ACKNOWLEDGEMENTS

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- Maldives Customs Services
- Faculty of Hospitality and Tourism Studies / Maldives National University

Ministry of Tourism also acknowledges with appreciation the Maldives tourism industry for their continued cooperation and assistance in the compilation of data for this publication.
INTRODUCTION

Tourism Yearbook 2014 has been produced and published by the Statistics & Research Section of the Ministry of Tourism. This publication briefly presents the overall performance of the tourism industry of the Maldives through 2009 to 2012. In addition to the available national tourism statistics for the past five years, the publication contains major highlights of the tourism industry in 2013.

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 2013

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

Under the Tourism Act, Law 2/99 of the Maldives, all establishments providing accommodation to tourists are required to register at the Ministry of Tourism (MoT). Hence, a register of all facilities are maintained and updated regularly by MoT. Accommodation facilities are classified into resorts, hotels, guest houses and safari vessels.

Over the years, the number of accommodation establishments and its related bed capacity increased steadily. While the number of establishments saw an increase of 53% during the period 2009 to 2013, the bed capacity increased by 19% during the period. In 2009 there were a total of 279 establishments with a total bed capacity of 24,978. This number was increased to 427 establishments with 29,949 beds at the end of 2013.

Table 1 below presents the types of accommodation establishments available in the Maldives with its bed capacity for the last five years.

Table 1: Accommodation Establishments and Bed Capacity, 2009-2013

<table>
<thead>
<tr>
<th>Type of Establishment</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Nos</td>
<td>Beds</td>
<td>Nos</td>
<td>Beds</td>
<td>Nos</td>
</tr>
<tr>
<td>Resorts / Marinas</td>
<td>97</td>
<td>20,942</td>
<td>98</td>
<td>21,350</td>
<td>101</td>
</tr>
<tr>
<td>Hotels</td>
<td>15</td>
<td>1,368</td>
<td>17</td>
<td>1,449</td>
<td>19</td>
</tr>
<tr>
<td>Guest Houses</td>
<td>22</td>
<td>462</td>
<td>25</td>
<td>476</td>
<td>38</td>
</tr>
<tr>
<td>Safari Vessels</td>
<td>145</td>
<td>2,206</td>
<td>156</td>
<td>2,434</td>
<td>157</td>
</tr>
<tr>
<td>Total</td>
<td>279</td>
<td>24,978</td>
<td>296</td>
<td>25,709</td>
<td>315</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism

The Maldives resorts with its unique ‘one-island-one-resort’ concept makes the resort sector as the most attractive form of accommodation in the Maldives. At the end of 2013, there were a total of 110 islands with 23,677 beds registered as tourist resorts in the Maldives, taking account 79% of the total bed capacity that year. In 2013, five new islands were registered as tourist resorts at MoT, increasing the bed capacity by 2.5% compared to 2012. New additions to the resort segment in 2013 include Mushimasmingili, a marina turned to a resort in North Ari Atoll, Randheli and Fushivelaavaru in Noonu Atoll, Kanifushi in Lhaviyani Atoll, and Male’fushi in Thaa Atoll. The 46 bed Maalifushi by Como in Th. Male’fushi was the first resort to open in the Atoll.

Hotels are located in inhabited islands. At the end of 2013 there were 19 hotels with 1,626 beds, contributing 5% to the total bed capacity during the year. Although the number of hotels remained same as that of 2012, bed capacity saw a slight change, due to the closure of Central Hotel (82 beds) and newly registered Sommerset Hotel (60 beds).

Guest Houses offer low cost accommodation for travelers visiting the local islands. Over the last five years number of guest houses increased at an average rate of 60% per year. In 2012, there were 75 guest houses with 1,101 beds registered in the Maldives, this number increased to 135 with 1,930 beds by the end of 2013.

The Live-aboard floating beds, commonly known as Safari Vessels are one of the most popular form of accommodation among tourists who visit the Maldives for diving. Although in terms of numbers, Safari vessels are the leading form of accommodation, their bed capacity represented only 9% of the total capacity of the country in 2013. At the end of 2013, there were a total of 163 safari vessels with 2,716 beds registered in the Maldives.
Resorts by Atolls

At the end of 2013, there was at least one resort open and operational in each atoll except for Gnaiyani Atoll in south.

Kaafu Atoll remained as the leading atoll in terms of bed capacity. In 2013, with a total of 9,268 beds the atoll represented nearly 40% of the bed capacity of the resort sector. With 3,818 beds Alifu Dhaalu Atoll injected 16% to the resort bed capacity during the year 2013. Alifu Alifu Atoll beds saw an increase of 8% with 2,156 beds at the end of the year contributing 8.5% shares to the bed capacity. With 1,704 beds Baa Atoll represented 7.2% of the resort beds in 2013. Bed capacity of Lhaviyani Atoll increase from 1,336 in 2012 to 1,476 by end 2013, increasing its share to 6.3%.

Thaa Atoll’s first resort, Maalifushi by Como (Male’fushi) with 46 beds, was opened in December 2013. With the two new resorts that came in to operation in Noonu Atoll, the bed capacity of the atoll increased to 796 in 2013.

Table 2: Bed Capacity of Resorts by Atolls, 2009 - 2013

<table>
<thead>
<tr>
<th>Atoll</th>
<th>2009 Beds</th>
<th>% Share</th>
<th>2010 Beds</th>
<th>% Share</th>
<th>2011 Beds</th>
<th>% Share</th>
<th>2012 Beds</th>
<th>% Share</th>
<th>2013 Beds</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haa Alifu</td>
<td>432</td>
<td>2.1</td>
<td>456</td>
<td>2.1</td>
<td>456</td>
<td>2.1</td>
<td>456</td>
<td>2.0</td>
<td>456</td>
<td>1.9</td>
</tr>
<tr>
<td>Shaviyani</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>97</td>
<td>0.4</td>
<td>97</td>
<td>0.4</td>
</tr>
<tr>
<td>Noonu</td>
<td>490</td>
<td>2.3</td>
<td>542</td>
<td>2.5</td>
<td>542</td>
<td>2.4</td>
<td>542</td>
<td>2.4</td>
<td>796</td>
<td>3.4</td>
</tr>
<tr>
<td>Raa</td>
<td>470</td>
<td>2.2</td>
<td>470</td>
<td>2.2</td>
<td>470</td>
<td>2.1</td>
<td>470</td>
<td>2.1</td>
<td>470</td>
<td>2.0</td>
</tr>
<tr>
<td>Baa</td>
<td>1,240</td>
<td>5.9</td>
<td>1,398</td>
<td>6.5</td>
<td>1,398</td>
<td>6.3</td>
<td>1,660</td>
<td>7.2</td>
<td>1,704</td>
<td>7.2</td>
</tr>
<tr>
<td>Lhaviyani</td>
<td>1,336</td>
<td>6.4</td>
<td>1,336</td>
<td>6.3</td>
<td>1,336</td>
<td>6.0</td>
<td>1,336</td>
<td>5.8</td>
<td>1,476</td>
<td>6.2</td>
</tr>
<tr>
<td>Kaafu</td>
<td>8,982</td>
<td>42.9</td>
<td>9,058</td>
<td>42.4</td>
<td>9,136</td>
<td>41.3</td>
<td>9,144</td>
<td>39.9</td>
<td>9,268</td>
<td>39.1</td>
</tr>
<tr>
<td>Alifu Alifu</td>
<td>1,988</td>
<td>9.5</td>
<td>1,988</td>
<td>9.3</td>
<td>1,988</td>
<td>9.0</td>
<td>1,988</td>
<td>8.7</td>
<td>2,156</td>
<td>9.1</td>
</tr>
<tr>
<td>Alifu Dhaalu</td>
<td>3,538</td>
<td>16.9</td>
<td>3,586</td>
<td>16.8</td>
<td>3,818</td>
<td>17.3</td>
<td>3,818</td>
<td>16.7</td>
<td>3,818</td>
<td>16.1</td>
</tr>
<tr>
<td>Vaavu</td>
<td>350</td>
<td>1.7</td>
<td>350</td>
<td>1.6</td>
<td>350</td>
<td>1.6</td>
<td>402</td>
<td>1.8</td>
<td>402</td>
<td>1.7</td>
</tr>
<tr>
<td>Meemu</td>
<td>400</td>
<td>1.9</td>
<td>400</td>
<td>1.9</td>
<td>400</td>
<td>1.8</td>
<td>400</td>
<td>1.7</td>
<td>400</td>
<td>1.7</td>
</tr>
<tr>
<td>Faaful</td>
<td>250</td>
<td>1.2</td>
<td>250</td>
<td>1.2</td>
<td>250</td>
<td>1.1</td>
<td>250</td>
<td>1.1</td>
<td>250</td>
<td>1.1</td>
</tr>
<tr>
<td>Dhaalu</td>
<td>436</td>
<td>2.1</td>
<td>436</td>
<td>2.0</td>
<td>436</td>
<td>2.0</td>
<td>590</td>
<td>2.6</td>
<td>590</td>
<td>2.5</td>
</tr>
<tr>
<td>Thaa</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>46</td>
<td>0.2</td>
</tr>
<tr>
<td>Laamu</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>194</td>
<td>0.9</td>
<td>194</td>
<td>0.8</td>
<td>194</td>
<td>0.8</td>
</tr>
<tr>
<td>Gaafu Alifu</td>
<td>200</td>
<td>1.0</td>
<td>250</td>
<td>1.2</td>
<td>324</td>
<td>1.5</td>
<td>524</td>
<td>2.3</td>
<td>524</td>
<td>2.2</td>
</tr>
<tr>
<td>Gaafu Dhaalu</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>200</td>
<td>0.9</td>
<td>200</td>
<td>0.9</td>
<td>200</td>
<td>0.8</td>
</tr>
<tr>
<td>Seenu</td>
<td>830</td>
<td>4.0</td>
<td>830</td>
<td>3.9</td>
<td>830</td>
<td>3.8</td>
<td>830</td>
<td>3.6</td>
<td>830</td>
<td>3.5</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>20,942</td>
<td>100.0</td>
<td>21,350</td>
<td>100.0</td>
<td>22,128</td>
<td>100.0</td>
<td>22,901</td>
<td>100.0</td>
<td><strong>23,677</strong></td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Resorts by Management Type

Number of resorts and their bed capacity by type of lease holders, operators and management is presented in Table 3. As can be seen from the table, the number of resorts leased to local parties increased from 73 in 2012 to 77 at end 2013. While the number of resorts leased to foreign companies also increased from 13 in 2012 to 15 at the end of 2013, the number of resorts leased to Joint Venture companies was down by one. The bed capacity of these establishments increased accordingly. While resorts leased to local parties had a total bed capacity of 17,126 bed capacity represented by foreign companies was 2,326. Resorts leased to joint venture companies had an aggregate total of 4,225 beds at the end of 2013.

At the end of 2013, out of the 77 (17,126 beds) resorts leased to local parties, 46 (11,204 beds) were operated and managed by locals, 22 (4,010 beds) were operated and managed by foreign companies and 5 (1,018 beds) were operated and managed by joint venture companies. Out of these 77, there were 4 (894 beds) resorts operated by locals and managed by foreign companies.

While there were 15 resorts having a total bed capacity of 2,326 beds with foreign companies as lease holder, operator and management, 13 resorts with 3,350 beds were leased to joint venture companies which were also operated and managed by joint venture companies.

