Cover Page Photo: Kolhumadulu (Thaa) Atoll, Kalhufahalafushi

Tourism Statistics – 2004 Edition

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

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Introduction

This publication briefly illustrates the development of tourism in the destination and covers the performance and trends of the leading source markets to the country. In addition to all the available national tourism statistics for the past five years 1999 - 2003, the report contains some important tourism statistics at regional and global level and also highlights the performance of some similar destinations to the Maldives. Explanatory notes are provided along with the figures, in order to make the data more comprehensive.

The opening part of this report represents some vital facts about the Maldives which would be informative to the user and the details covering a brief profile of the Ministry of Tourism (MoT) and the Maldives Tourism Promotion Board (MTPB) is also presented.

The information in this report is divided into the following four main sections.

Section I
Tourism Trends in the Maldives. In this section Tourism Sector statistics is presented for Tourist Accommodation Capacity, Tourist Arrival Trends, Major Markets, Economic Importance of Tourism, Tourism Sector Employment and Statistical Updates of Tourism Indicators.

Section II
Tourism Trends in Similar Destinations to the Maldives includes Seychelles, Mauritius and the Caribbean.

Section III
Over view of World Tourism Trends which covers Top Tourism Destinations, Top Earners, and Top Spenders in the world and Regional Results of the World.

Section IV
Covers Tourism Highlights of 2003, Organization Chart of the Ministry of Tourism with its functional responsibilities and important contact details of different sections.

بسم الله الرحمن الرحيم

Foreword by the Minister of Tourism

On behalf of the Ministry of Tourism, it is with utmost pleasure that I present the annual report of Tourism Statistics 2004. This report is published with the object of providing comprehensive statistical information on various aspects of tourism development in the Maldives for the period under review 1999 - 2003. The need for accurate and timely dissemination of tourism statistics is an important economic tool for the rapidly growing industry. I believe that this publication is a valuable contribution towards future development and planning purposes not only for tourism industry but also for other tourism related activities and those who are interested in the Maldives tourism research.

Honorable Mr. Hassan Sobir

Tourism Sector of the country continues to play a vital role in the development of the economy contributing 31.2 % to the Gross Domestic Product (GDP) at the end of the year 2003. At the same time tourist arrivals to the country also continues to display a remarkable increase from 429,666 in 1999 to 563,593 in 2003, an achievement of 7.5% average growth during the review period. The Maldives achieved the target of 500,000th tourist arrival in November 2003. Maldives experienced strong growth trends despite 11th September crisis in 2001, the subsequent economic slow down that affected world tourism and the outbreak of SARS epidemic in 2003 which affected our South East Asian markets.

The aim of Maldives tourism is to continue to explore and focus on new dimensions through nonstop progress and improvement in tourism sector for the development of the economy. Under the strategic policies on regional expansion of tourism zones as outlined in Second Tourism Master Plan, Ministry of Tourism has opened bidding on 31st March 2004. It includes tourist resort development in 11 designated islands with a bed capacity of 1650 in 9 new atolls. It is expected that this would contribute towards better economic growth generating income and employment opportunities for the locals in the region. Intensified promotional campaigns are also being carried through out the year as a safe, stable and desirable destination.

Efforts have also been made to widen the information and data covered in this report 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 – 2004 publication is the result of coordinated efforts of various Government Offices, Tourism Industry, World Tourism Organization (WTO) and various other sources. I also acknowledge with gratitude the valuable contribution and support rendered by these institutions, agencies and in particular the staff of the Statistics Section of the Ministry of Tourism for compilation and production of this publication.

Country Fact Sheet

Country		Republic of Maldives
Capital City		Male'
Local Language		Dhivehi
Official Language		Dhivehi & English
Location:	Latitude	7º 6' 35" N to 0º 42' 24" S
	Longitude	72º 33' 19" E to 73º 46' 13" E
Number of Atolls		20
Number of Islands		1,192
	Inhabited	199
	Uninhabited	993
Currency		Rufiya
Exchange Rate		US$ 1 = Rufiya 12.85
Standard Time		GMT + 5 hrs
Climate		Tropical
	May - October	Sunny / Rainy
	November - April	Sunny / Dry
Avg. Daily Temperature		25-30 ºC
Major Industries		Tourism & Fishing
Official Working Hours		0730 am - 1430 pm (Sunday - Thursday)

2003

POPULATION (Census)	
Total Population	270,101
Economically Active Population	87,987

EMPLOYMENT	
Government Employees	28,651
Expatriate Employees	33,765

HEALTH	
No. of Hospital Beds	643
Population per Hospital Bed	443
Population per practising Staff Nurse	499
Population per practising Doctors	739

EDUCATION	
Total No. of Students	104,408
No. of Educational Institutes	315
Literacy Rate (2000) (%)	98.94

FISHERIES & AGRICULTURE	
Total Catch ('000 metric tons)	155.4
Growth in Fish Catch	-5.4
Composition in Fish Catch (metric tons)	155
Exports ('000 metric tons)	116.5
Contribution to GDP (%)	6.6

TOURISM	2003
No. of Tourist Resorts	87
Tourist Arrivals	563,593
Total Bed Capacity	19,110
No. of new Resorts Under Construction	2
No. of New Islands for Resort Development (2004)	11
Tourism Revenue (million Rufiya)	899.7
Tourism Expenditure (million Rufiya)	40.0
Contribution to GDP (%)	32.8

TRANSPORT & COMMUNICATION		
Total No. of International Flights		
	Scheduled Flights	7,609
	Chartered Flights	922
	Non Scheduled Flights	645
Passenger Movement of International Flights		
	Arrivals	636,377
	Departure	653,150
	Direct Transit	120,844
Sea Transport		
	No. of Yacht Dhoni	203
	No. Launches	1,030
	No. of Boats	355
Land Transport		
	No. of Motor Cars	2,074
	No. of Motor/Auto Cycles	16,774
	Increase rate of all Types of Vehicles (%)	13.0
Communication		
	International Telephone Calls ('000 mins)	7,170
	Mobile Calls ('000 mins)	96,862
	Mobile phone accessible Atolls	all atolls except Faafu & Thaa Atoll

FOREIGN TRADE		
Exports		
	Total exports (f.o.b value in '000 US$)	112,963
Imports		
	Total imports (c.i.f value in '000 Rf)	6,026,026

NATIONAL ACCOUNTS		
	G.D.P Growth Rate (%)	8.4
	G.D.P Per Capita at 1995 constant basic prices (US$)	2,260.0

Ministry of Tourism (MoT)

First Row From Left: Ms. Hannath Ah. Badheeu (Secretary), Ms. Fathmath Nasma (Secretary), Ms. Ikleela Ismail (Senior Research Officer), Mr. Yazeed Mohamed, (Assistant Director Finance), Mr. Ali Niyaz (Senior Legal Officer), Hon. Mr. Hassan Sobir (Minister of Tourism), Mr. Mohamed Saeed (Deputy Minister of Tourism), Mr. Moosa Zameer Hassan (Assistant Director), Ms. Aishath Ali (Deputy Director Coordination), Mr. Ahmed Solih (Deputy Director Trade Standards).

Purpose

To develop tourism at a national level, and carry out long-term planning, development, monitoring, and regulatory functions to ensure a sustainable tourism industry for the benefit of the people of the Maldives.

Vision

The Vision of the Ministry of Tourism is for the Maldives to be the best example of sustainable tourism development - a nation with an economically profitable tourism industry in harmony with its natural environment, cultural resources, and the values of its people.

Mission

Improve the quality of life of the Maldivian people by optimizing and balancing the economic, environmental, and socio-cultural benefits of tourism, with equitable distribution of these benefits to the society, while minimising the possible negative impacts of tourism.

Goals and Objectives

- Increase economic benefits of tourism including growth of national income, more and better employment opportunities, increased net foreign exchange earnings, regional development, and increased revenues to the government.
- Ensure equitable distribution of the economic benefits of tourism to the society.
- Make tourism a vehicle for the protection and conservation of nature and natural resources, and the revitalization and preservation of the nation's cultural assets.
- Maintain the strong private sector role in the industry while enhancing the operating environment and facilitating the private sector to achieve the desired benefits of tourism.
- Increase Maldivian participation at all levels of the industry and especially increase the participation of women in this industry.
- Nurture a society that understands the value of tourism to the nation, and its critical role in the future prosperity of the country and its people.
- Remain competitive in the global market by continuously expanding and diversifying the product, enhancing the quality of services, and become established as a quality tourism destination delivering good value-for-money.
- Develop support infrastructure and activities, to ensure hassle-free travel and the safety and security of tourists during their holiday.

Main Functions

- Formulation and implementation of development policy.
- Long-term planning of tourism development at national level.
- Coordination of development implementation.
- Formulation and implementation of laws and regulations for tourism.
- Establishment and administration of facility and service standards.
- Adoption of sound environmental principles in tourism development and operation.
- Statistical collection, compilation and reporting.
- Conducting of research studies.
- Planning and implementation of human resource development for tourism.
- Establishment and administration of training standards, in coordination with the concerned authorities.
- Leasing of land for tourism and registration of all tourism operators and facilities

Maldives Tourism Promotion Board (MTPB)

Seated From Left: Mr. Abdulla Naeem (Assistant Director), Ms. Aminath Ahmed Shihab (Assistant Director), Ms. Zeeniya Zahir (Senior Marketing Office), Ms. Aishath Shahula (Assistant Accounts Officer) Standing From Left: Ms. Aishath Shihama (Secretary), Ms. Aishath Rimna (Secretary), Mr. Shaafy Adam (Information Officer (T)), Mr. Ismail Shaheer (Senior Marketing Officer), Mr. Mohamed Shamin Habib (Marketing Officer), Mr. Malyh Jamaal (Senior Marketing

Vision

Be the most exclusive destination in South Asia
Be the top tourism earner in South Asia
Be an example of sustainable tourism development in small island nations

Mission

The Maldives Tourism Promotion Board will promote quality and sustainable growth in the tourism industry of the Maldives to foster a well utilized and financially healthy private sector industry - in this way enabling the industry to deliver long term economic, social and cultural benefits to the people of Maldives, whilst at the same time contributing to enhancements in Maldives' unspoiled marine environment to the benefit of the people and visitors of the Maldives.

Objectives

- To strengthen and enhance the exclusive image of the destination in the source markets.
- To position the Maldives as a 'premium' destination worldwide.
- To achieve the growth targets set for the destination in the Marketing Plan for each year.
- To diversify the source markets as well as the market segments to the destination.
- To undertake market research to monitor the world economic conditions and travel trends in order to identify market opportunities.
- To monitor and support the private sector in their operations to maintain viable bed occupancy levels and to iron out seasonal fluctuations in visitor arrivals.

SECTION I

Tourism Trends in the Maldives

1.1 Tourist Accommodation

Nearly 86 percent of tourist accommodation facilities in Maldives are based on one island resorts concept which is called enclave tourism. The main tourist accommodation establishments in the Maldives that provide lodging facilities for the visitors in the destination are resort islands. These resort islands are of entirely unique to each island comprising of uncrowded beach holidays on turquoise waters, marine sports, with spectacular diving spots, recreational activities and in a warm pristine environment.

In addition there are few hotels, guest houses and a growing number of safari vessels. Only a small number of hotels and guest houses are located 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. The total bed capacity of all the tourist accommodations in the Maldives at the end of 2003 was 19,110 beds in 232 facilities. Compared to the previous year there was 1.5 percent increase in the total bed capacity of the sector.

	1999		2000		2001		2002		2003	
Category	No.	Beds	No.	Beds	No.	Bed	No.	Beds	No.	Beds
Tourist Resorts	84	15,044	86	15,914	87	16,318	87	16,400	87	16,444
Hotels	7	466	9	744	9	688	8	670	8	670
Guest Houses	19	321	22	356	20	367	17	282	24	360
Safari Vessels	113	1700	112	1,716	92	1,392	96	1,475	113	1,636
Total	223	17,531	229	18,730	208	18,765	208	18,827	232	19,110

Source: Ministry of Tourism

Table 01

Bed Capacity and Number of Accommodation Establishments, 1999 - 2003

At the inception of tourism in Maldives in 1972, the tourism industry had a total of 280 beds in two resorts. At the end of 2003, the total bed capacity has reached to 16,444 in 87 resort islands which is 2.7 percent growth compared to 2002.

In terms of tourism development, the government decided that future developments of tourism will be guided and directed towards those regions which at present have regional airports. As part of spatial planning, surveying and site identification for tourism expansion in none tourism zones had been completed during 2003. Within the last two years of survey project period 9 atolls were surveyed to identify areas/islands that are suitable for hotel/resort development. The aim of this was to identify resort development areas and to expand and maximize tourism benefits to locals in the future. Therefore under the government policy, tourism development is being expanded to areas near regional airports that have been already developed so that transport infrastructure would be easily accessible to both local community and the international visitor.

The Maldives tourism is almost entirely a nature based leisure product. One of the best ways to experience the beautiful nature of Maldives specially for those who appreciate water related activities like diving etc is going on live a-board, where the tourists could move from one island to the other. The number of floating beds has significantly increased with a slight fluctuation in the last two years of the period under observation. Operation of safari vessels is also mostly a seasonal activity. Currently there are 113 registered safari vessels, 24 guesthouses with 1,636 and 360 beds respectively. The safari vessels and guesthouses consist about 10.4 percent of the industry's bed capacity.

Year	Tourist Bednights	Bednight Growth (%)	Average Duration of Stay (days)
1999	3,718,207	7.32	8.7
2000	3,936,741	5.9	8.4
2001	3,932,748	-0.1	8.5
2002	4,066,640	3.4	8.4
2003	4,704,592	15.7	8.3

Source: Ministry of Tourism

Table 2 represents that although the bed night growth has recorded extensive variations, the number of tourist bed nights has demonstrated a significant increase during the period except for the year 2001 which experienced a negative growth of 0.1 percent due to the 11th September impact and the economic slow down that effected tourism worldwide. Thereafter the industry growths improved in 2002 and 2003 experienced with a phenomenal growth of 15.7 percent in bed nights.

The highest recorded monthly tourist bed nights in 2003 was (478,401) in January and the lowest recorded monthly tourist bed nights in 2003 was (231,132) in June. The average duration of stay has recorded marginal fluctuations over the last five-year period and 2003 registered an average duration of 8.3 days.

Table 02

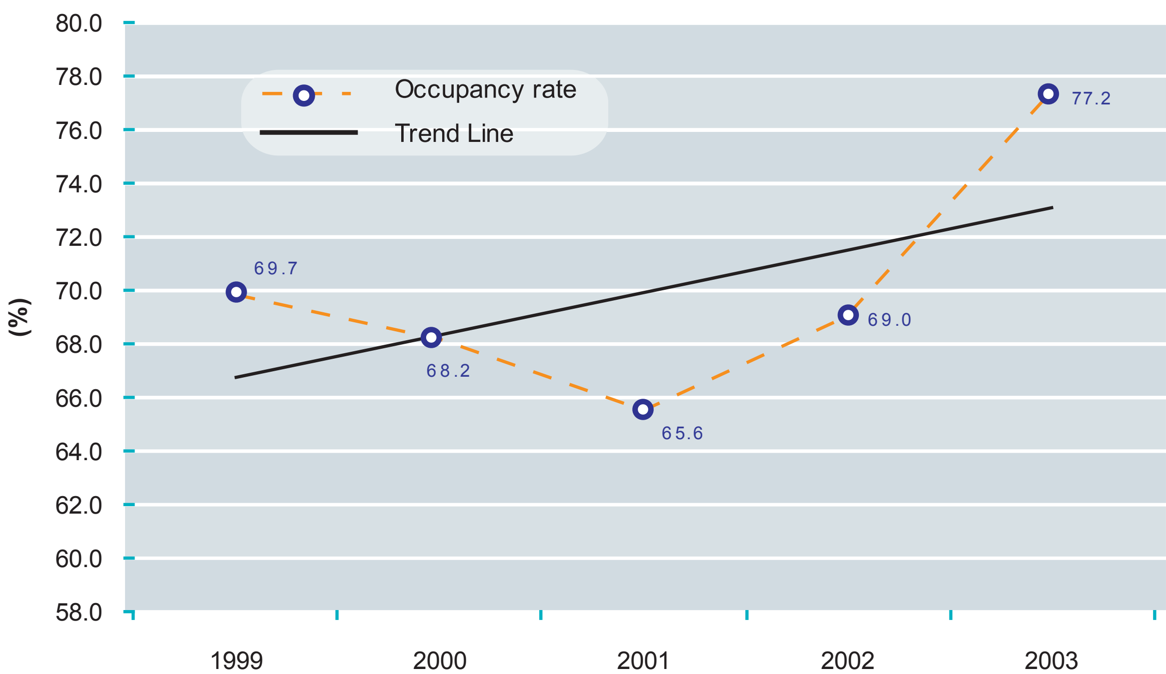
Tourist Bednights and Average Duration of Stay, 1999 -2003

Annual Bed Occupancy in Resorts and Hotels, 1999-2003

Maldives tourism industry stood at 69.7 percent occupancy in 1999. The trend line demonstrates that from 68.2 percent in 2000 the occupancy rate has gradually dropped to 65.6 percent in 2001. This fall in the occupancy rate was mainly due to the release of large number of resort beds into the market through 1998 – 2001. Also, industry had to face significant amount of cancellations due to the incident of the 11th September crisis in 2001. After a decline of 65.6 percent in 2001, the growth picked up relatively quickly in 2002 to 69.0 percent and recorded a healthier growth rate of 77.2 percent resulting favorable market demands and better performance by the industry. Better growths are expected in the years ahead depending on the world economic, political situations and existence of peace.

Figure 01

Occupany Rates 1999 - 2003



President of Maldives Occupancy Award

The main objective of the President of Maldives Occupancy Award is to give recognition to the effort of the tourism industry in maintaining a high tourist bed occupancy which is one of the quantitative indicators of industry performance. It was initiated in the year 1995 and thereafter it has been presented annually. This prestigious award possesses the pride of being the very first award given by the President of Maldives to the tourism industry.

The President of Maldives Occupancy Award is presented in three categories. They are:

1. Resort / Hotel with beds less than 100
2. Resort / Hotel with beds between 100 and 199
3. Resort / Hotel with beds over 200

The following table indicates the winners who had received the award in the past.

Table 03
President of Maldives Occupancy Award Winners, 1999 - 2002

Year	"Resort/Hotel with beds less than 100" Name	Beds	Occ. Rate	"Resort/Hotel with beds between 100 - 199" Name	Beds	Occ. Rate	"Resort/Hotel with beds over 200" Name	Beds	Occ. Rate
1999	Athuruga Island Resort	92	97.8	Lily Beach Resort	154	100.3	Kandooma Tourist Resort	206	94.4
2000	Dhiggiri Tourist Resort	90	88.3	Lily Beach Resort	170	94.5	Vilamendhoo Island Resort	282	89.2
2001	Athuruga Island Resort	92	77.9	Vilu Reef Resort	136	101.4	Meeru Island Resort	454	91.6
2002	Athuruga Island Resort	92	86.4	Vilu Reef Beach & Spa Resort	136	94.9	Meeru Island Resort	454	99.9

Source: Ministry of Tourism

The tourism indicator that is used to measure the quantitative aspect of this award is tourist bed-nights and occupancy rate. Hence, the winners are selected based on the annual reports that are generated using the daily tourist bed-night figures submitted by the resorts and hotels to the Ministry of Tourism. The tourism establishment that achieves the highest average occupancy rate for the year in each of the above categories will be awarded with the President of Maldives Occupancy Award for that year.

Distribution of Tourist Resort Beds by Atolls

The first tourist resort in the Maldives, Kurumba Village in Kaafu Atoll was 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 48.4 percent (7,954) beds 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 Vaavu Atoll consists of a total of 294 beds with 1.8 percent share.

