tourism YEARBOOK 2012

Ministry of Tourism, Arts & Culture
Republic of Maldives

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FOREWORD

Welcome to the Tourism Yearbook 2012!

It is with great pleasure that we present to you this annual publication of the Ministry of Tourism, Arts and Culture. The Tourism Yearbook is published with the objective of providing comprehensive and updated statistical information on the tourism industry, for the use of relevant Government authorities as well as private sector, institutions and individuals. This annual publication highlights key tourism indicators of the Maldives for the past five years and provides information on the performance of the Maldives tourism industry in 2011.

Year 2011 had been portrayed as a challenging year for the world tourism. While the global economy was recovering from the shock of 2008 and 2009, major political changes occurred in many countries specially the Middle East region. Regardless of these challenges, international tourist arrivals hit a new record registering an impressive 4.4% growth in 2011 with a healthy 980 million arrivals.

The Maldives set a new record in tourist arrivals to the country with over 930 thousand arrivals in a year and an impressive above average growth rate of nearly 18%. A significant increase in tourist bed capacity was recorded which resulted in an increased bed nights of tourists. While the European market share dropped, Asia and the Pacific recorded an increase, most of which accounts for the tremendous increase in the Chinese market. The increase in Chinese market led to a decline in average stay of tourists in the country.

For 2012, the initial projections were to reach a target of one million arrivals. However, due to the declines registered during the first quarter of the year, the target may not be achieved although a positive growth is still expected for the year.

Tourism Yearbook 2012 is the result of the collaboration of many. We acknowledge and appreciate the Government institutions and the private sector for providing continued support. We hope that the readers find this publication a vital source of information.

November 2012

Ahmed Adeeb Abdul Ghafoor
Minister of Tourism, Arts and Culture

ACKNOWLEDGEMENTS

Except where otherwise indicated, data used in this publication have been collected from relevant Government Authorities and the Maldives tourism industry.

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Department of National Planning
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Maldives Customs Services
Faculty of Hospitality and Tourism Studies

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INTRODUCTION

Tourism Yearbook 2012 has been produced and published by the Statistics & Research Section of the Ministry of Tourism, Arts and Culture. This publication briefly presents the overall performance of the tourism industry of the Maldives through 2007 to 2011. In addition to the available national tourism statistics for the past five years, the publication contains major highlights of the tourism industry in 2011.

This publication is divided into 6 sections

1. Tourist Accommodation
2. Tourist Arrival Trends
3. Economic Indicators of Tourism
4. Airlines Statistics
5. Tourism Forecasts; *and*
6. Tourism Highlights 2011

Each section provides important data and information. Together, the sections provide a comprehensive picture of tourism in the Maldives.

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SECTION 1: TOURIST ACCOMMODATION

Accommodation Facilities

As per Maldives Tourism Act Law No. 2/99, tourists visiting the Maldives must stay at a facility which is registered at the Ministry of Tourism, Arts and Culture (MOTAC) to accommodate tourists. There are four types of accommodation facilities currently available for tourists in the Maldives; namely tourist resorts, tourist hotels, tourist guest houses and safari vessels.

Uninhabited islands in the Maldives are developed into resorts, taking into consideration the 'one-island-one-resort' concept which is unique to the Maldives, offering splendid experiences in luxury vacations. At the end of 2011 there were 101 resort islands with a total bed capacity of 22,120 registered with the MOTAC. Being the most popular and traditional form of accommodation in the Maldives, 82.2% of the bed capacity originates in resorts in 2011. Three new resorts came into operation in 2011, which include Olhuveli in Laamu Atoll with 194 beds, Meradhoo in Gaafu Alifu Atoll with 74 beds and Magudhdhuva in Gaafu Dhaalu Atoll with 200 beds (refer table 1).

With the opening of two new hotels, total number of hotels increased from 17 in 2010 to 19 by end 2011 increasing the bed capacity to 1,603 (refer Table 1).

Guest Houses in the Maldives offer budget accommodation for tourists visiting local islands in the Maldives. Previously, this type of accommodation was available only in the capital city, Male'. Since 2011, guest houses are being developed in other local islands. 13 new guest houses were opened in different islands of the Maldives in 2011. At the end of 2011, there were 659 beds in 38 guest houses registered with MOTAC. Although guest houses contribute only 2.5% to the total bed capacity, this form of accommodation is increasing rapidly (refer table 1).

Live-aboard floating beds, commonly known as Safari Vessels, are a rapidly growing form of accommodation in the Maldives. A live-aboard vacation in the Maldives offers an onboard holiday, with an adventurous approach combined with various recreational activities, such as scuba diving, snorkeling, wave surfing and various kinds of game fishing. These vessels cruise around islands, sailing to secluded locations such as marine protected areas/parks in the Maldives. At the end of 2011, there were 157 safari vessels with a total bed capacity of 2,514 registered to accommodate tourists in the Maldives (refer table 1)

Table 1: Accommodation Establishments and Bed Capacity, 2007-2011

Type of Establishment	2007		2008		2009		2010		2011	
	Nos	Beds	Nos	Beds	Nos	Beds	Nos	Beds	Nos	Beds
Resorts / Marinas	92	19,028	94	19,860	97	20,942	98	21,342	101	22,120
Hotels	11	886 _/	13	1,110	15	1,368	17	1,449	19	1,603
Guest Houses	24	400	24	400	22	462	25	476	38	659
Safari Vessels	133	1,923	143	2,094	145	2,206	156	2,434	157	2,514
Total	**260**	**22,237**	**274**	**23,464**	**279**	**24,978**	**296**	**25,701**	**315**	**26,896**

Source: Ministry of Tourism, Arts and Culture
Note: Revised _/

Resorts by Atolls

The first tourist resort in the Maldives was opened in 1972 at Vihamanaafushi in Kaafu Atoll. Since then, Kaafu Atoll, being closest atoll to the only international airport in the country, was centralized as the first tourism zone in the Maldives. Subsequently, Alifu Atoll, the next closest atoll to the airport was developed. At the end of 2011, Kaafu and Alifu Atoll together held 67.5% of the total resort bed capacity (refer Table 2).

At the beginning of tourism in the Maldives, the policy was to develop resorts closer to the airport and away from local islands. Under the Second Tourism Master Plan, tourism expanded to new atolls. With the implementation of The Third Tourism Master Plan a new policy was adopted. With this new policy tourism was further expanded to the whole country with plans to develop domestic airports to cover all atolls.

In 2008, Noonu Atoll was opened for tourism with the opening of two new resorts, one in Medhafushi and one in Kudafunafaru. While in 2009, Gaafu Alif Atoll opened its first resort, tourism was introduced to Laamu and Gaafu Dhaalu Atolls in 2011 with the opening of their first resorts in Olhuveli and Magudhdhuva respectively.

Table 2: Bed Capacity of Resorts by Atolls, 2007 - 2011

Atoll	2007		2008		2009		2010		2011	
	Beds	% Share	Beds	% Share	Beds	% Share	Beds	% Share	Beds	% Share
Haa Alifu	390	2.0	432	2.2	432	2.1	456	2.1	456	2.1
Noonu	-	-	400	2.0	490	2.3	542	2.5	542	2.5
Raa	470	2.5	470	2.4	470	2.2	470	2.2	470	2.1
Baa	1,240	6.5	1,240	6.2	1,240	5.9	1,398	6.6	1,398	6.3
Lhaviyani	1,276	6.7	1,294	6.5	1,336	6.4	1,336	6.3	1,336	6.0
Kaafu	8,724	45.8	8,914	44.9	8,982	42.9	9,050	42.4	9,128	41.3
Alifu (North & South)	5,058	26.6	5,240	26.4	5,526	26.4	5,574	26.1	5,806	26.2
Vaavu	350	1.8	350	1.8	350	1.7	350	1.6	350	1.6
Meemu	400	2.1	400	2.0	400	1.9	400	1.9	400	1.8
Faafu	250	1.3	250	1.3	250	1.2	250	1.2	250	1.1
Dhaalu	324	1.7	324	1.6	436	2.1	436	2.0	436	2.0
Laamu	-	-	-	-	-	-	-	-	194	0.9
Gaafu Alifu	-	-	-	-	200	1.0	250	1.2	324	1.5
Gaafu Dhaalu	-	-	-	-	-	-	-	-	200	0.9
Seenu	546	2.9	546	2.7	830	4.0	830	3.9	830	3.8
	19,028	**100.0**	**19,860**	**100.0**	**20,942**	**100.0**	**21,342**	**100.0**	**22,120**	**100.0**

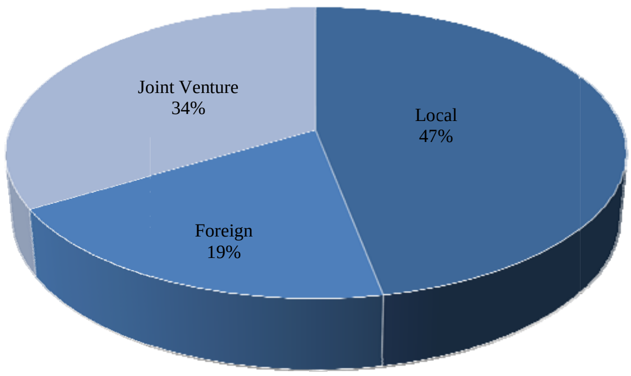
Source: Ministry of Tourism, Arts and Culture
Note: Revised _/

Resorts by Management Type

Resorts are leased by the government for a period of 35 years, and the leaseholder is allowed to sublease the property for operational purposes. In 2011, with a slight change that was brought to the Tourism Act, resort operators are allowed to sub-contract the islands for management purposes under a management agreement.

As shown in Table 3, in the year 2011 the number of resorts leased to local parties was 74 comprising of 16,714 beds (76%) of the total bed capacity of resorts. While the number of resorts leased to foreign parties was 12 with 11,858 beds, the number of beds in companies leased to joint ventures formed between local companies and foreign companies was 3,548 in 15 resorts.

Figure 1: Bed Capacity by Management Type, 2011



There were 47 resorts with 11,390 beds operated by local companies. The number of resorts managed by local companies was 43 with 10,394 beds. As can be seen from Table 3, the number of beds operated by local companies has increased from 49.9% in 2010 to 51.5% at the end of 2011.

The number of resort operators by foreign companies was 37 (6,422 beds), while the number of resorts managed by foreign companies was only 17 with 4,308 beds. At the end of 2011, the number of resorts managed by joint venture companies was 41 with 7,418 beds, which was 33.5% of the total bed capacity.

Table 3: Resorts by Type of Lease Holder, Operator and Management

Year		Lease Holder				Operator				Management			
		Local	Foreign	Joint Venture	Total	Local	Foreign	Joint Venture	Total	Local	Foreign	Joint Venture	Total
2007	Nos	70	8	14	**92**	44	31	17	**92**	-	-	-	-
	Share (%)	76.1	8.7	15.2	**100.0**	47.8	33.7	18.5	**100.0**	-	-	-	-
	Beds	14,716	1,122	3,190	**19,028**	10,146	5,340	3,542	**19,028**	-	-	-	-
	Share (%)	77.3	5.9	16.8	**100.0**	53.3	28.1	18.6	**100.0**	-	-	-	-
2008	Nos	74	8	12	**94**	44	33	17	**94**	-	-	-	-
	Share (%)	78.7	8.5	12.8	**100.0**	46.8	35.1	18.1	**100.0**	-	-	-	-
	Beds	15,882	1,086	2,892	**19,860**	10,322	5,706	3,832	**19,860**	-	-	-	-
	Share (%)	80.0	5.5	14.6	**100.0**	52.0	28.7	19.3	**100.0**	-	-	-	-
2009	Nos	73	8	16	**97**	42	35	20	**97**	-	-	-	-
	Share (%)	75.3	8.2	16.5	**100.0**	43.3	36.1	20.6	**100.0**	-	-	-	-
	Beds	16,192	1,180	3,570	**20,942**	10,354	5,960	4,628	**20,942**	-	-	-	-
	Share (%)	77.3	5.6	17.0	**100.0**	49.4	28.5	22.1	**100.0**	-	-	-	-
2010	Nos	74	10	14	**98**	43	37	18	**98**	-	-	-	-
	Share (%)	75.5	10.2	14.3	**100.0**	43.9	37.8	18.4	**100.0**	-	-	-	-
	Beds	16,562	1,382	3,398	**21,342**	10,642	6,302	4,398	**21,342**	-	-	-	-
	Share (%)	77.6	6.5	15.9	**100.0**	49.9	29.5	20.6	**100.0**	-	-	-	-
2011	Nos	74	12	15	**101**	47	37	17	**101**	43	17	41	**101**
	Share (%)	73.3	11.9	14.9	**100.0**	46.5	36.6	16.8	**100.0**	42.6	16.8	40.6	**100.0**
	Beds	16,714	1,858	3,548	**22,120**	11,390	6,422	4,308	**22,120**	10,394	4,308	7,418	**22,120**
	Share (%)	75.6	8.4	16.0	**100.0**	51.5	29.0	19.5	**100.0**	47.0	19.5	33.5	**100.0**

Source: Ministry of Tourism, Arts and Culture

Capacity Utilization

The bed night capacity, which is derived from operational bed capacity, recorded an increase of 3.5% in 2011 compared with 2010. With the increase in bed capacity, the actual tourist bed nights have been increasing steadily over the years. The dip recorded for the year 2009 was due to the world economic crisis in 2008 which resulted in a negative growth in tourists arrivals to the Maldives. The total registered bed nights of resorts, hotels, guest houses and safari vessels in 2011 was 6,529,141 which was an increase of 9.1% compared to that of 2010.

Although the bed nights have been increasing steadily over the years, capacity utilization rate or more commonly known as occupancy rate has declined through 2007 to 2010, from 82.5% to 69.5%. One of the major reasons for this drop in occupancy rate is the huge increase in bed capacity and the shift in market segments. In 2011, the national average occupancy rate recorded an increase of 73.1%, over 2010.

The shift in demographic profile of major generating markets from Western Europe to North East Asia, especially China is reflected in the declines of average stay of tourists. The Chinese market overtook all European markets and became the market leader by strengthening its position with a healthy market share. This shift has caused a decline in average stay of tourists in the country. As seen from Table 4, the average duration of stay has decreased from 8.5 days in 2007 to 7 days in 2011. According to the findings of Maldives Visitor Survey 2011, over 96% of the Chinese tourists stayed in the Maldives for less than 7 nights. Out of which 9% stayed for less than 3 nights.

Table 4: Bed Nights, Occupancy Rate and Duration of Stay, 2007 - 2011

Year	Bed Capacity in Operation (annual average)	Bed Night Capacity	Tourist Bed Nights	Bed Night Growth (%)	Occupancy Rate (%)	Average Duration of Stay (days)
2007	**17,589**	**6,400,167**	**5,293,224**	**9.7**	**82.5**	**8.5**
Resorts & Hotels	17,589 _/	6,400,167	5,293,224	9.7	82.5 _/	8.5
Guest House and Vessels	-	-	-	-	-	-
2008	**19,117**	**6,996,640**	**5,446,937**	**2.9**	**77.8**	**8.0**
Resorts & Hotels	19,117	6,996,640	5,446,937	2.9	77.8	8.0
Guest House and Vessels	-	-	-	-	-	-
2009	**20,137**	**7,338,221**	**5,150,688**	**-5.4**	**70.2**	**8.6**
Resorts & Hotels	20,137	7,338,221	5,150,688	-5.4	70.2	8.6
Guest House and Vessels	-	-	-	-	-	-
2010	**23,649**	**8,631,809**	**5,986,342**	**-**	**69.5**	**7.6**
Resorts & Hotels	21,541	7,861,955	5,829,589 _/	13.2	74.2	7.4 _/
Guest House and Vessels	2,108	769,854	156,753	-	20.7	0.2
2011	**24,490**	**8,938,190**	**6,529,141**	**9.1**	**73.1**	**7.0**
Resorts & Hotels	22,504	8,213,871	6,358,519	9.1	77.5	6.8
Guest House and Vessels	1,987	724,319	170,622	8.8	23.4	0.2

Source: Ministry of Tourism, Arts and Culture
Note: Revised _/

Figure 2: Bed nights Vs Occupancy Rate 2007 - 2011

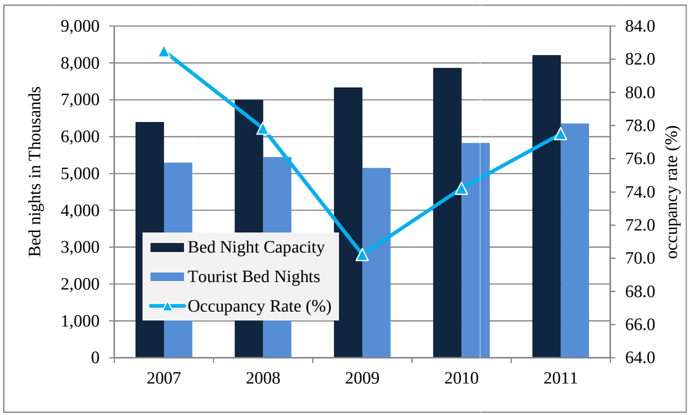


Figure 3: Average Duration of Stay 2007 - 2011

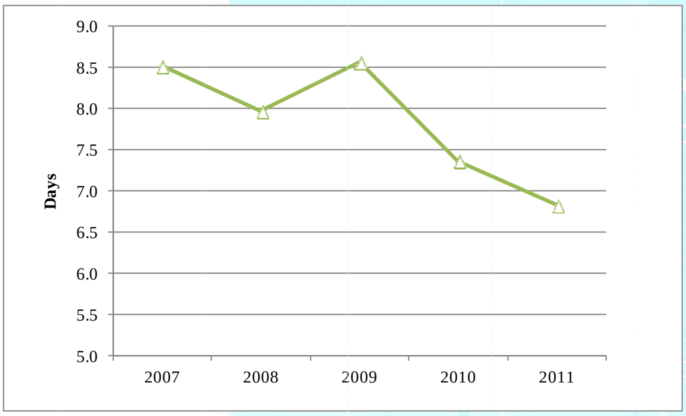


Table 5: Monthly Average Occupancy Rates of Resorts & Hotels, 2007 - 2011

Month	2007	2008	2009	2010	2011
January	94.8	90.0	86.5	83.5	87.2
February	100.1	95.9	85.9	92.5	94.4
March	94.3	95.7	81.6	82.6	85.8
April	92.6	88.2	75.2	74.2	83.8
May	70.4	70.4	59.1	64.5	65.5
June	58.9	54.2	47.5	50.2	55.0
July	72.0	65.3	56.7	63.5	68.9
August	84.4	76.0	66.0	73.1	72.8
September	73.6	66.0	62.7	67.6	69.3
October	81.2	75.7	73.0	79.8	83.4
November	85.7	78.1	74.6	81.4	83.9
December	85.1	78.4	73.8	77.7	79.9
Annual Average	**82.8**	**77.8**	**70.2**	**74.2**	**77.5**

Source: Ministry of Tourism, Arts and Culture

Table 5, presents the monthly average occupancy rates of resorts and hotels. As seen from the table, while occupancy rates are higher for the months from October to April, low rates are recorded for the period from May to September with June being the lowest month. Hence, October to April is the considered to the peak tourist season for the Maldives. This period also coincides with European Christmas/New year holidays as well as the Chinese New Year holidays.

SECTION 2: TOURIST ARRIVAL TRENDS

Global Arrival Trends

The year 2011 had been a challenging year for the world. While the global economy was in the recovery stage, major political changes occurred in the Middle East and in North Africa. Japan was hit by one of the worst natural disasters in its history. Despite all these challenges, tourist arrivals worldwide hit new records in 2011. According to the figures released by the United Nation's World Tourism Organization (UNWTO) in March 2012, tourist arrivals worldwide registered an increase of 4.4% in 2011 over 2010 reaching a total of 980 million.

Table 6: International Tourist Arrivals Worldwide, 2009 - 2011

	Tourist Arrivals (in millions)				
	2009	2010	2011 *	% Change (2011/2010)	% Share 2011 *
Europe	461.1	474.6	502.3	5.8	51.2
Asia & the Pacific	181.0	204.5	217.1	6.1	22.1
Americas	140.7	149.7	156.0	4.2	15.9
Africa	46.0	49.9	50.0	0.2	5.1
Middle East	52.1	59.9	54.8	-8.4	5.6
World	**881**	**939**	**980**	**4.4**	**100.0**

Note: *Data as collected by UNWTO, March 2012
Source: Adapted from UNWTO World Tourism Barometer, March 2012 Edition

As per the UNWTO World Tourism Barometer, March 2012 edition, Europe was the best performer in terms of arrival numbers with over 502 million arrivals, which accounted for 51.2% of total arrivals that year. The region registered a growth of 5.8% in 2011 compared with 2010.