Table 3: Resorts by Type of Lease Holder, Operator and Management, 2009-2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Lease Holder</th>
<th>Operator</th>
<th>Management</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Local</td>
<td>Foreign</td>
<td>Joint Venture</td>
</tr>
<tr>
<td>2009</td>
<td>Nos</td>
<td>73</td>
<td>8</td>
</tr>
<tr>
<td>Share (%)</td>
<td>75.3</td>
<td>8.2</td>
<td>16.5</td>
</tr>
<tr>
<td>Beds</td>
<td>16,192</td>
<td>1,180</td>
<td>3,570</td>
</tr>
<tr>
<td>Share (%)</td>
<td>77.3</td>
<td>5.6</td>
<td>17.0</td>
</tr>
<tr>
<td>2010</td>
<td>Nos</td>
<td>74</td>
<td>10</td>
</tr>
<tr>
<td>Share (%)</td>
<td>75.5</td>
<td>10.2</td>
<td>14.3</td>
</tr>
<tr>
<td>Beds</td>
<td>16,570</td>
<td>1,382</td>
<td>3,398</td>
</tr>
<tr>
<td>Share (%)</td>
<td>77.6</td>
<td>6.5</td>
<td>15.9</td>
</tr>
<tr>
<td>2011</td>
<td>Nos</td>
<td>74</td>
<td>12</td>
</tr>
<tr>
<td>Share (%)</td>
<td>73.3</td>
<td>11.9</td>
<td>14.9</td>
</tr>
<tr>
<td>Beds</td>
<td>16,722</td>
<td>1,858</td>
<td>3,548</td>
</tr>
<tr>
<td>Share (%)</td>
<td>75.6</td>
<td>6.5</td>
<td>16.0</td>
</tr>
<tr>
<td>2012</td>
<td>Nos</td>
<td>73</td>
<td>13</td>
</tr>
<tr>
<td>Share (%)</td>
<td>69.5</td>
<td>12.4</td>
<td>18.1</td>
</tr>
<tr>
<td>Beds</td>
<td>16,484</td>
<td>2,118</td>
<td>4,299</td>
</tr>
<tr>
<td>Share (%)</td>
<td>72.0</td>
<td>9.2</td>
<td>18.8</td>
</tr>
<tr>
<td>2013</td>
<td>Nos</td>
<td>77</td>
<td>15</td>
</tr>
<tr>
<td>Share (%)</td>
<td>70.0</td>
<td>13.6</td>
<td>16.4</td>
</tr>
<tr>
<td>Beds</td>
<td>17,126</td>
<td>2,326</td>
<td>4,225</td>
</tr>
<tr>
<td>Share (%)</td>
<td>72.3</td>
<td>9.8</td>
<td>17.8</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Capacity Utilization

Bed capacity in operation refers to the number of beds operational for a period. This excludes the bed capacity of those establishments which were temporarily closed for any purpose. At the end of 2013, the annual average operational bed capacity saw an increase of 4% with 26,101 beds, out of which 23,992 was from resorts and hotels only. This increase in operational bed capacity was reflected in the Bed Night Capacity for the year, totaling up to 9.5 million nights.

The tourist bed nights, which saw a negative growth of 1.2% in 2012, recovered during 2013 with an impressive 9.2% increase. At the end of 2013, the total tourist bed nights of all establishments was 7,041,313 out of this 97% represented the bed nights of resorts and hotels that year.

Occupancy rate has been maintained high over the last five years with a five year average rate of 71% from 2009 to 2013. Over the last five years occupancy rate was highest during the year 2013 with 74%. While resorts and hotels recorded an average rate of 78.4% during the year, the occupancy rate of vessels and guest houses was at 23.8%.

The average duration of stay has been declining over the years. Duration of stay dropped from 8.6 days in 2009 to 6.3 days by the year 2013. Main reason for the declining stay is the growth of Chinese market to the Maldives. The Maldives Visitor Survey conducted during January 2014 shows that Asian tourists, specially the Chinese tourists stay for a shorter period of 3 to 4 days, while the European visitors tend to stay longer with an average of 7 to 11 days.

### Table 4: Bed Nights, Occupancy Rate and Duration of Stay, 2009 - 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Bed Capacity in Operation (annual average)</th>
<th>Bed Night Capacity</th>
<th>Tourist Bed Nights</th>
<th>Bed Night Growth (%)</th>
<th>Occupancy Rate (%)</th>
<th>Average Duration of Stay (days)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>20,137</td>
<td>7,338,221</td>
<td>5,150,688</td>
<td>-5.4</td>
<td>70.2</td>
<td>8.6</td>
</tr>
<tr>
<td></td>
<td>Resorts &amp; Hotels</td>
<td>20,137</td>
<td>7,338,221</td>
<td>5,150,688</td>
<td>-5.4</td>
<td>70.2</td>
</tr>
<tr>
<td></td>
<td>Guest Houses &amp; Vessels</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>2010</td>
<td>23,649</td>
<td>8,631,809</td>
<td>5,986,342</td>
<td>-</td>
<td>69.5</td>
<td>7.6</td>
</tr>
<tr>
<td></td>
<td>Resorts &amp; Hotels</td>
<td>21,541</td>
<td>7,861,955</td>
<td>5,829,589</td>
<td>13.2</td>
<td>74.2</td>
</tr>
<tr>
<td></td>
<td>Guest Houses &amp; Vessels</td>
<td>2,108</td>
<td>769,854</td>
<td>156,753</td>
<td>-</td>
<td>20.7</td>
</tr>
<tr>
<td>2011</td>
<td>24,493</td>
<td>8,939,306</td>
<td>6,529,200</td>
<td>9.1</td>
<td>73.1</td>
<td>7.0</td>
</tr>
<tr>
<td></td>
<td>Resorts &amp; Hotels</td>
<td>22,507</td>
<td>8,214,987</td>
<td>6,358,578</td>
<td>9.1</td>
<td>77.5</td>
</tr>
<tr>
<td></td>
<td>Guest Houses &amp; Vessels</td>
<td>1,987</td>
<td>724,319</td>
<td>170,622</td>
<td>8.8</td>
<td>23.4</td>
</tr>
<tr>
<td>2012</td>
<td>25,062</td>
<td>9,148,755</td>
<td>6,450,889</td>
<td>-1.2</td>
<td>70.4</td>
<td>6.7</td>
</tr>
<tr>
<td></td>
<td>Resorts &amp; Hotels</td>
<td>23,483</td>
<td>8,572,045</td>
<td>6,317,301</td>
<td>-0.6</td>
<td>73.5</td>
</tr>
<tr>
<td></td>
<td>Guest Houses &amp; Vessels</td>
<td>1,579</td>
<td>576,710</td>
<td>133,588</td>
<td>-21.7</td>
<td>23.3</td>
</tr>
<tr>
<td>2013</td>
<td>26,101</td>
<td>9,527,714</td>
<td>7,041,313</td>
<td>9.2</td>
<td>74.0</td>
<td>6.3</td>
</tr>
<tr>
<td></td>
<td>Resorts &amp; Hotels</td>
<td>26,101</td>
<td>9,527,714</td>
<td>7,041,313</td>
<td>9.2</td>
<td>74.0</td>
</tr>
<tr>
<td></td>
<td>Guest Houses &amp; Vessels</td>
<td>2,109</td>
<td>770,426</td>
<td>181,033</td>
<td>35.5</td>
<td>23.8</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Note: Revised _/
The monthly pattern of average occupancy rates of resorts and hotels is presented in Table 5. As can be seen from the table, the Maldives experiences low rates of occupancy from the month of May through September with June recording the lowest over the years. From October, the occupancy rate increases and reaches a maximum during the month of February.
SECTION 2: TOURIST ARRIVAL TRENDS

Global Arrival Trends

The World Tourism Organization (UNWTO) reported that international tourism results were above expectations with an additional 52 million tourists travelling the world registering an impressive growth of 5% to reach a new record of 1,087 million during the year 2013. According to the UNWTO, demand for international arrivals was strong throughout the year with the month of March (+9%) recording the strongest growth and April (+1%) with the weakest.

Table 6: International Tourist Arrivals Worldwide, 2009 - 2013

<table>
<thead>
<tr>
<th></th>
<th>Tourist Arrivals (in millions)</th>
<th>% Change (2013/2012)</th>
<th>% Share 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2009</td>
<td>2010 /</td>
<td>2011 /</td>
</tr>
<tr>
<td>Europe</td>
<td>461.1</td>
<td>484.9</td>
<td>516.1</td>
</tr>
<tr>
<td>Asia &amp; the Pacific</td>
<td>181.0</td>
<td>205.1</td>
<td>218.6</td>
</tr>
<tr>
<td>Americas</td>
<td>140.7</td>
<td>150.3</td>
<td>156.0</td>
</tr>
<tr>
<td>Africa</td>
<td>46.0</td>
<td>49.9</td>
<td>49.7</td>
</tr>
<tr>
<td>Middle East</td>
<td>52.1</td>
<td>58.2</td>
<td>54.7</td>
</tr>
<tr>
<td>World</td>
<td>881</td>
<td>949</td>
<td>996</td>
</tr>
</tbody>
</table>

Note: *Data as collected by UNWTO, January 2014
/ revised
Source: Adapted from UNWTO World Tourism Barometer, January 2014 Edition

As per data collected by the UNWTO during January 2014, for the World Tourism Barometer (WTB), Europe was the leading region in terms of arrival numbers, taking hold of over 51% of worldwide arrivals and welcoming an additional 29 million international arrivals to reach a total of 563 million at the end of 2013. Growth (+5%) for the region exceeded the forecast for the year.

In terms of growth rate, strongest growth was recorded from Asia and the Pacific in 2013. With an additional 14 million arrivals to reach a total of 248 million, the region recorded a positive 6% growth during the year, with South-East Asia as the best performing sub-region.

The Americas, saw an increase of six million arrivals to reach a total of 169 million for the year registering a growth of 4% in 2013. The region maintained its share of worldwide arrivals at 16%.

Africa is said to have attracted three million additional arrivals in 2013 reaching a new record of 56 million. Africa recorded the second best growth during 2013 with 5.6%.

According to the WTB, results from the Middle East were “rather mixed and volatile”. The region recorded a marginal growth of 0.3% with 51.9 million arrivals during the year 2013.
Maldives Arrival Trends

Year 2013 was an outstanding year for the Maldives tourism. Arrivals reached and exceeded the much expected one million mark for the first time. Demand was high throughout the year with strong and above average growth rates except for the month of January. After a volatile 2012, Maldives had a gloomy start for the year 2013 with tourist arrivals recording a negative growth of 7.6% during the month of January. However, the month of February turned out to be a record month with arrivals exceeding hundred thousand in one month for the first time with a total of 104,745. The month of March recorded the best results in terms of growth with a positive 30.1%. Growth remained above average of the year (17.4%) during the months of May (+25%), June (+28.8%), August (+23.3%) and September (20.2%). During the rest of the months, growth remained well above the average (+11%) of five years (2009 to 2013). In terms of absolute numbers, October recorded the best results by welcoming 107,331 tourists during the month. Arrivals reached the historic one million mark during the month of November. The year ended with a total of 1,125,202 tourists.

Table 7: Monthly Arrivals to the Maldives, 2009 - 2013

<table>
<thead>
<tr>
<th></th>
<th>2009 Arrivals</th>
<th>Growth %</th>
<th>2010 Arrivals</th>
<th>Growth %</th>
<th>2011 Arrivals</th>
<th>Growth %</th>
<th>2012 Arrivals</th>
<th>Growth %</th>
<th>2013 Arrivals</th>
<th>Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>61,531</td>
<td>-4.8</td>
<td>67,478</td>
<td>9.7</td>
<td>79,493</td>
<td>17.8</td>
<td>96,146</td>
<td>20.9</td>
<td>88,869</td>
<td>-7.6</td>
</tr>
<tr>
<td>February</td>
<td>58,520</td>
<td>-13.9</td>
<td>77,063</td>
<td>31.7</td>
<td>87,392</td>
<td>13.4</td>
<td>83,252</td>
<td>-4.7</td>
<td>104,745</td>
<td>25.8</td>
</tr>
<tr>
<td>March</td>
<td>62,127</td>
<td>-13.3</td>
<td>74,975</td>
<td>20.7</td>
<td>80,732</td>
<td>7.7</td>
<td>76,469</td>
<td>-5.3</td>
<td>99,498</td>
<td>30.1</td>
</tr>
<tr>
<td>April</td>
<td>57,186</td>
<td>-8.8</td>
<td>60,742</td>
<td>6.2</td>
<td>79,497</td>
<td>31.6</td>
<td>79,288</td>
<td>-0.8</td>
<td>90,636</td>
<td>14.3</td>
</tr>
<tr>
<td>May</td>
<td>43,154</td>
<td>-11.5</td>
<td>58,324</td>
<td>35.2</td>
<td>64,456</td>
<td>10.5</td>
<td>63,534</td>
<td>-1.4</td>
<td>79,426</td>
<td>25.0</td>
</tr>
<tr>
<td>June</td>
<td>36,205</td>
<td>-10.1</td>
<td>44,050</td>
<td>21.7</td>
<td>55,947</td>
<td>27.0</td>
<td>59,379</td>
<td>6.1</td>
<td>76,493</td>
<td>28.8</td>
</tr>
<tr>
<td>July</td>
<td>44,332</td>
<td>-7.0</td>
<td>57,232</td>
<td>29.1</td>
<td>72,516</td>
<td>26.7</td>
<td>76,966</td>
<td>6.1</td>
<td>87,972</td>
<td>14.3</td>
</tr>
<tr>
<td>August</td>
<td>52,388</td>
<td>1.1</td>
<td>66,315</td>
<td>26.6</td>
<td>76,828</td>
<td>15.9</td>
<td>79,768</td>
<td>3.8</td>
<td>98,338</td>
<td>23.3</td>
</tr>
<tr>
<td>September</td>
<td>50,396</td>
<td>-0.6</td>
<td>62,524</td>
<td>24.1</td>
<td>71,861</td>
<td>14.9</td>
<td>76,806</td>
<td>6.9</td>
<td>92,298</td>
<td>20.2</td>
</tr>
<tr>
<td>October</td>
<td>62,432</td>
<td>10.8</td>
<td>74,707</td>
<td>19.7</td>
<td>91,059</td>
<td>21.9</td>
<td>92,391</td>
<td>1.5</td>
<td>107,331</td>
<td>16.2</td>
</tr>
<tr>
<td>November</td>
<td>61,986</td>
<td>6.9</td>
<td>74,252</td>
<td>19.8</td>
<td>85,501</td>
<td>15.1</td>
<td>82,311</td>
<td>-3.7</td>
<td>94,584</td>
<td>14.9</td>
</tr>
<tr>
<td>December</td>
<td>65,595</td>
<td>4.8</td>
<td>74,255</td>
<td>13.2</td>
<td>85,601</td>
<td>15.3</td>
<td>91,717</td>
<td>7.1</td>
<td>105,012</td>
<td>14.5</td>
</tr>
<tr>
<td>Total</td>
<td>655,852</td>
<td>-4.0</td>
<td>791,917</td>
<td>20.7</td>
<td>931,333</td>
<td>17.6</td>
<td>958,027</td>
<td>2.9</td>
<td>1,125,202</td>
<td>17.4</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data provided by: Department of Immigration & Emigration
Major Markets to the Maldives