Alifu Atoll opened its first tourist resort, Kuramathi Tourist Resort in 1977. And Alifu Atoll (North and South) has concentrated the highest number of beds (4,708) next to Kaafu Atoll with 26 resort islands. Alifu Atoll now shares 28.6 percent of the total beds in the tourism industry. Over the period, the total number of bed capacity of resorts has also been on the rise from year to year.

Under the First Phase of Second Tourism Master Plan, 14 islands with a bed capacity of 3,150 were allocated for resort development in 1997. Out of these 14 islands, 13 islands with a bed capacity of 2,750 came into operation from 1998 - 2001. Under this phase of the Tourism Master Plan, resorts had been opened in Raa, Baa, Lhaviyani, Meemu, Faafu and Dhaalu Atolls. In addition to the above, Villingili Island at Addu Atoll has been leased during August 2000 to a joint venture company formed with the government of Maldives for development of a 500 bed resort.

Atoll	1999		2000		2001		2002		2003	
	Bed	%Shared	Bed	%Shared	Bed	%Shared	Bed	%Shared	Bed	%Shared
Kaafu	7,672	51.0	7,844	49.3	7,888	48.3	7,910	48.2	7,954	48.4
Alifu (North & South)	4,570	30.4	4,598	28.9	4,654	28.5	4,708	28.7	4,708	28.6
Vaavu	294	2.0	294	1.8	294	1.8	294	1.8	294	1.8
Lhaviyani	1,090	7.2	1,090	6.8	1,090	6.7	1,090	6.6	1,090	6.6
Baa	724	4.8	724	4.5	1,028	6.3	1,034	6.3	1,034	6.3
Dhaalu	304	2.0	304	1.9	304	1.9	304	1.9	304	1.8
Meemu	140	0.9	380	2.4	380	2.3	380	2.3	380	2.3
Faafu	250	1.7	250	1.6	250	1.5	250	1.5	250	1.5
Raa	0	0.0	430	2.7	430	2.6	430	2.6	430	2.6
Total	15,044	100.0	15,914	100.0	16,318	100.0	16,400	100.0	16,444	100.0

Source: Ministry of Tourism

Table 04
Resort Beds by Atolls, 1999 - 2003

In view of government policies outlined to expand regional tourism, during first quarter of March 2004 the government has declared tendering of 11 new designated islands totalling a bed capacity of 1650 to be developed as tourist resorts in 9 Atolls. The new resort development is expanded to Haa Alifu, Haa Dhaalu, Shaviyani, Noonu, Thaa, Laamu, Gaafu Alifu, Gaafu Dhaalu and Fuvahmulaku Atolls where there are no tourism development activities. The government's policy is to distribute optimum economic benefits from tourism industry to the community as a result of this; tourism has been so far concentrated in 11 different atolls of the twenty administrative atolls in the Maldives.

	Local	Foreign	Joint Venture	Other	Total
Lease Holders					
No. of Resorts	69	7	10	1	87
No. of Beds	13,058	840	2,242	304	16,444
Operators					
No. of Resorts	50	24	13	-	87
No. of Beds	9,822	3,956	2,666	-	16,444

Source: Ministry of Tourism

Table 05
Tourist Resorts by Type of lease Holdings and Management Operators (As at end december, 2003)

Table: 5 shows the distribution of resort lessee and operators, against those managed by Maldivian companies and foreigners. The number of Maldivian nationals (or companies owned by Maldivian nationals) hold lease of 69 resorts, where as 50 resorts are operated by Maldivian. This indicates that compared to 58.5 percent in 2002, 59.7 percent of the total resort beds from the industry were operated or managed by locals in 2003. All the rest are managed by foreign companies or joint venture by Maldivians and foreign companies.

The resort lease holder shown in the other category is one where the government has no lease agreement for an island, hence is shown to be in a separate category.

1.2 Tourist Arrival Trends

The annual number of tourist arrivals into the country has considerably increased from 429,666 in 1999 to 563,593 in 2003 except for the year 2001. The decline of 1.3 percent tourist arrivals to Maldives in 2001 was due to the impact of the 11th September incident, and the subsequent slowdown of the global economy. However, the recovery period of the after affects was rather short due to the advantageous fact that Maldives is a safe and secure destination and 2002 re-gained the momentum of a gradual and positive increase in inbound traffic of 484,680 tourists. This was followed by a dynamic increase of 563,593 tourists in 2003. During 2003, Maldives reached and surpassed its target of half a million tourist arrivals and colourfully celebrated this special event. The highest recorded monthly tourist arrival for 2003 was 58,265 in the month of December.

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1999	42,603	43,732	45,170	35,817	26,390	22,639	30,188	38,738	34,450	33,755	39,923	36,261	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
2001	50,459	48,987	50,488	48,100	29,450	25,593	35,461	38,744	31,726	31,209	30,341	40,426	460,984
2002	36,211	47,024	49,280	42,647	31,529	23,641	34,341	41,243	39,760	42,579	42,310	54,115	484,680
2003	54,503	56,706	56,441	48,742	31,119	26,915	38,076	48,431	44,951	48,357	51,087	58,265	563,593

Source Data: Department of Immigration and Emigration

Table 06
Tourist Arrivals by Month, 1999 - 2003

In the past Maldives experienced a widely fluctuating growth pattern. During 1999 to 2000 at 8.6 to 8.7 percent respectively a steady growth level had been maintained which was a healthy sign for a destination like Maldives. This growth has been almost doubled in 2003 by 16.3 percent, which was a remarkable growth regardless of the global travel industry's unfortunate incidences on global health, political crisis and economic down turns. Prospects on almost all regions in the world were affected to an extent as a result of various factors. In spite of that the Maldives recorded a quick recovery of 5.1 percent growth in 2002 where it had been more than tripled in 2003. The over all industry performance on inbound traffic had been a commendable achievement. These numbers show that the Maldives is still classed as one of the most popular holiday destinations. Though our leading market contributors have been from Europe comprising well over three quarters of the total tourist arrivals for ages, few European markets also have demonstrated a negative growth. Especially, the Japanese market and other South Asian markets were affected due to SARS outbreak.

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1999	10.1	18.0	16.4	2.6	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
2001	11.4	0.0	11.2	10.7	9.0	6.5	7.4	-4.5	-14.0	-20.1	-22.2	-9.1	-1.3
2002	-28.2	-4.0	-2.4	-11.3	7.1	-7.6	-3.2	6.5	25.3	36.4	39.4	33.9	5.1
2003	50.5	20.6	14.5	14.3	-1.3	13.8	10.9	17.4	13.1	13.6	20.7	7.7	16.3

Source Data: Department of Immigration and Emigration

Table 07
Growth Trends of Monthly Tourist Arrivals, 1999 - 2003

The highest recorded monthly arrival growth rate for 2003 was 50.5 percent in the month of January. The arrival growth rates also illustrates that an average five year growth rate up to 2002 was 6.4 percent but an average five year growth rate up to 2003 is enhanced by 8.0 percent.

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Seasonality Ratio
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
2001	131	128	131	125	77	67	92	101	83	81	79	105	1.3
2002	90	116	122	106	78	59	85	102	98	105	105	134	1.3
2003	116	121	120	104	66	57	81	103	96	103	109	124	1.2

Source Data: Department of Immigration and Emigration

Table 08

Seasonal Variations of Tourist Arrivals, 1999 - 2003

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 is between May to September.

These seasonal variations have been less defined in the recent years. During May, June, July and September seasonal indices are low and it has registered slight variations. The annual seasonality ratio has remained constant at 1.3 from 1999 to 2002, compared to a minor fall of 1.2 in 2003. This reflects that the industry has become less seasonal and may have utilised special to low rates in resorts to fill up during European summer months.

Type of Carrier	1999	Share %	2000	Share %	2001	Share %	2002	Share %	2003	Share %
Scheduled	376,872	73.7	387,226	67.8	417,291	79.5	466,114	84.4	510,492	80.9
Chartered	134,667	26.3	184,109	32.2	107,903	20.5	85,852	15.6	120,334	19.1
Total	511,539	100.0	571,335	100.0	525,194	100.0	551,966	100.0	630,826	100.0

Source Data: Department of Civil Aviation

Table 09

Passenger Arrivals by Type of Carrier, 1999 - 2003

The passenger arrivals by type of carrier do not only accounts tourists but also includes Maldivian nationals who travels inbound in scheduled and chartered carriers. Table: 9 indicate that scheduled flights carry more number of passengers compared to chartered carriers. It is significant from the data that from 2001 onwards about 80 percent of the passengers chose scheduled flights as air carrier. Consecutively, in 2003 scheduled passenger arrivals to Maldives have dropped to 3.5 percent compared to 2002. This could be the SARS outbreak situation that especially affected airlines based in Asia and the Pacific. The records also showed that Maldives experienced cancellations of five flights of Singapore Airlines (Singapore/Male'/Singapore) and five flights of Sri Lankan Airlines (Heathrow/Male'/Heathrow) during SARS outbreak period April to June 2003.

1.3 Regional Trends and Major Markets

In 2003, international tourism lived through another considerably difficult year due to several negative factors such as Iraq conflict, SARS, outbreak of Avian Influenza and a persistently weak economy. According to WTO news releases, the Iraq conflict and the preceding high level of uncertainty depressed world wide travel in the first quarter of the year. It also states that although conditions improved notably throughout the year, and positive figures generally started to return in the second half of 2003. Recovery has not been sufficient to save the year for all destinations. Preliminary estimates of full year results show that world wide the volume of international tourism as measured in international tourist arrivals slid back a bit in 2003 compared to 2002. Similarly, the negative factors affected inbound traffic to Maldives to a certain degree recording decline to negative growth rates especially in some important markets such as Japan and Switzerland.

Europe generates by far the most visiting tourists to the Maldives since beginning of the tourism industry in 1972 and continues to remain as the major market generator contributing the highest market.

	1999	2000	2001	2002	2003
Europe	**340,469 (79.2)**	**362,196 (84.3)**	**364,105 (79.0)**	**373,428 (77.0)**	**443,093 (78.6)**
Austria	13,550 (3.2)	11,725 (2.7)	10,494 (2.3)	10,480 (2.2)	12,391 (2.2)
Belgium	3,114 (0.7)	5,071 (1.2)	3,719 (0.8)	2,606 (0.5)	2,795 (0.5)
Denmark	715 (0.2)	772 (0.2)	891 (0.2)	938 (0.2)	1,073 (0.2)
Finland	526 (0.1)	350 (0.1)	304 (0.1)	388 (0.1)	614 (0.1)
France	23,832 (5.5)	27,517 (6.4)	30,542 (6.6)	31,228 (6.4)	41,055 (7.3)
Germany	86,497 (20.1)	77,642 (18.1)	66,149 (14.3)	63,212 (13.0)	70,762 (12.6)
Greece	2,128 (0.5)	1,776 (0.4)	1,775 (0.4)	2,446 (0.5)	2,287 (0.4)
Italy	88,697 (20.6)	106,451 (24.8)	115,740 (25.1)	114,955 (23.7)	140,304 (24.9)
Netherlands	9,315 (2.2)	7,275 (1.7)	4,097 (0.9)	4,662 (1.0)	5,047 (0.9)
Norway	750 (0.2)	945 (0.2)	577 (0.1)	772 (0.2)	987 (0.2)
Portugal	4,117 (1.0)	4,276 (1.0)	3,526 (0.8)	2,785 (0.6)	3,379 (0.6)
Russia	3,428 (0.8)	3,608 (0.8)	3,983 (0.9)	7,550 (1.6)	12,108 (2.1)
Spain	5,634 (1.3)	5,322 (1.2)	4,203 (0.9)	5,160 (1.1)	6,323 (1.1)
Sweden	2,226 (0.5)	2,236 (0.5)	2,112 (0.5)	1,749 (0.4)	1,940 (0.3)
Switzerland	22,856 (5.3)	24,528 (5.7)	28,313 (6.1)	31,707 (6.5)	30,787 (5.5)
United Kingdom	63,919 (14.9)	71,440 (16.6)	77,151 (16.7)	80,377 (16.6)	93,989 (16.7)
Other countries	9,165 (2.1)	11,262 (2.6)	10,529 (2.3)	12,413 (2.6)	17,252 (3.1)
Global Total	**429,666**	**467,154**	**460,984**	**484,680**	**563,593**

Source Data: Department of Immigration and Emigration

Table 10
Tourist Arrivals & Market Share of Selected Markets from Europe 1999 - 2003

The major European Markets to the Maldives in 2003 were Italy, United Kingdom, Germany, France and Switzerland. Of the above Italy has been the leading contributor with an average of 23.82 percent in market shares for the last five years followed by United Kingdom 16.3 percent, Germany 15.62 percent, France 6.44 percent and finally Switzerland with 5.82 percent.

All the major markets had maintained a significant increase in the number of arrivals over the period except Germany and Switzerland. German market recorded an impressive rise of 11.9 percent in 2003 after three years of continuous negative growth rates. Contrary to that, Swiss market slumped to -2.9 percent in 2003 after four years of consecutive growth.

When considering the market share, the other significant emerging markets from European region include Austria, Russia, Spain, Netherlands, and Portugal. Of the above the highest arrival increase was from Russia, which climbed to 89.6 percent (7,550) in 2002 and 60.4 percent (12,108) in 2003 respectively.

	1999	2000	2001	2002	2003
Europe	**11.7**	**6.4**	**0.5**	**2.6**	**18.7**
Austria	-8.3	-13.5	-10.5	-0.1	18.2
Belgium	14.9	62.8	-26.7	-29.9	7.3
Denmark	-14.6	8.0	15.4	5.3	14.4
Finland	-4.0	-33.5	-13.1	27.6	58.2
France	16.6	15.5	11.0	2.2	31.5
Germany	13.3	-10.2	-14.8	-4.4	11.9
Greece	67.3	-16.5	-0.1	37.8	-6.5
Italy	11.8	20.0	8.7	-0.7	22.1
Netherlands	-0.7	-21.9	-43.7	13.8	8.3
Norway	4.9	26.0	-38.9	33.8	27.8
Portugal	96.7	3.9	-17.5	-21.0	21.3
Russia	-17.7	5.3	10.4	89.6	60.4
Spain	41.9	-5.5	-21.0	22.8	22.5
Sweden	-12.4	0.4	-5.5	-17.2	10.9
Switzerland	1.5	7.3	15.4	12.0	-2.9
United Kingdom	14.7	11.8	8.0	4.2	16.9
Other countries	20.7	22.9	-6.5	17.9	39.0
Global Total	**8.6**	**8.7**	**-1.3**	**5.1**	**16.3**

Source Data: Department of Immigration and Emigration

Table 11

Growth Trends of Selected European Markets 1999 - 2003 (Percent)

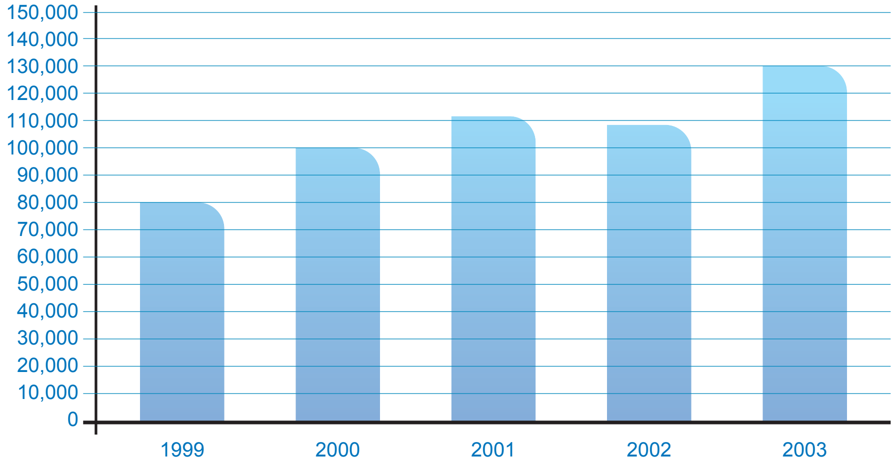
Although the annual tourist arrival volume has increased significantly over the last five years starting from 1999 to 2003, growth trends of major European markets comparatively went down from 2000 to 2002. In 2001 the annual growth trend dramatically fell to –1.3 percent, compared to 8.7 percent in the previous year. This was mainly due to the after math of 11th September 2001 terrorist attack in the US, which had triggered the worldwide slowdown of passenger travels. Though there had not been major loses to the industry due to the impact of Iraq crisis in 2003, the outbreak of SARS in South East Asia had an adverse effect on international tourists visiting the Maldives especially from this region. Occurrences of cancellations on bookings and travel postponement were experienced to an extent for safety and health reasons.

Major Markets from European Region

1. Italy

Figure 02

Tourist Arrivals from Italy, 1999 - 2003



Italy has been the leading market generator in the Maldives since the beginning of the tourism industry. Significant increases in the number of Italian tourists were seen during the last five years except that the growth trends of Italian market had drastically declined from 20 percent in 2000 to 8.7 percent in 2001 and recorded its lowest level of -0.7 percent in 2002. These declines were resulted with the economic slow down in global tourism industry and in Italy during 2001to first half of 2002 respectively.

The growth trends of the Italian market which had suffered a marginal decline over 2001-2002 has seen recorded increase during 2003. Total number of arrivals from Italy at the end of 2003 was 140,304 compared to 114,955 at the end of 2002, which was an increase of 22.1 percent. There are positive signs that this market would continue to grow in the future.

The European Monetary Union introduced the Euro on 1 January 1999 as a common currency to be used by financial institutions of member countries. In January 2002, Italy and 11 other European Union countries introduced a common European currency, the Euro.

2. United Kingdom

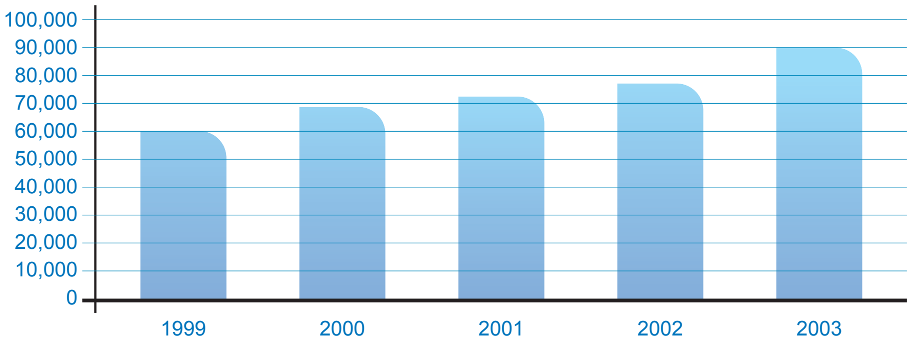


Figure 03
Tourist Arrivals from UK, 1999 - 2003

In terms of tourist arrivals the British market has performed very well during the period. Currently it is the second leading market that generates highest number of tourist inflows to the country.

The growth rate of British market has been very significant in 1999 - 2000 with 14.7 percent and 11.8 percent respectively. Substantially, this growth has slowed down to almost half from 8 percent in 2001 to 4.2 percent in 2002. This decline was of an indication that the country's GDP growth slipped in 2001-2003 due to the global downturn, the high value of the pound, and the bursting of the new economy with manufacturing and exports. Still, the UK economy is one of the strongest in Europe; inflation, interest rates, and unemployment remain low.

