

Measuring tourism industries in the Maldives

challenges and solutions



Agenda

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- **Introduction**
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- **Inbound tourism**
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- **Employment in tourism industry**
- **Challenges**



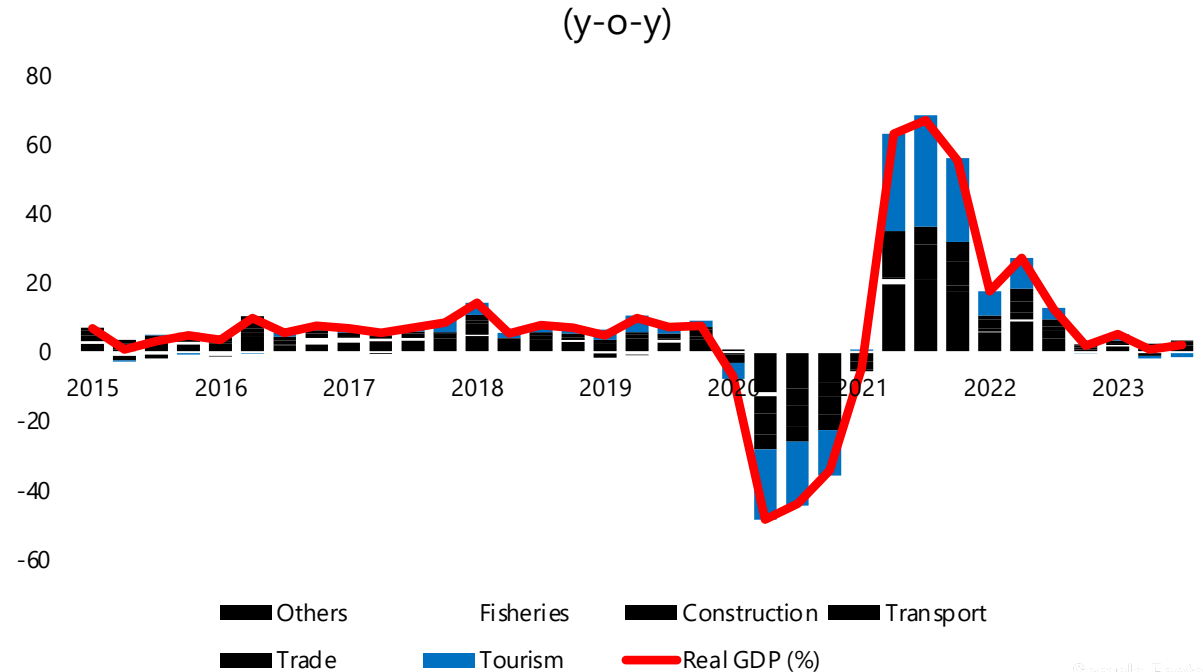
Introduction³

The tourism industry is the backbone of the Maldivian economy. Dating back to the early 1970s, the country developed two islands as resorts in 1972.

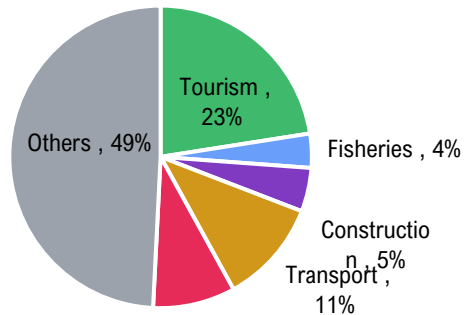
Real GDP growth



Contribution to Real GDP Growth by Sector, 2015-2023



Contribution to real GDP 2022, by sector



Data Sources

- Preliminary 2017 Supply and Use Tables (unpublished)
- Tourism GST data from the Maldives Inland Revenue Authority (MIRA)
- 2017 Maldives Visitor Survey
- 2016 Study on Domestic Tourism
- Published tourism data and statistics from the Ministry of Tourism (MOT)
- Balance of Payments from the Maldives Monetary Authority (MMA)
- 2016 Household Income and Expenditure Survey (MBS)
- 2014 Census data (MBS)
- Various Resorts data from Maldives Association for Tourism Industries (MATI)
- Various Financial statements
- Hajj Tourism data from Maldives Hajj Corporation Limited



2017

Tourism Satellite Account
and
Tourism Input Output
Indicators of The Maldives

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Methodology

Using the data sources and the recommended methodological framework, the 2017 TSA of Maldives provides a detailed presentation of expenditure or consumption in terms of goods and services acquired by visitors and the industries that produce them.