Europe, although remaining as the leading market generator to the Maldives over the years, has been losing its market position to the growing Asia Pacific region. During the last five years (2009 – 2013), on average, Europe has lost 5.2% of its shares every year. The Market share went down from an impressive 70.5% in 2009 to 46.9% by the end of 2013. In 2013, market shares from the Europe were dominated mainly by sub-regions, Western Europe (18.9%) and Central Eastern Europe (10.6%). Western Europe recorded a decline (-3.7%) in arrivals during the year 2013. While three (France, Germany and Switzerland) of the top ten markets to the Maldives were from this region, all registered negative growths. The Netherlands was the only major market from the sub-region with a positive growth (6.2%) in 2013. Central Eastern Europe performed well with an additional nineteen thousand tourists, registering a positive growth of 19.5% for the year. All major markets from this region showed positive growths with Poland recording the best results in terms of growth rate (70.2%). Northern Europe (9.2%) and Southern Europe (7.1%) recorded negative growths during the year with 4% and 2.4% respectively. All major markets from the Northern Europe except the United Kingdom (-6.4%) saw positive growths during 2013. From the Southern Europe, strong positive growths were seen from Portugal (26.1%) and Spain (25.1%). All other major markets from this sub-region recorded negative growths. Strongest growth within the Europe was seen from East Mediterranean Europe with over 52%. The Turkish market contributed significantly for the growth of this sub-region in 2013.

Asia & the Pacific continued its speedy growth. Over the last five years (2009 – 2013), market share increased at an average rate of 4.8% per year. The growth of this region was led by sub-region, North East Asia (36%), mainly the Chinese market which took hold of over 29.5% shares. Strongest growth was seen from the South Asia sub region with over 46%. South Asia contributed 3.6% to the market shares in 2013. While the South East Asia took hold of 5% market shares, the region recorded a growth of over 46% in 2013. Arrivals from Oceania increased by 11% in 2013, market share from this sub region stood at 1.7%. Japan, India and Korea were major contributors from Asia Pacific.

Americas was the third most tourist generating market region to the Maldives with an average five year increase rate of 0.2%. The region registered a robust growth of 23% in 2013 with all major markets from the region posting growth rate above 20%. Market share increased from 2.8% in 2012 to 2.9% by 2013. The United States of America remained as the best performing market from this region in 2013, taking hold of 1.8% of total tourist arrivals during the year.

The Middle East followed closely behind Americas in terms of market shares with 2.8% in 2013. The region registered the strongest growth for the year with a positive 46.7% in 2013. Saudi Arabia was best performing market from the region in 2013 with 0.9% market shares and over 10,000 arrivals. The African market share remained constant over the last four years at 0.7% registering a positive growth of 16.6% in 2013.
Top Ten Generating Markets in 2013

Arrivals from the top ten markets summed up to be 841,732 in 2013, which was 74.8% of the 1,125,202 tourists that visited the Maldives during the year. Other than the two markets in 8th and 9th positions switching positions, no major changes were seen in the top ten market list for 2013 (Table 8).

Table 8: Tourist Arrivals and Market Share of Top Ten Markets, 2013

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>331,719</td>
<td>29.5</td>
<td>229,551</td>
<td>24.0</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Germany</td>
<td>93,598</td>
<td>8.3</td>
<td>98,351</td>
<td>10.3</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>United Kingdom</td>
<td>85,869</td>
<td>7.6</td>
<td>91,776</td>
<td>9.6</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>Russia</td>
<td>76,479</td>
<td>6.8</td>
<td>66,378</td>
<td>6.9</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>Italy</td>
<td>57,854</td>
<td>5.1</td>
<td>62,782</td>
<td>6.6</td>
<td>5</td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>54,328</td>
<td>4.8</td>
<td>56,775</td>
<td>5.9</td>
<td>6</td>
</tr>
<tr>
<td>7</td>
<td>Japan</td>
<td>39,463</td>
<td>3.5</td>
<td>36,438</td>
<td>3.8</td>
<td>7</td>
</tr>
<tr>
<td>8</td>
<td>India</td>
<td>38,014</td>
<td>3.4</td>
<td>31,721</td>
<td>3.3</td>
<td>9</td>
</tr>
<tr>
<td>9</td>
<td>Switzerland</td>
<td>34,102</td>
<td>3.0</td>
<td>35,457</td>
<td>3.7</td>
<td>8</td>
</tr>
<tr>
<td>10</td>
<td>Korea</td>
<td>30,306</td>
<td>2.7</td>
<td>23,933</td>
<td>2.5</td>
<td>10</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>841,732</td>
<td>74.8</td>
<td>733,162</td>
<td>76.5</td>
<td></td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism

While the Chinese market strengthened its position at the top, increasing its shares from 24% in 2012 to 29.5% in 2013, the remaining markets in the list saw declines in their market shares during 2013. The German and U.K market remained at the second and third positions respectively, however both markets lost 2% of its shares. Russia remained at 4th place with 6.8% shares. Italy, France and Japan maintained their respective positions at the 5th, 6th and 7th places. India and Switzerland switched positions at 8th and 9th positions. While the Indian market saw a slight increase in its shares from 3.3% in 2012 to 3.4% by 2013 to overtake Switzerland, Swiss market saw a decline in its market shares in 2013. The Korean market strengthened its position at 10th place with a slight increase in its market share during 2013.
1. China

According to the World Tourism Organization (UNWTO), China is the fastest growing tourism source market in the world and the top international tourism spender since 2012. In 2013, over 98 million Chinese travelers are recorded to have travelled around the world, which was an increase of 18% compared to 2012. With the rise of personal income and living standards, Chinese people are eager to go sightseeing overseas. It is expected that the Chinese outbound market will further grow as the Chinese government has increased the number of permitted overseas destinations for its citizens to travel.

The Maldives is recognized as one of the most popular destinations among Chinese travelers. A remarkable growth in the Chinese market was observed over the last five years. Arrivals increased at an average rate of 54% annually. During the last five years (2009-2013), strongest growth was recorded in 2010 with a positive 96%. The market climbed to the number one position in 2010 and firmly maintained its position over the years followed. Market share has increased by three folds in 2013 compared to 2009. In 2013, the Maldives received a total of 331,719 tourists from China, with a robust growth of 44.5%. Chinese arrivals accounted for 29.5% of all arrivals during the year.

Figure 5: Growth Trends & Market Share of China, 2009 - 2013

Figure 6 represents monthly pattern of Chinese arrivals to the Maldives over the last five years. 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.

The Maldives Visitor Survey conducted in February 2014 shows that the main (48%) purpose of visit to Maldives by Chinese tourists was rest and relaxation. While the major motivators for choosing Maldives as a holiday destination was found to be beach and underwater, Maldives being an island nation and its reputation also played a major role for the Chinese tourists as a motivating factor in choosing Maldives. It was also found that over 90% of Chinese visitors were first time visitors, and their length of stay is shorter than the European visitors.

While the Maldives continue to be an attractive and highly demanding holiday destination among Chinese travelers, easier access with increased flight frequency gave a boost to the increasing demand.
2. Germany

The Germans are said to have taken 335 million domestic and outbound trips in 2013. According to a report by IPK International (a leading global tourism consulting group), the outbound travel from Germany increased by 2% (75.3 million trips) in 2013. Many factors are believed to be restricting outbound tourist flow from Germany. One of which include the German population getting older, hence smaller shorter trips are becoming more popular at the expense of longer ones and domestic trips being cheaper than trips abroad is gaining momentum.

Germany has played a major role in the Maldives tourism over the years. It remained as one of the top 3 markets since the beginning. Over the last five years, the market grew at an annual average rate of 6.5%. Germany rose to the second position in 2012, and maintained its position at the end of 2013. However, a considerable drop in its market share has been recorded over the years. Market share dropped from 10.5% in 2009 to 8.3% by 2013. In 2013, the Maldives welcomed a total of 93,598 tourists from Germany, registering a negative growth of 4.8%.

Figure 8 represents monthly arrival trends of the German market during the last five years. As seen from the graph, a uniform pattern is observed from the market over the last five years. From June till October, arrivals from this market increases steadily, attaining the peak during October. Arrivals from this market is at lowest during the month of June.

The Maldives Visitor Survey conducted in February 2014 shows that 50% of German tourists visit the Maldives for rest and relaxation. Underwater, beach and weather are found to be the main motivating factors for Germans to choose Maldives as a holiday destination. The German being a long-haul market, their duration of stay in the Maldives was found to be 12 to 15 nights.

Some factors that contributed to the decline in German market to the Maldives could be the ceasing of direct flights from Germany to the Maldives, such as Air Berlin which stopped its operation in 2013.
3. United Kingdom (UK)

In 2013, the number of outbound trips made by UK residents reached 56 million, reflecting a rise of 2% on the previous year, reported the Euro Travel Monitor. This was a return to positive growth after the 1% decline of 2012. The positive growth in terms of number of trips contributed to the rise in outgoing tourist expenditure, which recorded an increase by 6% in 2013.

The United Kingdom (U.K) is a key market for the Maldives, remaining as the number one market through 2007 to 2009. However, the market has been sinking over the years with a five year annual average growth of negative 6%. The market lost more than half of its shares over the last five years. Market share dropped from 16.2% in 2009 to 7.6% at the end of 2013. During the last five years, the only positive growth was seen in 2010. In 2013, the Maldives welcomed a total of 85,869 tourists from the U.K, which was a further decline (-6.4%) compared to the 91,776 tourists recorded in 2012.

The seasonality of the UK market is presented in Figure 10. As shown in the graph, a uniform pattern is followed over the years. From January till June, arrivals increase steadily. From June till December, arrivals increases again steadily with a slight dip during the month of September. June is recorded to be the weakest month in terms of arrival numbers.

Rest and relaxation was found to be the main purpose of visit to Maldives by U.K tourists in the Maldives Visitor Survey conducted in February 2014. While Underwater, beach and weather were found to be the main motivating factors for U.K tourists to choose Maldives as a holiday destination with weather taking the bigger bite. As with the German market, the average length of stay for the U.K market was also found to be 12 to 15 nights.

During the last five years, major airlines such as Britannia Airways and Monarch Airlines, which operated direct flights between U.K and Maldives stopped operations contributing to the decline of tourists from this market.
4. Russia

The Russian Federation, which moved up to be the 5th largest outbound market in 2012 in the world, is said to have recorded an increase of 26% in 2013. With its increasing middle class income and improving lifestyle, the Russian outbound travel market is growing rapidly and has become the second fastest growing tourist market in the world.

The Russian market has been an important market for the Maldives over the years. It remained as one of the top five markets during the last five years. Russia moved up to the fourth position in 2012, and maintained its position at the end of 2013, however, with a slight decline in market share (6.8%). With an average five year growth of 10.7%, the market has maintained an above average growth rate. In 2013, the Maldives received a total of 78,492 tourists from Russia, which was an increase of 15.2% compared with that of 2012.