Even though the country's annual arrival growth trend was down by -1.3 percent in 2001, the total number of arrivals for this market has remarkably grown in its volume over the last five years. Total number of tourist arrivals from United Kingdom was 93,989 in 2003 with a market share of 16.7 percent, compared to 80,377 in 2002 with a market share of 16.6 percent. Most significant determinant of this increase in the influx of UK tourists is expected to be the increase in consumer confidence due to intense promotion of Maldives as a safe destination

3. Germany

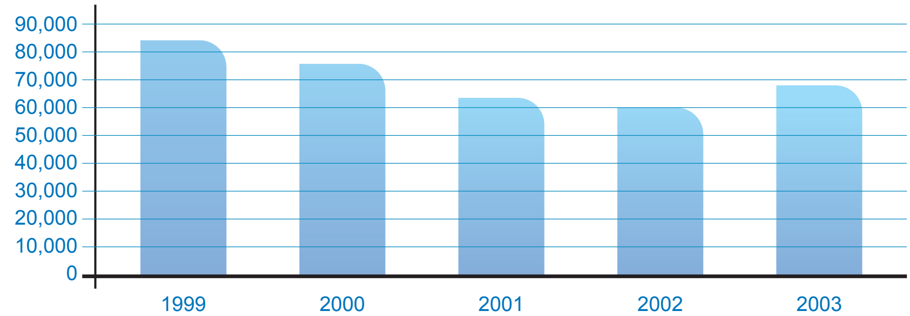


Figure 04
Tourist Arrivals from Germany, 1999 - 2003

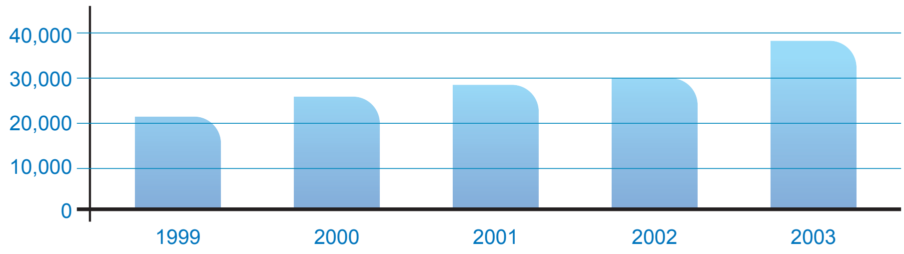
German market has experienced a sudden increase of 13.3 percent growth in 1999. Contrary to that during 2000-2002 the German market has shown negative growth trends leading to decline in number of German tourists visiting the country.

Again in 2003 a dynamic growth was seen with the arrival of total 70,762 German tourists, which was an increase of 12.6 percent from the previous year. The main factors for this favourable growth could be the strengthening of the German economy due to sharp rise in German exports, up by 13 percent which was boosted by the weak Euro and strong consumer spending in the year 2003. The income tax cuts in major Euro zone countries also meant that consumers are more likely to spend more, which will increase the prospects of more tourists travelling abroad.

Currently Germany is in the third position in terms of market share, where Italy and United Kingdom remains at the top respectively.

4. France

Figure 05
Tourist Arrivals from France, 1999 - 2003

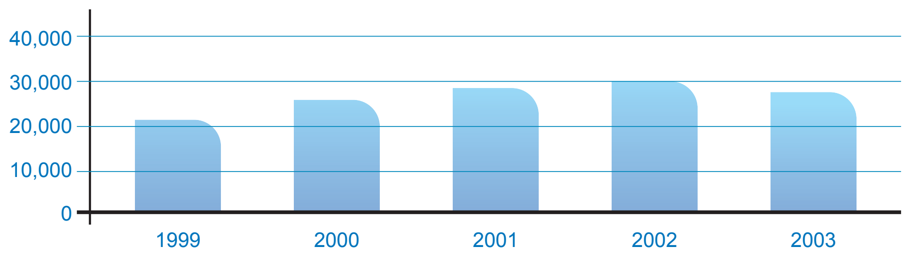


Among the major markets France has been repositioned as the fourth largest market share contributor to the Maldives from the European region by 7.3 percent in 2003.

The growth tendency of French market observed a sharp downward trend from 11.0 percent in 2001 to 2.2 percent in 2002. The main factors could be the deterioration of the exchange rate between certain currencies and the Euro, which also had an effect on the amount of spending by international travellers and the post- 11th September 2001 context continued to have an impact on the first half of 2002. Nevertheless, the growth trend of the French market has seen a dynamic increase of 31.5 percent in 2003 compared to the previous years decline. The total number of visitors from France at the end of 2003 was 41,055 as that of to 31,228 in 2002.

5. Switzerland

Figure 06
Tourist Arrivals from Switzerland, 1999 - 2003



Unlike the previous year, the Swiss market is placed as the fifth leading market in the European region in 2003 as the French market has step ahead with an annual increase of 10,268 tourists. The market share contribution from these two markets had been competitively varying at a very narrow level. Swiss market is now the fifth largest market share contributor among the European market segments. Total arrivals from Switzerland had declined to 30,787, from an annual growth rate of 12.0 percent in 2002 to 30,787 arrivals with -2.9 percent in 2003. The five year average market share for the period stood at 5.82 percent.

The main factors contributing to the decline on outbound traffic of Swiss market was likely to be the negative world economic situations including Middle East, and the spread of SARS in some part of Asian Nations. The reduction of direct flights from Switzerland to certain destinations and the economic recession in the country during last year also accounts for the decline.

Asia

Unexpected outbreak of the SARS brought the steady growth of the Asia and the Pacific temporarily to an abrupt halt, causing many destinations in the region to welcome less than half of their usual number of arrivals in the months of April and May. Even though tourists quickly started to travel after the virus was contained; it proved impossible to compensate the losses fully in the remainder of the year. The long-awaited economic recovery only started to become visible in the fourth quarter according to WTO.

	1999	2000	2001	2002	2003
Asia	**74,935 (17.4)**	**86,524 (20.1)**	**80,825 (17.5)**	**94,986 (19.6)**	**101,806 (18.1)**
Bangladesh	237 (0.1)	321 (0.1)	321 (0.1)	241 (0.0)	313 (0.1)
China	3,973 (0.9)	5,380 (1.2)	7,342 (1.6)	12,092 (2.5)	15,021 (2.7)
India	11,621 (2.7)	10,616 (2.5)	8,511 (1.8)	11,377 (2.3)	11,502 (2.0)
Japan	40,230 (9.4)	47,180 (11.0)	41,895 (9.1)	43,705 (9.0)	42,081 (7.5)
Korea	4,272 (1.0)	5,771 (1.3)	6,708 (1.5)	7,696 (1.6)	8,417 (1.5)
Malaysia	1,716 (0.4)	1,829 (0.4)	1,478 (0.3)	2,240 (0.5)	2,251 (0.4)
Pakistan	982 (0.2)	1,049 (0.2)	1,017 (0.2)	1,329 (0.3)	1,942 (0.3)
Philippines	291 (0.1)	317 (0.1)	346 (0.1)	405 (0.1)	376 (0.1)
Singapore	2,383 (0.6)	2,530 (0.6)	2,227 (0.5)	2,520 (0.5)	4,653 (0.8)
Sri Lanka	6,375 (1.5)	8,413 (2.0)	6,902 (1.5)	6,909 (1.4)	7,296 (1.3)`
Thailand	1,083 (0.3)	1,007 (0.2)	1,350 (0.3)	2,002 (0.4)	3,009 (0.5)
Other countries	1,772 (0.4)	2,111 (0.5)	2,728 (0.6)	4,470 (0.9)	4,945 (0.9)
Global Total	**429,666**	**467,154**	**460,984**	**484,680**	**563,593**

Source Data: Department of Immigration and Emigration

Table 12
Tourist Arrivals & Market Share of Selected Markets from Asia 1999 - 2003

Asia had been the second market generator next to Europe where Japan being the largest contributor from this region with a market share of 7.5 percent in 2003. Japan has also been the fourth largest market generator to the country over several years. The overall market share of this region stood at 18.1 percent in 2003 compared to the market share of Europe's 78.6 percent in the same period.

The other markets from where a considerable volume of inbound tourists arrived to the country in the later years are observed from China (including Hong Kong & Taiwan), India, and Korea.

The given period represents a dramatic inflow from the Chinese market from 3,973 in 1999 to 15,021 tourists in 2003. Maldives has received approved tourist destination status from the Government of the People's Republic of China in December 2002. Since than Maldives has recorded higher number of arrivals. Having several years of diplomatic ties with China and being one of the rapidly flourishing economies of today, it has become an important market for our destination. From 2002 onwards Maldives Tourism Promotion Board (MTPB) has officially started participating in the China International Travel Mart.

India is also a promising market to the Maldives and one of the largest growing economies of the world. In contrast to the first three years of negative growth, it has regained its growth potentiality during 2002 – 2003 and has recorded better performance by 11,377 to 11,502 tourist arrivals respectively. With a wide varied culture and tradition, stronger promotional efforts are required to penetrate in to the market in a wider context.

Table 13
Growth Trends of Selected Markets from Asia 1999 - 2003 (Percent)

When considering the volume, there has been improved performance in tourist arrivals from Korea. Stretching over the period, the tourist arrivals from this destination has been nearly doubled totalling 4272 in 1999 compared to 8,417 in 1998 which was an increase in growth trends from 51.4 percent to 9.4 percent respectively. Although a wider fluctuation was seen in the growth trend, the total numbers has increased annually.

	1999	2000	2001	2002	2003
Asia	**4.5**	**15.5**	**-6.6**	**17.5**	**7.2**
Bangladesh	-1.3	35.4	0.0	-24.9	29.9
China	29.5	35.4	36.5	64.7	21.1
India	-1.0	-8.6	-19.8	33.7	1.1
Japan	-0.7	17.3	-11.2	4.3	-3.7
Korea	51.4	35.1	16.2	14.7	9.4
Malaysia	40.8	6.6	-19.2	51.6	0.5
Pakistan	-6.6	6.8	-3.1	30.7	46.1
Philippines	35.3	8.9	9.1	17.1	-7.2
Singapore	11.9	6.2	-12.0	13.2	84.6
Sri Lanka	6.3	32.0	-18.0	0.1	5.6
Thailand	37.1	-7.0	34.1	48.3	50.3
Other countries	-9.5	19.1	29.2	63.9	18.8
Global Total	**8.6**	**8.7**	**-1.3**	**5.1**	**16.3**

Source Data: Department of Immigration and Emigration

The growth trend of Asian region had declined in 2001 where it plummeted to 6.6 percent nearly half of 15.5 percent in the previous. After the overall impact of the global travel industry the growth indicators picked up rather fast in 2002 by reaching 17.5 percent and 7.2 percent in 2003 respectively.

In comparison to the year before, the reduced growth in 2003 from Asian destinations to the Maldives could be the result of the world circumstance at that time and mainly the out break of the SARS virus in many ASEAN countries from March to June 2003. It was one of the worst world hit epidemics in the recent history. This has affected the outbound travel in many Asian countries. In addition, during the period there were cancellations of some Singapore Airlines and Sri Lankan Airlines flights to the Maldives. In complicating the matter, concurrently there was the outbreak of Avian Influenza; the wave of bird flu sweeping Asia was said to have appeared as early as 19th February 2003 in Hong Kong (SAR). Until the first quarter of 2004, number of countries in East Asia had reported the flu outbreak and this would certainly have an impact on travel and tourism.

The International Air Transport Association (IATA) also considered that in 2003 the combination of the war in Iraq, uncertainty on security, and SARS had an unprecedented effect on air transport. According to WTO, the SARS outbreak especially affected airlines based in Asia and the Pacific, the same ones that had led the industry in air traffic growth in previous years. In May, international passenger traffic plummeted to almost half the figure posted in the same month in 2002. The situation improved gradually and by the end of 2003 international traffic was down by around 10 percent and total traffic by 6 percent. A noticeable improvement is expected in 2004.

Major Market from Asian Region

1. Japan

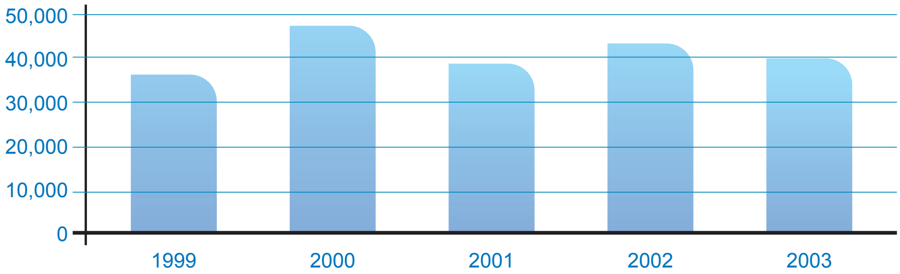


Figure 07

Tourist Arrivals from Japan, 1999 - 2003

From the overall market segments of the Maldives, the fourth-largest market generator next to Germany has been Japan and it's the only major market from the Asian region followed by China. The Japanese market has maintained an average market share of 9.2 percent over the last five years of which the highest of market share was 11.0 percent in 2000. In the same year the total number of Japanese tourist arrivals was 47,180, which was the highest during the period under review.

There had also been decline of growth rates during 1999, 2001 and 2003. The trend seems to show better performance every alternative year but this market seems to be very susceptible to any negative changes associated with global crisis hindering the world travel. As for the decrease in arrival by -11.2 percent in 2001 and -3.7 percent in 2003 was the outcome of attack on US and SARS epidemic in Asia and also the volatile situation experienced in the Middle East.

	1999	2000	2001	2002	2003
Africa	**1,846 (0.4)**	**2,311 (0.5)**	**2,060 (0.4)**	**3,002 (0.6)**	**3,984 (0.7)**
South Africa	1,437 (0.3)	1,767 (0.4)	1,368 (0.3)	1,914 (0.4)	2,929 (0.5)
Other countries	409 (0.1)	544 (0.1)	692 (0.2)	1,088 (0.2)	1,055 (0.2)
Global Total	**429,666**	**467,154**	**460,984**	**484,680**	**563,593**

Source Data: Department of Immigration and Emigration

Table 14

Tourist Arrivals & Market Share of Major Generating Markets from Africa 1999 - 2003

	1999	2000	2001	2002	2003
Africa	**-74.2**	**25.2**	**-10.9**	**45.7**	**32.7**
South Africa	-78.2	23.0	-22.6	39.9	53.0
Other countries	-30.1	33.0	27.2	57.2	-3.0
Global Total	**8.6**	**8.7**	**-1.3**	**5.1**	**16.3**

Source Data: Department of Immigration and Emigration

Table 15

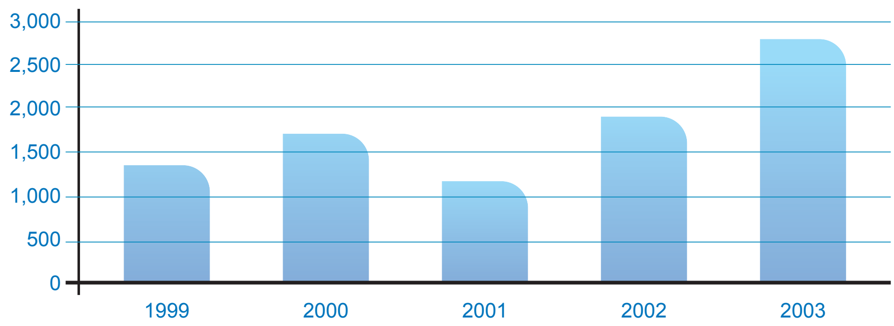
Growth Trends of Major Markets from Africa, 1999 - 2003 (Percent)

Africa South Africa remains the only leading market generator from the African continent. Total number of arrivals from Africa had been increasing over the last five years, totalling an average of 2,640 visitors per year.

There has been a substantial increase of tourist arrivals in the last two years from this region, totalling 3,002 in 2002 and 3,984 in 2003 respectively. More than half of these tourists were from South Africa, which accounted a total of 1,914 in 2002 and 2,929 in 2003 respectively. Along with this performance, nevertheless the growth trend of South African market escalated to 53 percent in 2003 from 39.9 percent in 2002. This rebound of raise in number tourists from South Africa in the later years could be the result of easy connections received to Maldives. After discontinuation of South African Charter in March 1999, the only direct flight that started its operation has been Air Seychelles in 2001 with weekly flights. From the figures it indicates that there is a potential growth for this market provided there is easy accessibility to the destination.

Figure 08

Tourist Arrivals from South Africa 1999 - 2003



	1999	2000	2001	2002	2003
Americas	**6,082 (1.4)**	**7,108 (1.7)**	**6,814 (1.5)**	**7,489 (1.5)**	**7,665 (1.4)**
Canada	1,165 (0.3)	1,316 (0.3)	1,442 (0.3)	1,569 (0.3)	1,649 (0.3)
U.S.A	4,103 (1.0)	4,795 (1.0)	4,435 (1.0)	5,030 (1.0)	5,005 (0.9)
Other countries	814 (0.2)	997 (0.2)	937 (0.2)	890 (0.2)	1,011 (0.2)
Global Total	**429,666**	**467,154**	**460,984**	**484,680**	**563,593**

Source Data: Department of Immigration and Emigration

Table 16

Tourist Arrivals & Market Share of Major Generating Markets from Americas, 1999 - 2003

	1999	2000	2001	2002	2003
Americas	**-0.6**	**16.9**	**-4.1**	**9.9**	**2.4**
Canada	5.0	13.0	9.6	8.8	5.1
U.S.A	8.8	16.9	-7.5	13.4	-0.5
Other countries	-34.4	22.5	-6.0	-5.0	13.6
Global Total	**8.6**	**8.7**	**-1.3**	**5.1**	**16.3**

Source Data: Department of Immigration and Emigration

Table 17

Growth Trends of Major Markets from Americas, 1999 - 2003 (Percent)

Americas United States and Canada has been the primary market generator from this region. United States also remains at the top position in international tourism expenditure and as well as top earners, which is also ranked the world's second top tourism destination. The total arrival from the US has shown a moderate increase over the years, accept during 2001 and 2003 where it had dropped by -7.5 percent and -0.5 percent respectively. At the same time, the total tourist arrival from Canada has maintained nearly stable growth rates through out the period.

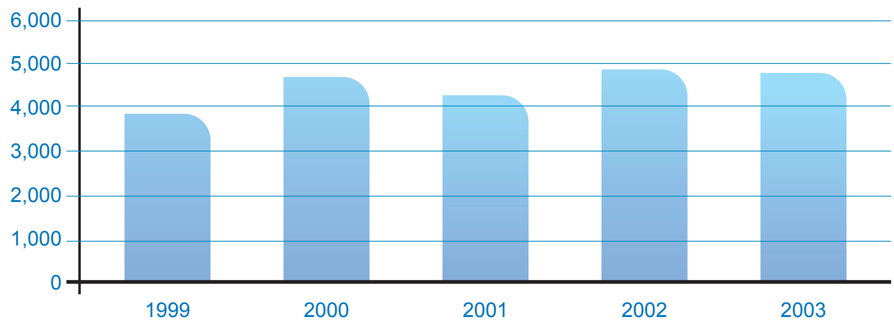


Figure 09

Tourist Arrivals from USA 1999 - 2003

	1999	2000	2001	2002	2003
Oceania	**6,334 (1.5)**	**9,015 (1.9)**	**7,180 (1.6)**	**5,775 (1.2)**	**7,045 (1.3)**
Australia	5,784 (1.3)	8,090 (1.7)	6,435 (1.4)	5,063 (1.0)	6,110 (1.1)
New Zealand	541 (0.1)	910 (0.2)	672 (0.1)	633 (0.1)	754 (0.1)
Other countries	9 (0.0)	15 (0.0)	73 (0.0)	79 (0.0)	181 (0.0)
Global Total	**429,666**	**467,154**	**460,984**	**484,680**	**563,593**

Source Data: Department of Immigration and Emigration

Table 18
Tourist Arrivals & Market Share of Major Generating Markets from Oceania, 1999 - 2003

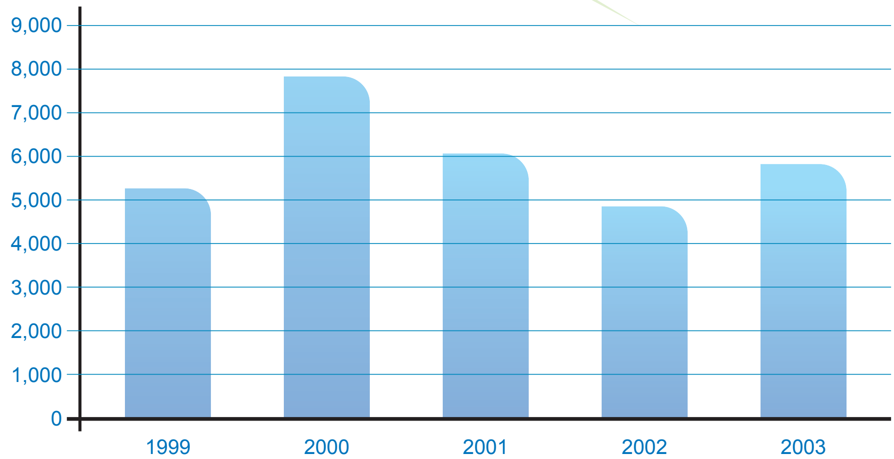
	1999	2000	2001	2002	2003
Oceania	**9.3**	**42.3**	**-20.4**	**-19.6**	**22.0**
Australia	9.9	39.9	-20.5	-21.3	20.7
New Zealand	4.2	68.2	-26.2	-5.8	19.1
Other countries	-35.7	66.7	386.7	8.2	129.1
Global Total	**8.6**	**8.7**	**-1.3**	**5.1**	**16.3**

Source Data: Department of Immigration and Emigration

Table 19
Growth Trends of Major Markets from Oceania, 1999 - 2003 (Percent)

Oceania Australia has remained as the only key market generator from this region for a long period of time and it has been a mature market. The highest number of arrivals visited in a given year from Australia during the period under observation was at the peak by 8,090 tourists in 2000. Afterwards a declining trend was followed during 2001 to 2002 until it had picked up in 2003 by 20.7 percent, almost at the same rate of previous declines. There is no direct flight operated from this region but connections can be accessible through Singapore Airlines, Sri-Lankan Airlines and Malaysian Airlines.