Asia & the Pacific region registered the highest growth in 2011with a positive 6.1%. This region was the second best performer in terms of arrival numbers in 2011 with a total of 217.1 million arrivals, contributing 22.1% to the total arrivals that year.

Americas recorded a total arrival of 156 million in 2011grasping nearly16% shares. The region registered a positive growth of 4.2% in 2011 compared with that of 2010.

Africa and Middle East, both were experiencing political turbulence in the region during the year 2011. While Africa posted just a slight increment of 0.2% in arrivals in 2011, the Middle East region registered a negative growth of 8.4% in 2011 compared to that of 2010.

Maldives Arrival Trends

Over the last five years (2007-2011), tourist arrivals to the Maldives increased at an average rate of 9.5%. However, the Maldives, remains vulnerable to worldwide incidents, and tourist arrivals tends to decline heavily, followed by any such natural or manmade disasters around the world. In 2009, arrivals to the Maldives declined due to the world economic crisis. Nevertheless, Maldives bounced back the following year with a robust growth of over 20%.

Table 7: Monthly Arrivals to the Maldives, 2007 - 2011

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2007	64,570	65,224	64,491	63,171	46,602	38,457	51,025	53,168	48,468	58,706	56,797	65,210	**675,889**
2008	64,621	67,963	71,623	62,670	48,764	40,283	47,675	51,824	50,687	56,363	57,961	62,578	**683,012**
2009	61,531	58,520	62,127	57,186	43,154	36,205	44,332	52,388	50,396	62,432	61,986	65,595	**655,852**
2010	67,478	77,063	74,975	60,742	58,324	44,050	57,232	66,315	62,524	74,707	74,252	74,255	**791,917**
2011	79,493	87,392	80,732	79,947	64,456	55,947	72,516	76,828	71,861	91,059	85,501	85,601	**931,333**

Source: Department of Immigration & Emigration

In 2011 the Maldives reached a new milestone in terms of arrival numbers reaching a total of 931,333 and registering an impressive17.6% growth over 2010. The UNWTO World Tourism Barometer, March 2012 edition highlighted the Maldives among the countries which recorded the fastest growth for the year.

Table 8: Growth Trends of Monthly Arrivals to the Maldives, 2007 – 2011 (percent)

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2007	10.7	19.2	18.1	12.8	13.8	16.4	19.3	6.4	8.7	7.3	6.0	11.2	**12.3**
2008	0.1	4.2	11.1	-0.8	4.6	4.7	-6.6	-2.5	4.6	-4.0	2.0	-4.0	**1.1**
2009	-4.8	-13.9	-13.3	-8.8	-11.5	-10.1	-7.0	1.1	-0.6	10.8	6.9	4.8	**-4.0**
2010	9.7	31.7	20.7	6.2	35.2	21.7	29.1	26.6	24.1	19.7	19.8	13.2	**20.7**
2011	17.8	13.4	7.7	31.6	10.5	27.0	26.7	15.9	14.9	21.9	15.1	15.3	**17.6**

Source: Department of Immigration & Emigration

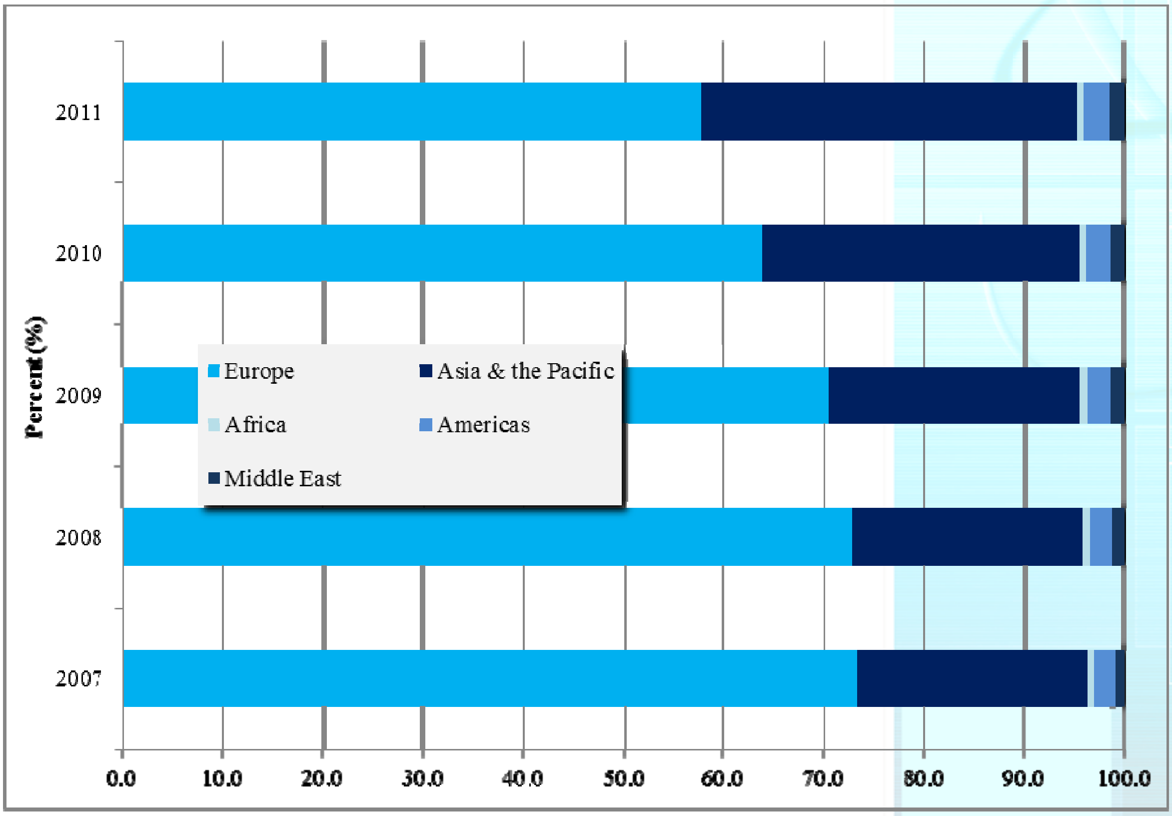
Major Markets

Europe, as the leading market generator to the Maldives, captured over 57% market shares in 2011. With a total of 537,757 tourists the region recorded a growth of 6.4% in 2011 compared with 2010. Although Europe sustained its market position, the market share has been dropping over the years. Share dropped from 73.3% in 2007 to 57.7% at the end 2011. Leading markets from this region in 2011 were the United Kingdom, Germany, Italy, Russia, France and Switzerland.

Asia and the Pacific is the second largest market generator to the Maldives. With a total of 348,887 tourists, this region secured over 37% market shares in 2011. With the rapid growth of Chinese market over the last few years, the market share of Asia region has been increasing steadily. Market share increased from 22.9% in 2007 to 37.5% at the end of 2011. Major markets from this region include China, Japan, India and Republic of Korea.

Americas, Middle East and Africa region contributed 2.5%, 1.6% and 0.7% shares respectively in 2011.While market shares of Americas and the Middle East has been increasing steadily over the last five years, market share of Africa show a slight drop from 2009 to 2010.

Figure 4: Market Share by Regions, 2007 - 2011



Top Ten Generating Markets in 2011

Europe and Asia Pacific region supplying over 95% to the market shares, the top ten markets to the Maldives generate from these two regions. While six markets from the top ten list were from Europe, remaining four were Asian markets. (Refer table 9)

Table 9: Tourist Arrivals and Market Share of Top Ten Markets, 2011

Rank 2011	Country	2011 Arrivals	2011 Market Share (%)	2010 Arrivals	2010 Market Share (%)	Rank 2010
1	China	198,655	21.3	118,961	15.0	1
2	United Kingdom	104,508	11.2	114,158	14.4	2
3	Germany	90,517	9.7	77,108	9.7	4
4	Italy	83,088	8.9	89,596	11.3	3
5	Russia	63,936	6.9	49,111	6.2	6
6	France	59,694	6.4	54,789	6.9	5
7	Japan	35,782	3.8	38,791	4.9	7
8	Switzerland	32,504	3.5	27,766	3.5	8
9	India	30,978	3.3	25,756	3.3	9
10	Korea	25,285	2.7	24,808	3.1	10
	Global Total	**931,333**		**791,917**		

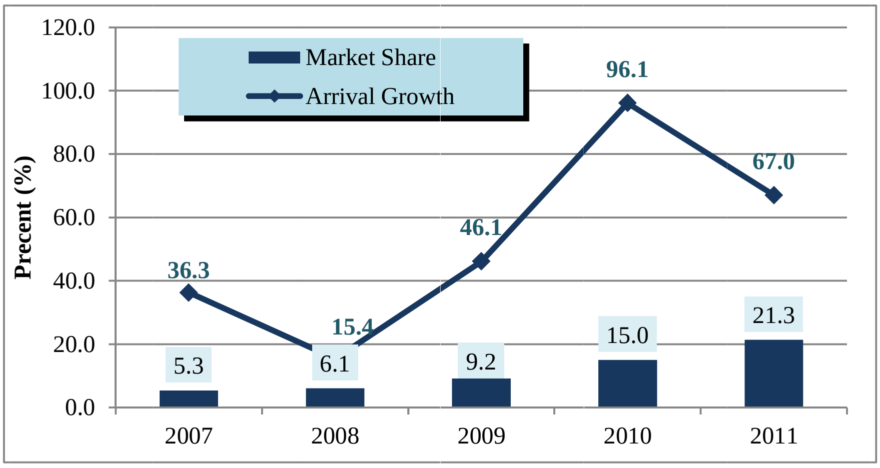
Source: Department of Immigration & Emigration

While no new markets made it to the top ten list, only a slight change in market positions were noted from 3rd to 6th positions. China and the United Kingdom maintained their ranks at the 1st and 2nd position with 21.3% shares and 11.2% shares respectively. Germany and Italy switched positions as 3rd and 4th markets with 9.7% shares and 8.9% shares respectively. Russia overtook France to climb to the 5th position with 6.9% shares and the French market was pushed down to the 6th position with a slight drop in its market share from 6.9% in 2010 to 6.4% in 2011. Japan, Switzerland, India and Korea maintained their respective positions as the 7th, 8th, 9th and 10th markets. While the Japanese market share recorded a drop from 4.9% in 2010 to 3.8% by 2011, Switzerland and India sustained their market shares at 3.5% and 3.3%. The Korean market also registered a drop in its market share from 3.1% in 2010 to 2.7% by 2011.

1. China

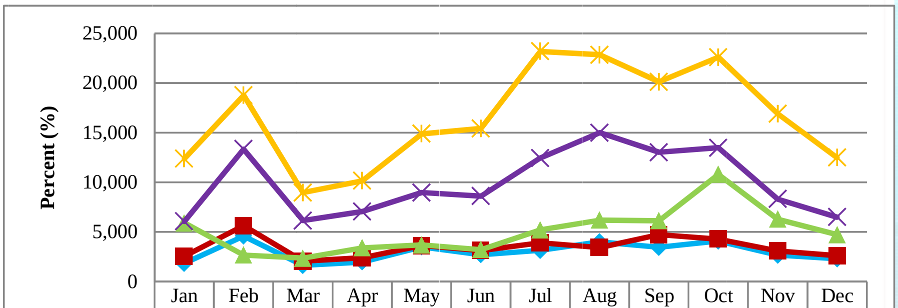
With its rapid increase in outbound tourism, China has become one of the largest global source markets for international tourism. According to the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012, more than 58 million arrivals were generated from China to Asia Pacific Region in 2011. The World Tourism Organization forecasts that China will have 100 million outbound travelers by 2020.

Figure 5: *Growth & Market Share of China, 2007 - 2011*



Chinese arrivals to the Maldives have been growing rapidly over the last five years at an average rate of 52.2%. With a total of 118,961 arrivals and 15% of total shares, China became the number one market to the Maldives in 2010. The market maintained its position in 2011 by further increasing its shares to 21.3% with 198,655 arrivals that year. This huge increase in Chinese arrivals to the Maldives mainly accounts for the increased direct access between Maldives and China as well as the strong demand for Maldives as a honeymoon destination among Chinese.

Figure 6: *Monthly Arrivals of Chinese Market, 2007 - 2011*



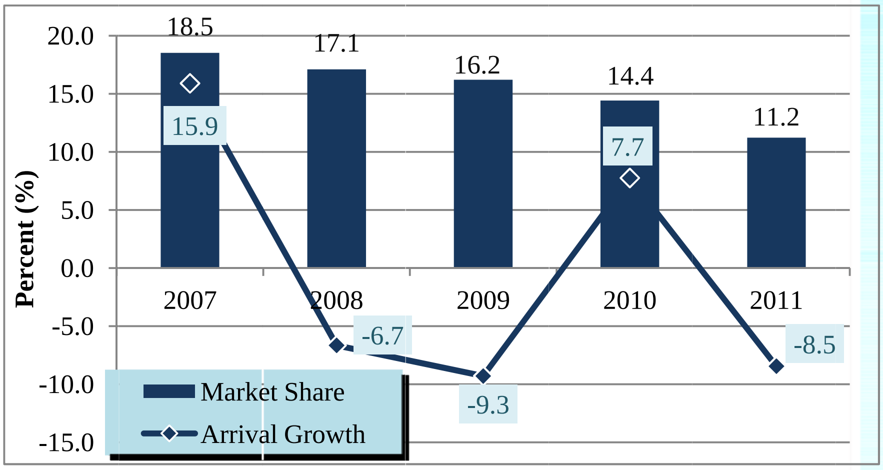
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	1,855	4,591	1,647	1,981	3,505	2,722	3,159	3,996	3,450	4,097	2,671	2,302
2008	2,569	5,638	2,065	2,408	3,631	3,133	3,903	3,440	4,724	4,286	3,101	2,613
2009	5,912	2,682	2,363	3,417	3,706	3,226	5,206	6,197	6,141	10,805	6,286	4,725
2010	6,069	13,345	6,144	7,060	8,964	8,615	12,449	14,998	13,028	13,476	8,313	6,500
2011	12,367	18,759	8,968	10,165	14,889	15,410	23,176	22,827	20,107	22,595	16,897	12,495

Figure 6 represents monthly arrivals from China to the Maldives from 2007 to 2011. As seen from the graph, while the peak season for Chinese arrivals is recorded to be from July to October, a sharp increase in arrivals is registered for the month of February. The Chinese New Year holidays falling into the month of February, is one of the major reasons for increased arrivals during this month.

2. United Kingdom

Although the UK market has traditionally been the largest source market to the Asia Pacific region from Europe, an overall 1% decline was recorded from this market for the region in 2011. According to the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012 early edition, during the year 2011 a total of 9.4 million visitors from UK travelled to the Asia Pacific region. Out of which 0.248 million travelled to South Asia.

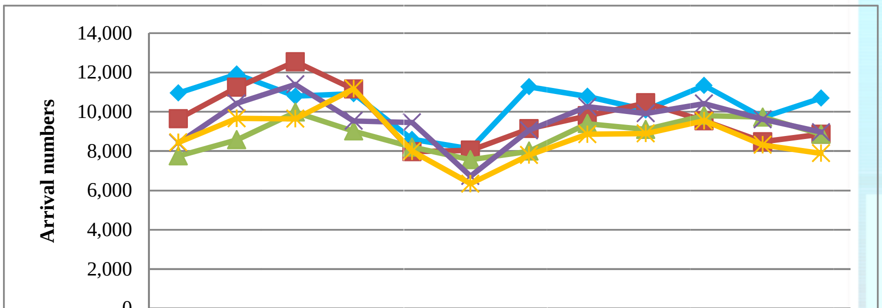
Figure 7: *Growth & Market Share of U.K, 2007 - 2011*



The United Kingdom is a well-established traditional market to the Maldives. UK remained as the number one market to the Maldives till end 2009. The market however, has been unstable since 2008 registering negative growths and dropping its market shares. In 2010, the UK market recorded a positive growth of 7.7% however the market lost nearly 2% of its shares along with its number one position.

In 2011, the Maldives received a total of 104,508 visitors from UK, which was a decline of -8.5% compared with 2010. With this decline, a considerable drop in market share, from 14.4% in 2010 to 11.2% in 2011, was also recorded. This decline is mainly associated with European economic crisis.

Figure 8: *Monthly Arrivals of U.K Market, 2007 - 2011*



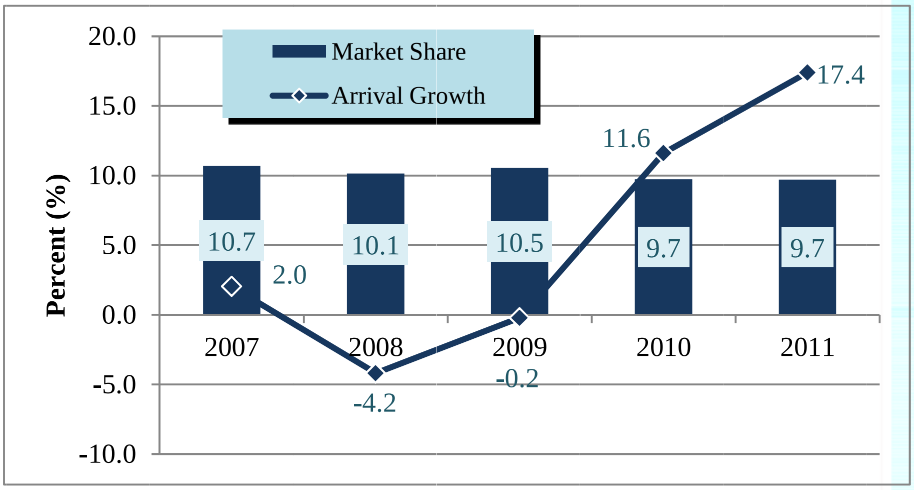
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	10,952	11,913	10,787	10,912	8,599	8,109	11,272	10,783	10,092	11,332	9,719	10,688
2008	9,638	11,238	12,544	11,150	7,972	8,037	9,136	9,789	10,448	9,541	8,470	8,858
2009	7,751	8,573	9,973	9,014	8,200	7,558	7,994	9,399	9,100	9,805	9,726	8,857
2010	8,405	10,422	11,394	9,529	9,460	6,728	9,053	10,259	9,917	10,419	9,614	8,958
2011	8,435	9,661	9,637	11,167	7,988	6,338	7,795	8,855	8,896	9,537	8,310	7,889

Figure 8 represents monthly arrivals from the U.K market from 2007 to 2011. As can be seen from the figure, while the months of March and October are recorded to be the peak months for arrivals from U.K, arrivals is at its lowest during the month of June.

3. Germany

International visitor arrivals from Germany into Asia Pacific region increased by 2% with a total of 4.9 million visits, reported the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012 early edition. According to the Travel Monitor, although the least visited sub region by Germans, South Asia recorded the strongest gain of +18% , receiving a total of 0.171 million tourists from Germany during the year 2011.

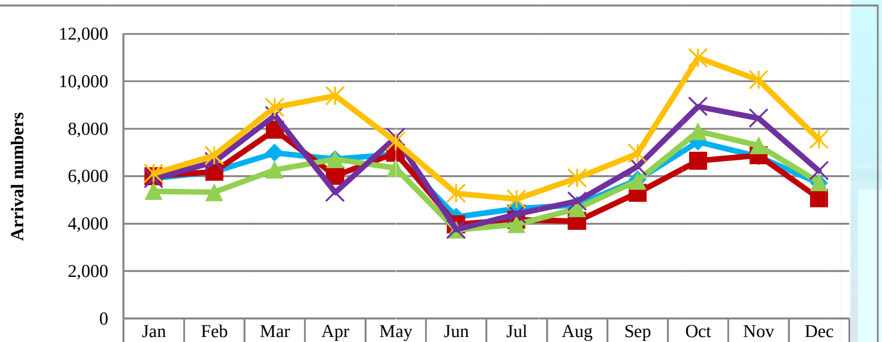
Figure 9: ***Growth & Market Share of Germany, 2007 - 2011***



Germany was the third largest market to the Maldives at the end of 2011. Although the market has lost 1% of its shares through 2007 to 2011, it appears to have stabilized in 2011. During the world economic recession period, 2008 and 2009, the market recorded negative growths. Whilst market share remained constant at 9.7%, the market performed remarkably well with increased volume in 2011. In terms of market ranking, Germany overtook Italy to jump up to the 3rd position in 2011.