A consistent monthly pattern is observed from the Russian market over the last five years (refer Figure 12). Arrivals peak in January and March with a sudden drop in February. From March till June, it again slows down and reaches the minimum in June. From June till December arrivals from this market increases steadily with a slight drop observed in September.

From the Maldives Visitor Survey conducted in February 2014, it was found that the main purpose of visit for Russian tourists to the Maldives was rest and relaxation, with snorkeling and diving also playing an important role as a purpose for Russian tourists. While the main motivator for this nationality to choose Maldives as their holiday destination was found to be beach and weather, the length of stay of Russian tourists was 8 to 11 nights.

The two Russian airlines, Aeroflot and Transaero Airlines, operating direct flights between Maldives and Russia recorded increased movements during 2013.
5. Italy

The Italian outbound travel market is believed to be a mature market made up of experienced travelers. However, Italians are said to prefer short haul destinations, traveling within Europe. Over 80% of all trips abroad by Italians were said to be to destinations in Europe. The UNWTO Barometer, January 2014 edition reported that in 2013, the Italian outbound expenditure to have recorded a decline.

Being the first group of tourists that visited the Maldives, the Italian market has been one of most well established and prevailing markets to the Maldives over the years. Italy was the market leader for the Maldives from 1998 till 2004. The market started declining after the Asian Tsunami in 2004. Over the last five years (2009-2013) the average annual growth rate of this market was recorded to be -10.6%

Italy was the fifth largest market at the end of 2013. The Maldives received a total of 57,854 tourists from Italy, this however, was a decline of -7.8% compared with that of 2012. Market share went down from 6.6% in 2012 to 5.1% in 2013.

As with other European markets, Italy performs best during the first and the last quarter of the year. The month of March is recorded to be the peak month for this market and June the weakest. Most noticeable change is observed between July and September with the sharp increase in August.

The Maldives Visitor Survey conducted in February 2014, results show that the main purpose of visit for Italian tourists to the Maldives was rest and relaxation, with snorkeling and diving also playing a significant role. While the main motivator for this nationality to choose Maldives as their holiday destination was found to be underwater, beach and weather, the length of stay of Italian tourists was 8 to 11 nights.

While major airliners from Italy, such as Air Italy and Eurofly, stopped its operations to the Maldives, Alitalia recorded declined movements in 2013.
6. France

The UNWTO Barometer, January 2014 edition reported that the French outbound tourism have recovered in 2013 with a +6% compared with a weak 2012. It is reported that recently, many French people have cut their holiday expenditure, by travelling closer to home, reducing the number of holidays they have in a year, or shortening the length of stay.

During the last five years, tourist arrivals to the Maldives from France increased at a five year annual average rate of 2.6%. The French market share has dropped considerably over the years, from 7.7% in 2009 to 4.8% by end 2013. With a total of 54,328 tourists in 2013, France was the 6th largest market to the Maldives during the year. However, a negative growth of 4.3% was recorded from this market in 2013, compared with that of 2012.

Figure 16 represents monthly arrival pattern of French market. As seen from the figure, arrivals peak during the first and last quarter of the year, reflecting the normal behavior of European markets. Peak month for the French market is recorded to be February and the weakest June.

According to the Maldives Visitor Survey conducted in February 2014 rest and relaxation along with diving are the main purpose of visit for French tourists to the Maldives. As per this survey, major motivators for the French tourists for choosing the Maldives were under water beauty, beach and weather. And their length of stay was found to be 8 to 11 days.

Although there are no listed directed flights between France and Maldives, connecting flights are operated via Dubai, Singapore and Colombo, by Emirates, Singapore Airlines and SriLankan Airlines.
7. Japan

Japan is said to be the second biggest Asian Travel market in the world. However, the UNWTO Barometer, January 2014 edition reported that the outbound tourism expenditure by Japan recorded a decline in 2013. Figures released by Japan Tourism Marketing Co., over 17 million departures were recorded from Japan in 2013, which was a decline of 5.5% compared with that of 2012.

Figure 17: Growth & Market Share of Japan, 2009 - 2013

Japan remained as the largest source market to the Maldives from Asia region as well as one of the top five markets among all till 2007. However, the market share has started declining since early 2000 from a healthy 10% in 2000 to a petty 3.5% at the end of 2013. The five year (2009-2013) annual average growth rate of the market, nevertheless, remained positive at 0.8%. With a total of 36,438 tourists, Japan was the 7th largest market to the Maldives at the end of 2013. While the market share went further down to 3.5%, a positive growth rate of 8.3% was recorded from the market in 2013.

Figure 18: Monthly Arrivals of Japanese Market, 2009 - 2013

The consistency in monthly performance from the Japanese market was maintained over the last five years. Contrary to the European markets, the Japanese market performs best during the third quarter of the year. Peak months for the Japanese tourists are recorded to be August and December and the lowest count in arrivals are recorded during the months of May and January.

According to the Maldives Visitor Survey conducted in February 2014 rest and relaxation and honeymoon are the main purpose of visit of Japanese tourists to the Maldives. Maldives being a peaceful country, has played a major role as a motivator for tourists from Japan to choose Maldives as their holiday destination. Japanese travelers stay in the Maldives for 4 to 7 nights.
8. India

India’s outbound tourism market is one of the fastest growing markets in the world. India’s outbound numbers is said to have grown by 12% over the last six to seven years. The World Tourism Organization (UNWTO) estimates that India will account for 50 million outbound visitors by 2020.

**Figure 19: Growth & Market Share of India, 2009 - 2013**

The Indian market became the 8th largest market to the Maldives at the end of 2013, overtaking the Swiss market. The market has been performing well over the last five years (2009-2013) with an average annual growth rate of 20%. Market share has increased from 2.4% in 2009 to 3.4% by end 2013. In 2013, the Maldives welcomed a total of 38,014 tourists from India, which was an increase of 19.8% compared with that of 2012.

![Graph of Growth & Market Share of India, 2009 - 2013](image)

**Figure 20: Monthly Arrivals of Indian Market, 2009 - 2013**

The monthly trends of Indian arrivals to the Maldives are presented in figure 20. As seen from the graph, the Indian market performs best during the last quarter of the year. While the peak month for Indian tourists is recorded as December, arrival performance is maintained at a uniform pattern through January to August, with a sudden increase observed from April to May.

![Graph of Monthly Arrivals of Indian Market, 2009 - 2013](image)

According to the Maldives Visitor Survey conducted in February 2014 rest, relaxation and honeymoon are the main purpose of visit for Indian tourists to the Maldives and the major motivator for choosing the Maldives as a holiday destination was the beach. Length of stay of Indians tourists in the Maldives was found to be 3 to 7 nights.

The flight movements between India and Maldives saw an increase during 2013 with the commencement of flights from Spicejet, a low-cost Indian Airliner.
9. Switzerland

The Swiss population enjoys travelling aboard despite the euro crisis and increased unemployment rates in other European countries, Switzerland’s economy is growing at a stable rate and consumer confidence has risen. The Swiss outbound tourist number is said to have increased by 2% in 2013. An estimated 85% of Swiss people on average are said to go on at least one holiday per year.

Figure 21: Growth & Market Share of Switzerland, 2009 - 2013

Switzerland, which was the 8th largest market to the Maldives in 2012, stepped down to the 9th position at the end of 2013. Over the last five years, the Swiss market has lost a considerable amount of its market shares. The market share dropped from 4.1% in 2009 to 3.0% at the end of 2013. However, a positive 5% was recorded as the five year annual average growth rate of the market. The Maldives welcomed a total of 34,102 tourists from Switzerland in 2013, which was a decline of -3.8% compared with that of 2013.

Monthly performance of the Swiss market is shown in Figure 22. As with most European markets, the Swiss market performs best during the first quarter and the last quarter of the year. While the month of June is recorded to be the weakest month in arrival count, arrivals peak during the months of April and October.

Figure 22: Monthly Arrivals of Swiss Market, 2009 - 2013

Rest and relaxation plus snorkeling were found to be the main purpose of visit of Swiss tourist, from the Maldives Visitor Survey, February 2014. Major motivators for this market to choose Maldives as their holiday destination include, underwater, beach and weather. Swiss tourists were recorded to stay in the Maldives for 4 to 7 nights.

The reduced flight movements from Edelweiss, a Swiss airliner which operates direct flights between Zurich and Male’, may have contributed to the declined arrivals from this market in 2013.
10. Korea

South Korea, officially known as the Republic of Korea is said to have generated around 14 million tourists around the world in 2013. Korean arrival worldwide is expected to have an increase of 8% during the year 2013. According to data from PATA (Pacific Asia Travel Association), arrivals from the Korean market across Asia Pacific destinations saw an increase of 9.6% in 2013.

**Figure 23: Growth & Market Share of Korea, 2009-2013**

![Graph showing market share and arrival growth for Korea, 2009-2013]

**Figure 24: Monthly Arrivals of Korean Market, 2009-2013**

![Graph showing monthly arrivals of the Korean market, 2009-2013]

In 2013, Korea was the 10th largest market to the Maldives with a total of 30,306 tourists. After a negative year in 2012, the Korean market saw a strong positive growth (26.6%) in 2013. Market share stood at 2.7% at the end of year 2013. Inconsistent behavior was observed from the Korean market over the last five years, with the market share going up and down. The five year annual average growth rate of the market, however, remained positive and above average at 10.8%.

The monthly arrival pattern of the Korean market is presented in Figure 24. The Korean market performs best during the last quarter of the year, attaining its peak during the month of October. Over the last five years, Korean performance remains slow with February as the weakest month.

The Korean Air, which stopped its operation during the year 2012, re-started its operation in 2013, reflecting the huge increase in arrivals during the year.
SECTION 3: ECONOMIC INDICATORS

Tourism Contribution to the Economy

The Maldives economy is largely driven by tourism, which takes hold of over one fourth of the country’s Gross Domestic Product (GDP). According to the Maldives Monetary Authority (MMA), the rapid economic growth & development Maldives have experienced in recent years was supported by a dynamic tourism sector. While tourism remains as the key foreign exchange earner for the country, it is also known as the leading employment generator.

Figure 25: GDP Contribution by Major Economic Sectors of the Maldives, 2013

Figure 25 represents GDP contribution by economic sectors in 2013. As can be seen from the graph, quarter of the pie (27%) is taken by Tourism. While Transport and Communication contributed 19% to GDP, Construction, Manufacturing, Electricity & Water all together contributed 17%. Government Administration contributed 11% to GDP in 2013. The percentage share of Fisheries and Agriculture to GDP was 3%. Other Services contributed 23% to GDP in 2013, these include, Real Estate, Wholesale & Retail Trade, Education, Health, Financial Services, Business Services and Social Services.

Over the last five years, tourism contribution to GDP, in terms of currency, increased steadily at an average annual rate of 5%. After a negative growth in 2009, due to the decline in tourist arrivals, tourism contribution to GDP saw a robust growth of 15% in 2010. While in 2012 GDP growth was marginal with 0.7%, 2013 saw a growth of 5% with a total of 6,159 million Rufiyaa. The share of tourism contribution fluctuated between 25% and 27% during the last five years. In 2009, tourism’s share in country’s GDP was at 25.8%. With a nearly 3% increment, the percent share rose to 27.9% in 2010. It further increased to 28.5% in 2011. However, with the slowed performance in tourist arrivals in 2012, tourism contribution to GDP dropped to 27.7%. In 2013 a slight increase of 0.2% was recorded in tourism’s share to GDP (refer Table 9).

Table 9: Tourism Contribution to GDP, 2009-2013
(Million Rufiyaa, at 2003 Constant Prices)

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP</th>
<th>GDP Growth %</th>
<th>Tourism Contribution</th>
<th>% Share of Tourism Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>17,853.00</td>
<td>-3.6</td>
<td>4,608.00</td>
<td>25.8</td>
</tr>
<tr>
<td>2010</td>
<td>19,113.00</td>
<td>7.1</td>
<td>5,335.00</td>
<td>27.9</td>
</tr>
<tr>
<td>2011</td>
<td>20,461.00</td>
<td>/</td>
<td>5,822.00</td>
<td>/</td>
</tr>
<tr>
<td>2012</td>
<td>21,160.00</td>
<td>/</td>
<td>5,862.00</td>
<td>/</td>
</tr>
<tr>
<td>2013</td>
<td>22,075.00</td>
<td>4.3</td>
<td>6,159.00</td>
<td>/</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data Provided by: National Bureau of Statistics

Note: / Estimated
/ / Projected
**Tourism Revenue** includes earnings received from Goods and Service Tax from the Tourism Sector (T-GST), Tourist Bed-night Tax, Tourism Land Rent and Lease Period Extension Fee. While the resort lease rent formula was revised in 2011 from a bed capacity based rent to a land based rent where US$ 8 is charged per square meter of the island, the T-GST rate was increased from 3.5% in 2011 to 6% in January 2012.