Figure 10
Tourist Arrivals from Australia 1999 - 2003



1.4 Economic Importance of Tourism

Table 20
Government Expenditure on Tourism 1999 - 2003 (Million Rufiyaa)

Year	Government Expenditure	Tourism Expenditure	% Share of Tourism Expenditure
1999	2,508.20 _/	22.90	0.9
2000	2,739.90	27.70	1.0
2001	2,912.10	31.40	1.1
2002	3,117.30	35.90	1.2
2003	3,428.40	37.50	1.1

Note: _/ Revised
Source: Ministry of Finance and Treasury

During the period, the figures demonstrate that the government expenditure had accounted substantial increase. Simultaneously, tourism expenditure has also increased at a steady rate since 1999 by Rf.22.9 million to Rf.37.5 million in 2003. The government had considerably managed to maintain the share of tourism expenditure at a consistent level. Tourism Expenditure in the above table accounts for the government budgeted amounts from Ministry of Tourism, Maldives Tourism Promotion Board (MTPB), Maldives Government Tourist Information Office (MGTIO) at Frankfurt in Germany and a Tourism Promotion Fund created by MTPB for tourism sector contribution towards marketing and promotion of the destination.

Table 21
Tourism Revenue and Tax, 1999 - 2003 (Million Rufiyaa)

Year	Government Revenue	Tourism Revenue	% Share of Tourism Revenue	Tourism Tax	% Share of Tourism Tax to Tourism Revenue
1999	2,128.44_/	627.90	29.5	276.00	44.0
2000	2,206.80	693.28	31.4	276.60	39.9
2001	2,310.90	715.85	31.0	292.70	40.9
2002	2,714.90	892.10	32.9	305.25	34.2
2003	3,061.80	899.65	29.4	359.80	40.0

Note: _/ Revised
Source: Department of Inland Revenue

The Tourism revenue shown in (table 21) 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 has been increasing from year to year and it is one of the major contributions to the government revenue.

Table 22
Tourism Receipts and Growth Rates 1999 - 2003 (Million U. S. Dollars)

Year	Tourism Receipts	Growth Rate (%)
1999	313.50	3.5
2000	320.70	2.3
2001	327.10	2.0
2002	318.40	-2.7
2003	387.80	21.8

** Estimated*
Source: Maldives Monetary Authority

The major source of foreign currency earnings into the country is through tourism. Tourism receipts refer to the expenditures made by tourists, which is very closely associated with tourist bed nights, duration of stay and room rates in resorts. Travel receipts are calculated in three parts and are adjusted for seasonality: Receipts by tour operators, purchases at resorts and expenditure outside resorts. Receipts by tour operators are calculated by multiplying the monthly bed nights by an estimated average daily expenditure. The other two items are aimed at covering the cost of incidentals, souvenirs and the like; that is, any expenditure other than what is spent on the tour package, and are calculated on the basis of a per day estimate.

Tourism receipts in the Maldives has been growing steadily till 2001; but is estimated to have declined by 2.7 percent in 2002 compared to the previous year according to the latest statistics releases of Maldives Monetary Authority. The key factors contributing to this estimated decline in earnings from tourism are the lower number of tourist arrivals and bed nights in the 'high season' of early 2002 which coincided with the wake of 11th September incident. The aftermath of this incident is coupled with the reduced room rates by the industry to attract more tourists. However due to the quick recovery and progress in the industry the growth rate of tourism receipts have had increased to 21.8 percent in 2003.

Table 23

Tourism Contribution to GDP, 1999 - 2003 (Million Rufiyaa, at 1995 Constant Prices)

Year	GDP	GDP Growth %	Tourism Contribution	% Share of Tourism Contribution
1999	6,056.60	7.2	1,982.30	32.7
2000	6,345.50	4.8	2,094.00	33.0
2001	6,564.40	3.4	2,093.50	31.9
2002	6,849.90	4.3	2,162.40 _/	31.6
2003	7,140.20*	4.2	2,225.00*	31.2

Note: _/ Revised
** Preliminary Estimate*
Source: Ministry of Planning & National Development

Share of tourism contribution to Gross Domestic Product (GDP) has had a very minute decline since 2001. Even though the level of GDP growth percent has increased during 1999, the rate of growth has slowed down from 2000 onwards. The period under review recorded a lowest percent of 3.4 in 2001. By the end of 2002 it started to regain its growth at 4.3 percent and 4.2 percent in 2003. Similarly tourism contribution to GDP in 2001 registered a decline of Rf. 0.5 mn compared to 2002. However, from 2001 onwards the percent share of tourism contribution to GDP remained relatively at the same levels.

Table 24

Inbound and Outbound travel, 1999 - 2003 (Only Maldivians)

Year	Arrivals	% change	Departure	% change
1999	42,746	15.7	42,322	15.9
2000	42,624	-0.3	42,332	0.0
2001	41,307	-3.1	41,367	-2.3
2002	41,298	0.0	42,707	3.2
2003	43,199	4.6	44,091	3.2

Source Data: Department of Immigration and Emigration

The number of Maldivians travelling overseas has increased over the years. This is due to the increasing number of business travellers and holiday makers. Maldivians also travel overseas to seek medical treatment, education and training, shopping, and for the Annual Hajj / Umrah Pilgrimages. On an average of five year period up to 2003 about 42,564 travelled out of Maldives per year compared to 41,500 up to 2002.

Year	Full Time Courses			Other Courses			Grand Total
	Male	Female	Total	Male	Female	Total	
1999	72	4	**76**	123	37	**160**	**236**
2000	63	15	**78**	165	13	**178**	**256**
2001	10	2	**12**	206	43	**249**	**261**
2002	41	10	**51**	104	40	**144**	**195**
2003	89	29	**118**	200	54	**254**	**372**
TOTAL	275	60	**335**	798	187	**985**	**1,320**

Figures Revised for 1999 - 2002
Source: Faculty of Hospitality & Tourism Studies (FHTS)

Table 25

Graduates from Faculty of Hospitality & Tourism Studies 1999 - 2003

Tourism and Hospitality Industry is the fastest growing industry in the Maldives. It demands a wide variety of different levels of skilled and professional people. Human resource development for the tourism industry is one of the major concerns of the country. 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 the only 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 of Hospitality and Tourism Studies is completely staffed by Maldivians except for three foreign language staff.

In 1997, the Institute was approved by the Business and Technical Education Council (BTEC) of United Kingdom and for the first time its BTEC National Diploma in Hotel Catering and Institutional Operations was started. IHCS is also affiliated with Birmingham College of Food, Tourism and Creative Studies.

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. In 2003, a total of 335 full time students and 985 students completed various other courses conducted by FHTS. However, with the expansion of the industry there has been always a shortage on formally trained persons to take up positions in the tourism 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. Some of the new full time courses that FHTS plans to introduce in 2004 are:
1.BTEC Higher Diploma in Hospitality Management
2.BTEC Diploma in Travel and Tourism
3.Advance Certificate in Commercial Cookery
4.Certificate II in Pastry and Bakery
5. BA (Hons) Hospitality and Tourism Management
6.Basic German Language
7.Basic Italian Language

1.5 Statistical Updates & Additional Tables

Table 26

Bed Capacity of Tourist Resorts & Distance from the Airport, 1999 - 2003

	Name of the Resort	Atoll	Year of Initial Operation	Airport Distance (Km)	Initial Bed Capacity	1999	2000	2001	2002	2003
1	Alimatha Aquatic Resort	Vaavu	1975	48.0	20	204	204	204	204	204
2	Angaaga Island Resort	South Alif	1989	85.0	100	100	100	100	100	100
3	Angsana Resort & Spa Maldives, Ihuru	Kaafu	1978	17.0	20	90	90	90	90	90
4	Asdhu Sun Island	Kaafu	1981	32.0	36	60	60	60	60	60
5	Athurugau Island Resort	South Alif	1990	90.0	79	92	92	92	92	92
6	Bandos Island Resort	Kaafu	1972	8.0	220	450	450	450	450	450
7	Banyan Tree (Vabbinfaru)	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 Alif	1983	48.3	20	90	90	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	206	206	206	206	206
12	Club Med Faru	Kaafu	1973	2.0	112	304	304	304	304	304
13	Club Rannalhi	Kaafu	1978	2.0	34	232	232	232	232	232
14	Coco Palm Resort & Spa (Dhunikolhu)	Baa	1998	124.0	192	200	200	200	200	200
15	Cocoa Island (Makunufushi)	Kaafu	1981	30.0	12	16	16	60	60	60
16	Dhiggiri Tourist Resort	Vaavu	1982	32.0	50	90	90	90	90	90
17	Dhigufinolhu Tourist Resort	Kaafu	1980	40.0	24	200	200	200	200	200
18	Dhonveli Beach & Spa Island (Tari, Kanuoiy Huraa)	Kaafu	1981	13.0	20	48	48	48	48	92
19	Ellaidhu Tourist Resort	North Alif	1985	54.0	32	156	156	156	156	156
20	Emboodhu Village	Kaafu	1979	8.0	44	236	236	236	236	236
21	Eriyadhu Island Resort	Kaafu	1982	40.0	40	114	114	114	114	114
22	Fesdhu Fun Island	North Alif	1982	72.4	90	110	110	110	110	110
23	Fihalhohi Island Resort	Kaafu	1981	28.0	90	184	256	256	256	256
24	Filitheyo Island Resort	Faafu	1999	120.7	250	250	250	250	250	250
25	Four Seasons Resort Maldives At Kuda Huraa	Kaafu	1977	12.9	32	212	212	212	212	212
26	Fullmoon Beach Resort (Furanafushi)	Kaafu	1973	5.6	112	300	312	312	312	312
27	Fun Island Resort (Bodufinolhu)	Kaafu	1980	38.0	44	200	200	200	200	200
28	Gangehi Island Resort	North Alif	1987	77.2	50	50	50	50	50	50
29	Gasfinolhu Island Resort	Kaafu	1980	23.0	18	80	80	80	80	80
30	Giraavaru Tourist Resort	Kaafu	1980	11.3	40	132	132	132	132	132
31	Hakuraa Huraa	Meemu	1999	128.7	72	140	140	140	140	140
32	Halaveli Holiday Village	North Alif	1982	36.0	30	112	112	112	112	112
33	Helengeli Tourist Resort	Kaafu	1979	46.7	20	100	100	100	100	100
34	Hilton Maldives Resort & Spa, Rangali Island	South Alif	1992	96.6	80	260	260	296	304	304
35	Holiday Island (Dhiffushi)	South Alif	1994	93.0	284	284	284	284	284	284
36	Island of Bolifushi	Kaafu	1982	12.0	64	110	110	110	110	110
37	Kandooma Tourist Resort	Kaafu	1985	27.4	98	204	204	204	204	204
38	Kanifinolhu Tourist Resort	Kaafu	1978	19.3	18	290	378	378	378	378
39	Kihaadhufaru Tourist Resort	Baa	1999	104.6	200	200	200	200	200	200
40	Komandoo Island Resort	Lhaviyani	1998	128.7	90	90	90	90	90	90
41	Kudahithi Tourist Resort	Kaafu	1984	27.4	12	14	14	14	14	14
42	Kudarah Island Resort	South Alif	1991	88.5	50	60	60	60	60	60
43	Kuramathi Tourist Resort	North Alif	1977	56.3	48	548	548	548	580	580

	Name of the Resort	Atoll	Year of Initial Operation	Airport Distance (Km)	Initial Bed Capacity	1999	2000	2001	2002	2003
44	Kuredhdhu Island Resort	Lhaviyani	1978	128.7	18	600	600	600	600	600
45	Kurumba Village (Vihamanaafushi)	Kaafu	1972	3.2	60	342	342	342	342	342
46	Laguna Beach Resort (Velassaru)	Kaafu	1974	11.3	90	258	258	258	258	258
47	Lhohifushi Tourist Resort	Kaafu	1979	22.5	40	254	254	254	254	254
48	Lily Beach Resort (Huvahendhoo)	South Alif	1994	85.0	168	154	170	170	170	170
49	Maayafushi Tourist Resort	North Alif	1983	63.0	48	120	120	120	120	120
50	Machchafushi Island Resort	South Alif	1992	95.0	96	116	128	128	128	128
51	Madoogali Resort	North Alif	1989	77.2	70	100	100	100	112	112
52	Makunudu Island	Kaafu	1983	38.6	58	74	74	74	74	74
53	Medhufushi Island Resort	Meemu	2000	128.7	240	-	240	240	240	240
54	Meedhupparu Isalnd Resort	Raa	2000	130.3	430	-	430	430	430	430
55	Meeru Island Resort (Meerufenfushi)	Kaafu	1978	37.0	128	454	454	454	454	454
56	Mirihi Island Resort	South Alif	1989	112.6	36	70	70	70	72	72
57	Moofushi Island Resort	South Alif	1990	80.0	84	120	120	120	120	120
58	Nakatchafushi Tourist Resort	Kaafu	1979	25.7	80	102	102	102	102	102
59	Nika Island Resort (Kudafolhudhu)	North Alif	1983	69.2	30	56	56	56	56	56
60	Olhuveli Beach & Spa Resort	Kaafu	1979	51.5	36	250	250	250	250	250
61	One & Only Kanuhura, Limited	Lhaviyani	1999	125.5	200	200	200	200	200	200
62	Palm Beach Island (Madhiriguraidhoo)	Lhaviyani	1999	128.7	200	200	200	200	200	200
63	Palm Tree Island (Veligandu Huraa)	Kaafu	1986	27.0	32	112	112	112	112	112
64	Paradise Island (Lankanfinolhu)	Kaafu	1979	9.6	24	520	520	520	520	520
65	Ranveli Village (Villingilivaru)	South Alif	1991	77.0	112	112	112	112	112	112
66	Reethi Beach Resort (Fonimagoodhoo)	Baa	1998	104.6	200	200	200	200	200	200
67	Reethi Rah Resort (Medhufinolhu)	Kaafu	1979	64.4	24	120	120	120	120	120
68	Rihiveli Beach Resort (Mahaanaelhi Huraa)	Kaafu	1980	40.2	40	100	100	100	100	100
69	Royal Island (Horubadhoo)	Baa	2001	110.0	304	-	-	304	304	304
70	Soneva Gili Resort & Spa (Hudhuveli, Lankanfushi)	Kaafu	1980	9.7	12	88	88	88	88	88
71	Sonevafushi Resort (Kunfunadhu)	Baa	1983	104.6	50	124	124	124	130	130
72	Summer Island Village (Ziyaaraifushi)	Kaafu	1983	35.0	58	216	216	216	216	216
73	Sun Island Resort (Nalaguraidhu)	South Alif	1998	99.8	700	700	700	700	700	700
74	Taj Coral Reef Resort (Hembadhoo)	Kaafu	1982	32.2	68	132	132	132	132	132
75	Taj Exortica Resort & Spa Maldives (Embudhu Finolhu)	Kaafu	1983	12.9	20	128	128	128	128	128
76	Thulhaagiri Island Resort	Kaafu	1980	11.0	44	116	116	116	138	138
77	Thundufushi Island Resort	South Alif	1990	80.5	74	94	94	94	94	94
78	Twin Island Resort (Maafushivaru)	South Alif	1991	54.7	60	76	76	76	76	76
79	Vaadhu Island Resort	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	Dhaalu	1998	125.0	50	168	168	168	168	168
82	Velidhu Island Resort	North Alif	1989	80.5	22	200	200	200	200	200
83	Veligandu Island	North Alif	1984	51.0	34	126	126	146	146	146
84	Vilamendhu Island Resort	South Alif	1994	48.3	200	282	282	282	282	282
85	Villivaru Island Resort	Kaafu	1981	29.0	120	120	120	120	120	120
86	Villu Reef Beach & Spa Resort (Meedhuffushi)	Dhaalu	1998	128.7	136	136	136	136	136	136
87	White Sand Resort & Spa (Dhidhdhufinolhu, Ari Beach)	South Alif	1988	104.0	180	282	282	282	282	282
	TOTAL					17,043	17,914	18,319	18,402	18,447

Source: Ministry of Tourism

Table 27

Flight Schedule (Winter 03/04 and Summer 04) Male' International Airport

Name Of Airline	Originating Sector	Aircraft Type	Capacity Seats	Winter 03/04 Frequency Per Week	Winter 03/04 Capacity Per Week Seats	Summer 04 Frequency Per Week	Summer 04 Capacity Per Week Seats	Remarks
Scheduled Flight Operators								
1 Srilankan Airlines	CMB	A330	294	2	588	2	588	
	CMB	A320	144	9	1,296	13	1,872	
	CMB	A340	375	2	750	3	1,125	
	NRT	A340	375	2	750	2	750	
	CDG	A340	375	1	375	1	375	
	LHR	A340	375	3	1,125	3	1,125	
	ZRH	A340	375	2	750	2	750	
2 Austrian Airlines	VIE	B767	258	3	774	1	258	
3 Qatar Airways	DOH	A330	294	7	2,058	7	2,058	
4 Lauda Air Italy	MXP/CMB	B767	258	2	516	2	516	
5 Condor	FRA/MLE	B767	258	1	258	1	258	
	MUC/MLE	B767	258	1	258	1	258	
6 Emirates	CMB	A 330	294	4	1,176	4	1,176	
	DXB/CMB	A 330	294	2	588	7	2,058	
	DXB	A 330	294	6	1,764	6	1,764	
7 Indian Air Lines	TRV	A 320	150	7	1,050	7	1,050	
8 Ltu International Airways	DUS	A330	323	1	323	1	323	
	MUC	A330	323	1	323	1	323	
	FRA	A330	323	1	323	1	323	
9 Malaysia Airlines	KUL	A 330	294	2	588	2	588	
10 Singapore Airlines	SIN	B777	323	5	1,615	5	1,615	
11 Eurofly	MXP	A330	288	2	576	6	1,728	
	MXP/FCO	A330	288	1	288	1	288	
	MXP/CMB	A330	288	1	288	1	288	
12 Air Seychelles	SEY/BOM	B737	126	1	126	1	126	
	BOM/SEY	B737	126	1	126	1	126	
13 Aeroflot	SVO	IL96	298	2	596	2	596	
Total Schedule Flights				72	19,248	84	22,305	

