	Russian Federation	7.4	-	-	-
14	Republic of Korea	4.0	6.4	60.4	1.3
15	Switzerland	6.8	6.3	-7.8	1.3

Source: Adapted from World Overview &amp; Tourism Topics - 2001

\* Data as collected by WTO August 2001

World Tourism Organisation (WTO)

## Concepts and Definitions

According to the WTO/United Nations Recommendations on Tourism Statistics, Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

**International Visitor:** For statistical purposes, the term “international visitor” describes “any person who travels to a country other than that in which s/he has his/her usual residence but outside his/her usual environment for a period not exceeding 12 months and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited”.

**Tourists (overnight visitors):** A visitor who stays at least one night in a collective or private accommodation in the country visited

**Passenger:** All arrivals to the country including all disembarking transit

**Accommodation Establishments:** An establishment offering rooms for rent to tourists. Establishments are classified as resorts, hotels, guesthouses and registered safari vessels

**Tourist bed nights:** A night spent by a tourist in an accommodation establishment

**Average length of stay:** The average time in days spent by the tourist during the time of visit

**Occupancy rate:** The occupancy rate expresses the ratio of the capacity of accommodation available during a given period to the use actually made of it in the same period

**Tourism Revenue:** Tourism revenue refers to the sum of payments made as lease rent, and bed tax

**Tourism Receipts:** Tourism receipts refers to the expenditure of tourists