Tourism Revenue recorded a huge increase in 2011, reflecting the changes brought to tourism lease rent formula and introduction of T-GST that year. In 2013 while the government revenue increased by 18% with 11.5 billion Rufiyaa, tourism revenue saw an increase of 21% with a total of 4.3 billion Rufiyaa. The share of tourism revenue to government revenue has increased significantly over the years, gaining 10% from 2009 to 2013. In 2013, tourism injected nearly 38% to total government revenue that year. While the revenue from land rent has declined over the last three years, robust increase in tourism related tax was recorded since the introduction of T-GST in 2011 (refer Table 10).

**Table 10: Tourism Revenue and Tax, 2009-2013**
(Million Rufiyaa)

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Government Revenue</th>
<th>Land Rent</th>
<th>Tourist Bed-night Tax</th>
<th>Tourism Goods &amp; Service Tax (T-GST)</th>
<th>Lease Period Extension Fee</th>
<th>Total Tourism Revenue</th>
<th>% Share of Tourism Revenue in Total Government Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>5,313.30</td>
<td>898.40</td>
<td>531.41</td>
<td>-</td>
<td>-</td>
<td>1,429.81</td>
<td>26.9</td>
</tr>
<tr>
<td>2010</td>
<td>6,392.40</td>
<td>1,100.38</td>
<td>594.36</td>
<td>-</td>
<td>19.1</td>
<td>1,713.86</td>
<td>26.8</td>
</tr>
<tr>
<td>2011</td>
<td>9,172.10</td>
<td>1,202.50</td>
<td>750.74</td>
<td>836.52</td>
<td>511.3</td>
<td>3,301.01</td>
<td>36.0</td>
</tr>
<tr>
<td>2012</td>
<td>9,771.40</td>
<td>1,049.84</td>
<td>802.90</td>
<td>1,566.35</td>
<td>168.7</td>
<td>3,587.80</td>
<td>36.7</td>
</tr>
<tr>
<td>2013</td>
<td>11,527.50</td>
<td>1,046.78</td>
<td>853.46</td>
<td>2,447.36</td>
<td>-</td>
<td>4,347.60</td>
<td>37.7</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data Provided by: Ministry of Finance and Treasury, Maldives Inland Revenue Authority

Tourism Receipts, the expenditure made by tourists in the Maldives during their stay, hence, any drop in tourist arrivals is reflected in tourism receipts. Over the last five years receipts increased steadily. A negative growth was recorded in 2009 reflecting the decline in arrivals that year due to the global financial crisis during the period 2008 to 2009. Similarly, in 2012 a marginal growth was recorded from tourism receipts due to the slowdown in arrivals during the year. In 2013, a strong growth of 19% was recorded compared to the sluggish performance in 2012. The Maldives received a total of 2,233.73 million US dollars as tourism receipts in 2013 (refer Table 11).

**Table 11: Tourism Receipts, 2009-2013**
(Million US Dollars)

<table>
<thead>
<tr>
<th>Year</th>
<th>Tourism Receipts</th>
<th>Growth Rate (%)</th>
<th>Exports, FOB</th>
<th>Imports, CIF</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>1,442.18</td>
<td>-5.61</td>
<td>76.37</td>
<td>962.53</td>
</tr>
<tr>
<td>2010</td>
<td>1,569.65</td>
<td>8.84</td>
<td>73.91</td>
<td>1,090.86</td>
</tr>
<tr>
<td>2011</td>
<td>1,867.89</td>
<td>19.00</td>
<td>114.81</td>
<td>1,328.55</td>
</tr>
<tr>
<td>2012</td>
<td>1,877.24</td>
<td>0.50</td>
<td>161.03</td>
<td>1,548.94</td>
</tr>
<tr>
<td>2013</td>
<td>2,233.73</td>
<td>18.99</td>
<td>165.93</td>
<td>1,727.29</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data provided by: 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. Table 12 presents the tourism expenditure in relation to total government expenditure from 2009 to 2013. As seen from the table although the total government expenditure has been increasing steadily, the expenditure made on tourism has declined considerably. In 2013, the government expenditure on tourism was 29.88 million Rufiyaa, which was a 43% decline compared with the 52.52 million spent on tourism in 2012.

Table 12: Government Expenditure on Tourism, 2009-2013
(Million Rufiyaa)

<table>
<thead>
<tr>
<th>Year</th>
<th>Government Expenditure</th>
<th>Tourism Expenditure</th>
<th>% Share of Tourism Expenditure</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>11,104.30</td>
<td>78.45</td>
<td>0.7</td>
</tr>
<tr>
<td>2010</td>
<td>10,996.40</td>
<td>46.86</td>
<td>0.4</td>
</tr>
<tr>
<td>2011</td>
<td>12,663.70</td>
<td>33.75</td>
<td>0.3</td>
</tr>
<tr>
<td>2012</td>
<td>13,200.23</td>
<td>52.52</td>
<td>0.4</td>
</tr>
<tr>
<td>2013</td>
<td>13,511.95</td>
<td>29.88</td>
<td>0.2</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data Provided by: Ministry of Finance and Treasury

Note: / Revised Figures

Figure 26: Tourism Revenue & Expenditure, 2009-2013
SECTION 4: AIRLINE STATISTICS

Traffic by Domestic Carriers

Passenger arrivals from domestic carriers at Ibrahim Nasir International Airport (INIA) is presented in Table 13. Domestic carriers include seaplane and airplane movements. Seaplane operators in the Maldives were Maldivian Air Taxi (MAT) and Trans Maldivian Airways (TMA). With the opening of new domestic airports, seaplane operations have declined since 2012. While MAT stopped its operations since 2012, TMA movements saw declines over the last two years.

On the contrary, airplane movements have increased significantly since 2012. In 2013, Maldivian operated by Island Aviation Services, saw an increase of 31% in the number of passengers brought into INIA, this was over 50% of all domestic passengers into INIA that year. Flight movements of Flyme increased by 93% in 2013.

Table 13: Passenger Arrivals by Domestic Carriers at Ibrahim Nasir International Airport, 2009-2013

<table>
<thead>
<tr>
<th>Operator</th>
<th>2009 No. of Movements (Take off / Landing)</th>
<th>2009 Passengers In</th>
<th>2010 No. of Movements (Take off / Landing)</th>
<th>2010 Passengers In</th>
<th>2011 No. of Movements (Take off / Landing)</th>
<th>2011 Passengers In</th>
<th>2012 No. of Movements (Take off / Landing)</th>
<th>2012 Passengers In</th>
<th>2013 No. of Movements (Take off / Landing)</th>
<th>2013 Passengers In</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Island Aviation Services</td>
<td>8,621</td>
<td>114,069</td>
<td>7,955</td>
<td>127,813</td>
<td>10,369</td>
<td>154,785</td>
<td>11,088</td>
<td>170,597</td>
<td>13,698</td>
<td>224,587</td>
</tr>
<tr>
<td>Fly Me</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maldivian Air Taxi</td>
<td>38,256</td>
<td>196,775</td>
<td>41,668</td>
<td>216,593</td>
<td>43,558</td>
<td>188,797</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mega Maldives</td>
<td></td>
<td></td>
<td>2</td>
<td>52</td>
<td></td>
<td></td>
<td>4</td>
<td>199</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Trans Maldivian Airways (scheduled)</td>
<td>328</td>
<td>4,145</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td>4</td>
<td>8</td>
<td>384</td>
<td></td>
</tr>
<tr>
<td>Trans Maldivian Airways</td>
<td>24,802</td>
<td>93,614</td>
<td>34,392</td>
<td>157,617</td>
<td>44,989</td>
<td>208,567</td>
<td>21,703</td>
<td>166,256</td>
<td>16,439</td>
<td>91,882</td>
</tr>
<tr>
<td>Other Domestic *</td>
<td></td>
<td></td>
<td>2,214</td>
<td>-</td>
<td>440</td>
<td>17</td>
<td>240</td>
<td>44</td>
<td>160</td>
<td>213</td>
</tr>
<tr>
<td>Total</td>
<td>72,007</td>
<td>408,603</td>
<td>86,231</td>
<td>502,075</td>
<td>100,218</td>
<td>565,097</td>
<td>36,759</td>
<td>398,159</td>
<td>37,479</td>
<td>441,024</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data Provided by: Maldives Civil Aviation Authority

Note: * Includes movements by photo, training, technical and surveillance flights

Traffic by International Carriers

Looking at traffic by carriers, while the Maldives welcomed over a million tourists in 2013, the total number of passenger arrivals to the Maldives during the year was 1,363,930. The Charter market caters mainly for the tourists, which brought in 18% of the total passengers during the year. On the other hand, arrivals from scheduled flights include tourists, expatriates and locals. Passengers from scheduled flights accounted for 82% of total passengers arrived in Maldives in 2013. A positive growth of 16% was recorded in passenger arrivals in 2013.

Table 14: Passenger Arrivals by Type of International Carriers 2009-2013

<table>
<thead>
<tr>
<th>Type of Carrier</th>
<th>2009 Arrivals</th>
<th>% Share</th>
<th>2010 Arrivals</th>
<th>% Share</th>
<th>2011 Arrivals</th>
<th>% Share</th>
<th>2012 Arrivals</th>
<th>% Share</th>
<th>2013 Arrivals</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled</td>
<td>696,925</td>
<td>83.8</td>
<td>837,027</td>
<td>83.0</td>
<td>1,013,652</td>
<td>89.6</td>
<td>985,672</td>
<td>84.5</td>
<td>1,112,333</td>
<td>81.6</td>
</tr>
<tr>
<td>Charter</td>
<td>134,999</td>
<td>16.2</td>
<td>171,716</td>
<td>17.0</td>
<td>117,671</td>
<td>10.4</td>
<td>180,802</td>
<td>15.5</td>
<td>251,597</td>
<td>18.4</td>
</tr>
<tr>
<td>Total</td>
<td>831,924</td>
<td>100.0</td>
<td>1,008,743</td>
<td>100.0</td>
<td>1,131,323</td>
<td>100.0</td>
<td>1,166,474</td>
<td>100.0</td>
<td>1,363,930</td>
<td>100.0</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data Provided by: Maldives Civil Aviation Authority
International Scheduled Carriers

The international scheduled flight movements and its number of passengers saw increases of 15% and 13% respectively in 2013. Declines, however were recorded in its movements from major airlines such as, Indian Airlines (-17.3%), Maldivian (-11.9%) and Meridiana Fly (-50.7%). The slowed movement from Indian Airlines and Maldivian, both operating direct flights between Chennai and Male’, may have been due to the commencement of a new Airline from India, Spicejet, which started low-cost direct flights between Chennai and Male’. Other new scheduled flights in 2013 include, Fly Dubai from Dubai, also a low-cost carrier and Turkish Airlines, which started direct flights between Istanbul and Male’. While Air Berlin stopped its operation in 2013, major scheduled airlines to Maldives, such as Emirates, Singapore Airlines, Srilankan and Qatar Airways all recorded positive growths in its movements and passengers in 2013.