1. **Inbound tourism expenditure**
2. **Domestic tourism expenditure**
3. **Outbound tourism expenditure**
4. **Internal tourism consumption**
5. **Production accounts**
6. **Employment in the tourism industries**

2017

Tourism Satellite Account
and
Tourism Input Output
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Classification

2017

Tourism Satellite Account and Tourism Input Output Indicators of The Maldives

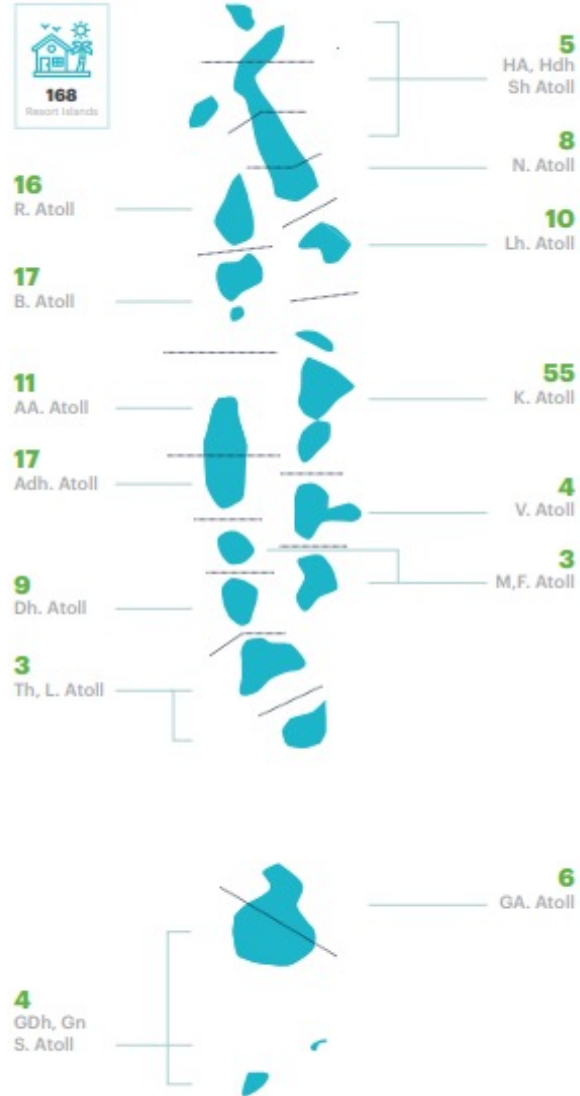
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List of tourism characteristic products, activities, and industry in SUT

Products	Activities	Industry in SUT 2017
Accommodation services for visitors	Accommodation for visitors	Resorts Other accommodation services
Food and beverage serving services	Food and beverage serving activities	Food and beverage services
Land passenger transport services	Land passenger transport	Land transport
Water passenger transport services	Water passenger transport	Water transport
Air passenger transport services	Air passenger transport	Air transport
Travel agencies and other reservation services	Travel agencies & other reservation service activities	Warehousing & support activities for transportation Administrative and support service activities
Cultural, sports, and recreational services	Cultural, sports, and recreational activities	Arts, entertainment and recreation & Other service activities