Name Of Airline	Originating Sector	Aircraft Type	Capacity Seats	Winter 03/04 Frequency Per Week	Winter 03/04 Capacity Per Week Seats	Summer 04 Frequency Per Week	Summer 04 Capacity Per Week Seats	Remarks
Charter (Passenger) Flight Operators								
1 Monarch Airlines	LGW	A330	374	2	748	3	1,122	
2 Belair	ZRH	B767	252	1	252	0	0	
3 Edelweiss	ZRH/CMB	A330	310	1	310	1	310	From 29 Sep 04 - 29 Oct 04 Only
	ZRH	A330	310	1	310	1	310	
4 Blue Panorama	MXP/FCO	B767	276	1	276	0	0	
							0	
5 Air 2000	LGW	B767	312	1	312	0	0	
							0	
6 My Travel Airways	MAN/LGW	A330	360	1	360	0	0	
							0	
7 Air Europe (Charter)	MXP	A330	298	6	1,788	4	1,192	
	MXP/FCO	A330	298	2	596	2	596	
	MXP/CMB	A330	298	1	298	1	298	
	VRN/FCO	A330	298	1	298	1	298	
8 Transaero	SVO	B767	276	2	552	2	552	
9 Star Airlines	CDG	A330	364	1	364	0	0	
10 Air Slovakia	BTS	B757	204	1	204	0	0	
11 Corse Air	ORY	A330	355	1	355	0	0	
12 Air Luxor	LIS/MAD	A330	278	1	278	0	0	
13 Britannia Airways	MAN/LGW	B767	315	1	315	0	0	
							0	
14 Thaijet	BKK/MLE	B757	210	0	0	1	210	*Will Operate Until 30 June 2004
Total Charter Flights				25	7,616	16	4,888	
Grand Total				**97**	**26,864**	**100**	**27,193**	

Source: Department of Civil Aviation

Table 28

Monthly Average Occupancy Rates in Resorts and Hotels, 1999 - 2003 (Percent)

Month	1999	2000	2001	2002	2003
January	86.8	78.4	86.6	67.1	90.4
February	90.9	91.0	89.9	81.8	95.5
March	86.6	82.9	83.3	79.3	87.3
April	74.1	77.2	76.7	70.0	80.3
May	52.2	48.8	51.5	56.4	55.8
June	44.5	43.1	42.6	42.0	46.6
July	55.6	55.6	57.4	57.0	63.4
August	74.1	70.8	69.9	77.1	84.6
September	67.9	64.1	60.0	68.4	72.1
October	65.5	64.0	53.8	73.6	76.4
November	74.9	70.8	55.5	76.8	87.3
December	63.7	71.2	60.2	78.1	87.0
Annual Average	**69.7**	**68.2**	**65.6**	**69.0**	**77.2**

Source: Ministry of Tourism

Table 29

Tourist Arrivals by Nationality January - April 2004

By Nationality	Apr-03	Apr-04	% Change '04/'03 (Apr)	% Share '04 (Apr)	Jan-Apr '03	Jan-Apr '04	% Change '04/'03 (Jan-Apr)	% Share '04 (Jan-Apr)
EUROPE	**41,312**	**44,343**	**7.3**	**80.0**	**180,594**	**196,124**	**8.6**	**81.4**
Austria	1,029	1,079	4.9	1.9	5,699	5,646	-0.9	2.3
Belgium	255	305	19.6	0.6	1,049	1,262	20.3	0.5
Czech Republic	127	228	79.5	0.4	867	1,124	29.6	0.5
Denmark	91	66	-27.5	0.1	453	534	17.9	0.2
Finland	32	29	-9.4	0.1	196	433	120.9	0.2
France	4,050	5,076	25.3	9.2	20,921	23,254	11.2	9.7
Germany	7,146	6,195	-13.3	11.2	25,822	25,653	-0.7	10.7
Greece	88	241	173.9	0.4	474	657	38.6	0.3
Hungary *	135	77	-43.0	0.1	1,590	2,303	44.8	1.0
Ireland *	114	192	68.4	0.3	482	611	26.8	0.3
Israel *	45	64	42.2	0.1	109	193	77.1	0.1
Italy	14,897	12,843	-13.8	23.2	66,273	62,042	-6.4	25.8
Netherlands	313	427	36.4	0.8	1,546	1,897	22.7	0.8
Norway	71	99	39.4	0.2	287	496	72.8	0.2
Poland	71	74	4.2	0.1	455	522	14.7	0.2
Portugal	208	297	42.8	0.5	694	767	10.5	0.3
Russia	779	1,840	136.2	3.3	3,967	6,550	65.1	2.7
Slovak Republic *	61	293	380.3	0.5	393	1,306	232.3	0.5
Slovenia *	56	78	39.3	0.1	280	312	11.4	0.1
Spain	320	418	30.6	0.8	1,059	1,292	22.0	0.5
Sweden	111	186	67.6	0.3	737	1,323	79.5	0.5
Switzerland	3,390	3,402	0.4	6.1	12,912	12,615	-2.3	5.2
Turkey	67	102	52.2	0.2	663	973	46.8	0.4
Ukraine *	76	120	57.9	0.2	313	536	71.2	0.2
United Kingdom	7,533	10,254	36.1	18.5	31,887	42,099	32.0	17.5
Other Countries	247	358	44.9	0.6	1,466	1,724	17.6	0.7
ASIA	**5,785**	**8,753**	**51.3**	**15.8**	**29,930**	**36,516**	**22.0**	**15.2**
China	356	1,278	259.0	2.3	4,522	7,317	61.8	3.0
India	1,012	871	-13.9	1.6	3,684	3,439	-6.7	1.4
Indonesia	28	38	35.7	0.1	120	135	12.5	0.1
Japan	2,413	3,513	45.6	6.3	12,819	13,743	7.2	5.7
Korea	569	597	4.9	1.1	2,136	2,618	22.6	1.1
Kuwait *	16	45	181.3	0.1	187	239	27.8	0.1
Malaysia	108	248	129.6	0.4	552	953	72.6	0.4
Pakistan	74	86	16.2	0.2	445	411	-7.6	0.2
Saudi Arabia *	25	58	132.0	0.1	233	370	58.8	0.2
Singapore	172	276	60.5	0.5	992	1,177	18.6	0.5
Sri Lanka	628	693	10.4	1.3	2,239	2,538	13.4	1.1
Thailand	165	611	270.3	1.1	855	1,284	50.2	0.5
Other Countries	219	439	100.5	0.8	1,146	2,292	100.0	1.0
AFRICA	**373**	**572**	**53.4**	**1.0**	**1,052**	**1,650**	**56.8**	**0.7**
South Africa	294	451	53.4	0.8	736	1,286	74.7	0.5
Other Countries	79	121	53.2	0.2	316	364	15.2	0.2
AMERICAS	624	898	43.9	1.6	2,683	3,439	28.2	1.4
Brazil	36	42	16.7	0.1	129	140	8.5	0.1
Canada	115	193	67.8	0.3	607	824	35.7	0.3
U.S.A.	431	580	34.6	1.0	1,782	2,176	22.1	0.9
Other Countries	42	83	97.6	0.1	165	299	81.2	0.1
OCEANIA	**648**	**830**	**28.1**	**1.5**	**2,133**	**3,075**	**44.2**	**1.3**
Australia	596	756	26.8	1.4	1,918	2,719	41.8	1.1
New Zealand	50	71	42.0	0.1	208	343	64.9	0.1
Other Countries	2	3	50.0	0.0	7	13	100.0	0.0
STATELESS/NOT STATED	**0**	**0**	**0.0**	**0.0**	**0**	**0**	**0.0**	**0.0**
TOTAL TOURIST ARRIVALS	**48,742**	**55,396**	**13.7**	**100.0**	**216,392**	**240,804**	**11.3**	**100.0**
ARRIVALS BY SURFACE	**1,377**	**152**	**-89.0**	**-**	**3,559**	**3,630**	**2.0**	**-**

*Note: * New Markets*
Source Data: Statistics Section / Ministry of Tourism

Table 30

Tourism Indicator Growth Table January - April 2004

	Year	January	February	March	April	Jan - Apr
TOURIST ARRIVALS						Total
FRONTIER ARRIVALS	**2003**	54,503	56,706	56,441	48,742	216,392
	2004	61,861	59,692	63,855	55,396	240,804
	Growth %	13.5	5.3	13.1	13.7	11.3
SURFACE ARRIVALS	**2003**	113	175	1,894	1,377	3,559
	2004	542	79	2,857	152	3,630
	Growth %	379.6	-54.9	50.8	-89.0	2.0
BED NIGHTS / RESORTS						Total
	2003	469,596	448,589	454,716	404,257	1,777,158
	2004	508,856	481,891	501,334	454,443	1,946,524
	Growth %	8.4	7.4	10.3	12.4	9.5
HOTELS	**2003**	8,805	7,792	7,497	6,772	30,866
	2004	13,311	11,547	11,305	9,312	45,475
	Growth %	51.2	48.2	50.8	37.5	47.3
TOTAL	**2003**	**478,401**	**456,381**	**462,213**	**411,029**	**1,808,024**
	2004	**522,167**	**493,438**	**512,639**	**463,755**	**1,991,999**
	Growth %	**9.1**	**8.1**	**10.9**	**12.8**	**10.2**
BED CAPACITY (Beds in Operation)						Average
RESORTS	**2003**	16,400	16,400	16,400	16,400	16,400
	2004	16,088	16,212	16,252	16,252	16,201
	Growth %	-1.9	-1.1	-0.9	-0.9	-1.2
HOTELS	**2003**	670	670	670	670	670
	2004	670	670	636	636	653
	Growth %	0.0	0.0	-5.1	-5.1	-2.5
TOTAL	**2003**	**17,070**	**17,070**	**17,070**	**17,070**	**17,070**
	2004	**16,758**	**16,882**	**16,888**	**16,888**	**16,854**
	Growth %	**-1.8**	**-1.1**	**-1.1**	**-1.1**	**-1.3**
OCCUPANCY RATE (%)						Average
RESORTS	**2003**	92.4	97.7	89.4	82.2	90.4
	2004	102.0	102.5	99.5	93.2	99.3
	Change	9.7	4.8	10.1	11.0	8.9
HOTELS	**2003**	42.4	41.5	36.1	33.7	38.4
	2004	64.1	59.4	57.3	48.8	57.4
	Change	21.7	17.9	21.2	15.1	19.0
TOTAL	**2003**	**90.4**	**95.5**	**87.3**	**80.3**	**88.4**
	2004	**100.5**	**100.8**	**97.9**	**91.5**	**97.7**
	Change	**10.1**	**5.3**	**10.6**	**11.3**	**9.3**
AVG. DURATION OF STAY (Days)						
	2003	8.8	8.0	8.2	8.4	8.4
	2004	8.4	8.3	8.0	8.4	8.3
	Change	-0.3	0.2	-0.2	-0.1	-0.1

Note: Surface Arrival figures are not included in the national Average count of Tourist Arrivals
Source Data: Statistics Section / Ministry of Tourism

Table 31

Tourist Arrivals by Selected Markets, 1999 - 2003

By Nationality	1999	2000	2001	2002	2003
Europe	**340,469**	**362,196**	**364,105**	**373,428**	**443,093**
Austria	13,550	11,725	10,494	10,480	12,391
Belgium	3,114	5,071	3,719	2,606	2,795
Denmark	715	772	891	938	1,073
Finland	526	350	304	388	614
France	23,832	27,517	30,542	31,228	41,055
Germany	86,497	77,642	66,149	63,212	70,762
Greece	2,128	1,776	1,775	2,446	2,287
Italy	88,697	106,451	115,740	114,955	140,304
Netherlands	9,315	7,275	4,097	4,662	5,047
Norway	750	945	577	772	987
Portugal	4,117	4,276	3,526	2,785	3,379
Russia	3,428	3,608	3,983	7,550	12,108
Spain	5,634	5,322	4,203	5,160	6,323
Sweden	2,226	2,236	2,112	1,749	1,940
Switzerland	22,856	24,528	28,313	31,707	30,787
United Kingdom	63,919	71,440	77,151	80,377	93,989
Other countries	9,165	11,262	10,529	12,413	17,252
Asia	**74,935**	**86,524**	**80,825**	**94,986**	**101,806**
Bangladesh	237	321	321	241	313
China	3,973	5,380	7,342	12,092	15,021
India	11,621	10,616	8,511	11,377	11,502
Japan	40,230	47,180	41,895	43,705	42,081
Korea	4,272	5,771	6,708	7,696	8,417
Malaysia	1,716	1,829	1,478	2,240	2,251
Pakistan	982	1,049	1,017	1,329	1,942
Philippines	291	317	346	405	376
Singapore	2,383	2,530	2,227	2,520	4,653
Sri Lanka	6,375	8,413	6,902	6,909	7,296
Thailand	1,083	1,007	1,350	2,002	3,009
Other countries	1,772	2,111	2,728	4,470	4,945
Africa	**1,846**	**2,311**	**2,060**	**3,002**	**3,984**
South Africa	1,437	1,767	1,368	1,914	2,929
Other countries	409	544	692	1,088	1,055
Americas	**6,082**	**7,108**	**6,814**	**7,489**	**7,665**
Argentina	199	176	148	93	113
Canada	1,165	1,316	1,442	1,569	1,649
U.S.A	4,103	4,795	4,435	5,030	5,005
Other countries	615	821	789	797	898
Oceania	**6,334**	**9,015**	**7,180**	**5,775**	**7,045**
Australia	5,784	8,090	6,435	5,063	6,110
New Zealand	541	910	672	633	754
Other countries	9	15	73	79	181
Global Total	**429,666**	**467,154**	**460,984**	**484,680**	**563,593**

Source Data: Department of Immigration and Emigration

Table 32

Market Share of Selected Markets, 1999 - 2003 (Percent)

By Nationality	1999	2000	2001	2002	2003
Europe	79.2	77.5	79.0	77.0	78.6
Austria	3.2	2.5	2.3	2.2	2.2
Belgium	0.7	1.1	0.8	0.5	0.5
Denmark	0.2	0.2	0.2	0.2	0.2
Finland	0.1	0.1	0.1	0.1	0.1
France	5.5	5.9	6.6	6.4	7.3
Germany	20.1	16.6	14.3	13.0	12.6
Greece	0.5	0.4	0.4	0.5	0.4
Italy	20.6	22.8	25.1	23.7	24.9
Netherlands	2.2	1.6	0.9	1.0	0.9
Norway	0.2	0.2	0.1	0.2	0.2
Portugal	1.0	0.9	0.8	0.6	0.6
Russia	0.8	0.8	0.9	1.6	2.1
Spain	1.3	1.1	0.9	1.1	1.1
Sweden	0.5	0.5	0.5	0.4	0.3
Switzerland	5.3	5.3	6.1	6.5	5.5
United Kingdom	14.9	15.3	16.7	16.6	16.7
Other countries	2.1	2.4	2.3	2.6	3.1
Asia	17.4	18.5	17.5	19.6	18.1
Bangladesh	0.1	0.1	0.1	0.0	0.1
China	0.9	1.2	1.6	2.5	2.7
India	2.7	2.3	1.8	2.3	2.0
Japan	9.4	10.1	9.1	9.0	7.5
Korea	1.0	1.2	1.5	1.6	1.5
Malaysia	0.4	0.4	0.3	0.5	0.4
Pakistan	0.2	0.2	0.2	0.3	0.3
Philippines	0.1	0.1	0.1	0.1	0.1
Singapore	0.6	0.5	0.5	0.5	0.8
Sri Lanka	1.5	1.8	1.5	1.4	1.3
Thailand	0.3	0.2	0.3	0.4	0.5
Other countries	0.4	0.5	0.6	0.9	0.9
Africa	0.4	0.5	0.4	0.6	0.7
South Africa	0.3	0.4	0.3	0.4	0.5
Other countries	0.1	0.1	0.2	0.2	0.2
Americas	1.4	1.5	1.5	1.5	1.4
Argentina	0.0	0.0	0.0	0.0	0.0
Canada	0.3	0.3	0.3	0.3	0.3
U.S.A	1.0	1.0	1.0	1.0	0.9
Other countries	0.1	0.2	0.2	0.2	0.2
Oceania	1.5	1.9	1.6	1.2	1.3
Australia	1.3	1.7	1.4	1.0	1.1
New Zealand	0.1	0.2	0.1	0.1	0.1
Other countries	0.0	0.0	0.0	0.0	0.0
Global Total	100.0	100.0	100.0	100.0	100.0

Source Data: Department of Immigration and Emigration

Table 33

Growth Trends of Selected Markets, 1999 - 2003 (Percent)

By Nationality	1999	2000	2001	2002	2003
Europe	**11.7**	**6.4**	**0.5**	**2.6**	**18.7**
Austria	-8.3	-13.5	-10.5	-0.1	18.2
Belgium	14.9	62.8	-26.7	-29.9	7.3
Denmark	-14.6	8.0	15.4	5.3	14.4
Finland	-4.0	-33.5	-13.1	27.6	58.2
France	16.6	15.5	11.0	2.2	31.5
Germany	13.3	-10.2	-14.8	-4.4	11.9
Greece	67.3	-16.5	-0.1	37.8	-6.5
Italy	11.8	20.0	8.7	-0.7	22.1
Netherlands	-0.7	-21.9	-43.7	13.8	8.3
Norway	4.9	26.0	-38.9	33.8	27.8
Portugal	96.7	3.9	-17.5	-21.0	21.3
Russia	-17.7	5.3	10.4	89.6	60.4
Spain	41.9	-5.5	-21.0	22.8	22.5
Sweden	-12.4	0.4	-5.5	-17.2	10.9
Switzerland	1.5	7.3	15.4	12.0	-2.9
United Kingdom	14.7	11.8	8.0	4.2	16.9
Other countries	20.7	22.9	-6.5	17.9	39.0
Asia	**4.5**	**15.5**	**-6.6**	**17.5**	**7.2**
Bangladesh	-1.3	35.4	0.0	-24.9	29.9
China	29.5	35.4	36.5	64.7	21.1
India	-1.0	-8.6	-19.8	33.7	1.1
Japan	-0.7	17.3	-11.2	4.3	-3.7
Korea	51.4	35.1	16.2	14.7	9.4
Malaysia	40.8	6.6	-19.2	51.6	0.5
Pakistan	-6.6	6.8	-3.1	30.7	46.1
Philippines	35.3	8.9	9.1	17.1	-7.2
Singapore	11.9	6.2	-12.0	13.2	84.6
Sri Lanka	6.3	32.0	-18.0	0.1	5.6
Thailand	37.1	-7.0	34.1	48.3	50.3
Other countries	-30.1	33.0	27.2	57.2	18.8
Africa	**-74.2**	**25.2**	**-10.9**	**45.7**	**32.7**
South Africa	-78.2	23.0	-22.6	39.9	53.0
Other countries	-30.1	33.0	27.2	57.2	-3.0
Americas	**-0.6**	**16.9**	**-4.1**	**9.9**	**2.4**
Argentina	-38.4	-11.6	-15.9	-37.2	21.5
Canada	5.0	13.0	9.6	8.8	5.1
U.S.A	8.8	16.9	-7.5	13.4	-0.5
Other countries	-32.9	33.5	-3.9	1.0	12.7
Oceania	**9.3**	**42.3**	**-20.4**	**-19.6**	**22.0**
Australia	9.9	39.9	-20.5	-21.3	20.7
New Zealand	4.2	68.2	-26.2	-5.8	19.1
Other countries	-35.7	66.7	386.7	8.2	129.1
Global Total	**8.6**	**8.7**	**-1.3**	**5.1**	**16.3**

Source Data: Department of Immigration and Emigration

Table 34

Tourism Sector Employment 2003 (Resorts & Hotels)