Table 15: Traffic by International Carriers – Scheduled, 2009-2013

<table>
<thead>
<tr>
<th>Operator</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No. of Movements (Take off / Landing)</td>
<td>Passenger In</td>
<td>No. of Movements (Take off / Landing)</td>
<td>Passenger In</td>
<td>No. of Movements (Take off / Landing)</td>
</tr>
<tr>
<td>Aeroflot</td>
<td>36</td>
<td>2,981</td>
<td>38</td>
<td>3,431</td>
<td>214</td>
</tr>
<tr>
<td>Air Berlin</td>
<td>144</td>
<td>16,019</td>
<td>224</td>
<td>25,948</td>
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<tr>
<td>Austrian Airlines</td>
<td>44</td>
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<td>48</td>
<td>5,146</td>
<td>74</td>
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<td>Bangkok Airways</td>
<td>210</td>
<td>8,569</td>
<td>224</td>
<td>8,302</td>
<td>330</td>
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<tr>
<td>British Airways</td>
<td>58</td>
<td>3,325</td>
<td>308</td>
<td>26,336</td>
<td>314</td>
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<tr>
<td>China Eastern Airlines</td>
<td>-</td>
<td>-</td>
<td>134</td>
<td>6,387</td>
<td>405</td>
</tr>
<tr>
<td>China Southern Airlines</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>180</td>
</tr>
<tr>
<td>Condor</td>
<td>254</td>
<td>30,364</td>
<td>260</td>
<td>30,317</td>
<td>258</td>
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<tr>
<td>Emirates</td>
<td>1,232</td>
<td>127,357</td>
<td>252</td>
<td>214,761</td>
<td>3,206</td>
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<td>Etihad Airways</td>
<td>-</td>
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<td>-</td>
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<tr>
<td>Eurolly</td>
<td>506</td>
<td>45,700</td>
<td>84</td>
<td>8,595</td>
<td>-</td>
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<tr>
<td>Fly Dubai</td>
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<td>Hainan Airlines</td>
<td>-</td>
<td>-</td>
<td>30</td>
<td>2,967</td>
<td>-</td>
</tr>
<tr>
<td>Indian Airlines</td>
<td>1,234</td>
<td>52,203</td>
<td>1,274</td>
<td>56,701</td>
<td>1,404</td>
</tr>
<tr>
<td>Jet Air Fly</td>
<td>-</td>
<td>-</td>
<td>10</td>
<td>381</td>
<td>72</td>
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<td>Jazeera Airways</td>
<td>102</td>
<td>12,438</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Malaysia Airlines</td>
<td>421</td>
<td>35,811</td>
<td>588</td>
<td>46,021</td>
<td>732</td>
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<tr>
<td>Maldivian</td>
<td>2,082</td>
<td>48,923</td>
<td>2,665</td>
<td>61,888</td>
<td>1,574</td>
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<tr>
<td>Mega Maldives</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>242</td>
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<tr>
<td>Meridiana Fly</td>
<td>-</td>
<td>-</td>
<td>346</td>
<td>28,387</td>
<td>344</td>
</tr>
<tr>
<td>Mihin Lanka</td>
<td>-</td>
<td>-</td>
<td>26</td>
<td>1,828</td>
<td>378</td>
</tr>
<tr>
<td>Oman Air</td>
<td>76</td>
<td>1,845</td>
<td>416</td>
<td>8,785</td>
<td>490</td>
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<td>Qatar Airways</td>
<td>772</td>
<td>59,411</td>
<td>1,096</td>
<td>64,019</td>
<td>1,462</td>
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<td>Shangai Airlines</td>
<td>-</td>
<td>-</td>
<td>62</td>
<td>5,938</td>
<td>44</td>
</tr>
<tr>
<td>Singapore Airlines</td>
<td>667</td>
<td>80,375</td>
<td>731</td>
<td>82,774</td>
<td>976</td>
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<td>Spicejet</td>
<td>-</td>
<td>-</td>
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<td>-</td>
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<tr>
<td>Srilankan Airlines</td>
<td>2,623</td>
<td>167,810</td>
<td>2,738</td>
<td>193,927</td>
<td>3,642</td>
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<td>Transaero Airlines</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>222</td>
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<tr>
<td>Turkish Airlines</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Expo Aviation (Cargo)</td>
<td>374</td>
<td>0</td>
<td>424</td>
<td>0</td>
<td>400</td>
</tr>
</tbody>
</table>

Schedule Total 10,855 696,925 13,624 837,027 16,279 1,013,652 15,348 985,672 17,580 1,112,333

Source: Ministry of Tourism
Data Provided by: Maldives Civil Aviation Authority
The charter segment saw impressive results in terms of movements as well as passenger arrivals in 2013. With 39% increase, charter flights brought in a total of 251,597 passengers in 2013. Three charter flights, all operating direct flights from Europe, registered negative growths in its movements during 2013. While Air Asia started charter flights in 2013, Korean Air, which stopped its operation in 2012, resumed their operations in 2013. Hainan Airlines brought in most passengers (39,127) in 2013 with a recorded 730 movements.

Table 16: Traffic by International Carriers – Chartered, 2009-2013

<table>
<thead>
<tr>
<th>Operator</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>No. of Movements (Take off / Landing)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passenger In</td>
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<tr>
<td>No. of Movements (Take off / Landing)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passenger In</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Air Asia</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>108</td>
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<tr>
<td>Air Italy</td>
<td>72</td>
<td>7,313</td>
<td>54</td>
<td>5,187</td>
<td>24</td>
</tr>
<tr>
<td>Alitalia</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>80</td>
</tr>
<tr>
<td>Allian Airlines</td>
<td>49</td>
<td>4,272</td>
<td>-</td>
<td>-</td>
<td>38</td>
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<tr>
<td>Belair</td>
<td>64</td>
<td>4,882</td>
<td>-</td>
<td>-</td>
<td>732</td>
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<tr>
<td>Britannia Airways/Thomson Fly</td>
<td>238</td>
<td>27,690</td>
<td>244</td>
<td>28,549</td>
<td>242</td>
</tr>
<tr>
<td>Cathay Pacific</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>6</td>
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<td>China Southern Airlines</td>
<td>-</td>
<td>206</td>
<td>22,391</td>
<td>-</td>
<td>164</td>
</tr>
<tr>
<td>Edelweis</td>
<td>174</td>
<td>19,467</td>
<td>194</td>
<td>18,659</td>
<td>182</td>
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<tr>
<td>Etihad Airways</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Hainan Airlines</td>
<td>-</td>
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<td>72</td>
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<td>Hongkong Airways</td>
<td>-</td>
<td>-</td>
<td>72</td>
<td>7,965</td>
<td>32</td>
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<td>Kingfisher Airlines</td>
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<td>2</td>
<td>2</td>
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<td>Korean Air</td>
<td>-</td>
<td>84</td>
<td>8,602</td>
<td>42</td>
<td>5,323</td>
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<td>8</td>
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<td>Mega Maldives</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>53</td>
<td>2,885</td>
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<td>Monarch Airlines</td>
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<td>17,058</td>
<td>88</td>
<td>13,411</td>
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<td>Neo Spa</td>
<td>160</td>
<td>18,308</td>
<td>190</td>
<td>21,477</td>
<td>208</td>
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<td>Sichuan Airlines</td>
<td>-</td>
<td>-</td>
<td>94</td>
<td>9,338</td>
<td>94</td>
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<tr>
<td>Star Airlines/XL Airways</td>
<td>101</td>
<td>12,628</td>
<td>112</td>
<td>15,608</td>
<td>92</td>
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<tr>
<td>Swiss Air</td>
<td>-</td>
<td>-</td>
<td>80</td>
<td>8</td>
<td>6</td>
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<td>Thomson Fly</td>
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<td>142</td>
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<tr>
<td>Transaero Airlines</td>
<td>124</td>
<td>16,520</td>
<td>210</td>
<td>27,299</td>
<td>-</td>
</tr>
<tr>
<td>Ukraine International</td>
<td>-</td>
<td>8</td>
<td>237</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>XL Airways</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>62</td>
</tr>
<tr>
<td>Other Internationals</td>
<td>1,836</td>
<td>6,661</td>
<td>1,846</td>
<td>10,216</td>
<td>2,367</td>
</tr>
<tr>
<td>Charter Total</td>
<td>2,927</td>
<td>134,999</td>
<td>3,236</td>
<td>171,716</td>
<td>3,392</td>
</tr>
<tr>
<td>Passenger In</td>
<td>4,949</td>
<td>14,922</td>
<td>20,712</td>
<td>30,987</td>
<td>14,922</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Data Provided by: Maldives Civil Aviation Authority
Global Forecasts, 2014

The World Tourism Organization (UNWTO), projects that international arrivals worldwide will increase between 4% and 4.5% in 2014. The expected pace of growth for 2014 is slightly below 2013 levels, however, above the UNWTO’s long-term forecast (3.8%) per year for the period 2010 to 2020.

Region wise, Asia and the Pacific is expected to display the best growth, between +5% and +6%, followed by Africa with +4% to +6%. While growth for Americas is projected between +3% and +4%, arrivals to Europe is expected to increase between +3% to +4%. For the Middle East region, the projected growth rate is between +0% and +5% (refer Table 17)

Table 17: Global Arrival Forecasts, 2014

<table>
<thead>
<tr>
<th>Region</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>Projection between (in %)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>-5.0</td>
<td>3.1</td>
<td>6.1</td>
<td>3.4</td>
<td>5.6</td>
<td>+3 and +4</td>
</tr>
<tr>
<td>Asia &amp; the Pacific</td>
<td>-1.6</td>
<td>13.2</td>
<td>6.6</td>
<td>6.8</td>
<td>6.5</td>
<td>+5 and +6</td>
</tr>
<tr>
<td>Americas</td>
<td>-4.7</td>
<td>6.6</td>
<td>3.6</td>
<td>4.5</td>
<td>3.4</td>
<td>+3 and +4</td>
</tr>
<tr>
<td>Africa</td>
<td>3.4</td>
<td>9.3</td>
<td>-0.5</td>
<td>6.9</td>
<td>5.1</td>
<td>+4 and +6</td>
</tr>
<tr>
<td>Middle East</td>
<td>-5.1</td>
<td>11.6</td>
<td>-6.1</td>
<td>-5.2</td>
<td>-0.6</td>
<td>+0 and +5</td>
</tr>
<tr>
<td>World</td>
<td>-3.9</td>
<td>6.5</td>
<td>4.9</td>
<td>4.0</td>
<td>5.1</td>
<td>+4 and +4.5</td>
</tr>
</tbody>
</table>

Source: World Tourism Organization (UNWTO) Adapted from UNWTO World Tourism Barometer, June 2014 edition

*Data as collected by UNWTO June 2014

Maldives Tourism Forecasts

At the end of first six months of 2014, with over 602 thousand tourists a healthy growth of 11.5% was recorded for Maldives. It is expected that the Maldives will receive 1.2 million tourists by the end of the year, with a growth rate of 8.1%. The expected growth rate for Maldives a slightly lower than the average so far this year, however, it is above the average forecasted by UNWTO for Asia and the Pacific region.

While the average duration of stay is expected to fall even further to 6.1 by the end of the year, due to the increase in Asian market, more specifically the Chinese market, whose average stay was found to be 4 to 7 nights, number of resorts is expected to increase to 114 with 25,807 beds by the end of 2014.

Table 18: Maldives Tourism Forecasts, 2014 - 2017

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist Arrivals (000’s)</td>
<td>958</td>
<td>602</td>
<td>1,217</td>
<td>1,382</td>
<td>1,549</td>
<td>1,718</td>
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<tr>
<td>% Growth</td>
<td>2.9</td>
<td>11.5</td>
<td>8.1</td>
<td>13.6</td>
<td>12.1</td>
<td>10.9</td>
</tr>
<tr>
<td>Average Stay (days)</td>
<td>6.3</td>
<td>6.2</td>
<td>6.1</td>
<td>6.0</td>
<td>6.0</td>
<td>6.0</td>
</tr>
<tr>
<td>Tourist Bed nights (000’s)</td>
<td>7,044</td>
<td>3,729</td>
<td>7,426</td>
<td>8,285</td>
<td>9,287</td>
<td>10,301</td>
</tr>
<tr>
<td>Bed night capacity (000’s)</td>
<td>10,502</td>
<td>11,206</td>
<td>11,894</td>
<td>12,866</td>
<td>13,062</td>
<td></td>
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<tr>
<td>Occupancy rate (%)</td>
<td>74.0</td>
<td>76.7</td>
<td>69.3</td>
<td>69.7</td>
<td>72.2</td>
<td>78.9</td>
</tr>
<tr>
<td>No. of Resorts / Hotels</td>
<td>110</td>
<td>111</td>
<td>114</td>
<td>121</td>
<td>127</td>
<td>127</td>
</tr>
<tr>
<td>Bed Capacity (end year total , resorts/hotels)</td>
<td>25,349</td>
<td>25,439</td>
<td>25,807</td>
<td>27,647</td>
<td>30,216</td>
<td>30,850</td>
</tr>
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</table>