The Maldives recorded a total of 90,517 visits from German market during the year 2011, which was an increase of 17.4% compared with 2010.

Figure 10: ***Monthly Arrivals of German Market, 2007 - 2011***



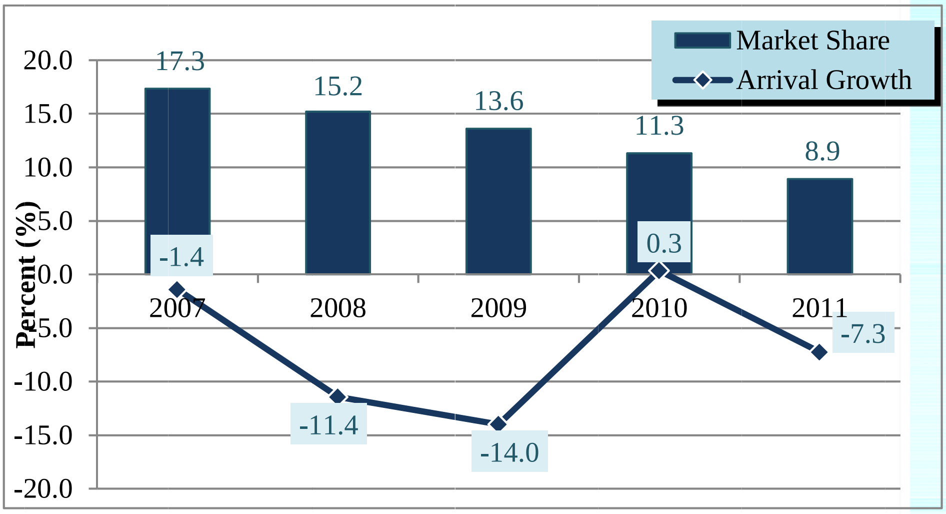
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	5,911	6,186	6,982	6,718	6,930	4,288	4,629	4,790	5,850	7,450	6,829	5,706
2008	6,000	6,182	7,949	6,015	6,983	3,964	4,163	4,103	5,292	6,647	6,880	5,062
2009	5,364	5,319	6,268	6,718	6,341	3,738	3,972	4,636	5,806	7,886	7,297	5,740
2010	5,890	6,602	8,554	5,317	7,634	3,748	4,402	4,943	6,412	8,937	8,444	6,225
2011	6,109	6,874	8,906	9,389	7,467	5,276	5,034	5,918	6,956	10,986	10,058	7,544

As with other European markets, the monthly arrival pattern of German tourists is very similar over the last five years except for the year 2011, where an increase is registered for the month of April while in other years, arrivals drop during this month. October to March is the most visible peak season and lowest count in arrivals is recorded for the moth June.

4. Italy

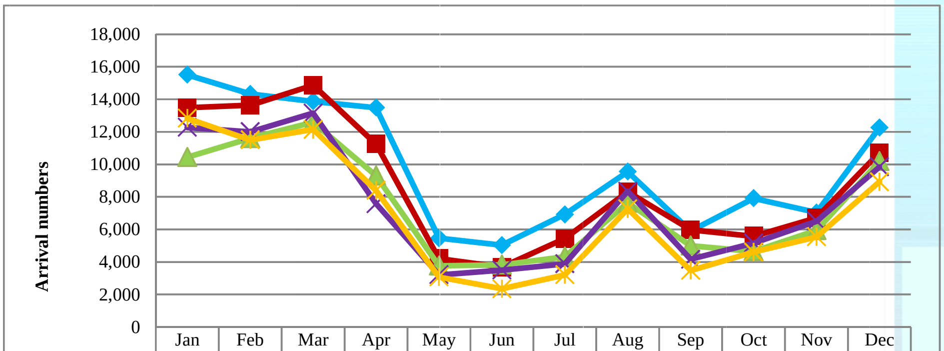
As per figures released by Pacific Asia Travel Association (PATA), tourist arrivals from the Italian market, to Asia Pacific destinations declined by -1.04% in 2011. While in 2010, the region received a total of 599.06 thousand Italians, this region was able to attract 592.84 thousand tourists in 2011. According to PATA figures, with over 50% of total Italian arrivals to the regions, Northeast Asian destinations are most popular among Italians. In 2011 South Asia received a total of 94.36 thousand tourists from Italy, which was 15.9% of total Italians that travelled to the region that year.

Figure 11: *Growth & Market Share of Italy, 2007 - 2011*



Italians being the first group of travelers to the Maldives, this market has played a major role in the tourism industry of the Maldives since tourism began in the country in 1972. Since 1998 till end 2006, Italy, with the largest share of arrivals, remained as the number one market to the Maldives. In 2007, with the drop in market the Italian went down to the second position. Over the last five years the Italian market lost more than half of its shares from 17.3% in 2007 to 8.9% by the end of 2011. Italy was the fourth largest market to the Maldives in 2011. The decline is associated with multiple factors, from European economy performance to decline in Italian managed tourist facilities and upgrading of Maldives resort facilities over the years.

Figure 12: *Monthly Arrivals of Italian Market, 2007 - 2011*



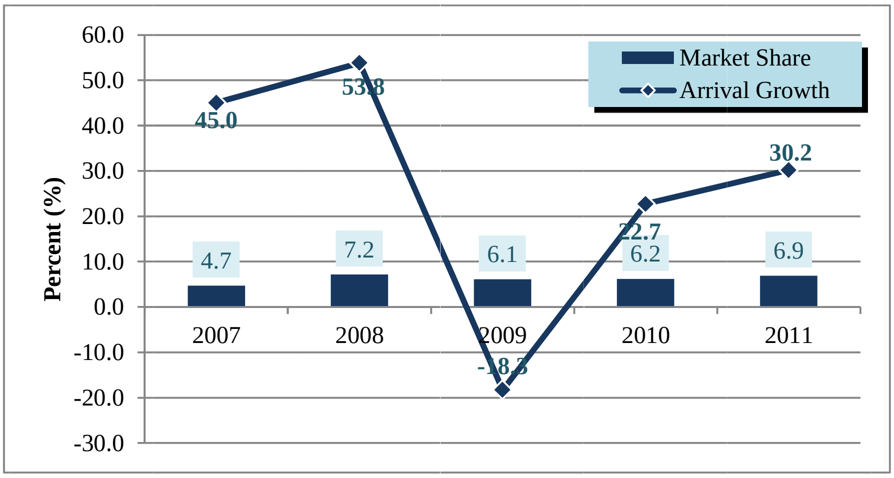
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	15,507	14,323	13,872	13,488	5,455	5,027	6,925	9,555	5,896	7,912	7,034	12,252
2008	13,473	13,630	14,865	11,246	4,212	3,683	5,432	8,305	5,972	5,579	6,711	10,715
2009	10,441	11,604	12,599	9,306	3,764	3,828	4,323	7,629	5,004	4,658	5,943	10,193
2010	12,276	12,003	13,153	7,577	3,213	3,495	3,882	8,351	4,167	5,153	6,506	9,845
2011	12,828	11,499	12,143	8,398	3,077	2,347	3,208	7,267	3,479	4,610	5,543	8,929

Figure 12 shows the monthly arrival pattern from Italian market to the Maldives. As can be seen from the graph, a consistent pattern is seen from this market over the last five years. Arrivals start to increase from the month of November and increasing steadily till March. From April to July the market gradually slows down and attains its lowest during the month of June. After a sharp increase in August, Italian arrival again drops during the month of September.

5. Russia

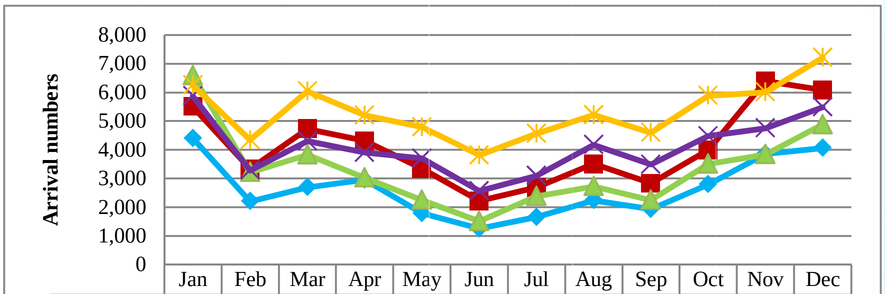
The PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012 early edition reported that Arrivals from Russia to the Asia Pacific region increased by 19% reaching 4.5 million at the end of 2011. When looking at sub regional level data collected by PATA for the Russian market, the strongest growth in 2011was recorded for the Southeast Asia region with 54% followed by South Asia with 34%.

Figure 13: *Growth & Market Share of Russia, 2007 - 2011*



At the end of 2011, Russia was the 5th largest market to the Maldives. The market performed remarkably well over the last five years with an average growth of 26%. The decline recorded for the year 2009 was due to the overall decline in arrivals that year as a result of world economic recession which started in late 2008. In 2011 with 63,936 arrivals, a strong growth of 30% and a slight increase in market share, the Russian market overtook France to jump to the 5th position.

Figure 14: *Monthly Arrivals of Russian Market, 2007 - 2011*



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	4,401	2,205	2,696	2,958	1,791	1,257	1,654	2,239	1,932	2,793	3,855	4,064
2008	5,507	3,339	4,730	4,313	3,345	2,225	2,691	3,511	2,834	3,997	6,397	6,089
2009	6,591	3,220	3,829	3,028	2,251	1,510	2,382	2,730	2,248	3,506	3,839	4,880
2010	5,873	3,285	4,301	3,899	3,704	2,569	3,098	4,176	3,488	4,482	4,750	5,486
2011	6,256	4,347	6,043	5,205	4,793	3,812	4,565	5,214	4,594	5,887	6,008	7,212

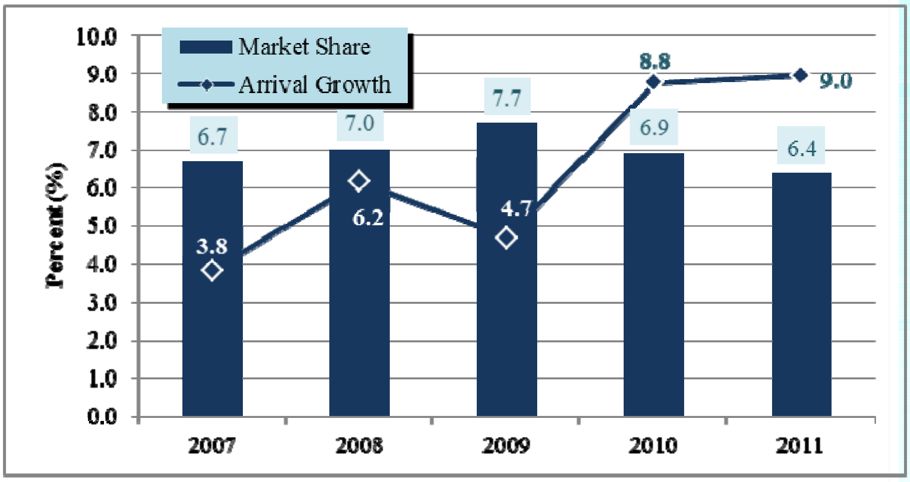
A harmonious monthly trend is observed from the Russian market over the last five years. (refer Figure 14). While in 2007 and 2009 January is the peak month for Russian tourists to the Maldives, in 2008, 2010 and 2011 December is recorded to be the peak month. A sharp drop in arrivals is recorded from January to February.

From February to March arrivals from Russia yet again increase as sharply. However, from March till June Russian arrivals drops steadily. June is recorded to be the lowest month of arrivals from this market to the Maldives.

6. France

In 2011, arrivals from France into Asia Pacific destinations increased by 6% to reach a total volume of nearly 4.7 million, reported the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012 early edition. As per the Tourism Monitor, South Asia was the fastest growing sub-region for the French market in 2011, with a total of 133,000 arrivals which was an improvement of over 22% compared with 2010.

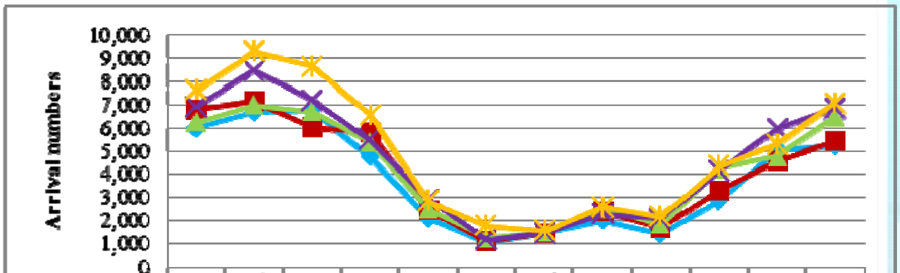
Figure 15: ***Growth & Market Share of France, 2007 - 2011***



In 2011, the Maldives received a total of 59,694 tourists from France, which was an increment of 9% compared with 2010. The French market has been stable over the last five years with an average growth of 6.5%. While all other markets registered negative growths during the world economic crisis in 2008 and 2009, the French market performed very well with positive growths of 6.2% and 4.7% in 2008 and 2009 respectively.

From 2007 till 2009 the French market share increased steadily. However, in 2010 and 2011 the market share dropped considerably from 7.7%in 2009 to 6.4% by end 2011. France was the 6th largest market to the Maldives at the end of 2011.

Figure 16: ***Monthly Arrivals of French Market, 2007 - 2011***



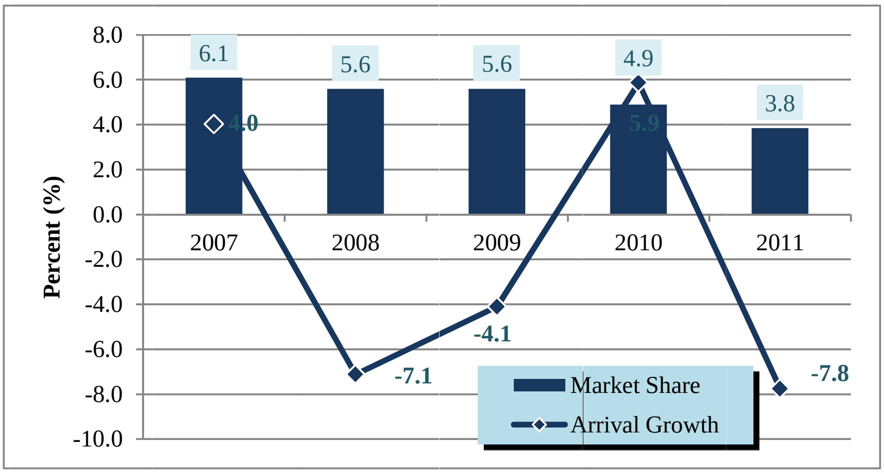
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	6,010	6,678	6,761	4,742	2,076	1,048	1,485	1,977	1,411	2,865	5,030	5,218
2008	6,784	7,163	6,019	5,801	2,437	1,096	1,455	2,393	1,674	3,295	4,565	5,418
2009	6,241	6,973	6,699	5,394	2,484	1,232	1,476	2,536	1,834	4,268	4,755	6,481
2010	6,899	8,464	7,190	5,459	2,920	1,155	1,464	2,257	2,061	4,159	5,930	6,831
2011	7,606	9,286	8,646	6,557	2,842	1,758	1,550	2,588	2,169	4,355	5,258	7,079

Figure 16 illustrates the monthly arrival pattern of French market to the Maldives from 2077 to 2011. As can be seen from the graph, a uniform monthly pattern is observed from this market over the last five years. As with all European markets, the lowest count in arrivals from France is registered for the month of June and February, the peak month.

7. Japan

Outbound travel from Japan to Asia Pacific destinations posted a growth of over 2% in 2011. According to the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012 early edition, a total of over 17.4 million Japanese travelled to the Asia Pacific region. The South Asian destinations, although recorded the least in terms of volume in arrivals, was the second best performing region in terms of its growth rate over 2010. As per the Tourism Monitor, a total of 0.823 million Japanese travelled to South Asia Region in 2011.

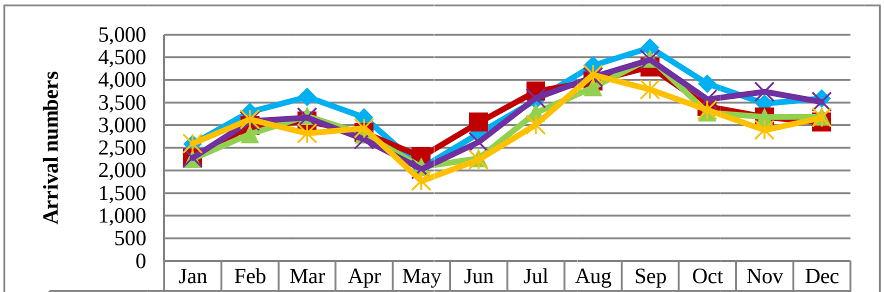
Figure 17: *Growth & Market Share of Japan, 2007 - 2011*



The Japanese market played a major role in the inbound tourism market to the Maldives in the tourism history of the country. Apart from being one of the top five markets, Japan was the number one Asian market to the Maldives till the year 2007. The market however, has been unstable and declining gravely since then. Over the last five years the Japanese market share has dropped considerably from 6.1% in 2007 to 3.8% by end 2011.

Five year average growth rate of the market stood at -1.8%. In 2011, with a total of 35,782 tourists Japan was the 7th largest market to the Maldives.

Figure 18: *Monthly Arrivals of Japanese Market, 2007 - 2011*



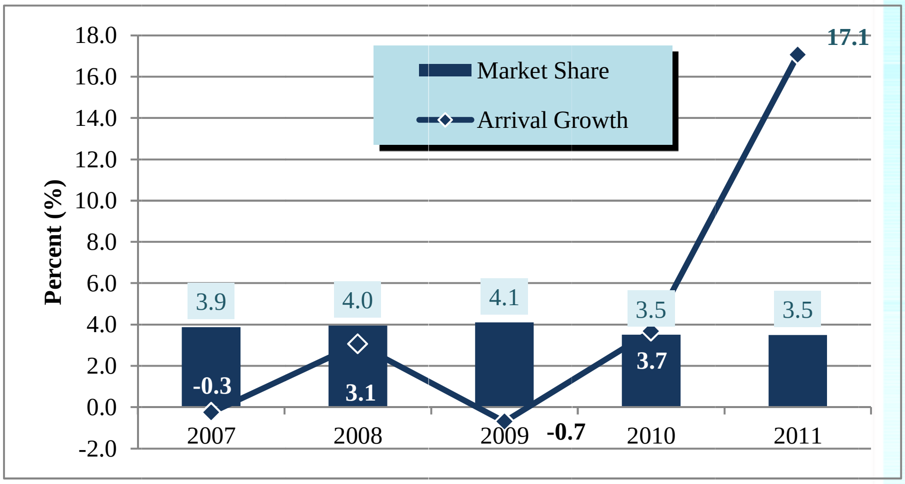
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	2,586	3,293	3,623	3,173	2,057	2,822	3,554	4,322	4,714	3,913	3,477	3,587
2008	2,269	2,985	3,088	2,832	2,305	3,062	3,746	3,966	4,288	3,413	3,178	3,061
2009	2,255	2,802	3,204	2,796	2,080	2,270	3,274	3,838	4,474	3,280	3,179	3,189
2010	2,275	3,090	3,169	2,684	2,024	2,626	3,595	4,061	4,447	3,569	3,738	3,513
2011	2,592	3,129	2,819	2,931	1,768	2,239	3,008	4,116	3,786	3,334	2,891	3,169

The Japanese market, although has dropped considerably over the years, a consistency has been maintained for the monthly performance. Contrary to the European markets, the peak month for Japanese arrivals to the Maldives is recorded to be September and the lowest is May. (refer Figure 18)

8. Switzerland

As per figures released by Pacific Asia Travel Association (PATA) Asia Pacific destinations received a total of 332,997 tourists from Switzerland, which was a 5.8% increase compared with the 314,786 Swiss that arrived to this destination in 2010. According to PATA figures, in 2011 the most traveled sub-region in Asia Pacific by Swiss was Southeast Asian destinations covering over 58% of total arrivals to the region that year. In 2011 South Asia received a total of 38,527 tourists from Switzerland, which was 12.2% of total Swiss that travelled to the region that year.