CATEGORY	LOCAL				FOREIGN				% Share		TOTAL
	Male	Female	Total	Local %	Male	Female	Total	Foreign %	Male	Female	
FRONT OFFICE, MANAGERIAL & ADMIN STAFF	1,319	132	1,451	57.1	969	122	1,091	42.9	90.0	10.0	2,542
General Manager	29	0	29	50.0	25	4	29	50.0	93.1	6.9	58
Manager	61	2	63	56.3	41	8	49	43.8	91.1	8.9	112
Assistant Manager	66	1	67	77.0	15	5	20	23.0	93.1	6.9	87
Reservation/Front Office Manager	59	5	64	64.6	20	15	35	35.4	79.8	20.2	99
Receptionist	334	76	410	87.0	33	28	61	13.0	77.9	22.1	471
Accountant	20	2	22	17.1	103	4	107	82.9	95.3	4.7	129
Cashier	122	3	125	86.8	16	3	19	13.2	95.8	4.2	144
Accounts Clerk	68	3	71	60.2	45	2	47	39.8	95.8	4.2	118
Billing Clerk	124	1	125	91.2	12	0	12	8.8	99.3	0.7	137
Night Auditor	37	0	37	49.3	38	0	38	50.7	100.0	0.0	75
Store Keeper	41	0	41	30.6	92	1	93	69.4	99.3	0.7	134
Storekeeping Helper	39	0	39	34.2	74	1	75	65.8	99.1	0.9	114
Office Boy	53	0	53	39.6	78	3	81	60.4	97.8	2.2	134
Watcher	50	0	50	20.4	195	0	195	79.6	100.0	0.0	245
Others	216	39	255	52.6	182	48	230	47.4	82.1	17.9	485
PUBLIC RELATIONS	176	11	187	44.5	152	81	233	55.5	78.1	21.9	420
Tour Guide/Guest Relations Officer	63	1	64	41.0	37	55	92	59.0	64.1	35.9	156
Airport Representative	71	1	72	98.6	0	1	1	1.4	97.3	2.7	73
Animator	8	1	9	10.6	64	12	76	89.4	84.7	15.3	85
Assistant Animator	6	0	6	30.0	10	4	14	70.0	80.0	20.0	20
Others	28	8	36	41.9	41	9	50	58.1	80.2	19.8	86
FOOD AND BEVERAGE	2,136	63	2,199	47.3	2,427	20	2,447	52.7	98.2	1.8	4,646
F & B Manager/Controller	19	0	19	31.1	40	2	42	68.9	96.7	3.3	61
F & B Supervisor	114	1	115	65.7	56	4	60	34.3	97.1	2.9	175
Chef	95	0	95	45.2	113	2	115	54.8	99.0	1.0	210
Cook	134	6	140	25.3	412	1	413	74.7	98.7	1.3	553
Kitchen Helper	147	10	157	25.0	470	0	470	75.0	98.4	1.6	627
Waiter	1,257	29	1,286	88.8	157	5	162	11.2	97.7	2.3	1,448
Pantry Boys	85	0	85	27.2	227	0	227	72.8	100.0	0.0	312
Barman	1	0	1	0.3	349	2	351	99.7	99.4	0.6	352
Bar Helper	38	1	39	25.0	117	0	117	75.0	99.4	0.6	156
Others	246	16	262	34.8	486	4	490	65.2	97.3	2.7	752
STAFF MESS	145	3	148	19.4	611	2	613	80.6	99.3	0.7	761
Cook	64	0	64	32.2	135	0	135	67.8	100.0	0.0	199
Assistant Cook	24	0	24	24.7	73	0	73	75.3	100.0	0.0	97
Kitchen Helper	26	3	29	13.4	187	0	187	86.6	98.6	1.4	216
Waiter	26	0	26	11.0	209	2	211	89.0	99.2	0.8	237
Others	5	0	5	41.7	7	0	7	58.3	100.0	0.0	12
HOUSE KEEPING	1,944	92	2,036	75.0	670	7	677	25.0	96.4	3.6	2,713
Supervisor	107	2	109	73.2	39	1	40	26.8	98.0	2.0	149
Head Room Boy	88	0	88	91.7	8	0	8	8.3	100.0	0.0	96
House Keeper	48	0	48	71.6	18	1	19	28.4	98.5	1.5	67
Room Boy/Maid	1,146	6	1,152	95.9	48	1	49	4.1	99.4	0.6	1,201
Tailor	25	1	26	26.8	71	0	71	73.2	99.0	1.0	97
Laundry Boy	279	6	285	57.6	210	0	210	42.4	98.8	1.2	495
Island Cleaner	116	54	170	46.8	193	0	193	53.2	85.1	14.9	363
Others	135	23	158	64.5	83	4	87	35.5	89.0	11.0	245

CATEGORY	LOCAL				FOREIGN				% Share		TOTAL
	Male	Female	Total	Local %	Male	Female	Total	Foreign %	Male	Female	
MAINTENANCE	1,006	83	1,089	38.9	1,710	0	1,710	61.1	97.0	3.0	2,799
Foreman	54	0	54	87.1	8	0	8	12.9	100.0	0.0	62
Supervisor	66	0	66	68.0	31	0	31	32.0	100.0	0.0	97
Electrician	68	0	68	48.6	72	0	72	51.4	100.0	0.0	140
Aircon Mechanic	33	0	33	31.4	72	0	72	68.6	100.0	0.0	105
Carpenter	127	0	127	48.3	136	0	136	51.7	100.0	0.0	263
Plumber & Fitters	31	0	31	32.0	66	0	66	68.0	100.0	0.0	97
Painter	31	0	31	43.1	41	0	41	56.9	100.0	0.0	72
Labourer	233	0	233	27.4	618	0	618	72.6	100.0	0.0	851
Gardener	60	28	88	25.9	252	0	252	74.1	91.8	8.2	340
Mason	30	0	30	19.9	121	0	121	80.1	100.0	0.0	151
General Worker	125	1	126	42.7	169	0	169	57.3	99.7	0.3	295
Others	148	54	202	62.0	124	0	124	38.0	83.4	16.6	326
POWER HOUSE	281	0	281	60.7	182	0	182	39.3	100.0	0.0	463
Mechanic	85	0	85	70.8	35	0	35	29.2	100.0	0.0	120
Electrician	37	0	37	53.6	32	0	32	46.4	100.0	0.0	69
Generator Attendant	125	0	125	63.8	71	0	71	36.2	100.0	0.0	196
Others	34	0	34	43.6	44	0	44	56.4	100.0	0.0	78
TRANSPORT	1,763	0	1,763	97.5	45	0	45	2.5	100.0	0.0	1,808
Manager	32	0	32	97.0	1	0	1	3.0	100.0	0.0	33
Captain (Boat/Dhonie/Launch)	527	0	527	100.0	0	0	0	0.0	100.0	0.0	527
Crew (Boat/Dhonie/Launch)	975	0	975	98.7	13	0	13	1.3	100.0	0.0	988
Driver	57	0	57	77.0	17	0	17	23.0	100.0	0.0	74
Others	172	0	172	92.5	14	0	14	7.5	100.0	0.0	186
SPORTS AND DIVING BASE PERSONNEL	234	4	238	40.2	199	155	354	59.8	73.1	26.9	592
Diving Instructor	26	0	26	16.0	97	40	137	84.0	75.5	24.5	163
Assistant Diving Instructor	15	0	15	39.5	14	9	23	60.5	76.3	23.7	38
Diving Guide	17	0	17	81.0	2	2	4	19.0	90.5	9.5	21
Compressor Boy	49	0	49	72.1	19	0	19	27.9	100.0	0.0	68
Windsurfing Instructor	34	0	34	68.0	14	2	16	32.0	96.0	4.0	50
Assistant Windsurfing Instructor	27	0	27	77.1	8	0	8	22.9	100.0	0.0	35
Others	66	4	70	32.3	45	102	147	67.7	51.2	48.8	217
MALE' OFFICE	224	50	274	73.5	89	10	99	26.5	83.9	16.1	373
Manager	38	5	43	78.2	8	4	12	21.8	83.6	16.4	55
Accountant	9	2	11	23.9	34	1	35	76.1	93.5	6.5	46
Purchase Officer	65	1	66	93.0	5	0	5	7.0	98.6	1.4	71
Clerk	36	18	54	84.4	10	0	10	15.6	71.9	28.1	64
Office Boy	31	0	31	58.5	22	0	22	41.5	100.0	0.0	53
Others	45	24	69	82.1	10	5	15	17.9	65.5	34.5	84
TOTAL	9,228	438	9,666	56.5	7,054	397	7,451	43.5	95.1	4.9	17,117

Note: Figures calculated on data recieved from 95 establishments (87 Resorts & 8 Hotels)
Source: Statistics Section / Ministry of Tourism

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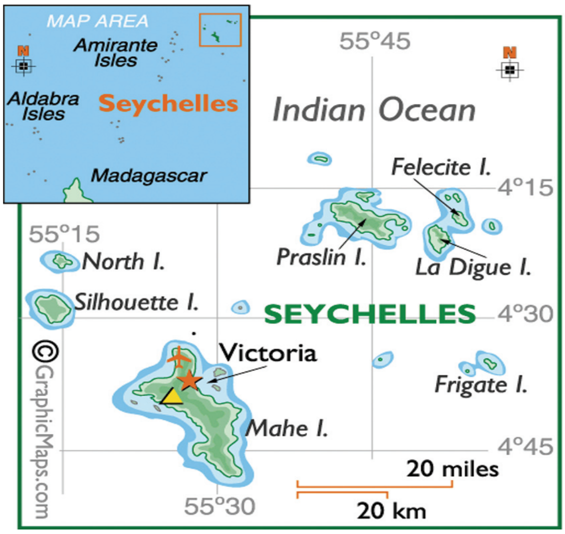
SECTION II

Tourism Trends in Similar Destinations to the Maldives

2.1 Tourism Trends in Similar Destinations to the Maldives

1. Republic of Seychelles



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Seychelles is a group of 115 diverse and tranquil islands covering an area of 1,400,000 sq. km in the Indian Ocean. The Seychelles archipelago is geographically located in east African coast, between four degrees and ten degrees south of the equator. Seychelles has been a British colony for162 years but the British did not settle in significant numbers hence the influence of the original French settlers are dominant. The population of the country during 2003 was 79,879 (mid year estimate). There are three official languages in Seychelles namely Creole, English and French. Roman Catholics and Anglicans are its main religions.

Tourism is one of the major industries in the country which employs about 30% of the labor force and provides more than 70% of hard currency earnings, and by tuna fishing. In recent years the government has encouraged foreign investment in order to upgrade hotels and other services. The vulnerability of the tourist sector was illustrated by a drop in its bed nights due to the 11 September 2001 terrorist attacks on the US.

Seychelles may have a lot of similarities to the Maldives which includes a glorious tropical climate, pure crystal clear white sandy beaches, underwater beauty of flora and fauna, and spectacular diving sights. However, Seychelles is a different product and is marketed quite differently from the Maldives which has gained immense popularity as a sun, sand and sea destination. In the recent years Seychelles has given considerable importance to improve product quality in order to let the visitors afford value for money. Efforts have been also made to develop new niche markets, through the development of new products, including nature-based and ecotourism concepts. Niche products include sailing, diving, fishing, romance (honeymoons, weddings & anniversaries) and ecology.

	2000	2001	2002	2003
International Tourist Arrivals ('000)	130	130	132	122
Bed Capacity / Hotels & Similar Establishments	5,000	4,940	4,780	4,930
Tourist Bed nights ('000) / Hotels & Similar Establishments	946	926	897	833
Occupancy Rate (Percent)	52.0	51.0	51.0	46.0

Source: Ministry of Tourism & Transport, Republic of Seychelles

Table 35
Tourism Trends in Seychelles 2000 - 2003

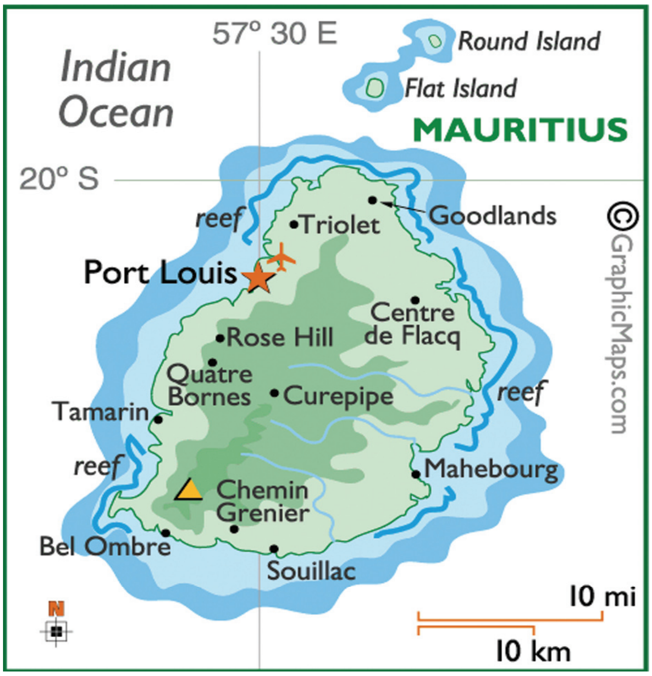
Seychelles also has a warm climate ranging at 24° C to 32° C with untouched forests, bird sanctuaries, exotic hideaways, fishing grounds, and its limited land-mass set aside as nature reserves and diversified attractions makes the country promote and brand the destination with the marketing campaign "as pure as it gets". Some of the other attractions and activities that visitors enjoy in Seychelles both on sea and land includes discovering the underwater world from glass bottom boats, sailing, snorkelling, surfing, world famous beaches watching scenic viewpoints, island hopping, horse riding, golf, tennis and casinos.

Similar to the Maldives Seychelles also captures a significant share of the European market. Its leading market in 2003 was France with 25,990 tourists followed by United Kingdom (19,139), Germany (15,903) and Italy (17,778) . Potential markets include South Africa and United States of America. WTO reports that Seychelles had difficulty to enter in the stiff price competition going on in the sector and faced a drop of 8% tourist arrivals in 2003. The total number of tourist arrivals during 2003 was 122,038.

The national airline of Air Seychelles operates regular scheduled flights to several international destinations such as London (Gatwick), Paris (Charles de Gaulle), Rome (Fumicino), Singapore, Munich, Zurich, Mauritius, Johannesburg, Dubai, Mayotte (territorial collectively of France), Maldives, Bombay and Comoros.

The monetary unit is Seychelles rupee (SCR) and the indicative exchange rate against 1US is about SCR 5.7458.

2. Republic of Mauritius



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Mauritius is of volcanic origin, sheltered for its major part by barriers of coral reefs forming natural, safe, crystal clear lagoons. It is situated approximately 2000 kilometers to the south – eastern coast of Africa and lies east of Madagascar on 20 S, 57.5 E. The land has an area covering 1,865-square kilometers. The coastline of 330 kilometers is almost entirely surrounded by one of the largest unbroken coral reefs in the world. Discovered by the Portuguese in 1505, Mauritius was subsequently held by the Dutch, French, and British before independence was attained in 1968.

The official languages are English, French and Creole where as Hindi is also widely spoken in everyday life. It offers a wide variety of products, has different cultures, religions and people. Mauritius with its diverse cultures and religions comes from the ancestral soils of India, Africa, China and Europe. Hinduism, Christianity, Islam and Buddhism are the most practiced religions.

The economy of Mauritius is based on the export of sugarcane, textiles and tourism. Mauritius is also one of the popular beach destinations similar to Maldives. However, there are several differences in its natural formation and marketing of both the destinations. Maldives is a low lying island archipelago which has a tropical climate through out the year. Whereas as in some parts of Mauritius, 600metres above sea level the average temperature varies from about 20° C to 26° C. The temperatures at the coastal areas are warmer as that of the Maldives. The population figure for 2003 was 1.19 million. The monetary unit of Mauritius is the Mauritian Rupee and the indicative exchange rate against 1US Dollar is MUR 27.27.

	2000	2001	2002	2003
International Tourist Arrivals ('000)	656	660	682	702
Bed Capacity / Hotels & Similar Establishments	17,776	18,350	19,597	19,727
Tourist Bed nights ('000) / Hotels & Similar Establishments	6,413	6,528	6,769	6,952
Occupancy Rate (Percent)	62.0	58.0	59.0	55.0
Average Length of Stay (days)	10.4	10.4	10.5	10.5*
Tourism Receipts (US$ mn)	508	597	619	711
Share of Tourism in GDP (%)	5.6	6.3	6.0	5.8
Gross National Product (US$ mn)	4,235	4,351	4,798	5,733

*Note: * Preliminary Estimates*
Source: Ministry of Tourism and Leisure for Permenant Secretary, Mauritius

Table 36
Tourism Trends in Mauritius 2000 - 2003

Despite the unfavourable international environment characterized by economic sluggishness in major source markets, wars and terrorist attacks and the recent SARS disease, the Mauritian tourism sector has shown resilience by registering positive growth rate in tourist arrivals and gross tourism receipts in 2003.

The total number of tourist arrivals for the year 2003 attained 702,018 representing an increase of 3.0% growth compared to 2002. Europe is accounted as the main market generator for Mauritius contributing 66.0% of total tourist arrivals in 2003. Similar to that of Maldives its major market generators are France, Germany, United Kingdom and Italy. India is the largest market of the continent which went up by 21.4% at the year end.

This positive result in the face of adverse world events has been possible being given (i) the maintenance of selective, low-impact, high-spending tourism policy; (ii) the maintenance of high quality standards and exclusivity of the destination; (iii) the versatility in adjusting the country's marketing strategy and making use of tactical advertising campaigns and; (iv) the shifting emphasis on safety and security of the destination.

One of the aspects of the Mauritian marketing strategy is to create a "Destination Mauritius" brand logo and slogan that would be an integral component of competitive positioning for both destinations and commercial enterprises. In terms of diversification of tourism products the potential for future golf course development on the island has been confirmed. A study is also being commissioned by the Ministry of Tourism and Leisure on a Tourism signage programme in the districts to attract and enhance the destination's touring experience for visitors.

The optimism of the tourism industry is based on the expectation of a gradual improvement of the economic conditions, the reduction of uncertainty as a result of relaxation of international tensions, and the waning of the SARS. Prospected growth for Mauritius is promising for 2004. It is estimated that tourist arrivals will reach 740,000 in 2004, representing a growth rate of around 5 percent.

3. Caribbean

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The Caribbean consists of a number of small magnificent island nations and territories. The Caribbean Islands are one of the premier tourist destinations. In 1492, Christopher Columbus landed in the Bahamas and became the first European to venture into the area. Long called the West Indies, it's now commonly referred to as the Caribbean, a name that became popular after World War II. The Caribbean is approximately 500 years old and the Indians and the Europeans are among the early explorers and inhabitants. The older civilization of the Americas and the people who arrived from Europe, Africa, and Asia has also contributed to the culture and history of these islands. The destination provides a charming architecture reflecting its past with a flavour of Europe, Dutch and the French.

It has a tropical climate – creatures, plants and landscapes unmatched in diversity and beauty. Caribbean offers an extraordinary wide range of exciting activities and attractions to its visitors in different islands: golf, hiking, sky diving, cruising, gambling in world-class casinos, honeymoon and weddings, big game fishing and scuba diving are some popular activities through out most of the region. Caribbean has world's third largest barrier reef and is one of its main attractions. Further more to add to its natural beauty and elegance as that of the Maldives, Caribbean Islands' peaceful society and non-existence of internal aggression makes it a dream holiday destination to the visitor for fun, enjoyment and relaxation.

The main markets for the Caribbean are mostly North Americans due to their proximity to the destination. However, the Caribbean also attracts a large number of Europeans and Japanese visitors. According to World Tourism Barometer, January 2004 issue by WTO the price competitiveness both in the European and in the American market benefited destinations in the Caribbean as more Americans saw them as a safe and inexpensive alternative to Europe and Asia. Five of the major Caribbean destinations, Puerto Rico (+5%), Cuba (+13%), Dominican Republic (+18%), Bahamas (+1%), and Jamaica (+7%), all recorded increases, while most of the smaller destinations also recovered positive ground in 2003.

Caribbean Tourism Organization (CTO) includes 34 remarkable destinations so rich and varied, which is the international development agency and the official body for promoting and developing tourism throughout the Caribbean. CTO work together with the destinations to encourage sustainable tourism that is sensitive to the economic, social and cultural interests of the Caribbean people, preserves their natural environment and provides the highest quality of service to their visitors.