Total Number of Resorts by Atoll



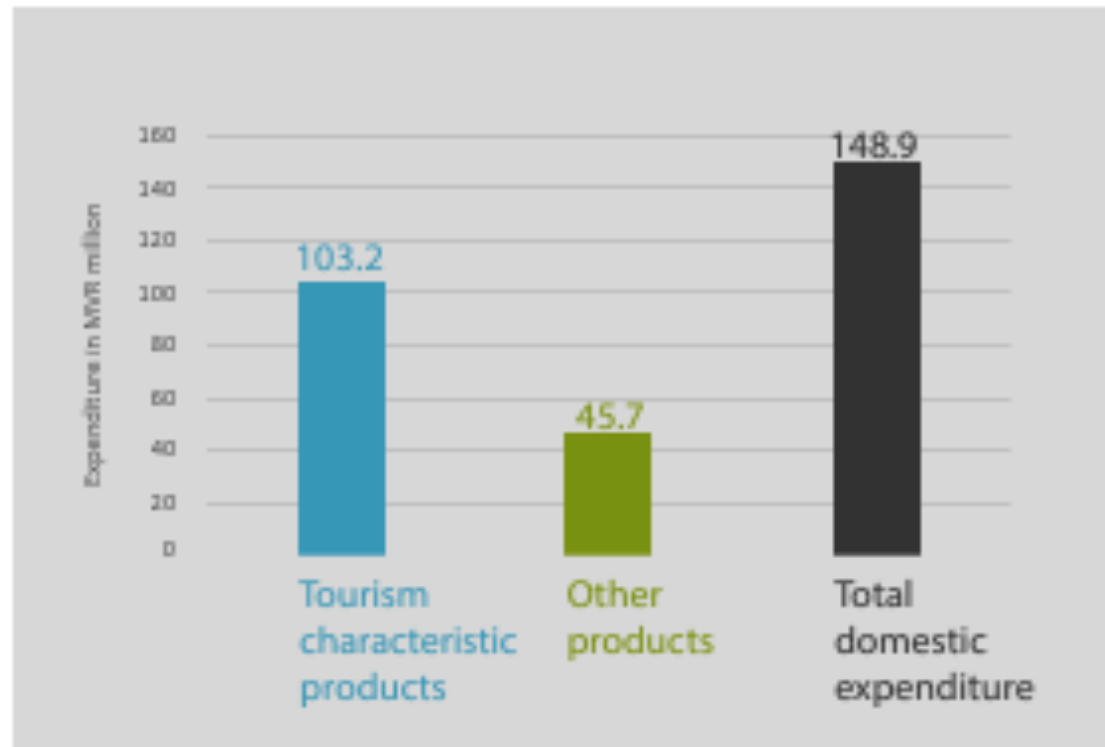
Kaafu Atoll holds the highest number of resorts (**55**), Trailed by Baa Atoll and Alif Dhaal Atoll (**17** resorts each) Conversely, Haa Dhaal, Faafu, and Thaa Atoll each had a solitary resort island