Source: Ministry of Tourism
<table>
<thead>
<tr>
<th>Island</th>
<th>Facility Type</th>
<th>Batch</th>
<th>Lease Holder</th>
<th>Leased Date</th>
<th>Beds</th>
<th>Estimated Opening Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Haa Alif Atoll</td>
<td>Resort</td>
<td></td>
<td>Mr. Franchin Gaiseppe, Polverara, Italy</td>
<td>4-Dec-12</td>
<td>200</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>City Hotel</td>
<td>MTDC Islands</td>
<td>Maldives Tourism Development Corporation PLC</td>
<td>27-Feb-07</td>
<td>100</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Haa Dhaal Atoll</td>
<td>Resort</td>
<td></td>
<td>City Hotel Hanimaadhuo Pvt Ltd</td>
<td>19-Dec-13</td>
<td>82</td>
<td>Dec-2014</td>
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<tr>
<td></td>
<td>Resort</td>
<td>11 Islands 2004</td>
<td>Mr. Abdalla Ali, H. Girithereyge</td>
<td>5-May-05</td>
<td>200</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Resort</td>
<td>Phase I- 2006- Rent Controlled</td>
<td>JH Resorts Pvt Ltd</td>
<td>25-Jun-06</td>
<td>250</td>
<td>NA</td>
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<tr>
<td></td>
<td>Resort</td>
<td>MTDC Islands</td>
<td>Maldives Tourism Development Corporation PLC</td>
<td>17-Sep-06</td>
<td>600</td>
<td>Jun-2017</td>
</tr>
<tr>
<td>Shaviyani Atoll</td>
<td>Resort</td>
<td>11 Islands 2004</td>
<td>Mr. Mohamed Latheef, H. Baraboamaage</td>
<td>5-May-05</td>
<td>200</td>
<td>Jun-2015</td>
</tr>
<tr>
<td></td>
<td>Resort</td>
<td>Phase II- 2006- Rent Controlled</td>
<td>Mr. Hussain Waheed, Huvandhummaage, Sh. Foakaidhoo</td>
<td>24-Aug-06</td>
<td>200</td>
<td>May-2017</td>
</tr>
<tr>
<td></td>
<td>Resort</td>
<td>Phase II- 2006- Rent Controlled</td>
<td>Mr. Ali Shareef, Ma. Anaa Villa</td>
<td>31-Aug-06</td>
<td>200</td>
<td>NA</td>
</tr>
<tr>
<td>Noon Atoll</td>
<td>Resort</td>
<td>Relocation of H.A. Kelaa</td>
<td>Hamid Ismail, H. Hirifushi, Male, Maldives</td>
<td>7-Oct-08</td>
<td>200</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Resort</td>
<td>MTDC Islands</td>
<td>Maldives Tourism Development Corporation PLC</td>
<td>17-Sep-06</td>
<td>180</td>
<td>Jun-2018</td>
</tr>
<tr>
<td></td>
<td>Resort</td>
<td></td>
<td>One and Half Degree Maldives Pvt. Ltd</td>
<td>NA</td>
<td>200</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Resort</td>
<td>Establishments with Airports</td>
<td>Noonu Hotels &amp; Resort Development Pvt Ltd</td>
<td>12-Sep-13</td>
<td>200</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>Resort</td>
<td></td>
<td>Millenium Capital Management Private limited</td>
<td>7-Nov-13</td>
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<td>Zens Resorts Pvt Ltd</td>
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<td>Leased Date</td>
<td>Beds</td>
<td>Estimated Opening Date</td>
</tr>
<tr>
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<td>---------------</td>
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<td>Moving International (Pvt). Ltd</td>
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Source: Ministry of Tourism

Revised on September 2014
## Table 20: Bed Capacity of Resorts and Distance from Airport, 2009-2013

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<th>Name of the Resort</th>
<th>Atoll &amp; Island Name</th>
<th>Airport Distance (Km)</th>
<th>Year of Initial Operation</th>
<th>Initial Bed Capacity</th>
<th>2009</th>
<th>2010</th>
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<th>Initial Bed Capacity</th>
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Source: Ministry of Tourism
Table 21: Bed Capacity of Hotels, 2009-2013

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<td>84</td>
<td>84</td>
<td>84</td>
</tr>
<tr>
<td>15 Nasandhura Palace Hotel</td>
<td>K. Male'</td>
<td>2.0</td>
<td>1981</td>
<td>60</td>
<td>36</td>
<td>36</td>
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<td>36</td>
<td>36</td>
</tr>
<tr>
<td>16 Off Day Inn</td>
<td>K. Male'</td>
<td>2.0</td>
<td>1999</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
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</tr>
<tr>
<td>17 Relax Inn</td>
<td>K. Male'</td>
<td>2.0</td>
<td>1998</td>
<td>60</td>
<td>74</td>
<td>74</td>
<td>74</td>
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</tr>
<tr>
<td>18 Riveries Diving Village</td>
<td>L. Gan</td>
<td>260.0</td>
<td>2012</td>
<td>46</td>
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<td>-</td>
<td>-</td>
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<td>46</td>
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<tr>
<td>19 The Boutique Inn at Villa Shabnamee</td>
<td>K. Male'</td>
<td>2.0</td>
<td>2009</td>
<td>24</td>
<td>24</td>
<td>24</td>
<td>24</td>
<td>24</td>
<td>24</td>
</tr>
<tr>
<td>20 The Somerset Hotel</td>
<td>K. Male'</td>
<td>2.0</td>
<td>2013</td>
<td>60</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>60</td>
</tr>
<tr>
<td>21 The Wave Hotel and Spa</td>
<td>K. Male'</td>
<td>2.0</td>
<td>2008</td>
<td>32</td>
<td>32</td>
<td>32</td>
<td>32</td>
<td>32</td>
<td>32</td>
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<tr>
<td>22 Traders Hotel</td>
<td>K. Male'</td>
<td>2.0</td>
<td>2009</td>
<td>78</td>
<td>234</td>
<td>234</td>
<td>234</td>
<td>234</td>
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<tr>
<td><strong>Total</strong></td>
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<td></td>
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<td>1,368</td>
<td>1,449</td>
<td>1,603</td>
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</tbody>
</table>

Source: Ministry of Tourism

Note: ** License Cancelled
*** Changed to a Guest House
Table 22: Graduates from Faculty of Hospitality and Tourism Studies 2009 - 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Full Time Courses</th>
<th>Other Courses</th>
<th>Grand Total</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
<td>Total</td>
</tr>
<tr>
<td>2009</td>
<td>48</td>
<td>15</td>
<td>63</td>
</tr>
<tr>
<td>2010</td>
<td>76</td>
<td>24</td>
<td>100</td>
</tr>
<tr>
<td>2011</td>
<td>65</td>
<td>20</td>
<td>85</td>
</tr>
<tr>
<td>2012</td>
<td>82</td>
<td>26</td>
<td>108</td>
</tr>
<tr>
<td>2013</td>
<td>0</td>
<td>0</td>
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<tr>
<td></td>
<td>271</td>
<td>85</td>
<td>356</td>
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</table>

Source: Ministry of Tourism
Data provided by: Faculty of Hospitality and Tourism Studies (FHTS)

Table 23: Inbound and Outbound Travel (Maldivians Only) 2009 - 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Arrivals</th>
<th>% change</th>
<th>Departure</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>120,328</td>
<td>-0.8</td>
<td>121,464</td>
<td>-1.3</td>
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<tr>
<td>2010</td>
<td>129,286</td>
<td>7.4</td>
<td>129,608</td>
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<tr>
<td>2011</td>
<td>132,215</td>
<td>2.3</td>
<td>131,501</td>
<td>1.5</td>
</tr>
<tr>
<td>2012</td>
<td>137,706</td>
<td>4.2</td>
<td>139,210</td>
<td>5.9</td>
</tr>
<tr>
<td>2013</td>
<td>157,741</td>
<td>14.5</td>
<td>166,363</td>
<td>19.5</td>
</tr>
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</table>

Source: Ministry of Tourism
Data provided by: Department of Immigration and Emigration

Table 24: Seasonal Variations of Tourist Arrivals (Seasonal Indices) 2009 - 2013

<table>
<thead>
<tr>
<th>Year</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Seasonality Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>108</td>
<td>103</td>
<td>109</td>
<td>100</td>
<td>76</td>
<td>64</td>
<td>78</td>
<td>92</td>
<td>89</td>
<td>110</td>
<td>109</td>
<td>115</td>
<td>1.2</td>
</tr>
<tr>
<td>2010</td>
<td>102</td>
<td>117</td>
<td>114</td>
<td>92</td>
<td>88</td>
<td>67</td>
<td>87</td>
<td>100</td>
<td>95</td>
<td>113</td>
<td>113</td>
<td>113</td>
<td>1.2</td>
</tr>
<tr>
<td>2011</td>
<td>102</td>
<td>113</td>
<td>104</td>
<td>103</td>
<td>83</td>
<td>72</td>
<td>93</td>
<td>99</td>
<td>93</td>
<td>117</td>
<td>110</td>
<td>110</td>
<td>1.2</td>
</tr>
<tr>
<td>2012</td>
<td>120</td>
<td>104</td>
<td>96</td>
<td>99</td>
<td>80</td>
<td>74</td>
<td>96</td>
<td>100</td>
<td>96</td>
<td>116</td>
<td>103</td>
<td>115</td>
<td>1.2</td>
</tr>
<tr>
<td>2013</td>
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<td>105</td>
<td>98</td>
<td>114</td>
<td>101</td>
<td>112</td>
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Source: Ministry of Tourism
### Table 25: Tourist Arrivals and Market Share by Selected Markets 2009 - 2013