SECTION III

Over View of World Tourism Trends and Regional Results

3.1 World Tourism Trends - Overview 2002

According to World Tourism Organisation (WTO) 2002 was certainly not an easy year and international tourism held up fairly well. Data collected by WTO from the vast majority of destination countries, the number of international tourist arrivals grew by 2.7 percent in 2002 after a decrease of 0.5 percent in 2001. And for the first time, the 700 million mark was surpassed and compared to the previous record year 2000 almost 16 million more arrivals were counted.

As per the study of WTO many destinations started the year in the negative, others managed to post increases. A gradual improvement was noticed over the months, although uncertainty continued to play a major role in the markets, under the threat of new terrorist attacks and the looming Iraq conflict. Additionally, the long awaited economic recovery, was not taking place as rapidly as initially expected, affecting in particular some of the most important generating markets.

Table 37

World's Top Tourism Destinations, 2002

International Tourist Arrivals (million)				
Rank		2002*	Change (%) 2002*/2001	Share(%)
1	France	77.0	2.4	11.0
2	Spain	51.7	3.3	7.4
3	United States	41.9	-6.7	6.0
4	Italy	39.8	0.6	5.7
5	China	36.8	11.0	5.2
6	United Kingdom	24.2	5.9	3.4
7	Canada	20.1	1.9	2.9
8	Mexico	19.7	-0.7	2.8
9	Austria	18.6	2.4	2.6
10	Germany	18.0	0.6	2.6
World Total		703.0	2.7	100.0

Source: Adapted from tourism Highlights 2003
World Tourism Organisation (WTO)

** Data as collected by WTO September 2003*

Except for the change in positions between Canada and Mexico, the ranking of the world's top 10 destinations by arrivals remained unchanged in 2002. France and Spain firmly lead the ranking, together accounting for more than 18 percent of all international arrivals, and the United States maintained its third position despite suffering declines consecutively for two years. China confirmed its importance as a growing world tourism destination and achieved the fastest growth among the Top 10 (+ 11%).

International Tourism Receipts (US$ billion)				
Rank		2002*	Change (%) 2002*/2001	Share(%)
1	United States	66.5	-7.4	14.0
2	Spain	33.6	2.2	7.1
3	France	32.3	7.8	6.8
4	Italy	26.9	4.3	5.7
5	China	20.4	14.6	4.3
6	Germany	19.2	4.0	4.0
7	United Kingdom	17.8	9.5	3.8
8	Austria	11.2	11.1	2.4
9	Hong Kong (China)	10.1	22.2	2.1
10	Greece	9.7	3.1	2.1
World Total		474.0	3.2	100.0

Source: Adapted from tourism Highlights 2003
World Tourism Organisation (WTO)

* Data as collected by WTO September 2003

Table 38
World's Top Tourism Earners, 2002

The United States remains the unchallenged leader among the world earners with US$ 67 billion, in spite of the crisis and the significant drop of almost 20 percent in receipts since 2000. Spain, France and Italy are follows the lead respectively. Among the top earners, Hong Kong (China), China and Australia performed strongest, all recording double digit growth in 2002.

International Tourism Expenditure (US$ billion)				
Rank		2002*	Change (%) 2002*/2001	Share(%)
1	United States	58.0	-3.6	12.2
2	Germany	53.2	2.4	11.2
3	United Kingdom	40.4	10.8	8.5
4	Japan	26.7	0.6	5.6
5	France	19.5	9.8	4.1
6	Italy	16.9	14.4	3.6
7	China	15.4	10.7	3.2
8	Netherlands	12.9	7.5	2.7
9	Hong Kong (China)	12.4	0.8	2.6
10	Russian Federation	12.0	20.5	2.5
World Total		474.0	3.2	100.0

Source: Adapted from tourism Highlights 2003
World Tourism Organisation (WTO)

* Data as collected by WTO September 2003

Table 39
World's Top Tourism Spenders, 2002

The ranking of the world's top spenders on international tourism remained virtually unchanged, except for the entry of the Russian Federation in the tenth position to the detriment of Canada. Expenditure by the regional leaders United States, Germany (in euro terms actually performing negatively) and Japan stagnated or only grew marginally in 2002, while the Russian Federation (+21%), Italy (+14%), China (+11%) and the United Kingdom (+11%) still added a double-digit increase.

3.2 Regional Results

1. Africa

Table 40
International Tourist Arrivals 2002

Major Destinations Africa	(1000) 2002*	Change (%) 2002*/2001	Share(%)
Algeria	998	10.7	3.4
Botswana	1,037	-1.1	3.6
Ghana	483	10.1	1.7
Kenya	838	-0.4	2.9
Mauritius	682	3.2	2.3
Morocco	4,193	-7.0	14.4
South Africa	6,550	10.9	22.5
Tanzania	550	9.8	1.9
Tunisia	5,064	-6.0	17.4
Zambia	565	14.8	1.9
Africa Total	29,136	2.8	100.0

Source: Adapted from tourism Highlights 2003
World Tourism Organisation (WTO)

** Data as collected by WTO September 2003*

In 2002, Africa recorded a 2.8 percent increase in international tourist arrivals to 29 million. By sub region and country results were rather mixed. North Africa experienced an overall decline of 20% because of decrease in its major destinations Tunisia (-6%) and Morocco (-1%). By contrast, many destinations of sub-Saharan Africa recorded sound results, most notably the region's top destination South Africa (+11%). International tourism receipts reached almost US$ 12 billion, corresponding to US$ 405 per tourist arrival.

Africa generally benefited from the fact that some of the sub-Saharan destinations were considered as "safe havens". South Africa saw an increase of 3% in tourist arrivals until September 2003, but demand has been losing some of its previous strength in the last months.

2. Americas

Table 41
International Tourist Arrivals 2002

Major Destinations Americas	(1000) 2002*	Change (%) 2002*/2001	Share(%)
Argentina	2,820	7.6	2.5
Brazil	3,783	-20.7	3.3
Canada	20,057	1.9	17.5
Chile	1,412	-18.0	1.2
Costa Rica	1,113	-1.6	1.0
Cuba	1,656	-4.6	1.4
Dominican Rp	2,811	-2.5	2.4
Jamaica	1,266	-0.8	1.1
Mexico	19,667	-0.7	17.1
Puerto Rico	3,087	-13.1	2.7
United States	41,892	-6.7	36.5
Uruguay	1,258	-33.5	1.1
Americas Total	114,855	-4.4	100.0

Source: Adapted from tourism Highlights 2003 World Tourism Organisation (WTO)

** Data as collected by WTO September 2003*

Destinations in the Americas in general continue to suffer declines in international arrivals in 2002 resulting in a decrease of the regional total by 4%. Declines were particularly significant in South America (-14%) and the Caribbean (-5%), induced mostly by the reduced outbound traffic from the United States and Argentina. Two of the main destinations, the United States and Mexico, show negative results, though Mexico performed well in terms of tourism receipts (+5%). Given its positive performance (+2%), Canada overtook Mexico as the second most important destination in the region. South America was plagued by the economic problems in the sub region, in particular in Argentina and Venezuela. Argentina's neighbours recorded considerable losses, most notably Uruguay (-34%) and Brazil (-21%). Argentina itself posted growth of 8%, due to the beneficial effect of the peso for international travellers. The Americas leads all regions in receipts in per arrival at almost US$1000, corresponding to a total of over US$ 114 billion.

2003 began for the Americas under the spectre of the pending war in Iraq. The US suffered the impact generated by the conflict with state security. Traffic also was considerably influenced by the change of colours from yellow (elevated) to orange (high) of the US Homeland Security Threat Advisory System Colour Code. Although the situation gradually relaxed, tension resumed a few times during the year and fear has not yet disappeared completely.

3. Europe

Table 42
International Tourist Arrivals 2002

Major Destinations Europe	(1000) 2002*	Change (%) 2002*/2001	Share(%)
Austria	18,611	2.4	4.7
Belgium	6,724	4.2	1.7
Croatia	6,944	6.1	1.7
France	77,012	2.4	19.3
Germany	17,969	0.6	4.5
Greece	14,180	0.9	3.5
Hungary	15,870	3.5	4.0
Ireland	6,476	1.9	1.6
Italy	39,799	0.6	10.0
Netherlands	9,595	1.0	2.4
Poland	13,980	-6.8	3.5
Portugal	11,666	-4.1	2.9
Russian Fed	7,943	7.3	2.0
Spain	51,748	3.3	12.9
Switzerland	10,000	-7.4	2.5
Turkey	12,782	18.5	3.2
Ukraine	6,326	9.2	1.6
United Kingdom	24,180	5.9	6.0
Europe Total	399,759	2.3	100.0

Source: Adapted from tourism Highlights 2003
World Tourism Organisation (WTO)

** Data as collected by WTO September 2003*

Europe booked a moderate increase of slightly over 2 per cent and reached a total of 400 million international tourist arrivals in 2002. Receipts grew to US$ 240 billion, corresponding to US$ 600 per international tourist arrival. Results are fair, taking into account the overall weak economy of the region, in particular of Germany. Top destinations, France and Spain, recorded increases respectively just around and slightly above the regional average. Turkey led in terms of growth with an increase of 19%, while the Russian Federation, Ukraine and other CIS countries in general also performed rather well. The United Kingdom bucked the negative trend of the past three years.

The economic situation in some of the major generating markets to Europe together with the conflict in Iraq determined tourism performance in Europe during 2003. Some important destinations were particularly affected by the decline in long-haul traffic caused by the war in Iraq, by SARS and by the increasingly weaker USD. With many major Western Europe and N.W Europe outbound markets in or close to recession: Germany, France, Italy, the Netherlands, Belgium, Norway, Denmark, Finland, and Switzerland all passed in 2003 with one or more quarters with negative GDP growth. Destinations in Western and Southern Europe generally suffered rather sluggish intraregional demand. Of the mentioned source markets, the weakest were Germany, Denmark, the Netherlands and Switzerland, all decreased expenditure on international tourism by 4% or over in the 9-10 months over which data is available.

The exchange rates USD/euro and GBP/euro also determined the distribution of flows within Europe, with Euro zone countries losing competitiveness to other destinations given the comparatively rising prices due to the continuously appreciating euro.

Destinations in France and Italy were also specially affected by the decline of traffic from US and Japan. In the case of France, factors such as strikes and fire waves also determined the negative results of the high season.

4. Asia and the Pacific

Table 43
International Tourist Arrivals 2002

Major Destinations Asia & the Pacific	2002*	Change (%) 2002*/2001	Share(%)
Australia	4,841	-0.3	3.7
China	36,803	11.0	28.0
Hong Kong (China)	16,566	20.7	12.6
India	2,370	-6.6	1.8
Indonesia	5,033	-2.3	3.8
Japan	5,239	9.8	4.0
Korea, Republic of	5,347	3.9	4.1
Macao (China)	6,565	12.4	5.0
Malaysia	13,292	4.0	10.1
New Zealand	2,045	7.1	1.6
Philippines	1,933	7.6	1.5
Singapore	6,996	4.0	5.3
Taiwan (Pr. of China)	2,726	4.2	2.1
Thailand	10,873	7.3	8.3
Asia & the Pacific Total	131,295	8.4	100.0

*Source: Adapted from tourism Highlights 2003
World Tourism Organisation (WTO)*

** Data as collected by WTO September 2003*

Asia and the Pacific continued its vigorous performance of the past years with an increase of 10 million international tourist arrivals to 131 million (+8%). International tourism receipts amounted to US$ 95 billion or US$ 720 per arrival. The region is profiting from strong intraregional demand and has not been very much affected by the weak economy of Japan, traditionally its major generating market. New emerging markets such as China, Hong Kong (China), the Republic of Korea, Taiwan (P.R of China) and Singapore are increasingly taking over the role of the motor of tourism in the region. Northeast Asia led all subregions with 12 per cent growth in international tourist arrivals, with China (+11%), Hong Kong (China) (+12%) and Japan (+10%) all recording double-digit increases. The solid growth of Northeast Asia in recent years is very much the reflection of the growing role of China as both tourism destination and generating market to neighbouring countries. Southeast Asia and Oceania grew at more moderate rates of 5 per cent and 1 per cent respectively. South Asia, which declined by 4.5 per cent in 2001, recorded a 1 per cent increase in 2002.
SARS clearly dominated the tourism results in Asia and the Pacific in 2003. After a positive beginning for most countries in January and February, the following months brought decrease of over 50 percent. Although recovery was generally quick, most of the major destinations in North-East region and South-East region have not or will not be able to return to end the year positively. Monthly data can be observed that destinations in North-East Asian destinations seem to recover more quickly compared to South-East Asian destinations.

The South-Asian destinations by contrast look back on a rather prosperous period. Sri Lanka (+24%), Nepal (+22%), Maldives (+16%), India (+15%), and Bangladesh (+14%), all posted double- digit increases, leaving behind the two difficult years that preceded.

5. Middle East

Table 44
International Tourist Arrivals 2002

Major Destinations Middle East	(1000) 2002*	Change (%) 2002*/2001	Share(%)
Bahrain	3,167	13.6	11.5
Egypt	4,906	12.6	17.8
Jordan	1,622	9.8	5.9
Lebanon	956	14.2	3.5
Saudi Arabia	7,511	11.7	27.2
Syrian Arab Republic	2,809	-	10.2
United Arab Emirates	5,445	31.7	19.7
Middle East Total	27,594	16.7	100.0

Source: Adapted from tourism Highlights 2003
World Tourism Organisation (WTO)

** Data as collected by WTO September 2003*

In spite of the continuing difficult conditions, the Middle East rebounded surprisingly strongly in 2002. After the loss of 1 per cent suffered in 2001, the region grew by 17 per cent to a total of almost 28 million international tourist arrivals. All major destinations consistently show double-digit increases, ranging from 10 for Jordan to 32 per cent for United Arab Emirates. This evolution can on one hand be seen as the result of the substantial investment in tourist infrastructure in the region, and on the other hand as the reflection of the strong potential of the intraregional market, with Saudi Arabia becoming an important player, not only as a destination but also as a source market. International tourism receipts for the region grew to US$ 13 billion, corresponding to US$ 470 per international tourist arrival.

It is interesting to note that in the Muslim countries of both Africa and Middle East the month of November 2003 shows a peak because of travel related with the end of the Ramadan, while the two preceding months were generally much weaker.

With the preliminary data received for the limited destinations Egypt, managed to post positive results (+22%, expressed in USD), probably as a result of the increase in demand from Middle East source markets. Lebanon also reported 6 percent increase in visitor arrivals.

SECTION IV

Tourism Highlights and Functional Responsibilities

4.1 Tourism Highlights 2003

1. Recreational Diving Regulation

A Seminar on Maldives Recreational Diving was held on 25th February 2003 in the seminar room of Youth Centre. The objective of the Dive seminar was to provide information on the new dive regulations of the Ministry of Tourism and to identify important issues within the dive industry. The Seminar also gave the opportunity for participants to interact with other operators in the industry. This regulation was effective from 31st March 2003 and some clauses of the regulation are being reviewed.

2. Visit of Malaysian Officials

At the request of the Ministry of Culture and Tourism of Malaysia, from a Malaysian company, I. N. G. Shapan visited Maldives between 22nd and 26th February 2003. The purpose of the visit by this four member team was to learn the different approaches, systems and standards adhered in the Maldives and to make most out of it to the tourism industry of the different states of the Malaysian Peninsula. Two from the team also visited some of the resorts for data collection.

3. Seminar on Tourist Safety Measures

A Seminar was conducted jointly by the Ministry of Defence and National Security and the Ministry of Tourism to examine the threats faced by terrorism to the tourism industry. It was held on 6th January 2003 at Nasandhura Palace Hotel. The purpose of this seminar was to disseminate information and to answer queries from resort operators / owners with regard to conducting a Tourist Security Survey. This Tourist Security Survey was carried out in eight tourist resorts commenced on 29th January 2003. The objective of this survey was to study the vulnerability of tourist establishments to terrorist attacks and also to examine the threats facing the industry due to other sources as well as from natural disasters.

4. Photo Exhibition

A Photo Exhibition was held at Dharubaruge from 25th - 28th February 2003. The exhibition was officially opened by His Excellency President Maumoon Abdul Gayoom. This was an exhibition mainly showcasing 30 years of tourism in the Maldives, photographed by Mr. Michael Friedel. Mr. Michael Friedel a German national started his career in 1950. And he is said to have taken more than hundred thousand pictures so far. He had earned many prestigious awards and accolades for his exceptional work.

5. Coral Spawning

A six member team at Banyan Tree Maldives Vabbinfaru has directly observed coral spawning for the first time in the history of Maldives. The Banyan tree team was lead by Dr. Andrew Hayward from Australia and Mr. Abdul Azeez Abdul Hakeem a local Marine Environment Advisor. The observation was successfully organized after researchers from Banyan Tree Maldives Vabbinfaru and Ministry of Fisheries Agriculture and Marine Resources of Maldives monitored maturation of the corals and predicted a possible spawning during the week of the full moon in March 2003.

The team mainly concentrated on Acroporas which was placed along the entrance used by the divers in Banyan Tree Maldives. The full moon due on 18th March 2003 became the prime target of Banyan Tree team as it is internationally found normal for corals to spawn in rhythm with the cycle of the moon. The corals spawn 5 days after the full moon, in total darkness without moonlight on 23rd March 2003. The eggs were said to be pink in colour and released white, thick liquid. At the same time policute worms also came out of the ground to spawn.

6. Memorandum of Understanding Signed

The Government of the Republic of Maldives and the Government of the Democratic Socialist Republic of Sri-Lanka has signed a Memorandum of Understanding on 6th May 2003. This Understanding was signed to develop the mutual co-operation in the field of Tourism and to encourage promoting the tourism. From the Republic of Maldives Minister of Foreign Affairs Honourable Mr. Fathuhullah Jameel and from Republic of Sri-Lanka Foreign Minister Honourable Mr. Tiroan Fenando signed the Memorandum of Understanding.

7. Whale and Dolphin Watching

The Maldives: Home for 21 species of whales and dolphins.
A series of whale and dolphin watching surveys were carried out in the Maldives from March - April 2003. During this period more than 14000 individual whales and dolphins of 16 different species have been sighted in the Maldives in 356 separate encounters. Whales and dolphins are well-protected species in the Maldives since 15th May 1993 and the islands have become a safe sanctuary for whale and dolphin populations of different kinds.

8. O'Neill Deep Blue Open 2003

The O'Neill Deep Blue Open 2003, the prestigious 5 star World Qualifying Series Prime Surf event has taken place in the Maldives from 9th -15th June 2003. The competition kick-started with a colourful opening ceremony held traditional Maldivian style in Lohifushi Island Resort. Once again, the Maldives was proud and lucky to offer the very best of island surfs for more than 176 eager international surfers who travelled to Maldives to participate in the event. Australia's Trent Munro topped the finals by winning O'Neill Deep Blue Open 2003 banking a hefty US$12,000 cheque. The Brazilian talents Paulo Moura, Raoni Monteiro and Rodrigo Dornelles occupied three of the four final berths leading second, third and fourth places respectively. The competition was judged by eight foreign and two Maldivian judges.

9. Visit of Malaysia's Chief Minister

Malaysia's Chief Minister of Melaka Hon. Datuk Seri Mohamed Ali Mohamed Rustham visited Maldives with a four member delegation team from the 1st - 3rd September 2003. The Chief Minister also visited some tourist resorts; Paradise Island Resort, Four Season Resort Maldives at Kuda Hura, Baros Holiday Village, Banyan Tree and Fullmoon Beach Resort to familiarize himself with the Tourism Industry of Maldives.