RESULTS

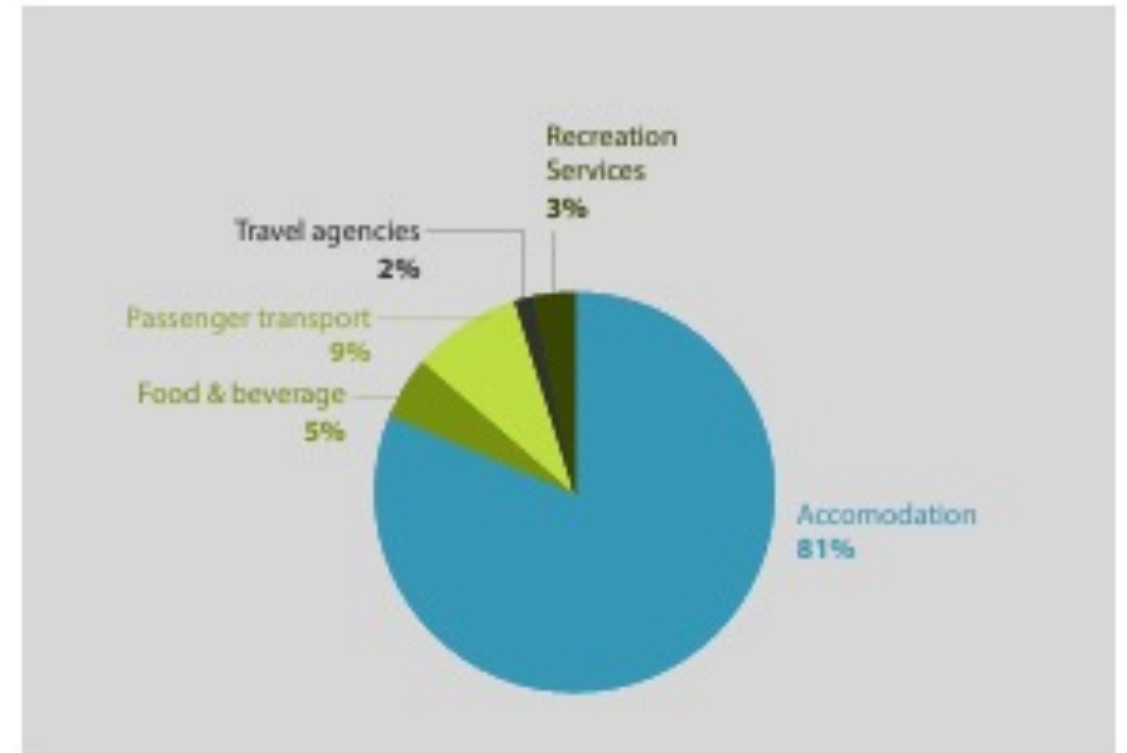


INBOUND TOURISM

Inbound tourist expenditure by type of products, 2017

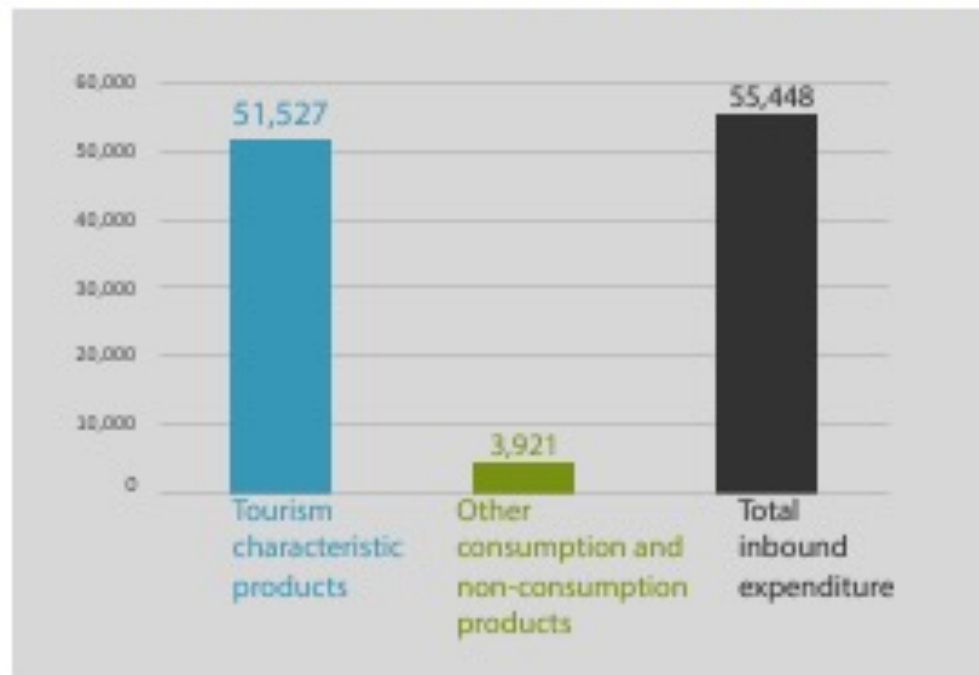


Share of tourism characteristic products, 2017



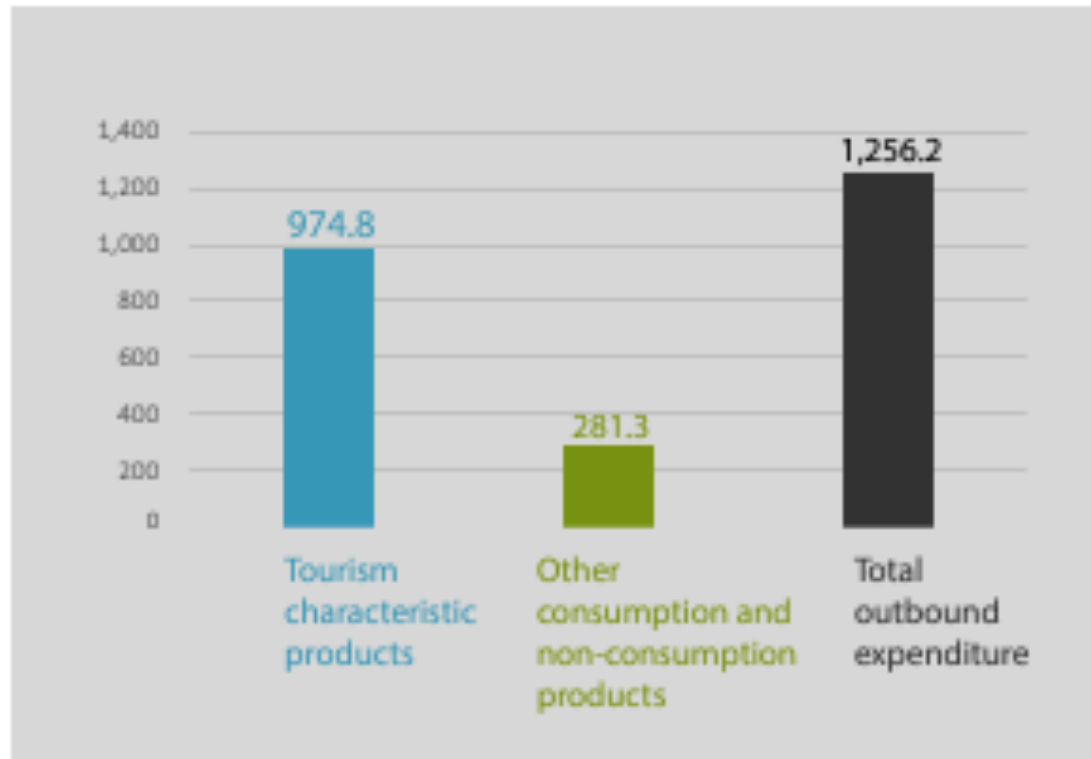
Domestic Tourism

Domestic tourist expenditure by type of products, 2017



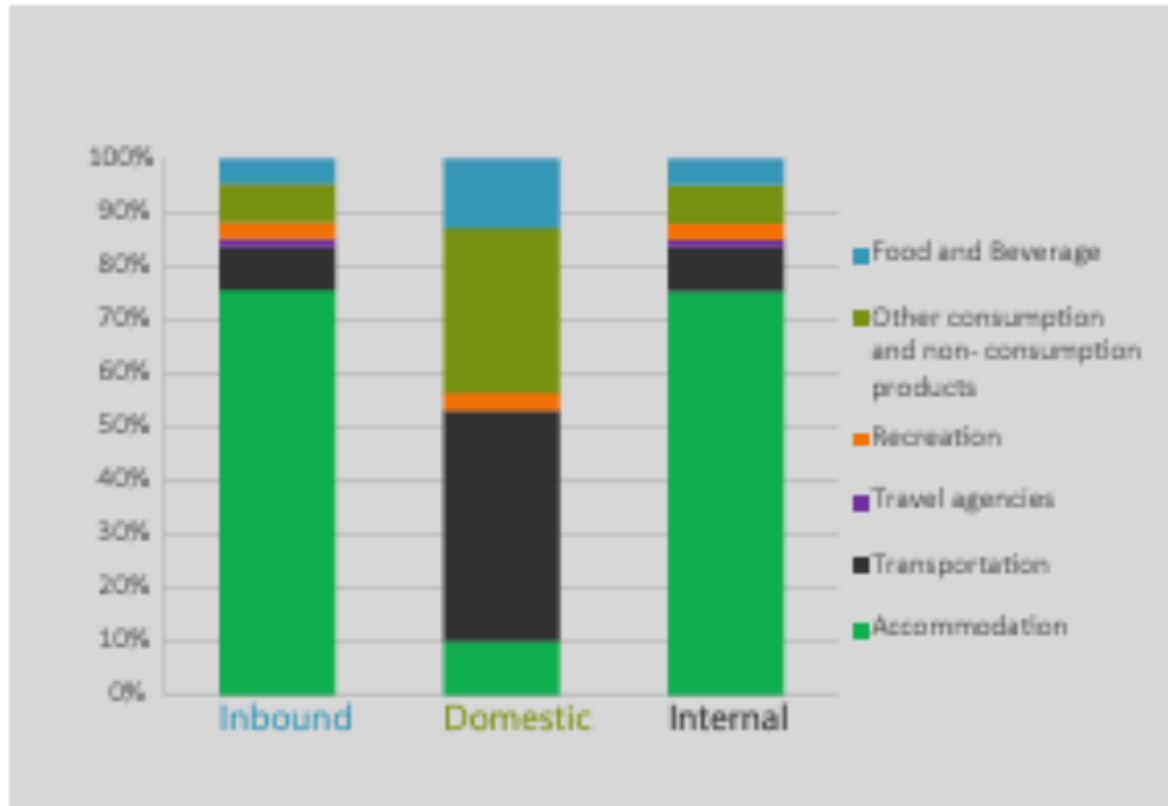
Outbound Tourism

Outbound tourist expenditure by type of products, 2017



Internal Tourism Consumption Expenditure

Proportion of Inbound, Domestic, and Internal Tourism expenditure, by type of products, 2017



Tourism Direct Gross Value Added (TDGVA)

Tourism Direct Gross Value Added (TDGVA) and Tourism Direct Gross Domestic Product, 2017

Indicator	Value in MVR million
Tourism Direct Gross Value Added	22,976.74
Gross Domestic Product	75,864.86
TDGVA as percent of GDP	35.16%
Tourism Direct Gross Value Added plus tourism goods and services tax	27,159.74
Gross Domestic Product	75,864.86
TDGDP as percent of GDP	35.80%

Employment in tourism industry



Employment in tourism industry

ISIC	Sector	Employees			Employers			Independent/family/group worker			Total Female	Total Male	Grand Total
		Female	Male	Total	Female	Male	Total	Female	Male	Total			