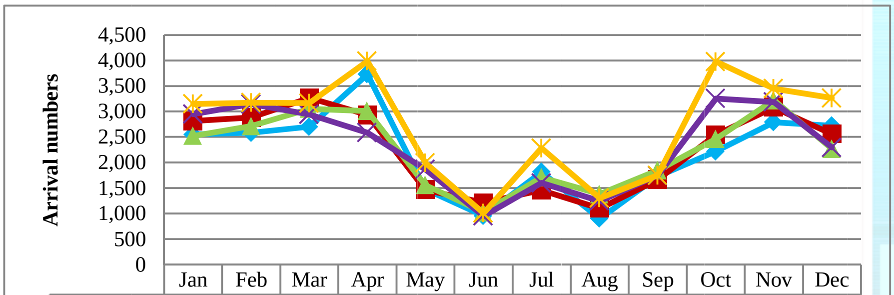
Figure 19: *Growth & Market Share of Switzerland, 2007 - 2011*



In 2011 the Maldives received a total of 32,504 tourists from Switzerland, which was an increase of 17.1% compared with the 27,766 arrivals in 2010. Tourist arrivals to the Maldives from Swiss market have been increasing steadily over the last five years at an average rate of 4.6%. The Swiss market share increased steadily from 2007 till end 2009.

In 2010, the market share dropped considerably from 4.1% to 3.5% and in 2011 it remained at 3.5%. At the end of 2011, Switzerland was the 8th largest market to the Maldives

Figure 20: *Monthly Arrivals of Swiss Market, 2007 - 2011*



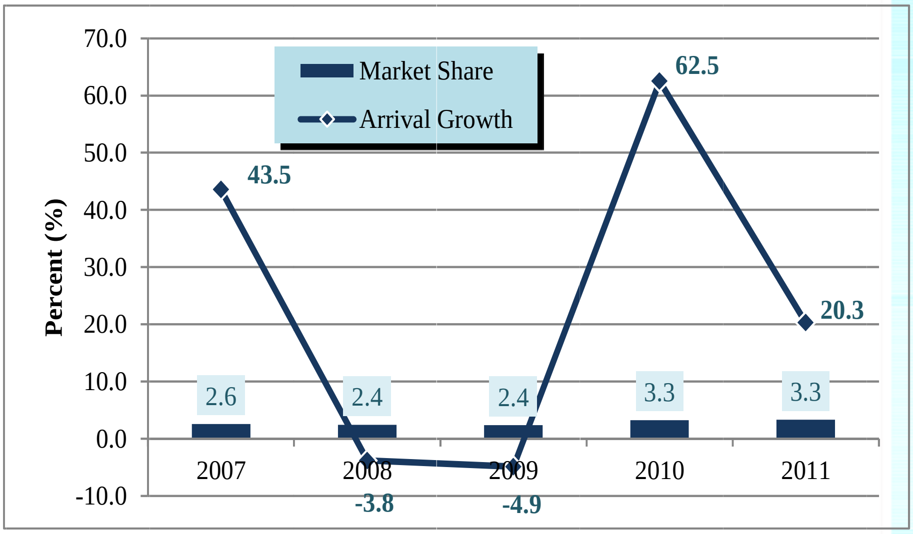
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	2,551	2,581	2,702	3,731	1,478	956	1,817	904	1,726	2,221	2,792	2,724
2008	2,815	2,883	3,265	2,933	1,465	1,214	1,459	1,099	1,665	2,544	3,080	2,561
2009	2,522	2,715	3,055	3,010	1,559	1,025	1,711	1,382	1,848	2,464	3,221	2,271
2010	2,949	3,145	2,942	2,585	1,867	953	1,599	1,247	1,745	3,254	3,186	2,294
2011	3,148	3,173	3,163	3,988	1,996	1,010	2,282	1,302	1,752	3,978	3,449	3,263

Figure 20 illustrates the monthly arrivals from Swiss market to the Maldives from 2007-2011. As seen from the graph, while June and August are recorded to have the lowest count arrivals from this market, arrivals is at its peak during the months of April and November.

9. India

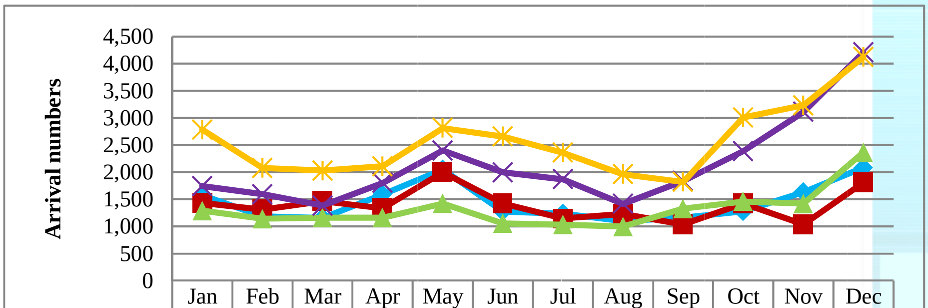
According to the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012 early edition, India generated close to 5.4 million arrivals to Asia Pacific destinations in 2011. This was an increase of 7.3% over 2010. Although in terms of volume, Southeast Asia destinations captured most of the arrivals from India to the Asia Pacific destinations, South Asia recorded the highest growth rate for the Indian market over 2010.

Figure 21: *Growth & Market Share of India, 2007 - 2011*



The Indian market to the Maldives has been growing at above average growth rates of 23.5% over the last five years. In 2011, Maldives received a total of 32,504 tourists from India, which was an increase of 20.3% compared with 2010. Market share remained at 3.3%. Being a neighboring country and having easier access, India remains to be a potential tourist market to the Maldives.

Figure 22: *Monthly Arrivals of Indian Market, 2007 - 2011*



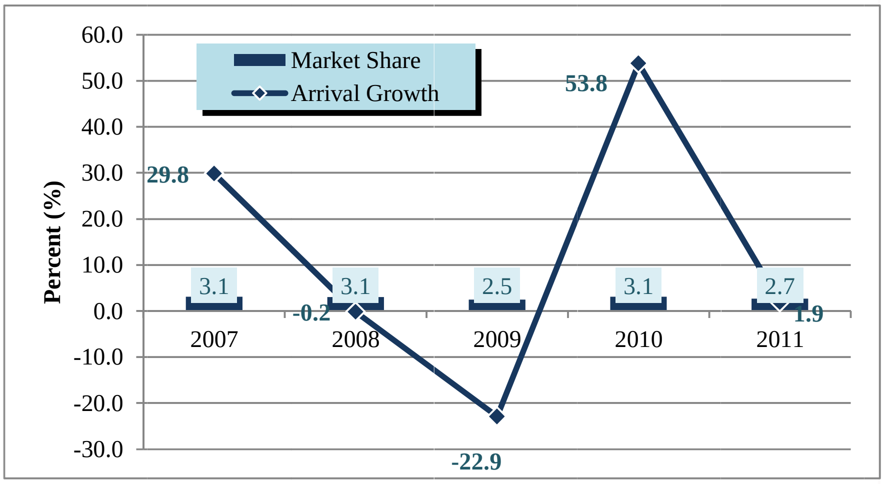
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	1,578	1,184	1,156	1,592	2,051	1,275	1,237	1,099	1,159	1,278	1,634	2,084
2008	1,436	1,313	1,467	1,337	2,001	1,425	1,147	1,231	1,036	1,425	1,037	1,808
2009	1,290	1,143	1,163	1,165	1,425	1,058	1,032	999	1,328	1,462	1,421	2,364
2010	1,742	1,594	1,385	1,802	2,400	1,999	1,871	1,419	1,838	2,387	3,110	4,209
2011	2,786	2,078	2,030	2,109	2,813	2,659	2,359	1,963	1,820	3,007	3,232	4,122

The monthly arrivals pattern of Indian market is shown in figure 22. As seen from the graph, the monthly behavior of this market remained consistent from 2007 till 2009. In 2010 and 2011, monthly performance from this market has changed significantly. Unlike other markets, the Indian market performs well during the month of May with a sharp increase during the month.

10. Korea

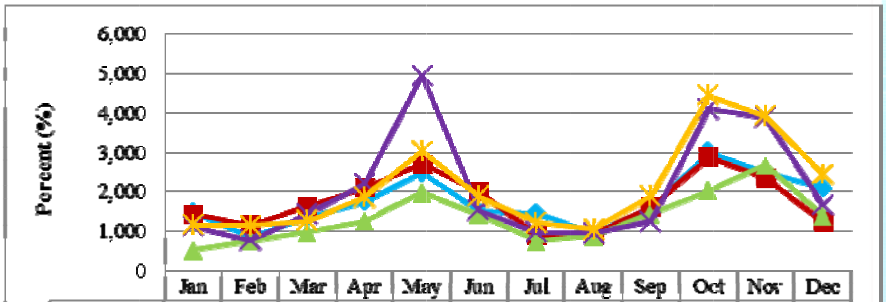
The Republic of Korea generated nearly 13 million tourists into the Asia Pacific destinations in 2011. According to the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2012 early edition, arrivals from the Korean market across Asia Pacific destinations increased by less than 1% in 2011.

Figure 23: ***Growth & Market Share of Korea, 2007 - 2011***



The Maldives received a total of 25,285 tourists from Korea in 2011, which was a 1.9% growth compared with that of 2010. Although there was an increase in arrivals from this market, a slight drop in market share was recorded in 2011. Over the last five years, from 2007 to 2011, the market grew at an average annual rate of 12.5%.

Figure 24: ***Monthly Arrivals of Korean Market, 2007 - 2011***



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2007	1,492	862	1,344	1,749	2,484	1,496	1,454	947	1,574	3,019	2,472	2,083
2008	1,438	1,164	1,632	2,103	2,705	2,001	898	911	1,610	2,879	2,353	1,240
2009	523	768	987	1,264	1,985	1,417	763	878	1,442	2,032	2,673	1,403
2010	1,128	772	1,442	2,194	4,942	1,517	969	943	1,243	4,102	3,898	1,658
2011	1,154	1,147	1,257	1,863	3,031	1,869	1,204	1,051	1,893	4,451	3,919	2,446

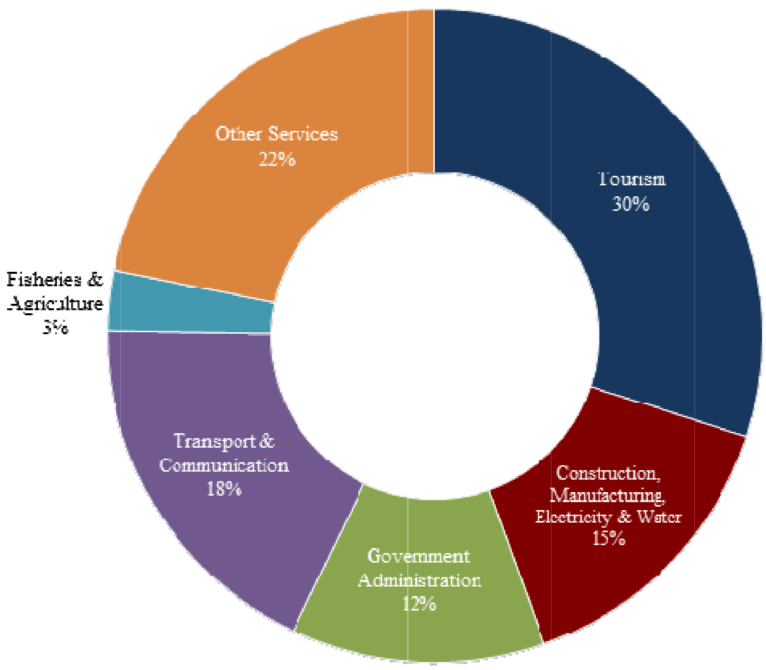
Figure 24 show the monthly arrival pattern of the Korean market. While the months of May, October and November are recorded to be the peak months for Korean arrivals, lowest count in arrivals is recorded for the months of January and July.

SECTION 3: ECONOMIC INDICATORS

Tourism Contribution to the Economy

Tourism is the largest economic activity in the country as well as the major source of foreign exchange earnings. Figure 25 shows the GDP contribution by major sectors in 2011. As displayed in the figure tourism contribution to the GDP in 2011 was 30% which was an increase of 1.8% compared with that of 2010. Construction, Manufacturing, Electricity & Water all together contributed 15% to GDP, Transport and Communication contributed 18% to the country's GDP in 2011.

Figure 25: ***GDP Contribution by Major Economic Sectors, 2011***



Source: Department of National Planning

With the increase in tourism supply and demand, the contribution from tourism to the country's GDP has been increasing over the years (refer Table 10). In 2008, while the GDP contribution in currency, recorded an increase, the percent share declined by 2.2%. From 2008 to 2009 again a slight decline was recorded which was due to global financial crisis. However the industry managed to achieve a GDP growth rate of 2.5% in 2010. The percentage share of tourism contribution to GDP was seen at 30.2% for the first time in 2011 after the Asian Tsunami of December 2004. The steady increase leads us to consider that the tourism sector has the potential for a steady growth in GDP share in the long-term future.

Table 10: Tourism Contribution to GDP, 2007-2011 (Million Rufiyaa, at 2003 Constant Prices)

Year	GDP	GDP Growth %	Tourism Contribution	% Share of Tourism Contribution
2007	16,512.00	10.6	4,704.00	28.5
2008	18,526.00	12.2	4,870.00	26.3
2009	17,648.00	-4.7	4,608.00	26.1
2010	18,659.00	5.7	5,335.00	28.6
2011	20,051.00	7.5	6,061.00	30.2

Source: Department of National Planning

Tourism revenue refers to the lease rent payable to government by the islands leased for resort development, the bed tax of US$ 8 collected from all tourist accommodating establishments and the newly introduced Tourism Goods and Service Tax (T-GST) collected from all tourist facilities. The T-GST was first introduced in October 2011 at the rate of 3.5%. The rate was later increased to 6% in January 2012. The resort lease rent formula was also revised in 2011 from a tourist bed based rent to a land area based rent where US$ 8 is charged per square meter of the land.

As seen from Table 11 the percentage share of tourism revenue dropped from 34% to 28.4% in 2008 and further 26.9 in 2009. However, 2011 saw an increase of 13%. The industry reached an all-time high of 39.7% share earning 3.3 billion Rufiyaa as revenue out of which 1.6 billion was received as tourism tax. The huge increase in tourism tax revenue was due to the newly introduced T-GST.

Table 11: Tourism Revenue and Tax, 2007-2011 (Million Rufiyaa)

Year	Government Revenue	Tourism Revenue	% Share of Tourism Revenue	Tourism Tax	% Share of Tourism Tax to Tourism Revenue
2007	6,527.20 _/	2,216.00 _/	34.0	547.30 _/	24.7 _/
2008	6,939.30 _/	1,969.80	28.4	566.55	28.8
2009	5,313.30 _/	1,429.81	26.9	531.41	37.2
2010	6,392.40 _/	1,711.30	26.8	602.70	35.2
2011	8,323.30	3,305.00	39.7	1,588.00	48.0

Source: Ministry of Finance and Treasury
Maldives Inland Revenue Authority

Note: _/ Revised Figures

Tourism receipts is the expenditure made by tourists during their stay in the Maldives, hence calculated in US Dollars. With the introduction of T-GST in 2011, it was found that tourism receipts have been under estimated over the years. Hence, the Maldives Monetary Authority (MMA), Central Bank of Maldives, revised their calculations for Tourism Receipts using the GST records of Maldives Inland Revenue Authority (MIRA).

As seen from Table 12, Tourism Receipts have been increasing over the last five years, with the exception of 2009 which recorded a decline 8.3% reflecting the decline in arrivals that year due to the global financial crisis which started in 2008. The percentage is steadily climbing from 2010 onwards with 2011 closing at 20.90% which is an all time high tourism receipt of 1.87 billion US dollars.

Table 12: Tourism Receipts, 2007-2011 (Million US Dollars)

Year	Tourism Receipts 1_/	Growth Rate (%)	Exports, FOB	Imports, CIF
2007	1,304.42	17.55	107.75	1,092.02
2008	1,437.02	10.17	125.87	1,382.11
2009	1,317.19	-8.34	76.37	962.53
2010	1,545.25	17.31	73.91	1,090.86
2011	1,868.20	20.90	114.81	1,328.55

Source: Maldives Monetary Authority
Maldives Customs Services

Note: _/ Revised Estimates based on GST data from MIRA

Tourism Expenditure refers to the expenditure made on tourism from the central government budget. The percentage share of tourism expenditure has always been less than 1.5% of the total government expenditure as seen from Table 13. With the exception of 2006 and 2007 during which the government spent over 100 million rufiyaa, the following four years showed a significant decrease with the government expenditure sloping by 36.7 million rufiyaa in 2009. Although there was a slight increase in tourism expenditure from 2010 to 2011 the percentage share of tourism expenditure remained the same at 0.5%.

Table 13: Government Expenditure on Tourism, 2007-2011 (Million Rufiyaa)

Year	Government Expenditure	Tourism Expenditure	% Share of Tourism Expenditure
2007	8,325.40 _/	108.20 _/	1.3
2008	10,342.40 _/	93.30 _/	0.9
2009	11,104.30 _/	56.60 _/	0.5
2010	10,996.40 _/	45.40	0.4
2011	12,503.90	58.44	0.5

Source: Ministry of Finance and Treasury

Note: _/ Revised Figures

SECTION 4: AIRLINE STATISTICS

Traffic by International Carriers

In 2011, over 1.1 million international visitor arrivals were recorded for the Maldives (Table 14). This include international passengers arrived at both Ibrahim Nasir International Airport as well as the Gan International Airport. Out of the 1.1 million passengers that arrived in the country, over 89% came from scheduled flight. While the scheduled passengers increased by 21% in 2011, the charter market recorded a considerable drop of 31% over 2010.

Table 14: Passenger Arrivals by Type of International Carriers 2007-2011

Type of Carrier	2007		2008		2009		2010		2011	
	Arrivals	% Share	Arrivals	% Share	Arrivals	% Share	Arrivals	% Share	Arrivals	% Share
Scheduled	669,219	80.3	694,718	80.8	696,925	83.8	837,027	83.0	1,013,652	89.6
Charter	164,217	19.7	164,587	19.2	134,999	16.2	171,716	17.0	117,671	10.4
Total	**833,436**	**100.0**	**859,305**	**100.0**	**831,924**	**100.0**	**1,008,743**	**100.0**	**1,131,323**	**100.0**

Source: Department of Civil Aviation

Traffic by Domestic Carriers

Table 15 shows traffic by domestic carriers at Ibrahim Nasir International Airport. At the end of 2011, the domestic flight movements increased by 16% compared with 2010. With this increase in movements, the number of passengers carried with also increased by 13%. A new airline, Fly Me started operating in 2011, which carried a total of 12,446 passengers that year.

As can be seen from the table, most passengers were carried by the Trans Maldivian Airways and Maldivian Air Taxi. Both these airlines mainly cater for the tourism sector of the Maldives and operate sea planes only.

Table 15: Passenger Arrivals by Domestic Carriers at Ibrahim Nasir International Airport, 2007-2011

Operator	2007		2008		2009		2010		2011	
	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In
Domestic										
Island Aviation Services	9,139	93,244	9,311	90,557	8,621	114,069	7,955	127,813	10,369	154,785
Fly Me									834	12,446
Maldivian Air Taxi	38,959	195,361	39,570	204,413	38,256	196,775	41,668	216,593	43,558	188,797
Mega Maldives	-	-	-	-	-	-	2	52	28	485
Trans Maldivian Airways (Scheduled)	-	-	1,538	21,408	328	4,145	-	-	-	-
Trans Maldivian Airways	26,798	109,825	25,856	101,624	24,802	93,614	34,392	157,617	44,989	208,567
Other Domestic *	-	-	-	-	-	-	2,214	-	440	17
Total	**74,896**	**398,430**	**76,275**	**418,002**	**72,007**	**408,603**	**86,231**	**502,075**	**100,218**	**565,097**

Source: Department of Civil Aviation

International Scheduled Carriers

The scheduled flights carrying over 1 million passengers into the country in 2011, flight movements (in and out) of this sector recorded an increase of 50% compared with 2010. Newly started scheduled flights include China Southern Airlines, Etihad Airways, Jet Air Fly, Shanghai Airlines, Transearo Airlines, Mega Maldives and Meridiana Fly.