10. Survey on Uninhabited Islands

Officials from the Ministry of Tourism, Ministry of Construction Public Works and Ministry of Home Affairs, Housing and Environment and other participants from related tourism fields participated in the survey conducted from 7th September - 16th October 2003. In preparation of the second phase of the second Tourism Master Plan, Ministry of Tourism and the concerned authorities of the government surveyed the uninhabited islands and the reefs of the Maldives. In this survey more importance was given to areas near the regional airports and atolls where tourism activities are not developed at present. The survey team collected and documented technical information related to uninhabited islands and their surrounding atmosphere. The team surveyed uninhabited islands and reefs of Thialdhunamthi Atoll, Miladhunmadulu Atoll and Kolhumadulu Atoll. The project on surveying the islands and reefs commenced on August 2002 and other atolls already surveyed includes, Huvadhoo Atoll, Hadhunmathee Atoll and Addu Atoll. Within the last two years 324 uninhabited islands were surveyed from nine atolls.

11. All Atolls Open for cruising

Holidaying on a boat or dive safari is the best way to explore the hidden beauty of the Maldives islands. From August 2003, all 26 atolls in the Maldives had been opened for cruising by local safari operators in the country. Until the introduction of this open policy, the local safaris were allowed to travel only within those atolls where tourist resorts were developed. Now more than ever, our visitors will be able to enjoy the diversity of the destination, discover the magnificence of untouched dive sites and new surfing points, or interact with inhabitants of Maldives to experience the historical ways of life still present within the archipelago of 1190 islands.

12. Half a Millionth Tourist Arrival

Since tourism started modestly in the Maldives in 1972, the Maldives for the first time celebrates the arrival of 500,000 tourists to the country on 26th November 2003 by Euro fly; a charter flight that operates from Malpensa in Italy to the Maldives. The lucky visitor chosen as the 500,000th tourist was Ms. Valeria Vavassori from Italy. This was Ms. Vavassori's first visit to the Maldives. She spent her holidays in Machafushi Island Resort.

This remarkable achievement on Maldivian tourism was marked with colourful traditional dances and vibrant beats of the 'boduberu' (traditional Maldivian drums) performed at the arrival hall of Malé International Airport. The Minister of Tourism offered the winner with 2 free holidays in the Maldives for two persons as well as two First Class Round-the-World tickets. The free gifts had been presented by Honourable Mr. Hassan Sobir, Minister of Tourism at the Maldivian Evening for Borsa Internazionale del Tourismo (BIT) fair held on 14th February 2004 at Marriott Hotel in Milan, Italy.

13. Awards

The following are the awards presented by the President of Maldives, His Excellency Maumoon Abdul Gayoom on the occasion to mark World Tourism Day ceremony at Maldives Centre for Social Education on 1st October 2003.

1. President of Maldives National Award

The President's Award of Honour for Outstanding Service to the public in the tourism industry for the year 2003 was received by Mr. Ahmed Saleem of H. Gadhamoo. Mr. Saleem graduated as an architect and was the first architect in the Maldives. He has played a vital role in the design and development of many resorts in the Maldives.

2. President of Maldives Green Resort Award 2003

The Green Resort Award is an annual presidential recognition given to the best environmentally performing tourist resort in the Maldives. The award aims to generate environment consciousness, reward good practices of resort hotels and thereby facilitate sustainable tourism development. The Green Resort Award is a visionary initiative of the President of Maldives and was first presented in 1999. Thereafter annually this award has been a limelight of the Tourism Day function. In 2003 the president of Maldives Green Resort Award was won by Sun Island Resort at Nalaguraidhoo Island in South Ari Atoll.

3. President of Maldives Human Resource Award 2003

In recognition to the importance of Human Resources in the industry, the government established a prestigious annual award to be given to the tourist establishments, which undertake the best initiative and programs to develop human resources, was won by Bandos Island Resort.

4. President of Maldives Occupancy Award 2002

The main objective of Occupancy Award is to give recognition to the effort of the tourism industry in maintaining a high tourist bed occupancy which is one of the quantitative indicators of industry performance. As for this award, the past year's award is always given away in the following year. The President of Maldives Occupancy Award for 2002 has been presented to the following:

1. Athuruga Island Resort achieving 86.4% occupancy rate in the cat egory of less than hundred beds.
2. Vilu Reef Beach & Spa Resort achieving 94.9% occupancy rate in the category of 100-199 beds.
3. Meeru Island Resort achieving 99.9% occupancy rate in the category of over 200 beds.

14. Certificate of Recognition for Internal Awards/Certificates achieved by Resorts/Hotels

Ministry of Tourism officially recognises the international awards and certificates, achieved by Resorts and Hotels in the Maldives. These certificates were also presented by the President of Maldives, His Excellency Maumoon Abdul Gayoom.

1. Sonevagili Resort & Spa, K. Lankanfushi
The Hotel of the Year 2003 presented by Tatler Magazine, UK

2. Hilton Maldives Resorts & Spa, Rangali Island, ADH. Rangali
The Runner up for Hotel of the Year 2003 presented by Tatler Magazine, UK

3. Coco Palm Resort & Spa, B. Dhunikolhu
1. No. 1 Resort in the best resort Hotel, Over Seas 2003 presented by marine Arts Centre Company Ltd, The Dive and Travel Awards Committee, Japan
2. Green Globe 21 Benchmarked Certificate presented by Green Globe Asia Pacific
3. TUI Holly Award 2002 presented by TUI, Germany

4. Nakatchafushi Tourist Resort
TUI Holly Award 2002 presented by TUI, Germany

5. Baros Holiday Resort
TUI Holly Award 2002 presented by TUI, Germany

6. Villu Reef Resort & Spa, Dh. Meedhuffushi
Partners in Excellence-Highly Commended, Best JMC All Inclusive Longhaul 2002 presented by Thomas Cook, UK

7. Hakura Club, M. Hakuraa Hura
Partners in Excellence-Highly Commended, Best JMC All Inclusive Longhaul 2002 presented by Thomas Cook, UK

8. Meedhupparu Island Resort
Partners in Excellence-Highly Commended, Best JMC All Inclusive Longhaul 2002 presented by Thomas Cook, UK

9. Sun Island Resort, A. Dh. Nalaguraidhoo
Partners in Excellence-Highly Commended, Best JMC All Inclusive Longhaul 2002 presented by Thomas Cook, UK

10. Olhuveli Beach 7 Spa Resort

1st Prize of Best Beach 2003 presented by Marine Arts Centre Company Ltd, The Dive and Travel Awards Committee, Japan

11. Taj Coral Reef Resort, K. Hembadhu

Excellence of Service in the Maldives 2002 presented by Tropical Places UK

12. Vilamendhoo Island resort

Best Diving Resort in the Maldives 2002 presented by Tauchen, Germany

13. Filitheyo Island Resort

Best Divers Hotel WorldWide 2002 Presented by Tauchen, Germany

14. Hulhule Island Hotel

The ISO 9001:2000 Certification, quality Management Systems presented by Sri-Lanka Standards Institution and RVA, Netherlands

15. The Maldives: An island nation's advancement into the future

While the Maldives undergoes developmental progress and transformation as an advancing South Asian Nation, the people re-elected President Maumoon Abdul Gayoom for another presidential term of five years. The President was sworn-in for a new term of office on 11th November 2003 and made appointments to the governing posts following the inauguration of the new presidential term held in Male' the capital of Maldives. Hon. Mr Hassan Sobir was appointed for the portfolio of Minister of Tourism for a second term.

The Maldives has experienced tremendous development progress as a nation in the last twenty five years. Tourism remains to be country's main income generator with very favourable growth rates in tourist arrivals, in spite of complexities facing the global travel market. With the increasing popularity of the Maldives as a unique and exclusive destination, the nation consisting of 1,190 magnificent coral islands had already welcomed 563,593 tourists by end of the year 2003.

16. Visit of Indonesian Officials

Fifteen delegates from Ministry of Culture and Tourism, Indonesia visited to Maldives on an official tour during 8th - 12th December 2003. The purpose of the visit was to study the development achieved by Maldivian tourism industry. Minister of Tourism Hon. Mr. Hassan Sobir, officials of the Ministry and Maldives Tourism Promotion Board (MTPB) and members of Maldives Association of Tourism Industry (MATI) met with the delegates. The Delegation visited Giraavaru Tourist Resort, Four Season Resort Maldives at Kuda Hura, Lhohifushi Tourist Resort, Taj Exotica Resort & Spa Maldives, Embudhu Village, Olhuveli Beach & Spa Resort, Fun Island Resort, Meeru Island Resort, and Kanifinolhu Tourist Resort to get familiarized on Tourism Industry of Maldives. They also visited K.Atoll Hura an inhabited island to experience the local life.

17. Resort Classification System

Maldives has experienced rapid growth in the tourism industry and today new concepts are becoming more popular in the world market. For the industry to compete internationally, resorts need to be classified in a consistent manner. Ministry of Tourism made public announcement for handling of the project on classification of resorts for bidding during 2003. The bid proposals submitted by the parties were not satisfactory to the Ministry. Hence the Ministry is seeking technical assistance from the World Tourism Organisation to undertake the study. Such a system is expected to be developed in the near future.

18. Introduction of "Travel and Tourism"

For the first time in the Maldives, "Travel and Tourism" as a subject had been introduced, for the academic year 2003 at Secondary School level. The purpose of introducing a tourism subject at school level is to create interest among the students and to learn about Maldives tourism industry. As a pilot programme in 2003, travel and tourism was taught as an optional subject for all grade eight students of Aminiyya, Majeedhiya and Dharumavantha Schools.

19. Sharks – Extending on the Recreational Value

Annually thousands of holiday-makers travel to the Maldives because of the warm, clear water, extensive coral reefs and rich underwater fauna. Particularly the diving excursions to the sharks are a great fascination for visitors to the Maldives. There are over 37 species of sharks recorded in the Maldives and many more are expected to occur. Whale shark is among the protected marine species in the Maldives including whales and dolphins.

The government of Maldives recognising the value of sharks as a tourist attraction has established protection measures to facilitate conservation and sustainable fisheries. One of these steps is the establishment of a no shark fishing zone in the main tourism zone that includes 7 atolls since 1998; these atolls are Baa Atoll, Lhaviyani Atoll, Male' Atoll, North & South Ari Atolls, Vaavu Atoll and Seenu Atoll. Another important development is the establishment of protected dive sites since June 1995. There are currently 25 popular dive sites declared as marine protected areas.

Recently a "Shark watch" program has been launched by the Ministry of Tourism to create awareness on the importance of shark species for the tourism industry. The program aims to identify the interest of the tourists visiting Maldives on sharks, their sighting information and general species types through sighting cards collected from tourist resorts, dive centres and live-aboard vessels. The program is implemented with the support from the Marine Research Centre Maldives, the dive centres and the tourism industry.

Maldives shark protection measures have been popular with the tourism industry and there is a recent tourism industry initiative, Blackfin Reef Shark Project organised by the Banyan Tree Maldives Vabbinfaru in collaboration with ReefQuest Centre for Shark Research, University of British Columbia. The study will examine the behaviour, population structure and dynamics of this shark species. The project will create unique opportunities for guests of the resort to participate in the on-going research and it will also increase awareness of the importance of the Blacktip Reef and other sharks to Maldivian marine ecology.

4.3 Main Functions of the Various Sections in the Ministry of Tourism

MINISTER'S BUREAU

From Left to Right: Mr. Mohamed Saeed (Deputy Minister of Tourism), Hon. Mr. Hassan Sobir (Minister of Tourism) and Ms. Dheeniya Mohamed (Secretary).

- Preparation and management of the Minister's daily appointments and programs
- Coordination and liaison with tourism membership organizations and international agencies
- Administration and coordination of Minister's official trips and that of visiting delegations and dignitaries hosted by the Ministry.
- Attend to both local and international general inquiries and Ministers communications.
- Coordination and arrangement of Senior Staff Meetings of the Ministry
- Maintenance of personal records and communications of the Minister and the Deputy Minister

ADMINISTRATION SECTION

From Left to Right: Mr. Ali Waheed (Senior Secretary), Ms. Fathmath Nasma (Secretary), Ms. Aishath Shenin (Secretary), Ms.Fathmath Rasheeda (Senior Secretary),Ms. Aishath Rauf (Assistant Secretary), Ms. Aminath Manike (Massakath) and Mr. Mohamed Imad (Senior Messenger)

- Overall administrative operation of the Ministry
- Management of incoming and outgoing mails and maintaining all correspondence records.
- Maintenance of Government communication Master files and the central filing system.
- Maintenance of staff attendance, staff personal files and employment records
- Managing human resource requirement of the Sections of the Ministry and execution of the employment regulations.
- Compilation and preparation of the daily minutes and records of important events
- Compilation and preparation of the Annual Report of the Ministry.

FINANCE SECTION

- Preparation, maintenance and record keeping of annual budgets and financial accounts of the Ministry.
- Preparation of reports that are required by Ministry of finance and Audit office, as per Government of Maldives Accounting Manual.
- Collection of Accounts Receivables and settlement of Accounts Payables
- Maintenance of daily income and expenditure transactions, cash in hand and cash at bank and safeguarding the assets of the Ministry.
- Disbursement of monthly salary for the Ministry's staff.
- Purchasing of goods and services requested by the various Sections of the Ministry
- Carrying-out office building and equipment maintenance work and maintenance of the Network, Intranet, Internet, and the Database of the Ministry.
- Keeping of records of the Ministry's inventory and safeguarding assets against theft, mislaid, and misuse.
- Maintenance of stock and keeping of records of all the stock items as required by the Government of Maldives Accounting Manu

From Left to Right: Mr. Mohamed Mifthah (Assistant Accounts Officer), Ms. Ashiya Nargis (Accounts Officer), Mr. Yazeed Mohamed (Assistant Director Finance & Head of Section), Mr. Hassan Zameel (Senior Budget Officer) and Ms. Hannath Ahmed Badheeu (Secretary)

LEGAL AFFAIRS AND REGISTRATION SECTION

- Registration of tourist resorts, tourist hotels, tourist guest houses, tourist vessels, dive centers, and similar tourist establishments.
- Execution of agreements pertaining to places and islands leased by the government, and supervising all matters related to the said agreements.
- Implementation of all laws and regulations on tourism.
- Regulation of all matters relating to tourists, including the problems faced by those who visit Male; the capital of the Maldives.
- Imposition of penalties on those who fail to pay the tourism tax and resort lease rent.
- Imposition of penalties on those who breach laws on tourism and the related regulations.
- Supervision and issuing of licenses to travel agencies and similar places and regulating these institutions.

From Left to Right: Mr. Faseeh Zahir (Legal Assistant), Ms. Aishath Sheeza (Legal Officer (T)), Mr. Ali Niyaz (Senior Legal Officer & Head of Section) and Ms. Mariyam Tina (Legal Officer (T))

PLANNING AND DEVELOPMENT SECTION

From Left to Right: Ms. Suzana Thaufeeq (Assistant Planning Officer), Ms. Riva Hussain (Assistant Under Secretary), Mr. Ismail Firag (Deputy Director Planning and Development & Head of Section), Mr. Yusuf Riza (Assistant Director) and Ms. Aminath Shaneez (Assistant Planning Officer)

- Formulation and implementation of tourism development policy including preparation and implementation of tourism master plans and short-term action plans for tourism development.
- Co-ordination on all matters related to survey and selection of new zones / islands / facilities for tourism development.
- Preparation of tender documents for the development, evaluation of submitted bid proposals and lease of new facilities, in line with the prevailing policy for tourism product development
- Assessment of HRD requirement of the tourism sector, facilitation of human resource development and administration of training standards, in coordination with the concerned authorities.
- Co-ordinate participation and processing of all scholarships and training programs, and international seminars, workshops and conferences relevant to the tourism industry.
- Co-ordinate with the relevant government authorities in the preparation of national development plans and similar planning activities, and provide all necessary input related to tourism sector

TRADE STANDARDS SECTION

From Left to Right: Ms. Aishath Yaadha (Assistant Planning Officer), Mr. Mohamed Adly (Assistant Planning Officer), Mr. Hassan Amroo (Planning Officer (T)), Mr. Ahmed Solih (Deputy Director Trade Standards & Head of Section), Mr. Ahmed Janah (Planning Officer (T)), Ms. Fathmath Naziya (Planning Officer) and Ms. Aminath Nuzla Hameed (Planning Officer (T))

- Evaluation of development plans and proposals for compliance to standards of the Ministry
- Issuance of construction and tourism development permits for new and upgrading projects and
- Develop and review standards and regulations for the development and operation of tourist facilities.
- Inspection of tourist facilities for compliance to developmental, operational and service standards set by the Ministry.
- Implementation of government subsidies on the tourism sector, such as granting import duty concession on tourism development projects.
- Record keeping of incidents and accidents in tourism facilities and liaison with other government agencies.
- Review and dissemination of information relating to tourist facility services.

ENVIRONMENT SECTION

- Facilitation and processing of environment impact assessment (EIA) for tourism development projects in conformity with Environment Protection and Conservation Act of Maldives.
- Development of appropriate environment standards, regulations and guidance for the development and operation of tourist facilities in an ecologically sustainable manner.
- Evaluation and processing of environmental protection and coastal construction projects proposed for tourist facilities.
- Identification of suitable environmental technology requirements and facilitate application in tourist facilities for the sustainable development of tourism.
- Monitoring of environmental performance and ensure implementation of environmental standards in tourist facilities.
- Monitoring and management of tourism conservation sites and designated protected dive sites under management of the Ministry of Tourism.
- Act as the environmental focal point of the Ministry.

From Left to Right: Mr. Moosa Zameer Hassan (Assistant Director & Head of Section), Ms. Aminath Fazla (Environment Officer (T)) and Mr. Mohamed Imdhah (Environment Officer (T))

STATISTICS SECTION

- Collection, computation and maintenance of tourism statistical data.
- Compilation and provision of statistical information required by National Accounts System and by the government authorities, international and private agencies.
- Compilation and issuance of monthly and annual reports on tourist arrivals, tourist bed-nights, bed capacity, bed occupancy and average duration of stay.
- Publication of Annual Tourism Statistics Report based on tourism indicators and industry performance.
- Compilation and generation of annual reports on Annual Employment and Wages Report of the Tourism Sector.
- Preparation of Tourism Indicator Projections
- Execution of international visitor surveys and preparation of reports based on it.
- Publication of quarterly News Brief of the Ministry and news release on monthly performance of tourism indicators.
- Act as the focal point for tourism data collection and dissemination.

From Left to Right: Ms. Ikleela Ismail (Senior Research Officer & Head of Section), Ms. Mariyam Sharmeela (Assistant Statistical Officer) Mr. Ghiyas Abdul Bari (Statistical Officer) and Ms. Mariyam Ramzee (Assistant Statistical Officer)

Maldives Government Tourist Information Office (MGTIO)

Maldives Government Tourist Information Office (MGTIO) / Fremdenverkehrsamt der Malediven in Frankfurt, Germany was opened on 30 August 1997. It is the representative office of the Ministry of Tourism / Maldives Tourism Promotion Board (MTPB). MGTIO was opened in Germany in order to liaise with MTPB, to carry out tourism promotion and public relation activities in Europe. It is the only government office opened in European region for the purpose of marketing the Maldives as a tourist destination.

MGTIO is responsible for undertaking market analyses in the region, report compilation on generating market performance, dissemination of information on Maldives, organising and executing participation of the country in promotional fairs held in Europe, organisation and provide assistance in familiarisation trips of trade visitors and journalists.

From Left to Right: Mr. Ibrahim Asim (Acting in Charge) and Ms. Helga Saxler (Office Assistant)

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Explanatory Notes and Definitions

The explanatory notes and definitions in this publication are used as per WTO recommendations and some of the terminologies are specific to the use of data provided in this publication itself. 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”.

Tourist (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 passengers

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

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

Average length of stay:

The average time in days spent by the tourist during the time of visit

Tourism Revenue:

Tourism revenue refers to the sum of payments made to the government by the operators/owners as lease rent, and bed tax

Tourism Expenditure:

Tourism expenditure refers to the sum of government allocated budget for the purpose of tourism development and promotion activities

Tourism Receipts:

Tourism receipts refers to the expenditure of tourists

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