55	Accommodation	3,058	29,090	32,148	19	596	615	224	1,705	1,929	3,301	31,391	34,692
551	Short term accommodation activities	3,051	29,061	32,112	18	596	614	220	1,699	1,919	3,289	31,356	34,645
552	Camping grounds, recreational vehicle parks and trailer parks	6	21	27	-	-	-		4	4	6	25	31
559	Other accommodation	1	8	9	1	-	1	4	2	6	6	10	16
56	Food and beverage service activities	482	5,143	5,625	33	266	299	371	341	712	886	5,750	6,636
561	Restaurants and mobile food service activities	442	4,735	5,177	26	255	281	266	313	579	734	5,303	6,037
562	Event catering and other food service activities	40	406	446	7	11	18	102	27	129	149	444	593
563	Beverage serving activities	-	2	2	-	-	-	3	1	4	3	3	6
501	Sea and coastal water transport *	93	3,341	3,434	1	206	207	25	627	652	119	4,174	4,293
511	Passenger air transport	507	1,769	2,276	2	10	12	11	33	44	520	1,812	2,332
522	Support activities for transportation	622	3,248	3,870	3	47	50	19	173	192	644	3,468	4,112
791	Travel agency and tour operator activities	284	479	763	11	92	103	13	75	88	308	646	954
799	Other reservation service and related activities	25	23	48	1	-	1	2	3	5	28	26	54
900	Creative, arts and entertainment activities	22	49	71	3	18	21	42	184	226	67	251	318
910	Libraries, archives, museums and other cultural activities	24	12	36	-	-	-				24	12	36
931	Sports activities	81	277	358	7	22	29	15	87	102	103	386	489
932	Other amusement and recreation activities	12	83	95	-	10	10	2	33	35	14	126	140
Tourism industries Total		5,210	43,514	48,724	103	1,267	1,370	724	3,261	3,985	6,037	48,042	54,079
Other industries		31,189	70,342	101,531	648	3,645	4,293	21,637	24,030	45,667	53,474	98,017	151,491
Grand Total		36,399	113,856	150,255	751	4,912	5,663	22,361	27,291	49,652	59,511	146,059	205,570
Tourism share		14%	38%	32%	14%	26%	24%	3%	12%	8%	10%	33%	26%

* will include non-tourism related work, eg. general freight services

Challenges

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Human resources – Insufficient number of staff for compilation of TSA

Capacity and Training – Staff have limited capacity

Data availability – Marketing expenditure, Investment on tourism, lack of details in the available data

Funding – Limited budget for statistics activities

Coordination – lack of coordination and differences in priorities



*Thank
you*

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Maldives Bureau of Statistics

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