Of these new scheduled flights, most number of passengers arrived from Transearo Airlines 30,268 passengers, Meridiana Fly, 29,965 passengers and China Southern Airlines 25,655 passengers. Transearo Airlines is a direct flight from Moscow Russia, the China Southern comes directly from Guangzhou, China and Meridiana is a direct flight from Malpensa, Italy.

Table 16: Traffic by International Carriers – Scheduled, 2007-2011

Operator	2007		2008		2009		2010		2011	
	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In
Aeroflot	-	-	26	2,492	36	2,981	38	3,431	214	19,414
Air Berlin	-	-	-	-	144	16,019	224	25,948	162	19,070
Air Sahara	264	8,575	-	-	-	-	-	-	-	-
Austrian Airlines	110	7,827	42	3,342	44	3,794	48	5,146	74	7,086
Bangkok Airways	224	9,142	256	8,872	210	8,569	224	8,302	330	11,523
British Airways	-	-	-	-	58	3,325	308	26,336	314	28,451
China Eastern Airlines	280	7,075	217	7,690	-	-	134	6,387	405	19,419
China Southern Airlines	-	-	-	-	-	-	-	-	180	25,655
Condor	258	28,512	252	27,949	254	30,364	260	30,317	258	30,149
Czech Airlines	-	-	-	-	-	-	-	-	-	-
Emirates	1,242	109,713	1,234	128,053	1,232	127,357	1,948	172,016	2,208	194,831
Etihad Airways	-	-	-	-	-	-	-	-	122	5,750
Eurofly	487	50,476	522	52,787	506	45,700	84	8,595	-	-
Hainan Airlines	-	-	-	-	-	-	-	-	30	2,967
Indian Airlines	1,258	68,425	1,326	63,836	1,234	52,203	1,274	56,701	1,404	57,137
Jet Air Fly	-	-	-	-	-	-	10	281	72	1,408
Jazeera Airways	38	641	30	498	102	12,438	-	-	-	-
L. T. U	314	37,859	258	29,896	-	-	-	-	-	-
Lauda Air - Italy / Livingston	190	23,219	138	13,209	-	-	-	-	-	-
Malaysia Airlines	333	15,297	422	27,162	441	35,811	588	46,021	732	46,950
Maldivian	-	-	991	25,028	2,082	48,923	2,665	61,888	1,574	31,017
Martin Air	56	1,229	-	-	-	-	-	-	-	-
Mega Maldives	-	-	-	-	-	-	-	-	242	19,127
Meridiana Fly	-	-	-	-	-	-	326	28,387	344	29,965
Mihin Lanka	208	10,229	116	4,603	-	-	26	1,828	378	22,246
Oman Air	-	-	-	-	76	1,845	416	8,785	490	17,049
Qatar Airways	736	65,891	732	62,263	772	59,411	1,096	64,019	1,462	79,510
Shangai Airlines	-	-	-	-	-	-	62	5,938	44	3,009
Singapore Airlines	730	90,472	735	83,569	667	80,375	731	82,774	976	103,327
Srilankan Airlines	1,893	132,406	2,252	153,469	2,623	167,810	2,738	193,927	3,642	208,324
Transaero Airlines	-	-	-	-	-	-	-	-	222	30,268
Viva Macau	70	2,231	-	-	-	-	-	-	-	-
Srilankan Airlines (Cargo)	186	0	4	0	-	-	-	-	-	-
Expo Aviation (Cargo)	537	0	440	0	374	0	424	0	400	-
Schedule Total	**9,414**	**669,219**	**9,993**	**694,718**	**10,855**	**696,925**	**13,624**	**837,027**	**16,279**	**1,013,652**

Source: Department of Civil Aviation

International Charter Carriers

From the charter market, while some major charters, such as Transaero Airlines and China Southern Airlines started operating scheduled flights, others, such as Monarch Airlines, Atlant Soyuz and Belair stopped its operation in 2011. New charters include Hongkong Airways, Korean Air and Sichuan Airlines.

Table 17: Traffic by International Carriers – Chartered, 2007-2011

Operator	2007		2008		2009		2010		2011	
	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In
Air Italy	72	7,723	8	925	72	7,313	54	5,187	24	2,441
Alitalia	-	-	-	-	-	-	-	-	4	480
Atlant Soyuz	-	-	34	2,927	49	4,272	-	-	-	-
Belair	52	4,430	78	5,899	64	4,882	-	-	-	-
Blue Panorama Airlines	84	9,317	96	9,339	-	-	-	-	-	-
Britannia Airways/Thomson Fly	18	2,001	76	9,106	238	27,690	244	28,549	242	28,356
China Southern Airlines	-	-	-	-	-	-	206	22,391	-	-
Condor	-	-	24	781	-	-	-	-	-	-
Edelweiss	156	18,194	158	18,956	174	19,467	194	18,659	182	19,398
First Choice	210	25,172	180	21,406	-	-	-	-	-	-
Hongkong Airways	-	-	-	-	-	-	-	-	72	7,965
Kingfisher Airlines	-	-	-	-	-	-	-	-	2	2
Korean Air	-	-	-	-	-	-	84	8,602	42	5,323
Kras Air	40	3,575	131	13,463	-	-	-	-	-	-
Malev - Hungarian Airlines	18	937	-	-	-	-	-	-	-	-
Mega Maldives	-	-	-	-	-	-	-	-	53	2,885
Monarch Airlines	226	33,728	190	30,243	109	17,058	88	13,411	-	-
My Travel Airways	72	8,558	-	-	-	-	-	-	-	-
Neos Spa	78	7,950	82	9,099	160	18,508	190	21,477	208	23,676
Sichuan Airlines	-	-	-	-	-	-	-	-	94	9,338
Star Airlines/XL Airways	110	16,651	110	16,000	101	12,628	112	15,608	92	13,701
Swiss Air	-	-	-	-	-	-	-	80	6	87
Transaero Airlines	140	14,746	122	15,406	124	16,520	210	27,299	-	-
Travel Services	2	45	8	410	-	-	-	-	-	-
Tuifly Nordic	-	-	10	1,394	-	-	-	-	-	-
Ukraine International	-	-	-	-	-	-	8	237	4	152
Vaso Airlines	7	303	-	-	-	-	-	-	-	-
Volare	40	3,785	60	4,070	-	-	-	-	-	-
Other Internationals	1,906	7,102	2,141	5,163	1,836	6,661	1,846	10,216	2,367	3,867
Charter Total	**3,231**	**164,217**	**3,508**	**164,587**	**2,927**	**134,999**	**3,236**	**171,716**	**3,392**	**117,671**
Grand Total (Schedule+Charter)	**12,645**	**833,436**	**13,501**	**859,305**	**13,782**	**831,924**	**16,860**	**1,008,743**	**19,671**	**1,131,323**

Source: Department of Civil Aviation

SECTION 5: TOURISM FORECASTS

Global Forecasts, 2012

After a year of healthy growth in international arrivals, united Nations World Tourism Organization (UNWTO) forecasts an increase of arrivals between +3% and +4% in 2012, reaching the historic one billion mark by the end of the year.

While Africa as well as Asia and the Pacific is expected to remain solid between +4% and +6%, for Americas and the Europe arrival growth is expected to be between +2% and +4%. For the Middle East region, UNWTO projects a growth between 0% and +5% (refer Table 18)

Table 18: Global Forecasts, 2012

	Real year, change (in %)				2012
	2008	2009	2010	2011	Projection between (in %)
Europe	0.5	-4.9	2.9	6.0	+2 and +4
Asia & the Pacific	1.2	-1.6	12.9	5.6	+4 and +6
Americas	2.7	-4.9	6.5	4.2	+2 and +4
Africa	3.4	3.2	6.7	0.0	+4 and +6
Middle East	20.1	-4.6	15.1	-7.9	+0 and +5
World	**2.1**	**-3.8**	**6.5**	**4.4**	**+3 and +4**

Source: World Tourism Organization (UNWTO) Adapted from UNWTO World Tourism Barometer, January 2012 edition

Maldives Tourism Forecasts

Tourist arrival to the Maldives is expected to grow by 4.7% reaching 974,829 by end 2012. This is below the initial expected growth rate and the one million target for the year, mainly due to the four consecutive months of negative growth recorded for 2012. While average stay is expected to decline, the average occupancy rate for the year is anticipated to have a slight increase of 0.3%.

From 2013 to 2015 the tourist arrival forecasts are based on the Global Elasticity model developed to forecast tourist arrivals to the Maldives with technical assistance from the World Bank, which takes into account the long term observed elasticity of Maldives tourism to global tourism. With the rapid growth in the Chinese market, average duration of stay is expected to decline even further. However, the occupancy rate is expected to be maintained above 80%. With new islands leased for resort/hotel development, bed capacity is expected to increase to 27,240 by end 2015.

Table 19: Maldives Tourism Forecasts, 2012 - 2015

	Real		Projections			
	2011	2012 (end Sep)	2012	2013	2014	2015
Tourist Arrivals (000's)	931	692	975	1,057	1,144	1,237
% Growth	17.6	3.4	4.7	8.5	8.1	8.2
Average Stay (days)	7.0	6.8	6.6	6.8	6.5	6.2
Tourist Bed nights (000's)	6,359	4,728	6,464	7,167	7,470	7,707
Bed night capacity (000's)	8,214	7,107	8,867	9,093	9,716	9,942
Occupancy rate (%)	77.5	69.7	77.8	84.2	81.9	82.4
No. of Resorts / Hotels	112	124	124	134	141	141
Bed Capacity (end year total , resorts/hotels)	23,306	24,380	24,512	24,995	26,700	27,322

Source: Ministry of Tourism, Arts and Culture

Table 20: Resort / Hotel Projects Underway

	Island	Facility Type / Batch	Lease Holder	Leased Date	Beds	Estimated Opening Date
Mathi Uthuru (Upper North Province)					**2,550**	
Haa Alif Atoll					**400**	
1	Kelaa	Laggoon Resorts / Lagoon Developments	Hamidh Ismail, H. Hirifushi, Male'	7-Oct-08	200	NA
2	Naridhoo	Phase 2 - Open Rent - 2006	Mr. Ali Zahir, H. Iruvelige	15-Nov-06	100	NA
3	Uligamu	MTDC Islands - City Hotel	Maldives Tourism Development Corporation PLC	27-Feb-07	100	NA
Haa Dhaal Atoll					**1,550**	
4	Dhipparufushi	New Resorts with Transport Network projects	Trinus-CAE Holdings Pvt Ltd	5-May-10	100	NA
5	Hanimaadhoo	Regional Airport Hotels	Ms. Fathimath Thasleema, M. Maafannu Villa	18-Jun-07	200	NA
6	Hondaafushi	11 Islands - 2004	Mr. Abdulla Ali, H. Girithereyge Hithafinivaa Magu	5-Aug-05	200	NA
7	Kudamuraidhoo	Phase 1 - Open Controlled - 2006	JH Resorts Pvt Ltd	25-Jun-06	250	Na
8	Naagoashi	MTDC Islands	Maldives Tourism Development Corporation PLC	17-Sep-06	600	December-13
9	Nolhivaranfaru	Training Resorts	Nalaveli Maldives Pvt.Ltd,	3-Dec-08	200	NA
Shaviyani Atoll					**600**	
10	Dholhiyadhoo	11 Islands - 2004	Mr. Mohamed Latheef, H. Baraboamaage	5-Aug-05	200	June-13
11	Gaakoshibi	Phase 2 - Open Controlled - 2006	Mr. Hussain Waheed, Huvandhumaage, Sh. Foakaidhoo	24-Aug-06	200	NA
12	Kabaalifaru	Phase 2 - Open Controlled - 2006	Mr. Ali Shareef, M. Anaa Villa	31-Aug-06	200	NA
Uthuru Province (North Province)					**3,270**	
Noon Atoll					**980**	
13	Dhigurah	Other Resort Projects	Wego Private Limited	19-Jan-12	NA	NA
14	Ekulhivaru	MTDC Islands	Maldives Tourism Development Corporation PLC	17-Sep-06	180	NA
15	Fushivelavaru	Housing Fund Projects	Gladonia Maldives Pvt Ltd	5-Aug-10	100	June-13
16	Huvadhumaavattaru	Tourist Establishments with Airports	Noonu Hotels & Resorts Development Pvt. Ltd.	8-Jan-08	200	NA
17	Maafaru	Tourist Establishments with Airports - Transit Hotel	Noonu Hotels & Resorts Development Pvt. Ltd.	8-Jan-08	200	NA
18	Maavelaavaru	11 Islands - 2004	Athama Investments Pvt.Ltd	5-Aug-05	100	December-13
19	Raafushi	Housing Fund Projects	Exotic properties Pvt.Ltd	13-Dec-210	100	NA
20	Randheli	11 Islands - 2004	I & T Management Pvt. Ltd.	22-Aug-06	100	June-13

Table 20: *(continued…)*

	Island	Facility Type / Batch	Lease Holder	Leased Date	Beds	Estimated Opening Date
Raa Atoll					**890**	
21	Eiythigili	Population Consolidation	Amin Construction Pvt. Ltd.	2-Jan-08	200	NA
22	Furaveri	Population Consolidation	Mr. Ahmed Ibrahim Didi, 7-A, Ma Niyaz Villa, Buruzu Magu	6-Feb-12	200	NA
23	Ifuru	Tourist Establishments w/ Airports	Ifuru Investment Pvt Ltd	25-May-11	NA	NA
24	Kudakurathu	New Resorts with Transport Network projects	Dheebaja Investment Pvt Ltd	5-May-10	100	December-14
25	Lundhufushi	Phase 1 - Open Rent - 2006	Silver Tides Pvt Ltd	9-Jul-06	40	NA
26	Maamigil	Other Resort Projects	Ahmed Waheed G. Vaffushi, Male'	2-Feb-11	200	December-13
27	Maamunagau	Other Resort Projects	Cocoon Investment Pvt. Ltd	14-Jul-11	NA	NA
28	Maanenfushi	Phase 2 - Open Rent - 2006	Ms. Nasra Abdul Sattar, M. Maavina, Male'	3-Sep-06	150	NA
29	Madivaafaru	Tourist Establishments with Airports	Ifuru Investment Pvt Ltd	25-May-11	NA	NA
30	Muravandhoo	Tourist Establishments with Airports	Ifuru Investment Pvt Ltd	25-May-11	NA	NA
Baa Atoll					**700**	
31	Dharavandhoo / Finolhas	Tourist Establishments with Airports	Coastline Hotels & Resorts Pvt. Ltd.	10-Dec-07	200	December-14
32	Kanufushi	Tourist Establishments with Airports	Coastline Hotels & Resorts Pvt. Ltd.	6-Jan-08	200	NA
33	Muthaafushi	Tourist Establishments with Airports	STO Hotels and Resorts Pvt Ltd	6-Jan-08	100	NA
34	Vakkaru	Population Consolidation	Efzy Holdings Pvt. Ltd.	25-Feb-08	200	December-13
Lhaviyani Atoll					**700**	
35	Hudhufushi	Other Resort Projects - 13 islands leased in 2000	Mr. Abdul Rauf, M. Snowrose, Male'	9-Oct-00	400	July-14
36	Kanifushi	Phase 2 - Open Controlled - 2006	Mr. Mohamed Nasheedh, H. Fodhdhooge	14-Sep-06	300	July-13
Medhu Uthuru Province (North Central Province)					**700**	
Male' (Capital)					**200**	
37	Male' Hotel / Dharubaaruge	Other Islands + City Hotels	Male' Investments Pvt. Ltd.	28-Oct-07	200	NA
Kaaf Atoll					**400**	
38	Kaashidhuffaru / Dhiffushi Falhu	Laggoon Resorts / Lagoon Developments	Hamidh Ismail, H. Hirifushi, Male'	22-Jun-08	200	NA
39	Kuda Villigili	Other Resort Projects	Kudaviligili Development Pvt Ltd	8-Jun-10	200	NA
40	Lagoon 17	Laggoon Resorts / Lagoon Developments	Dutch Docklands Maldives Pvt Ltd	27-Jan-11	NA	August-14
41	Lagoon 19	Laggoon Resorts / Lagoon Developments	Dutch Docklands Maldives Pvt Ltd	27-Jan-11	NA	NA

Table 20: (*continued…*)

	Island	Facility Type / Batch	Lease Holder	Leased Date	Beds	Estimated Opening Date
42	Lagoon 37	Laggoon Resorts / Lagoon Developments	Dutch Docklands Maldives Pvt Ltd	27-Jan-11	NA	NA
43	Lagoon 7	Laggoon Resorts / Lagoon Developments	Dutch Docklands Maldives Pvt Ltd	27-Jan-11	NA	NA
44	Lagoon 9	Laggoon Resorts / Lagoon Developments	Dutch Docklands Maldives Pvt Ltd	27-Jan-11	NA	NA
Alif Alif Atoll					**0**	
Alif Dhaal Atoll					**0**	
Vaav Atoll					**100**	
45	Fottheyo	New Resorts with Transport Network projects	Maldives Transport & Contracting Company Plc.	5-May-10	100	NA
Medhu Province (Central Province)					**260**	
Meem Atoll					**60**	
46	Dhekunuboduveli / Kudausffushi / Gasveli	Phase 2 - Open Rent - 2006	Mr. Mohamed Manik, M. Villa Dhashuge	3-Sep-06	60	December-14
Faaf Atoll					**0**	
Dhaal Atoll					**200**	
47	Dhoores	New Resorts with Transport Network projects	Vermillion International Pvt Ltd	26-May-11	100	NA
48	Vohmuli	New Resorts with Transport Network projects	Vermillion International Pvt Ltd	19-May-10	100	December-14
Medhu Dhekunu Province (South Central Province)					**1,280**	
Thaa Atoll					**580**	
49	Elaa	Phase 2 - Open Controlled - 2006	Villa Shipping & Trading Company Pte. Ltd	19-Sep-06	280	NA
50	Kalhufahalafushi	11 Islands - 2004	Asia Resorts Pvt.Ltd	5-Aug-05	200	NA
51	Male'fushi	Phase 1 - Open Controlled - 2006	I. V. P. l. Investnment Company Pvt Ltd	2-Jul-06	100	July-13
Laam Atoll					**700**	
52	Bodufinolhu / Gasgandufinolhu	Training Resorts	Premier Equity Pvt. Ltd.	28-Sep-08	150	NA
53	Gan	Hotel & Training facility	Premier Equity Pvt. Ltd.	28-Sep-08	150	NA
54	Gan Medical Resort	Other Resort Projects	Island Development Company Pvt. Ltd	27-Jul-11	NA	NA
55	Kadhdhoo	Regional Airport Hotels	Mr. Ali Ibrahim, Finivaage, Adh. Fenfushi	14-Jun-07	200	NA
56	Vadinolhu	New Resorts with Transport Network projects	Maldives Dhoni Services	31-Mar-10	200	NA

Table 20: *(continued…)*

	Island	Facility Type / Batch	Lease Holder	Leased Date	Beds	Estimated Opening Date
Mathi Dhekunu Province (Upper South Province)					**1,302**	
Gaaf Alif Atoll					**648**	
57	Dhigurah	Tourist Establishments with Airports	Bonavista (Maldives) Pvt.Ltd	10-Jul-10	NA	July-14
58	Kondeymathee Laabadhoo	MTDC Islands	Maldives Tourism Development Corporation PLC	17-Sep-06	100	NA
59	Maanagala (Matu)	New Resorts with Transport Network projects	Trinus-CAE Holdings Pvt Ltd	5-May-10	100	NA
60	Maarehaa	Tourist Establishments with Airports	Moving International (Pvt). Ltd	10-Jul-11	NA	NA
61	Mahadhdhoo	Phase 2 - Open Rent - 2006	Mahadhdhoo Investment Pvt. Ltd.	17-Aug-06	100	NA
62	Munandhuvaa	Phase 1 - Open Rent - 2006	Clear Sand Pvt Ltd	18-Jun-06	48	NA
63	Vodamulaa	MTDC Islands	Maldives Tourism Development Corporation PLC	27-Mar-07	300	NA
Gaaf Dhaal Atoll					**654**	
64	Gazeera	Phase 1 - Open Rent - 2006	Gazeera Pvt. Ltd.	22-Jun-06	44	NA
65	Kaadedhdhoo	Regional Airport Hotels	Dream Ocean Holidays Pvt. Ltd.	1-Jul-07	200	NA
66	Kaishidhoo	Phase 2 - Open Rent - 2006	Kaishidhoo Resorts Pvt. Ltd.	3-Sep-06	60	NA
67	Konotta	11 Islands - 2004	Crystal Lagoon Resorts Pvt.Ltd	5-Aug-05	100	December-13
68	Lonudhuahutta	11 Islands - 2004	One and Half Degree Maldives Pvt. Ltd	5-Aug-05	100	NA
69	Maavaarulu	Tourist Establishments with Airports	Moving International (Pvt). Ltd	10-Jul-11	NA	NA
70	Vatavarreha	Phase 1 - Open Controlled - 2006	Yacht Tours Maldives Pvt Ltd	26-Jun-06	150	NA
Dekunu Province (South Province)					**320**	
Gnaviyani Atoll					**120**	
71	Fuvahmulak	Other Islands + City Hotels	One and Half Degree Maldives Pvt Ltd	2-Jun-06	120	NA
Seenu Atoll					**200**	
72	Hankede	Other Islands + City Hotels	Dollarton Private Limited	9-Apr-06	200	NA
Total					**9,682**	

Source: Ministry of Tourism, Arts and Culture — Revised on October 2012

SECTION 6: OTHER TABLES

Table 21: Bed Capacity of Resorts and Distance from Airport, 2007-2011

	Name of the Resort	Atoll & Island Name	Airport Distance (Km)	Year of Initial Operation	Initial Bed Capacity	2007	2008	2009	2010	2011
1	Adaaran Prestige Vaadhu	K. Vaadhu	8.0	1978	18	66	66	100	100	100
2	Adhaaran Club Rannaalhi	K. Rannalhi	34.0	1978	34	232	256	256	256	256
3	Adhaaran Select Hudhuranfushi	K. Lhohifushi	22.5	1979	40	354	354	354	354	354
4	Adhaaran Select Meedhupparu	R. Meedhupparu	130.3	2000	430	470	470	470	470	470
5	Alimatha Aquatic Resort	V. Alimatha	48.0	1975	20	260	260	260	260	260
6	Amari Addu Maldives	S. Herethere	480.0	2007	106	546	546	546	546	546
7	Anantara Kihavah Villas	B. Kihavah Haruvalhi	125.0	2010	110	-	-	-	110	110
8	Anantara Resort & Spa Maldives	K. Dhigufinolhu	40.0	1980	24	220	220	220	220	220
9	Angaaga Island Resort and Spa	A.Dh. Angaga	85.0	1989	100	140	140	140	140	140
10	Angsana Resort & Spa Maldives, Ihuru	K. Ihuru	17.0	1978	20	90	90	90	90	90
11	Angsana Resort and Spa Maldives - Velavaru	Dh. Velavaru	125.0	1998	50	168	168	236	236	236
12	Asdhu Sun Island	K. Asdhu	32.0	1981	36	60	60	60	60	60
13	Athurugau Island Resort	A.Dh. Athurugau	90.0	1990	79	98	98	98	146	146
14	Ayada Maldives	G.Dh. Magudhdhuva	420.0	2011	200	-	-	-	-	200
15	Bandos Island Resort and Spa	K. Bandos	8.0	1972	220	450	450	450	450	450
16	Banyan Tree Maldives Vabbinfaru	K. Vabbinfaru	12.0	1977	24	96	96	96	96	96
17	Baros Holiday Resort	K. Baros	16.0	1973	56	150	150	150	150	150
18	Bathala Island Resort	A.A. Bathala	48.3	1983	20	90	90	90	90	90
19	Biyaadhu Island Resort	K. Biyaadhoo	18.0	1982	192	192	192	192	192	192
20	Centara Grand Island Resort & Spa Maldives	A.Dh. Machchafushi	95.0	1992	96	128	128	224	224	224
21	Chaaya Island Dhonveli	K. Kanuoiy Huraa	13.0	1981	20	292	292	296	296	296
22	Chaaya Lagoon Hakuraa Huraa	M. Hakuraa Huraa	128.7	1999	72	160	160	160	160	160
23	Cinnamon Island Alidhoo	H.A. Alidhoo	300.0	2007	66	200	200	200	200	200
24	Club Faru, Farukolhufushi	K. Farukolhufushi	2.0	1973	112	304	304	304	304	304
25	Coco Palm Boduhithi	K. Boduhithi	29.0	1979	50	206	206	206	206	206
26	Coco Palm Dhunikolhu	B. Dhunikolhu	124.0	1998	192	200	200	200	200	200
27	Coco Palm Kudahithi	K. Kudahithi	27.4	1984	12	14	14	14	14	14
28	Cocoa Island	K. Makunufushi	30.0	1981	12	70	70	70	70	70
29	Conrad Maldives Rangali Island	A.Dh. Rangalifinolhu	96.6	1992	80	304	304	304	304	304
30	Constance Halaveli Resort	A.A. Halaveli	36.0	1982	30	112	112	172	172	172
31	Constance Moofushi Resort	A.Dh. Moofushi	80.0	1990	84	124	124	124	124	220
32	Dhiggiri Tourist Resort	V. Dhiggiri	32.0	1982	50	90	90	90	90	90
33	Dream Island Maldives	K. Villivaru	29.0	1981	120	120	120	120	120	120
34	Ellaidhu Tourist Resort	A.A. Ellaidhoo	54.0	1985	32	176	224	224	224	224

Table 21: (*continued…*)

	Name of the Resort	Atoll & Island Name	Airport Distance (Km)	Year of Initial Operation	Initial Bed Capacity	2007	2008	2009	2010	2011
35	Emboodhu Village	K. Emboodhu	8.0	1979	44	236	236	236	236	236
36	Eriyadhu Island Resort	K. Eriyadhu	40.0	1982	40	114	114	114	114	114
37	Fihalhohi Island Resort	K. Fihaalhohi	28.0	1981	90	300	300	300	300	300
38	Filitheyo Island Resort	F. Filitheyo	120.7	1999	250	250	250	250	250	250
39	Four Seasons Resort Maldives at Kuda Huraa	K. Kuda Huraa	12.9	1977	32	212	212	212	212	212
40	Four Seasons Resort Maldives at Landaa Giraavaru	B. Landaa Giraavaru	120.0	2006	206	206	206	206	206	206
41	Fun Island Resort	K. Bodufinolhu	38.0	1980	44	200	200	200	200	200
42	Gangehi Island Resort	A.A. Gangehi	77.2	1987	50	50	72	72	72	72
43	Gasfinolhu Island Resort	K. Gasfinolhu	23.0	1980	18	80	80	80	80	80
44	Giraavaru Tourist Resort	K. Giraavaru	11.3	1980	40	132	132	132	132	132
45	Helengeli Island Resort	K. Helengeli	46.7	1979	20	100	100	100	100	100
46	Hilton Maldives - Irufushi Resort & Spa	N. Medhafushi	238.0	2008	200	-	300	390	442	442
47	Holiday Inn Resort Kandooma Maldives	K. Kandoomafushi	27.4	1985	98	204	322	322	322	322
48	Holiday Island	A.Dh. Dhiffushi	93.0	1994	284	284	284	284	284	284
49	Huvafenfushi	K. Nakatchafushi	25.7	1979	80	102	102	102	102	102
50	Huvandhumaafushi	G.A Funamauddua	400.0	2009	100	-	-	100	150	150
51	Island Hideaway at Dhonakulhi Maldives, Spa Reso	H.A. Dhonakulhi	250.0	2005	50	90	90	90	90	90
52	Jumeirah Dhevanafushi	G.A Meradhoo	400.0	2011	38	-	-	-	-	74
53	Jumeirah Vittaveli Island Resort at Bolifushi	K. Bolifushi	12.0	1982	64	110	110	110	110	174
54	Kanifinolhu Tourist Resort	K. Kanifinolhu	19.3	1978	18	444	444	444	448	448
55	Kihaadhufaru Tourist Resort	B. Kihaadhuffaru	104.6	1999	200	200	200	200	200	200
56	Komandoo Maldive Island Resort	Lh. Komandoo	128.7	1998	90	120	120	120	120	120
57	Kudarah Island Resort	A.Dh. Kudarah	88.5	1991	50	60	60	60	60	60
58	Kuramathi Tourist Resort	A.A. Kuramathi	56.3	1977	48	580	580	580	580	580
59	Kuredhdhu Island Resort	Lh. Kuredhdhu	128.7	1978	18	740	746	768	768	768
60	Kurumba Maldives	K. Vihamanaafushi	3.2	1972	60	362	362	362	362	362
61	Lily Beach Resort	A.Dh. Huvahendhoo	85.0	1994	168	170	170	250	250	250
62	Lux* Maldives (Diva Maldives)	A.Dh. Dhidhdhufinoll	104.0	1988	180	282	394	394	394	394
63	Maayafushi Tourist Resort	A.A. Maayafushi	63.0	1983	48	150	150	150	150	150
64	Madoogali Resort	A.A. Madoogali	77.2	1989	70	112	112	112	112	112
65	Makunudhoo Island	K. Makunudhu	38.6	1983	58	74	74	74	74	74
66	Medhufushi Island Resort	M. Medhufushi	128.7	2000	240	240	240	240	240	240
67	Meeru Island Resort	K. Meerufenfushi	37.0	1978	128	570	570	570	570	570
68	Mirihi Island Resort	A.Dh. Mirihi	112.6	1989	36	72	72	72	72	72
69	Nika Island Resort	A.A. Kudafolhudhu	69.2	1983	30	76	76	76	76	76

Table 21: *(continued…)*

	Name of the Resort	Atoll & Island Name	Airport Distance (Km)	Year of Initial Operation	Initial Bed Capacity	2007	2008	2009	2010	2011
70	Olhuveli Beach & Spa Resort	K. Olhuveli	51.5	1979	36	268	268	268	332	332
71	One & Only Kanuhura, Maldives	Lh. Kanuhuraa	125.5	1999	200	200	200	200	200	200
72	One & Only Reethi Rah, Maldives	K. Medhufinolhu	64.4	1979	24	264	264	268	268	268
73	Palm Beach Island	Lh. Madhiriguraidhoo	128.7	1999	200	216	228	248	248	248
74	Palm Tree Island	K. Veligandu Huraa	27.0	1986	32	138	138	138	138	138
75	Paradise Island Resort & Spa	K. Lankanfinolhu	9.6	1979	24	520	568	568	568	568
76	Park Hyatt Maldives, Hadaha	G.A Hadahaa	405.0	2009	100	-	-	100	100	100
77	Ranveli Village	A.Dh. Villingilivaru	77.0	1991	112	112	112	112	112	112
78	Reethi Beach Resort	B. Fonimagoodhoo	104.6	1998	200	200	200	200	248	248
79	Rihiveli Beach Resort	K. Mahaanaelhi Hura	40.2	1980	40	100	100	100	100	100
80	Royal Island	B. Horubadhoo	110.0	2001	304	304	304	304	304	304
81	Shangri - La Villingili Resort & Spa	S. Villingili	478.0	2009	284	-	-	284	284	284
82	Sheraton Maldives Full Moon Reosort & Spa	K. Furanafushi	5.6	1973	112	312	312	312	312	312
83	Six Senses Laamu	L. Olhuveli	260.0	2011	66	-	-	-	-	194
84	Soneva Fushi By Six Senses	B. Kunfunadhoo	104.6	1983	50	130	130	130	130	130
85	Soneva Gili By Six Senses	K. Lankanfushi	9.7	1980	12	94	94	94	94	94
86	Summer Island Village	K. Ziyaaraifushi	35.0	1983	58	216	216	216	216	230
87	Sun Island Resort & Spa	A.Dh. Nalaguraidhoo	99.8	1998	700	852	852	852	852	852
88	Taj Exortica Resort & Spa Maldives	K. Embudhu Finolhu	12.9	1983	20	128	128	128	128	128
89	Thulhaagiri Island Resort	K. Thulhaagiri	11.0	1980	44	138	138	172	172	172
90	Thundufushi Island Resort	A.Dh. Thundufushi	80.5	1990	74	94	94	94	94	144
91	Twin Island Resort	A.Dh. Maafushivaru	54.7	1991	60	98	98	98	98	98
92	Vakarufalhi Island Resort	A.Dh. Vakarufalhi	90.0	1994	100	100	100	150	150	150
93	Velassaru Maldives	K. Velassaru	11.3	1974	90	258	258	258	258	258
94	Velidhoo Island Resort	A.A. Velidhoo	80.5	1989	22	200	200	200	200	200
95	Veligandu Island	A.A. Veligandu	51.0	1984	34	148	148	148	148	148
96	Vilamendhoo Island Resort	A.Dh. Vilamendhoo	48.3	1994	200	282	282	282	282	368
97	Villu Reef Beach & Spa Resort	Dh. Meedhuffushi	128.7	1998	136	156	156	200	200	200
98	Vivanta by Taj - Coral Reef, Maldives	K. Hembadhoo	32.2	1982	68	132	132	124	124	124
99	W. Retreat & Spa Maldives	A.A. Fesdhu	72.4	1982	90	164	164	164	164	164
100	Waldorf Astoria Maldives	H.A Manafaru	337.0	2007	100	100	142	142	166	166
101	Zitahli Resort & Spa, Kudafunafaru	N. Kudafunafaru	180.0	2008	100	-	100	100	100	100
Total						**19,028**	**19,860**	**20,942**	**21,342**	**22,120**

Source: Ministry of Tourism, Arts & Culture

Table 22: Bed Capacity of Hotels, 2007-2011

	Name of the Resort	Atoll & Island Name	Airport Distance (Km)	Year of Initial Operation	Initial Bed Capacity	2007	2008	2009	2010	2011
1	Central Hotel	K. Male'	2.0	1998	82	82	82	82	82	82
2	Coral Hotel & Spa	K. Male'	2.0	2006	77	77	77	77	77	81
3	Equator Village - Gan	S. Gan	400.0	1992	60	156	156	156	156	156
4	Gan Island Retreat	S. Gan	400.0	2011	100	-	-	-	-	100
5	Green Hotel	L. Gan	260.0	2011	50	-	-	-	-	50
6	Hulhule Island Hotel	K. Hulhule'	0.0	2000	176	170	272	272	272	272
7	Hulhumale' Sunshine Hotel	K. Hulhumale'	1.0	2010	30	-	-	-	30	30
8	Kam Hotel	K. Male'	2.0	1994	58	24	24	24	24	24
9	Lucky Hiya Hotel	K. Male'	2.0	2007	39	39	39	39	39	39
10	Marble Hotel	K. Male'	2.0	2008	40	-	40	40	55	55
11	Mookai Hotel	K. Male'	2.0	2000	102	102	102	102	102	102
12	Mookai Siutes	K. Male'	2.0	2008	98	-	98	98	98	98
13	Nalahiya Hotel	K. Male'	2.0	2007	84	84	84	84	84	84
14	Nasandhura Palace Hotel	K. Male'	2.0	1981	60	62	62	-	36	36
15	Off Day Inn	K. Male'	2.0	1999	30	30	30	30	30	30
16	Relax Inn	K. Male'	2.0	1998	60	60	74	74	74	74
17	The Boutique Inn at Villa Shabnamee	K. Male'	2.0	2009	24	-	-	24	24	24
18	The Wave Hotel and Spa	K. Male'	2.0	2008	32	-	32	32	32	32
19	Traders Hotel	K. Male'	2.0	2009	78	-	-	234	234	234
Total						**886**	**1,172**	**1,368**	**1,449**	**1,603**

Source: Ministry of Tourism, Arts & Culture

Table 23: Graduates from Faculty of Hospitality and Tourism Studies 2007 - 2011

Year	Full Time Courses			Other Courses			Grand Total
	Male	Female	Total	Male	Female	Total	
2007	63	16	**79**	104	71	**175**	**254**
2008	75	49	**124**	64	13	**77**	**201**
2009	48	15	**63**	95	54	**149**	**212**
2010	76	24	**100**	13	11	**24**	**124**
2011	65	20	**85**	16	52	**68**	**153**
Total	**327**	**124**	**451**	**292**	**201**	**493**	**944**

Source: Faculty of Hospitality and Tourism Studies (FHTS)

Table 24: Inbound and Outbound Travel (Maldivians Only) 2007 - 2011

Year	Arrivals	% change	Departure	% change
2007	100,575	22.3	101,842	37.0
2008	121,287	20.6	123,008	20.8
2009	120,328	-0.8	121,464	-1.3
2010	129,286	7.4	129,608	6.7
2011	132,215	2.3	131,501	1.5

Source: Department of Immigration and Emigration

Table 25: Seasonal Variations of Tourist Arrivals (Seasonal Indices) 2007 - 2011

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Seasonality Ratio
2007	115	116	114	112	83	68	91	94	86	104	101	116	**1.2**
2008	114	119	126	110	86	71	84	91	89	99	102	110	**1.3**
2009	108	103	109	100	76	64	78	92	89	110	109	115	**1.2**
2010	102	117	114	92	88	67	87	100	95	113	113	113	**1.2**
2011	102	113	104	103	83	72	93	99	93	117	110	110	**1.2**

Source: Ministry of Tourism, Arts & Culture

Table 26: Tourist Arrivals and Market Share by Selected Markets 2007 - 2011

REGION / NATIONALITY	2007		2008		2009		2010		2011	
EUROPE	**495,371**	(73.3)	**497,560**	(72.8)	**462,192**	(70.5)	**505,421**	(63.8)	**537,757**	(57.7)
CENTRAL / EASTERN EUROPE	**51,101**	(7.6)	**72,726**	(10.6)	**62,849**	(9.6)	**75,435**	(9.5)	**95,247**	(10.2)
Belarus	583	(0.1)	742	(0.1)	812	(0.1)	898	(0.1)	1,161	(0.1)
Bulgaria	784	(0.1)	965	(0.1)	902	(0.1)	1,051	(0.1)	1,368	(0.1)
Czech Republic	2,766	(0.4)	3,811	(0.6)	3,851	(0.6)	5,137	(0.6)	6,471	(0.7)
Hungary	2,568	(0.4)	2,052	(0.3)	1,848	(0.3)	2,434	(0.3)	2,596	(0.3)
Kazakhstan	1,294	(0.2)	1,656	(0.2)	1,756	(0.3)	1,572	(0.2)	1,731	(0.2)
Poland	2,659	(0.4)	3,325	(0.5)	3,357	(0.5)	3,795	(0.5)	4,158	(0.4)
Romania	1,128	(0.2)	1,225	(0.2)	1,247	(0.2)	1,290	(0.2)	1,656	(0.2)
Russia	31,845	(4.7)	48,978	(7.2)	40,014	(6.1)	49,111	(6.2)	63,936	(6.9)
Slovakia	1,469	(0.2)	1,916	(0.3)	1,970	(0.3)	2,348	(0.3)	2,822	(0.3)
Ukraine	3,545	(0.5)	5,399	(0.8)	4,643	(0.7)	5,445	(0.7)	6,729	(0.7)
Other Central / Eastern Europe	2,460	(0.4)	2,657	(0.4)	2,449	(0.4)	2,354	(0.3)	2,619	(0.3)
NORTHERN EUROPE	**134,927**	(20.0)	**128,591**	(18.8)	**116,491**	(17.8)	**126,222**	(15.9)	**119,388**	(12.8)
Denmark	1,819	(0.3)	1,834	(0.3)	1,722	(0.3)	2,422	(0.3)	3,173	(0.3)
Finland	789	(0.1)	865	(0.1)	1,088	(0.2)	1,281	(0.2)	1,535	(0.2)
Ireland	3,148	(0.5)	2,884	(0.4)	2,420	(0.4)	2,514	(0.3)	2,444	(0.3)
Norway	1,808	(0.3)	2,596	(0.4)	2,120	(0.3)	2,153	(0.3)	2,775	(0.3)
Sweden	2,149	(0.3)	3,542	(0.5)	3,165	(0.5)	3,638	(0.5)	4,896	(0.5)
United Kingdom	125,158	(18.5)	116,821	(17.1)	105,950	(16.2)	114,158	(14.4)	104,508	(11.2)
Other Northern Europe	56	(0.0)	49	(0.0)	26	(0.0)	56	(0.0)	57	(0.0)
SOUTHERN EUROPE	**137,227**	(20.3)	**123,637**	(18.1)	**109,308**	(16.7)	**111,165**	(14.0)	**104,060**	(11.2)
Greece	4,850	(0.7)	4,926	(0.7)	5,406	(0.8)	4,630	(0.6)	3,009	(0.3)
Italy	117,246	(17.3)	103,823	(15.2)	89,292	(13.6)	89,596	(11.3)	83,328	(8.9)
Portugal	4,188	(0.6)	4,150	(0.6)	4,822	(0.7)	4,555	(0.6)	4,325	(0.5)
Slovenia	1,204	(0.2)	1,372	(0.2)	1,324	(0.2)	1,647	(0.2)	2,342	(0.3)
Spain	8,798	(1.3)	8,217	(1.2)	7,279	(1.1)	8,912	(1.1)	8,861	(1.0)
Other Southern Europe	941	(0.1)	1,149	(0.2)	1,185	(0.2)	1,825	(0.2)	2,195	(0.2)
WESTERN EUROPE	**168,062**	(24.9)	**167,424**	(24.5)	**169,027**	(25.8)	**185,433**	(23.4)	**211,755**	(22.7)
Austria	13,673	(2.0)	13,462	(2.0)	13,274	(2.0)	14,944	(1.9)	16,655	(1.8)
Belgium	3,552	(0.5)	3,368	(0.5)	3,437	(0.5)	4,386	(0.6)	5,738	(0.6)
France	45,301	(6.7)	48,100	(7.0)	50,373	(7.7)	54,789	(6.9)	59,694	(6.4)
Germany	72,269	(10.7)	69,240	(10.1)	69,085	(10.5)	77,108	(9.7)	90,517	(9.7)
Netherlands	6,479	(1.0)	5,595	(0.8)	5,355	(0.8)	5,682	(0.7)	5,693	(0.6)
Switzerland	26,183	(3.9)	26,983	(4.0)	26,783	(4.1)	27,766	(3.5)	32,504	(3.5)
Other Western Europe	605	(0.1)	676	(0.1)	720	(0.1)	758	(0.1)	954	(0.1)
EAST MEDITERRANEAN EUROPE	**4,054**	(0.6)	**5,182**	(0.8)	**4,517**	(0.7)	**7,166**	(0.9)	**7,307**	(0.8)
Israel	1,308	(0.2)	1,588	(0.2)	1,380	(0.2)	2,113	(0.3)	2,433	(0.3)
Turkey	2,442	(0.4)	3,235	(0.5)	2,758	(0.4)	4,637	(0.6)	4,542	(0.5)
Other East Mediterranean Europe	304	(0.0)	359	(0.1)	379	(0.1)	416	(0.1)	332	(0.0)

Table 26: (*continued…*)

REGION / NATIONALITY	2007		2008		2009		2010		2011	
ASIA & THE PACIFIC	**155,024**	(22.9)	**156,132**	(22.9)	**163,942**	(25.0)	**250,638**	(31.6)	**348,887**	(37.5)
NORTH EAST ASIA	**100,669**	(14.9)	**102,899**	(15.1)	**115,445**	(17.6)	**186,452**	(23.5)	**265,096**	(28.5)
China	35,976	(5.3)	41,511	(6.1)	60,666	(9.2)	118,961	(15.0)	198,655	(21.3)
Japan	41,121	(6.1)	38,193	(5.6)	36,641	(5.6)	38,791	(4.9)	35,782	(3.8)
Korea	20,976	(3.1)	20,934	(3.1)	16,135	(2.5)	24,808	(3.1)	25,285	(2.7)
Taiwan	2,018	(0.3)	2,233	(0.3)	1,975	(0.3)	3,831	(0.5)	5,305	(0.6)
Other North East Asia	578	(0.1)	28	(0.0)	28	(0.0)	61	(0.0)	69	(0.0)
SOUTH EAST ASIA	**13,344**	(2.0)	**13,678**	(2.0)	**14,097**	(2.1)	**16,818**	(2.1)	**23,726**	(2.5)
Indonesia	943	(0.1)	581	(0.1)	677	(0.1)	818	(0.1)	1,283	(0.1)
Malaysia	2,999	(0.4)	3,137	(0.5)	3,139	(0.5)	3,894	(0.5)	6,055	(0.7)
Philippines	982	(0.1)	871	(0.1)	979	(0.1)	1,066	(0.1)	1,652	(0.2)
Singapore	4,456	(0.7)	4,956	(0.7)	5,214	(0.8)	5,332	(0.7)	7,990	(0.9)
Thailand	3,663	(0.5)	3,952	(0.6)	3,813	(0.6)	5,397	(0.7)	6,214	(0.7)
Other South East Asia	301	(0.0)	181	(0.0)	275	(0.0)	311	(0.0)	532	(0.1)
SOUTH ASIA	**30,350**	(4.5)	**28,981**	(4.2)	**25,996**	(4.0)	**36,612**	(4.6)	**45,870**	(4.9)
Bangladesh	1,284	(0.2)	455	(0.1)	388	(0.1)	525	(0.1)	1,496	(0.2)
India	17,327	(2.6)	16,663	(2.4)	15,850	(2.4)	25,756	(3.3)	30,978	(3.3)
Pakistan	1,013	(0.1)	1,191	(0.2)	1,046	(0.2)	1,256	(0.2)	1,842	(0.2)
Sri Lanka	9,654	(1.4)	9,752	(1.4)	7,833	(1.2)	7,872	(1.0)	9,670	(1.0)
Other South Asia	1,072	(0.2)	920	(0.1)	879	(0.1)	1,203	(0.2)	1,884	(0.2)
OCEANIA	**10,661**	(1.6)	**10,574**	(1.5)	**8,404**	(1.3)	**10,756**	(1.4)	**14,195**	(1.5)
Australia	9,406	(1.4)	9,368	(1.4)	7,392	(1.1)	9,622	(1.2)	12,778	(1.4)
New Zealand	1,142	(0.2)	1,184	(0.2)	991	(0.2)	1,103	(0.1)	1,390	(0.1)
Other Oceania	113	(0.0)	22	(0.0)	21	(0.0)	31	(0.0)	27	(0.0)
Africa	**4,846**	(0.7)	**5,694**	(0.8)	**5,034**	(0.8)	**5,628**	(0.7)	**6,465**	(0.7)
South Africa	3,293	(0.5)	3,732	(0.5)	2,975	(0.5)	3,157	(0.4)	3,684	(0.4)
Other Africa	1,553	(0.2)	1,962	(0.3)	2,059	(0.3)	2,471	(0.3)	2,781	(0.3)
Americas	**14,198**	(2.1)	**14,485**	(2.1)	**15,159**	(2.3)	**18,601**	(2.3)	**23,654**	(2.5)
Brazil	708	(0.1)	1,327	(0.2)	1,304	(0.2)	1,761	(0.2)	2,342	(0.3)
Canada	2,851	(0.4)	2,966	(0.4)	3,043	(0.5)	3,815	(0.5)	4,690	(0.5)
U.S.A	9,348	(1.4)	8,853	(1.3)	9,438	(1.4)	11,482	(1.4)	14,490	(1.6)
Other Americas	1,291	(0.2)	1,339	(0.2)	1,374	(0.2)	1,543	(0.2)	2,132	(0.2)
Middle East	**6,450**	(1.0)	**9,141**	(1.3)	**9,525**	(1.5)	**11,629**	(1.5)	**14,570**	(1.6)
Kuwait	1,004	(0.1)	1,340	(0.2)	1,181	(0.2)	1,409	(0.2)	1,797	(0.2)
Lebanon	660	(0.1)	1,139	(0.2)	984	(0.2)	1,145	(0.1)	1,346	(0.1)
Saudi Arabia	1,940	(0.3)	2,747	(0.4)	3,036	(0.5)	4,040	(0.5)	5,005	(0.5)
United Arab Emirates	807	(0.1)	1,394	(0.2)	1,580	(0.2)	1,699	(0.2)	2,292	(0.2)
Other Middle East	2,039	(0.3)	2,521	(0.4)	2,744	(0.4)	3,336	(0.4)	4,130	(0.4)
Global Total	**675,889**		**683,012**		**655,852**		**791,917**		**931,333**	

Source: Department of Immigration and Emigration

Table 27: Growth Trends of Selected Markets, 2007 – 2011 (Percent)

REGION / NATIONALITY	2007	2008	2009	2010	2011
EUROPE	**8.3**	**0.4**	**-7.1**	**9.4**	**6.4**
CENTRAL / EASTERN EUROPE	***40.3***	***42.3***	***-13.6***	***20.0***	***26.3***
Belarus	19.2	27.3	9.4	10.6	29.3
Bulgaria	73.8	23.1	-6.5	16.5	30.2
Czech Republic	20.5	37.8	1.0	33.4	26.0
Hungary	-3.5	-20.1	-9.9	31.7	6.7
Kazakhstan	117.5	28.0	6.0	-10.5	10.1
Poland	44.2	25.0	1.0	13.0	9.6
Romania	70.7	8.6	1.8	3.4	28.4
Russia	45.0	53.8	-18.3	22.7	30.2
Slovakia	55.6	30.4	2.8	19.2	20.2
Ukraine	46.1	52.3	-14.0	17.3	23.6
Other Central / Eastern Europe	17.3	8.0	-7.8	-3.9	11.3
NORTHERN EUROPE	***16.2***	***-4.7***	***-9.4***	***8.4***	***-5.4***
Denmark	21.3	0.8	-6.1	40.7	31.0
Finland	52.3	9.6	25.8	17.7	19.8
Ireland	18.9	-8.4	-16.1	3.9	-2.8
Norway	12.1	43.6	-18.3	1.6	28.9
Sweden	19.4	64.8	-10.6	14.9	34.6
United Kingdom	15.9	-6.7	-9.3	7.7	-8.5
Other Northern Europe	12.0	-12.5	-46.9	115.4	1.8
SOUTHERN EUROPE	***2.1***	***-9.9***	***-11.6***	***1.7***	***-6.4***
Greece	35.3	1.6	9.7	-14.4	-35.0
Italy	-1.4	-11.4	-14.0	0.3	-7.3
Portugal	14.6	-0.9	16.2	-5.5	-2.7
Slovenia	51.3	14.0	-3.5	24.4	-2.3
Spain	31.7	-6.6	-11.4	22.4	9.0
Other Southern Europe	17.2	22.1	3.1	54.0	21.1
WESTERN EUROPE	***0.4***	***-0.4***	***1.0***	***9.7***	***14.2***
Austria	-3.0	-1.5	-1.4	12.6	11.4
Belgium	-11.0	-5.2	2.0	27.6	30.8
France	3.8	6.2	4.7	8.8	9.0
Germany	2.0	-4.2	-0.2	11.6	17.4
Netherlands	-19.5	-13.6	-4.3	6.1	0.2
Switzerland	-0.3	3.1	-0.7	3.7	17.1
Other Western Europe	-3.4	11.7	6.5	5.3	25.9
EAST MEDITERRANEAN EUROPE	***31.9***	***27.8***	***-12.8***	***58.6***	***2.0***
Israel	54.6	21.4	-13.1	53.1	15.1
Turkey	19.5	32.5	-14.7	68.1	-2.0
Other East Mediterranean Europe	65.2	18.1	5.6	9.8	-20.2

Table 27: (*continued…*)

REGION / NATIONALITY	2007	2008	2009	2010	2011
ASIA & THE PACIFIC	**24.0**	**0.7**	**5.0**	**52.9**	**39.2**
NORTH EAST ASIA	***20.7***	***2.2***	***12.2***	***61.5***	***42.2***
China	36.3	15.4	46.1	96.1	67.0
Japan	4.0	-7.1	-4.1	5.9	-7.8
Korea	29.8	-0.2	-22.9	53.8	1.9
Taiwan	57.5	10.7	-11.6	94.0	38.5
Other North East Asia	1345.0	-95.2	0.0	117.9	13.1
SOUTH EAST ASIA	***22.5***	***2.5***	***3.1***	***19.3***	***41.1***
Indonesia	50.9	-38.4	16.5	20.8	56.8
Malaysia	2.9	4.6	0.1	24.1	55.5
Philippines	47.4	-11.3	12.4	8.9	55.0
Singapore	4.7	11.2	5.2	2.3	49.8
Thailand	62.7	7.9	-3.5	41.5	15.1
Other South East Asia	63.6	-39.9	51.9	13.1	71.1
SOUTH ASIA	***33.4***	***-4.5***	***-10.3***	***40.8***	***25.3***
Bangladesh	22.3	-64.6	-14.7	35.3	185.0
India	43.5	-3.8	-4.9	62.5	20.3
Pakistan	-9.5	17.6	-12.2	20.1	46.7
Sri Lanka	21.4	1.0	-19.7	0.5	22.8
Other South Asia	90.4	-14.2	-4.5	36.9	56.6
OCEANIA	***33.6***	***-0.8***	***-20.5***	***28.0***	***32.0***
Australia	36.5	-0.4	-21.1	30.2	32.8
New Zealand	13.5	3.7	-16.3	11.3	26.0
Other Oceania	39.5	-80.5	-4.5	47.6	-12.9
Africa	**16.2**	**17.5**	**-11.6**	**11.8**	**14.9**
South Africa	10.8	13.3	-20.3	6.1	16.7
Other Africa	29.8	26.3	4.9	20.0	12.5
Americas	**31.3**	**2.0**	**4.7**	**22.7**	**27.2**
Brazil	25.5	87.4	-1.7	35.0	33.0
Canada	29.8	4.0	2.6	25.4	22.9
U.S.A	30.7	-5.3	6.6	21.7	26.2
Other Americas	43.0	3.7	2.6	12.3	38.2
Middle East	**47.5**	**41.7**	**4.2**	**22.1**	**25.3**
Kuwait	50.3	33.5	-11.9	19.3	27.5
Lebanon	64.2	72.6	-13.6	16.4	17.6
Saudi Arabia	26.8	41.6	10.5	33.1	23.9
United Arab Emirates	64.0	72.7	13.3	7.5	34.9
Other Middle East	59.3	23.6	8.8	21.6	23.8
Global Total	**12.3**	**1.1**	**-4.0**	**20.7**	**17.6**

Source: Department of Immigration and Emigration

Table 28: Tourist Arrivals by Markets, (at end September 2012)

REGION / NATIONALITY	January - September			
	2011	2012	% Change	% Share 2012
EUROPE	**387,936**	**376,674**	**-2.9**	**54.5**
CENTRAL / EASTERN EUROPE	***66,720***	***70,084***	***5.0***	***10.1***
Belarus	804	1,041	29.5	0.2
Bulgaria	1,008	986	-2.2	0.1
Czech Republic	4,581	3,953	-13.7	0.6
Hungary	2,020	1,749	-13.4	0.3
Kazakhstan	1,151	2,170	88.5	0.3
Poland	2,837	2,589	-8.7	0.4
Romania	1,096	1,302	18.8	0.2
Russia	44,829	46,440	3.6	6.7
Slovakia	2,087	1,894	-9.2	0.3
Ukraine	4,559	5,640	23.7	0.8
Other Central / Eastern Europe	1,748	2,320	32.7	0.3
NORTHERN EUROPE	***88,659***	***78,495***	***-11.5***	***11.3***
Denmark	2,110	2,349	11.3	0.3
Finland	1,022	955	-6.6	0.1
Ireland	1,760	1,863	5.9	0.3
Norway	1,928	2,145	11.3	0.3
Sweden	3,025	3,155	4.3	0.5
United Kingdom	78,772	67,987	-13.7	9.8
Other Northern Europe	42	41	-2.4	0.0
SOUTHERN EUROPE	***80,004***	***61,161***	***-23.6***	***8.8***
Greece	2,394	1,606	-32.9	0.2
Italy	64,231	47,348	-26.3	6.8
Portugal	3,633	2,867	-21.1	0.4
Slovenia	1,178	922	-21.7	0.1
Spain	7,042	6,527	-7.3	0.9
Other Southern Europe	1,526	1,891	23.9	0.3
WESTERN EUROPE	***147,489***	***161,343***	***9.4***	***23.3***
Austria	11,765	12,797	8.8	1.9
Belgium	4,085	3,756	-8.1	0.5
France	43,002	42,197	-1.9	6.1
Germany	61,929	71,950	16.2	10.4
Netherlands / Holland	4,181	4,517	8.0	0.7
Switzerland	21,814	25,487	16.8	3.7
Other Western Europe	713	639	-10.4	0.1
EAST MEDITERRANEAN EUROPE	***5,064***	***5,591***	***10.4***	***0.8***
Israel	1,634	1,990	21.8	0.3
Turkey	3,165	3,404	7.6	0.5
Other East Mediterranean Europe	265	197	-25.7	0.0

Table 28: *(continued…)*

REGION / NATIONALITY	January - September 2011	2012	% Change	% Share 2012
ASIA & THE PACIFIC	**249,820**	**275,343**	**10.2**	**39.8**
NORTH EAST ASIA	***191,316***	***213,797***	***11.8***	***30.9***
China	146,668	169,117	15.3	24.5
Japan	26,388	25,947	-1.7	3.8
Korea	14,469	15,661	8.2	2.3
Taiwan	3,746	3,041	-18.8	0.4
Other North East Asia	45	31	-31.1	0.0
SOUTH EAST ASIA	***16,499***	***19,093***	***15.7***	***2.8***
Indonesia	875	1,198	36.9	0.2
Malaysia	4,284	4,731	10.4	0.7
Philippines	1,183	1,546	30.7	0.2
Singapore	5,352	6,295	17.6	0.9
Thailand	4,474	4,880	9.1	0.7
Other South East Asia	331	443	33.8	0.1
SOUTH ASIA	***31,335***	***29,687***	***-5.3***	***4.3***
Bangladesh	1,049	839	-20.0	0.1
India	20,617	19,723	-4.3	2.9
Pakistan	1,233	1,353	9.7	0.2
Sri Lanka	7,073	6,447	-8.9	0.9
Other South Asia	1,363	1,325	-2.8	0.2
OCEANIA	***10,670***	***12,766***	***19.6***	***1.8***
Australia	9,576	11,548	20.6	1.7
New Zealand	1,073	1,196	11.5	0.2
Other Oceania	21	22	4.8	0.0
AFRICA	**4,560**	**5,005**	**9.8**	**0.7**
South Africa	2,595	2,732	5.3	0.4
Other Africa	1,965	2,273	15.7	0.3
AMERICAS	**16,367**	**18,375**	**12.3**	**2.7**
Brazil	1,793	2,180	21.6	0.3
Canada	3,152	3,439	9.1	0.5
U.S.A.	9,906	10,899	10.0	1.6
Other Americas	1,516	1,857	22.5	0.3
MIDDLE EAST	**10,489**	**16,211**	**54.6**	**2.3**
Kuwait	1,225	2,145	75.1	0.3
Lebanon	979	1,250	27.7	0.2
Saudi Arabia	3,761	5,513	46.6	0.8
United Arab Emirates	1,627	2,983	83.3	0.4
Other Middle East	2,897	4,320	49.1	0.6
TOTAL TOURIST ARRIVALS	**669,172**	**691,608**	**3.4**	**100.0**

Source: Department of Immigration and Emigration

Table 29: Tourism Indicators, (at end September 2012)

TOURIST ARRIVALS		Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Jan-Sep Total
FRONTIER ARRIVALS (by air)		2011	79,493	87,392	80,732	79,947	64,456	55,947	72,516	76,828	71,861	669,172
		2012	96,146	83,252	76,469	79,288	63,534	59,379	76,966	79,768	76,806	691,608
		Growth %	20.9	-4.7	-5.3	-0.8	-1.4	6.1	6.1	3.8	6.9	3.4
SURFACE ARRIVALS (Cruise Passengers)		2011	0	0	0	0	0	0	0	0	0	0
		2012	0	0	0	0	0	0	0	0	0	0
		Growth %	-	-	-	-	-	-	-	-	-	-
REGISTERED CAPACITY 2012												**Average**
RESORTS	Nos.		102	103	105	105	105	105	105	105	105	104
	Beds		22,140	22,277	22,483	22,593	22,593	22,783	22,783	22,783	22,783	22,580
HOTELS	Nos.		19	20	20	20	20	20	20	20	19	20
	Beds		1,603	1,649	1,649	1,613	1,627	1,627	1,627	1,627	1,597	1,624
GUEST HOUSES	Nos.		43	43	44	45	50	56	59	60	67	52
	Beds		701	717	735	787	791	851	895	903	985	818
SAFARIVESSELS	Nos.		158	159	160	160	161	161	159	158	159	159
	Beds		2,530	2,544	2,564	2,564	2,583	2,583	2,557	2,541	2,560	2,558
TOTAL	**Nos.**		**322**	**325**	**329**	**330**	**336**	**342**	**343**	**343**	**350**	336
	Beds		**26,974**	**27,187**	**27,431**	**27,557**	**27,594**	**27,844**	**27,862**	**27,854**	**27,925**	27,581
OPERATIONAL CAPACITY												**Average**
RESORTS	Nos.	2011	90	92	92	93	93	93	92	93	93	92
		2012	95	96	98	99	97	96	97	98	99	97
	Beds	2011	20,604	20,894	20,990	21,234	21,192	21,014	20,544	21,090	21,126	20,965
		2012	21,514	21,574	21,671	21,779	21,713	21,611	21,899	22,081	22,177	21,780
HOTELS	Nos.	2011	16	17	17	17	17	17	17	17	17	17
		2012	18	19	19	19	19	19	19	19	18	19
	Beds	2011	1,423	1,473	1,473	1,473	1,473	1,473	1,473	1,473	1,473	1,467
		2012	1,573	1,619	1,619	1,619	1,597	1,597	1,597	1,597	1,567	1,598
GUEST HOUSES	Nos.	2011	22	25	26	26	24	26	25	23	26	25
		2012	28	20	29	35	38	38	45	47	50	37
	Beds	2011	458	525	531	527	483	507	476	442	480	492
		2012	462	361	451	593	555	555	647	683	713	558
SAFARIVESSELS	Nos.	2011	106	112	118	116	100	104	112	86	79	104
		2012	59	53	78	80	71	64	60	67	75	67
	Beds	2011	1,649	1,758	1,820	1,806	1,486	1,593	1,713	1,291	1,205	1,591
		2012	835	879	1,146	1,152	1,040	894	834	992	1,125	989
TOTAL	**Nos.**	2011	**234**	**246**	**253**	**252**	**234**	**240**	**246**	**219**	**215**	238
		2012	**200**	**188**	**224**	**233**	**225**	**217**	**221**	**231**	**242**	220
	Beds	2011	**24,134**	**24,650**	**24,814**	**25,040**	**24,634**	**24,587**	**24,206**	**24,296**	**24,284**	24,516
		2012	**24,384**	**24,433**	**24,887**	**25,143**	**24,905**	**24,657**	**24,977**	**25,353**	**25,582**	24,925

Table 29: (*continued…*)

BED NIGHTS	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Jan-Sep Total
RESORTS	**2011**	575,643	570,008	578,260	553,106	445,082	357,673	453,491	494,602	453,010	**4,480,875**
	2012	622,944	570,182	547,335	527,562	445,433	363,041	467,362	512,488	439,180	**4,495,527**
	Growth %	8.2	0.0	-5.3	-4.6	0.1	1.5	3.1	3.6	-3.1	**0.3**
HOTELS	**2011**	19,917	21,429	19,438	17,693	15,428	13,551	16,889	14,569	16,977	**155,891**
	2012	23,478	17,021	15,986	14,310	10,599	10,665	12,919	12,793	14,797	**132,568**
	Growth %	17.9	-20.6	-17.8	-19.1	-31.3	-21.3	-23.5	-12.2	-12.8	**-15.0**
GUEST HOUSES	**2011**	2,445	2,586	2,824	2,078	1,557	2,640	2,628	2,098	2,600	**21,456**
	2012	2,867	1,678	2,423	3,625	2,359	2,296	2,676	3,417	3,109	**24,450**
	Growth %	17.3	-35.1	-14.2	74.4	51.5	-13.0	1.8	62.9	19.6	**14.0**
SAFARIVESSELS	**2011**	14,404	20,805	23,917	18,706	6,790	2,483	5,475	8,442	7,065	**108,087**
	2012	9,413	10,517	16,011	14,318	6,723	3,080	3,713	5,871	6,044	**75,690**
	Growth %	-34.7	-49.4	-33.1	-23.5	-1.0	24.0	-32.2	-30.5	-14.5	**-30.0**
TOTAL	**2011**	**612,409**	**614,828**	**624,439**	**591,583**	**468,857**	**376,347**	**478,483**	**519,711**	**479,652**	**4,766,309**
	2012	**658,702**	**599,398**	**581,755**	**559,815**	**465,114**	**379,082**	**486,670**	**534,569**	**463,130**	**4,728,235**
	Growth %	**7.6**	**-2.5**	**-6.8**	**-5.4**	**-0.8**	**0.7**	**1.7**	**2.9**	**-3.4**	**-0.8**
OCCUPANCY RATE (%)											**Average**
RESORTS	**2011**	90.1	97.4	88.9	86.8	67.7	56.7	71.2	75.7	71.5	**78.5**
	2012	93.4	94.4	81.5	80.7	66.2	56.0	68.8	74.9	66.0	**75.8**
	Change	3.3	-3.0	-7.4	-6.1	-1.6	-0.7	-2.4	-0.8	-5.5	**-2.7**
HOTELS	**2011**	45.1	52.0	42.6	40.0	33.8	30.7	37.0	31.9	38.4	**39.1**
	2012	48.1	37.5	31.9	29.5	21.4	22.3	26.1	25.8	31.5	**30.5**
	Change	3.0	-14.4	-10.7	-10.6	-12.4	-8.4	-10.9	-6.1	-6.9	**-8.6**
GUEST HOUSES	**2011**	17.2	15.9	17.2	13.1	10.4	16.8	17.8	15.3	18.1	**15.8**
	2012	20.0	16.6	17.3	19.7	13.7	13.3	13.3	164.5	14.5	**32.6**
	Change	2.8	0.7	0.2	6.6	3.3	-3.5	-4.5	149.2	-3.5	**16.8**
SAFARIVESSELS	**2011**	28.2	38.2	42.4	34.5	14.7	5.0	10.3	21.1	19.5	**23.8**
	2012	36.4	38.6	45.1	41.4	20.9	11.1	14.4	19.1	17.9	**27.2**
	Change	8.2	0.4	2.7	6.9	6.1	6.1	4.1	-2.0	-1.6	**3.4**
TOTAL	**2011**	**81.9**	**89.1**	**81.2**	**78.8**	**61.4**	**51.0**	**63.8**	**69.0**	**65.8**	**71.3**
	2012	**87.1**	**87.6**	**75.4**	**74.2**	**60.2**	**51.2**	**62.9**	**68.0**	**60.3**	**69.7**
	Change	**5.3**	**-1.5**	**-5.8**	**-4.5**	**-1.2**	**0.2**	**-0.9**	**-1.0**	**-5.5**	**-1.6**
AVG. DURATION OF STAY (Days)											
	2011	7.7	7.0	7.7	7.4	7.3	6.7	6.6	6.8	6.7	**7.1**
	2012	6.9	7.2	7.6	7.1	7.3	6.4	6.3	6.7	6.0	**6.8**
	Change	-0.9	0.2	-0.1	-0.3	0.0	-0.3	-0.3	-0.1	-0.6	**-0.3**

Source: Ministry of Tourism, Arts and Culture

Security Seminar for the Tourism Sector of Maldives

In April 2011, the Ministry of Tourism, Arts and Culture (MOTAC), the Maldives Police Services (MPS), the Maldives National Defense Force (MNDF) and the Maldives Association of Tourism Industry (MATI) jointly organized a two day seminar to address the ongoing security concerns in the tourism industry of the Maldives.

The seminar which was attended by 145 participants, who were mainly from the Maldives tourism sector and the relevant governmental authorities, was inaugurated by the then president H.E Mohamed Nasheed. In his inaugural speech, the president highlighted the importance of tourism to the economy of Maldives and the rising security issues for the industry. He also highlighted the importance of the seminar and the roles all stakeholders in strengthening this industry.

After the discussions held regarding the safety and security of tourists visiting the Maldives, safeguarding and protection of tourism sector investments and properties, it was agreed to establish a standard security system for the tourist resorts to prevent unauthorized access to resorts. Also agreed was to formulate a security action plan for the tourism sector of the Maldives.

Workshop on Tourism Sector Forecasting Models

As part of the Maldives Tourism Technical Assistance and Policy Note of the World Bank, a team from the Bank undertook analytical work on the tourism sector of the Maldives, in consultation with various industry stakeholders and governmental authorities over a period from November 2010 to February 2011, which resulted in the development of four models to forecast tourist arrivals to the country and a paper on the Maldives tourism sector positioning.

A consultation workshop organized jointly by the World Bank and the Ministry of Tourism, Arts and Culture was thereafter held in October 2011, during which the paper on the “Maldives Tourism Sector Positioning” was shared for discussion among participants and the forecasting models were presented. The workshop was attended by various tourism sector stakeholders and relevant government authorities.

The first session of this interactive three session workshop was focused on the overview of the Maldives Tourism Sector Study and its key analytical findings. Session two was based on the technical work on forecasting arrivals. During this session, the World Bank consultants introduced and explained the four forecasting models namely; the *Global Elasticity model*, the *Temporal Method*, the *Time Series model* and the *Econometric model*. Session three was focused on Contemporary Issues in the Maldives Tourism Sector and areas for further Analytical Work.

Workshop on the Adaptation of Strategic Human Resource Plan for the Tourism Sector

The Ministry of Tourism, Arts and Culture in collaboration with United Nations Development Programme conducted a one day workshop on 12th September 2011 to discuss the Draft Strategic Human Resource Plan with the tourism sector. The workshop was attended by 114 participants from resorts, tourism related associations and relevant government authorities.

The draft plan, prepared by Human Resources consultant Mr. Wouter Schalken, includes a Situational Analysis and the Human Resource Demand and Supply forecast of the Tourism Industry.

This plan was submitted to the National Planning Council and the cabinet secretariat for endorsement as an official policy document for the tourism sector.

Maldives Visitor Survey 2011

The Ministry of Tourism, Arts and Culture in collaboration with Maldives Monetary Authority conducted the Maldives Visitor Survey 2011 from 31st March 2011to 14th April 2011. The primary goal of the Maldives Visitor Survey 2011 was to contribute to the efforts to enhance the tourism industry in the Maldives by providing those in industry and the government with a resource which details the characteristics, preferences and expectations of tourists who visit the Maldives. This survey also seeks to identify deviations from the last Tourist Profile and Opinion Survey conducted in 2008.

The survey was able to capture information on:

- The demographic, economic, social, and geographic profile of tourists who visit the Maldives
- Opinions of tourists about their place of stay in the Maldives; services and facilities; modes of travel to the Maldives
- Patterns of visit, perceptions of value for money, holiday preferences and interests; and
- Tourist expenditure in the Maldives.

The survey report was launched at a ceremony held on 12th January 2012 by the then Special Advisor to the President, Hon. Ibrahim Hussain Zaki. The report is available for download from the website of Ministry of Tourism, Arts and Culture.

Celebrating World Tourism Day 2011

As in previous years, the Ministry of Tourism, Arts and Culture together with the Maldives tourism industry celebrated the World Tourism Day 2011. Special activities were carried out to mark the day, which include;

Issuing of a Tourism Day Supplement: A special supplement was released on 27th September 2011. The supplement contained highlights from major events since tourism day 2010. Also included were messages on the occasion of tourism day 2011 by the then president of the Maldives HEP Mr. Mohamed Nasheed, the then Minister of Tourism, Arts and Culture, Dr. Mariyam Zulfa, the Secretary General of World Tourism Organization (UNWTO) and from senior officials from the tourism industry of the Maldives.

Installation of Male' Attractions Map: A map identifying tourist attractions and areas of interest for tourists was installed in two locations of Male'. The two locations are Jumhooree Maidhan (Republic Square) near Jetty No.1 and in front of Nasandhura Palace Hotel.

Organizing a Dhivehi Fair: A local souvenir fair was held on the occasion of tourism day on 1st October 2011 at the Republic Square. The fair was organized by National Centre for the Arts in association with the Ministry of Tourism, Arts and Culture. With participation from 14 local souvenir shops, stalls were set up to display local products. Live music and cultural dances enhanced the event.

Third Tourism Master Plan Review

The Third Tourism Master Plan (TTMP) of Maldives which covers the period 2007 – 2011 was formulated by the Ministry of Tourism Arts and Culture (MOTAC) under the direction of a Project Steering Committee, comprising 14 Government Ministries. Following a change in the government administration, the Ministry of Tourism initiated a review of strategic actions formulated in the TTMP with the objective of extending the Mater Plan's strategies up to end of 2013.

The prime objective of reviewing the TTMP was to:

- Assess the extent of the implementation of the Third Tourism Master Plan (2007 - 2011), Evaluate and review the proposed policies and strategies of the Plan, against changes in the political, social, economic, institutional and legislative environments over the period.
- Formulate a two year extension on the Third Tourism Master Plan until 2013, consisting of a Situation Analysis, the Master Plan and the Implementation

The review process started with the analysis of the stated strategic actions stated in the TTMP, followed by regular discussion meetings held with MOTAC as the review process progressed. Further to this, several stakeholder meetings were held to understand the level of implementation of the strategic actions in the TTMP, and the feedback from these discussions was duly noted. The reviewed document is available for download from the website of Ministry of Tourism, Arts and Culture.

Conference / Seminars

23rd Joint Meeting of the UNWTO Commission for Asia and UNWTO Conference on Mainstreaming Tourism and the Media

The World Tourism Organization (UNWTO) 23rd Joint meeting of the UNWTO Commission for Asia and UNWTO Conference on Mainstreaming Tourism and the Media, was held from 24-27 March 2011in Colombo Sri Lanka. The Maldives was represented by the then Minister of Tourism, Arts and Culture, Dr. Mariyam Zulfa and the Deputy Director General of the Ministry of Tourism, Arts and Culture, Mr. Moosa Zameer Hassan.

During the conference period, bilateral meetings were held between Hon. Dr. Mariyam Zulfa and counterpart tourism ministers, including Hon. Basil Rajapaksa, the Minister of Economic Development of Sri Lanka.

19th General Assembly of the UNWTO

The World Tourism Organization (UNWTO) 19th General Assembly, was held from 10-14 October 2011 in Korea. The Maldives was represented by the then Minister of Tourism, Arts and Culture, Dr. Mariyam Zulfa and the Deputy Director General of the Ministry of Tourism, Arts and Culture, Mr. Moosa Zameer Hassan.

Following the general assembly and the South Asia Commission meeting, the Maldives proposed to host the 2013 official World Tourism Day in the Maldives and was successfully endorsed.

Staff Training Overseas

Training Program for Young Leaders 2010, Vocational Training Education Course

The training program for Young Leaders 2010, Vocational Training Education was held from 22 February to 11 March 2011 in Japan. Mr. Ghaly Murthala, Assistant Director, Ms. Azma Najeeb Para Legal Assistant, Ms. Fareesha Haneef, Assistant Planning Officer and Ms. Dheena Shareef, Assistant Human Resource Officer took part in this training course.

5th UNWTO Asia Pacific Executive Training Program

The 5th UNWTO Asia/Pacific Executive Training Program was held in Brunei from 12th to 16th June 2011. Permanent Secretary of Ministry of Tourism, Arts and Culture Mr. Ahmed Solih participated in this training program.

Malta Commonwealth Third Country Training Program – Management of Coastal Recreation Resources

The Malta-Commonwealth Third Country Training Programme - Management of Coastal Recreation Resources was held in Malta from 4th to 14th April. Ms. Jimzeena Musthafa, Environment Analyst participated in this training.

Marketing & Promotional Activities

Maldives Participates in ITB 2011

The Maldives was represented at the 45th International Tourism Bourse (ITB) held in Berlin, Germany from 09 – 13 March 2011.The then Minister of Tourism, Arts & Culture, Dr. Mariyam Zulfa together with then Managing Director of Maldives Marketing and Public Relations Corporation (MMPRC), Mr. Simon Hawkins led the delegation from the Maldives.

ITB Berlin is the B2B-Platform of all tourism industry offers with all levels of the industry including tour operators, booking engines, destinations, airlines, and hotels right through to car rental companies. In addition, the world's largest tourism convention Market Trends & Innovations provides unique opportunities to benefit from the global tourism industry.

During the event, the Hon. Minister held interviews and meetings with the major German tour operators as well as Airlines and media. The minister also participated at the panel on climate change convention and presented a paper about the Maldives. Further, Dr. Zulfa gave information about the investment opportunities and government policies regarding the foreign investment in the Maldives.

Maldives Participates in ATM Dubai

The Maldives Marketing and Public Relations Corporation (MMPRC) participated in the 18th Arabian Travel Market (ATM) which was held from 2nd to 5th May 2011 at Dubai International Convention and Exhibition Centre, Dubai. The Maldives delegation, comprising of 77 members, was led by the then Managing Director of MMPRC, Mr. Simon Hawkins.

ATM, the largest trade and consumer travel show in the Gulf region, serves as an ideal platform for Maldivian suppliers and relevant agencies to establish marketing networks with their United Arab Emirates (UAE) and Middle East counterparts.

Maldives wins Travel Agents Choice Award at World Travel Market 2011

The Maldives Marketing & Public Relations Corporation and representatives from Maldives tourism industry participated in one of the biggest travel trade event, the 32nd World Travel Market (WTM) that was held from 7 to 10 November 2011 at ExCeL London.

The Maldivian delegation led by the then Chairman, Mr. Thoyyib Mohamed Waheed and Managing Director, Mr. Simon Hawkins, of the Maldives Marketing & Public Relations Corporation (MMPRC); comprises 171 participants from 70 organizations. WTM, the second largest travel trade exhibition after ITB Berlin, serves as an ideal platform for Maldivian suppliers and relevant agencies to establish marketing networks with their United Kingdom (UK) and European counterparts.

During the event, the Maldives received the award for "Long Haul Destination of the year for Romance", the reader's choice award conducted by Selling Long Haul Magazine.

Other Promotional Activities

Fairs & Exhibition List 2011

	Name of Fair	City/Country	Venue	Dates	Type of Fair
1	FITUR	Madrid, Spain	Parque Ferial Juan Carlos 1, 28042 Madrid, Apdo. De Correos 67.067, Spain (www.fituronline.com)	19 - 23 Jan	Trade & Consumer
2	BOOT	Dusseldorf, Germany	Messe Dusseldorf GmbH, D-40001 Dusseldorf, Germany (www.boot.de)	22 - 30 Jan	Dive
3	SATTE	New Delhi, India	Hall 8-12A, Pragati Maidan, New Delhi (www.satte.org)	27 - 29 Jan	Trade & Consumer
4	BIT	Milan, Italy	Expo cts via G. Govone, 66 - 20155 Milan, Italy (www.expocts.it/bit)	17 - 20 Feb	Trade & Consumer
5	ITB	Berlin, Germany	Messe Berlin GmbH, Messedamm 22, D-14055 Berlin, Germany (www.itb-berlin.de)	9 - 13 Mar	Trade & Consumer
6	MITT	Moscow, Russia	Krasnaya Presnya Exhibition Complex, ZAO Expocentre, Moscow, Russia (www.mitt-moscow.com)	16 - 19 Mar	Trade & Consumer
8	ATM	Dubai, U.A.E	Dubai International Convention & Exhibition Centre, Sheikh Zayed Road, Dubai, United Arab Emirates (www.arabiantravelmarket.com)	2 - 5 May	Trade & Consumer
8	BITE	Beijing, China	China National Convention Centre, 7 Tiancheng East Road, Chaoyang District, Beijing 100105, China (www.bitechina.com.cn)	17 - 19 June	Trade & Consumer
9	DRT Expo	Hong Kong	Hong Kong Exhibition Centre (China Resources Building) 3F, Low Block, China Resources Building, 26 Harbour Road, Wanchai, Hong Kong (www.divingandresorttravelexpo.com)	8 - 10 July 2011	Dive & Liveaboard
10	Top Resa	Paris, France	Paris Porte de Versailles Exhibition Centre, 75015 Paris, France (www.iftm.fr)	20 - 23 Sep	Trade
11	JATA WTF	Tokyo, Japan	Tokyo International Exhibition Center, 3-21-1 Ariake, Koto-ku, Tokyo 135-0063, Japan (www.jata-wtf.com/en)	29 Sep - 2 Oct	Trade & Consumer
12	TTG Incontri	Rimini, Italy	TTG Italia S.p.A - RIMINI FIERA -Via Emilia, 155 - 47900 Rimini, Italy (www.ttgitalia.com/ttgincontri)	6 - 8 October	Trade
13	CITM	Kunming, China	Kunming International Convention & Exhibition Center, Kunming, China (www.citm.com.cn)	27 - 30 Oct	Trade & Consumer