<table>
<thead>
<tr>
<th>REGION / NATIONALITY</th>
<th>2009 (78.5)</th>
<th>2010 (63.8)</th>
<th>2011 (77.7)</th>
<th>2012 (64.4)</th>
<th>2013 (66.9)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EUROPE</strong></td>
<td>462,192</td>
<td>505,421</td>
<td>537,757</td>
<td>517,809</td>
<td>527,274</td>
</tr>
<tr>
<td><strong>CENTRAL / EASTERN EUROPE</strong></td>
<td>62,849</td>
<td>75,435</td>
<td>95,247</td>
<td>100,097</td>
<td>119,568</td>
</tr>
<tr>
<td>Belarus</td>
<td>812 (0.1)</td>
<td>898 (0.1)</td>
<td>1,161 (0.1)</td>
<td>1,509 (0.2)</td>
<td>2,030 (0.2)</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>902 (0.1)</td>
<td>1,051 (0.1)</td>
<td>1,368 (0.1)</td>
<td>1,479 (0.2)</td>
<td>1,882 (0.2)</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>3,851 (0.6)</td>
<td>5,137 (0.6)</td>
<td>6,471 (0.7)</td>
<td>5,588 (0.6)</td>
<td>6,421 (0.6)</td>
</tr>
<tr>
<td>Hungary</td>
<td>1,848 (0.3)</td>
<td>2,434 (0.3)</td>
<td>2,596 (0.3)</td>
<td>2,408 (0.3)</td>
<td>2,796 (0.2)</td>
</tr>
<tr>
<td>Kazakhstan</td>
<td>1,756 (0.3)</td>
<td>1,572 (0.2)</td>
<td>1,731 (0.2)</td>
<td>2,875 (0.3)</td>
<td>3,131 (0.3)</td>
</tr>
<tr>
<td>Poland</td>
<td>3,357 (0.5)</td>
<td>3,795 (0.5)</td>
<td>4,158 (0.4)</td>
<td>3,918 (0.4)</td>
<td>6,668 (0.6)</td>
</tr>
<tr>
<td>Romania</td>
<td>1,247 (0.2)</td>
<td>1,290 (0.2)</td>
<td>1,656 (0.2)</td>
<td>1,879 (0.2)</td>
<td>2,423 (0.2)</td>
</tr>
<tr>
<td>Russia</td>
<td>40,014 (6.1)</td>
<td>49,111 (6.2)</td>
<td>63,936 (6.9)</td>
<td>66,378 (6.9)</td>
<td>76,479 (6.8)</td>
</tr>
<tr>
<td>Slovakia</td>
<td>1,970 (0.3)</td>
<td>2,348 (0.3)</td>
<td>2,822 (0.3)</td>
<td>2,636 (0.3)</td>
<td>2,758 (0.2)</td>
</tr>
<tr>
<td>Ukraine</td>
<td>4,643 (0.7)</td>
<td>5,445 (0.7)</td>
<td>6,729 (0.7)</td>
<td>8,044 (0.8)</td>
<td>10,362 (0.9)</td>
</tr>
<tr>
<td>Other Central / Eastern Europe</td>
<td>2,449 (0.4)</td>
<td>2,354 (0.3)</td>
<td>2,619 (0.3)</td>
<td>3,383 (0.4)</td>
<td>4,618 (0.4)</td>
</tr>
<tr>
<td><strong>NORTHERN EUROPE</strong></td>
<td>116,491 (17.8)</td>
<td>126,222 (15.9)</td>
<td>119,388 (13.4)</td>
<td>107,352 (11.2)</td>
<td>103,104 (9.2)</td>
</tr>
<tr>
<td>Denmark</td>
<td>1,722 (0.3)</td>
<td>2,422 (0.3)</td>
<td>3,173 (0.3)</td>
<td>3,493 (0.4)</td>
<td>4,055 (0.4)</td>
</tr>
<tr>
<td>Finland</td>
<td>1,088 (0.2)</td>
<td>1,281 (0.2)</td>
<td>1,535 (0.2)</td>
<td>1,402 (0.1)</td>
<td>1,549 (0.1)</td>
</tr>
<tr>
<td>Ireland</td>
<td>2,420 (0.4)</td>
<td>2,514 (0.3)</td>
<td>2,444 (0.3)</td>
<td>2,483 (0.3)</td>
<td>2,590 (0.2)</td>
</tr>
<tr>
<td>Norway</td>
<td>2,120 (0.3)</td>
<td>2,153 (0.3)</td>
<td>2,775 (0.3)</td>
<td>2,902 (0.3)</td>
<td>3,281 (0.3)</td>
</tr>
<tr>
<td>Sweden</td>
<td>3,165 (0.5)</td>
<td>3,638 (0.5)</td>
<td>4,896 (0.5)</td>
<td>5,230 (0.5)</td>
<td>5,694 (0.5)</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>105,950 (16.2)</td>
<td>114,158 (14.4)</td>
<td>104,508 (12.1)</td>
<td>91,776 (9.6)</td>
<td>85,869 (7.6)</td>
</tr>
<tr>
<td>Other Northern Europe</td>
<td>26 (0.0)</td>
<td>56 (0.0)</td>
<td>57 (0.0)</td>
<td>66 (0.0)</td>
<td>66 (0.0)</td>
</tr>
<tr>
<td><strong>SOUTHERN EUROPE</strong></td>
<td>109,308 (16.7)</td>
<td>111,165 (14.4)</td>
<td>104,060 (12.2)</td>
<td>81,287 (8.3)</td>
<td>79,264 (7.1)</td>
</tr>
<tr>
<td>Greece</td>
<td>5,406 (0.8)</td>
<td>4,630 (0.6)</td>
<td>3,009 (0.3)</td>
<td>2,058 (0.2)</td>
<td>1,841 (0.2)</td>
</tr>
<tr>
<td>Italy</td>
<td>89,292 (13.6)</td>
<td>89,596 (11.3)</td>
<td>83,328 (8.9)</td>
<td>62,782 (6.4)</td>
<td>57,854 (5.1)</td>
</tr>
<tr>
<td>Portugal</td>
<td>4,822 (0.7)</td>
<td>4,555 (0.6)</td>
<td>4,325 (0.5)</td>
<td>3,660 (0.4)</td>
<td>4,617 (0.4)</td>
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<tr>
<td>Slovenia</td>
<td>1,324 (0.2)</td>
<td>1,647 (0.2)</td>
<td>2,342 (0.3)</td>
<td>1,295 (0.1)</td>
<td>1,243 (0.1)</td>
</tr>
<tr>
<td>Spain</td>
<td>7,279 (1.1)</td>
<td>8,912 (1.1)</td>
<td>8,861 (1.0)</td>
<td>8,824 (0.9)</td>
<td>11,040 (1.0)</td>
</tr>
<tr>
<td>Other Southern Europe</td>
<td>1,185 (0.2)</td>
<td>1,825 (0.2)</td>
<td>2,195 (0.2)</td>
<td>2,668 (0.3)</td>
<td>2,769 (0.2)</td>
</tr>
<tr>
<td><strong>WESTERN EUROPE</strong></td>
<td>169,027 (25.8)</td>
<td>185,433 (23.4)</td>
<td>211,755 (23.7)</td>
<td>220,817 (23.8)</td>
<td>212,655 (18.9)</td>
</tr>
<tr>
<td>Austria</td>
<td>13,274 (2.0)</td>
<td>14,944 (1.9)</td>
<td>16,655 (1.8)</td>
<td>18,164 (1.8)</td>
<td>18,140 (1.6)</td>
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<td>5,738 (0.6)</td>
<td>5,141 (0.5)</td>
<td>5,130 (0.5)</td>
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<tr>
<td>France</td>
<td>50,373 (7.7)</td>
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<td>59,694 (6.4)</td>
<td>56,775 (5.9)</td>
<td>54,328 (4.8)</td>
</tr>
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<td>Germany</td>
<td>69,085 (10.5)</td>
<td>77,108 (9.7)</td>
<td>90,517 (9.7)</td>
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<td>93,598 (8.3)</td>
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<td>Netherlands</td>
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<td>6,077 (0.6)</td>
<td>6,453 (0.6)</td>
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<td>35,457 (3.7)</td>
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</tr>
<tr>
<td>Other Western Europe</td>
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<td>758 (0.1)</td>
<td>954 (0.1)</td>
<td>852 (0.1)</td>
<td>904 (0.1)</td>
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<tr>
<td><strong>EAST MEDITERRANEAN EUROPE</strong></td>
<td>4,517 (0.7)</td>
<td>7,166 (0.9)</td>
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<td>8,256 (0.8)</td>
<td>12,583 (1.1)</td>
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<td>Turkey</td>
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<td>416 (0.1)</td>
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<td>213 (0.0)</td>
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</table>
### Table 25: (continued…)

<table>
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<th>REGION / NATIONALITY</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ASIA &amp; THE PACIFIC</td>
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</tr>
<tr>
<td>China</td>
<td>60,666</td>
<td>118,961</td>
<td>198,655</td>
<td>229,551</td>
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<td>16,135</td>
<td>24,808</td>
<td>25,285</td>
<td>23,933</td>
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<td>1,975</td>
<td>3,831</td>
<td>5,305</td>
<td>4,430</td>
<td>6,522</td>
</tr>
<tr>
<td>Other North East Asia</td>
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<td>61</td>
<td>69</td>
<td>45</td>
<td>103</td>
</tr>
<tr>
<td><strong>SOUTH EAST ASIA</strong></td>
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<td></td>
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<td>818</td>
<td>1,283</td>
<td>1,772</td>
<td>2,511</td>
</tr>
<tr>
<td>Malaysia</td>
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<td>3,894</td>
<td>6,055</td>
<td>6,766</td>
<td>10,875</td>
</tr>
<tr>
<td>Philippines</td>
<td>979</td>
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<td>1,652</td>
<td>2,265</td>
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</tr>
<tr>
<td>Singapore</td>
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<td>7,990</td>
<td>9,625</td>
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<tr>
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<td>5,397</td>
<td>6,214</td>
<td>6,896</td>
<td>11,705</td>
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<tr>
<td>Other South East Asia</td>
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<td>311</td>
<td>532</td>
<td>636</td>
<td>1,570</td>
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<tr>
<td><strong>SOUTH ASIA</strong></td>
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</tr>
<tr>
<td>Bangladesh</td>
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<td>525</td>
<td>1,496</td>
<td>1,221</td>
<td>1,906</td>
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<tr>
<td>India</td>
<td>15,850</td>
<td>25,750</td>
<td>30,978</td>
<td>31,721</td>
<td>38,014</td>
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<tr>
<td>Pakistan</td>
<td>1,046</td>
<td>1,256</td>
<td>1,842</td>
<td>1,857</td>
<td>2,693</td>
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Source: Ministry of Tourism
Data provided by: Department of Immigration and Emigration
### Table 26: Growth Trends of Selected Markets, 2009 – 2013 (Percent)

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| GLOBAL                     | -4.0 | 20.7 | 17.6 | 2.9  | 17.4 |

Source: Ministry of Tourism
Data provided by: Department of Immigration and Emigration
Table 27: Tourist Arrivals by Markets, (end June, 2014)

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<th>January - June 2014</th>
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<th>% Share 2014</th>
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Table 27: (continued…)

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<th>% Change</th>
<th>% Share 2014</th>
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Source: Ministry of Tourism  
Data provided by: Department of Immigration and Emigration
Table 28: Tourism Indicators, (end June, 2014)

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<th>JAN - MAR</th>
<th>APR - JUN</th>
<th>JAN - JUN</th>
<th>Total</th>
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<td>SURFACE ARRIVALS (Cruise Passengers)</td>
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REGISTERED CAPACITY 2014

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<table>
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OPERATIONAL CAPACITY

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### Table 28: (continued…)

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<th>JAN - JUN</th>
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<td>3,498,615</td>
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<tr>
<td><strong>Growth %</strong></td>
<td>4.8</td>
<td>7.3</td>
<td>5.9</td>
</tr>
<tr>
<td><strong>HOTELS</strong></td>
<td>55,960</td>
<td>46,789</td>
<td>102,749</td>
</tr>
<tr>
<td></td>
<td>67,878</td>
<td>50,849</td>
<td>118,727</td>
</tr>
<tr>
<td><strong>Growth %</strong></td>
<td>21.3</td>
<td>8.7</td>
<td>15.6</td>
</tr>
<tr>
<td><strong>GUEST HOUSES</strong></td>
<td>20,817</td>
<td>16,836</td>
<td>37,653</td>
</tr>
<tr>
<td></td>
<td>36,392</td>
<td>24,305</td>
<td>60,697</td>
</tr>
<tr>
<td><strong>Growth %</strong></td>
<td>74.8</td>
<td>44.4</td>
<td>61.2</td>
</tr>
<tr>
<td><strong>SAFARIVESSELS</strong></td>
<td>43,870</td>
<td>20,970</td>
<td>64,840</td>
</tr>
<tr>
<td></td>
<td>32,755</td>
<td>18,249</td>
<td>51,004</td>
</tr>
<tr>
<td><strong>Growth %</strong></td>
<td>-25.3</td>
<td>-13.0</td>
<td>-21.3</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>1,944,425</td>
<td>1,563,859</td>
<td>3,508,284</td>
</tr>
<tr>
<td></td>
<td>2,048,964</td>
<td>1,680,079</td>
<td>3,729,043</td>
</tr>
<tr>
<td><strong>Growth %</strong></td>
<td>5.4</td>
<td>7.4</td>
<td>6.3</td>
</tr>
<tr>
<td><strong>OCCUPANCY RATE (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>RESORTS</strong></td>
<td>89.7</td>
<td>72.1</td>
<td>80.9</td>
</tr>
<tr>
<td></td>
<td>92.6</td>
<td>76.1</td>
<td>84.3</td>
</tr>
<tr>
<td><strong>Change</strong></td>
<td>2.9</td>
<td>4.0</td>
<td>3.4</td>
</tr>
<tr>
<td><strong>HOTELS</strong></td>
<td>38.6</td>
<td>34.1</td>
<td>36.4</td>
</tr>
<tr>
<td></td>
<td>47.3</td>
<td>40.5</td>
<td>43.9</td>
</tr>
<tr>
<td><strong>Change</strong></td>
<td>8.7</td>
<td>6.4</td>
<td>7.6</td>
</tr>
<tr>
<td><strong>GUEST HOUSES</strong></td>
<td>24.3</td>
<td>17.4</td>
<td>20.9</td>
</tr>
<tr>
<td></td>
<td>26.0</td>
<td>17.2</td>
<td>21.6</td>
</tr>
<tr>
<td><strong>Change</strong></td>
<td>1.7</td>
<td>-0.2</td>
<td>0.8</td>
</tr>
<tr>
<td><strong>SAFARIVESSELS</strong></td>
<td>49.5</td>
<td>20.3</td>
<td>34.9</td>
</tr>
<tr>
<td></td>
<td>40.1</td>
<td>20.6</td>
<td>30.3</td>
</tr>
<tr>
<td><strong>Change</strong></td>
<td>-9.4</td>
<td>0.3</td>
<td>-4.6</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>82.6</td>
<td>65.6</td>
<td>74.1</td>
</tr>
<tr>
<td></td>
<td>84.5</td>
<td>68.8</td>
<td>76.7</td>
</tr>
<tr>
<td><strong>Change</strong></td>
<td>1.9</td>
<td>3.3</td>
<td>2.6</td>
</tr>
<tr>
<td><strong>AVG. DURATION OF STAY (Days)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>6.6</td>
<td>6.3</td>
<td>6.5</td>
</tr>
<tr>
<td></td>
<td>6.4</td>
<td>6.0</td>
<td>6.2</td>
</tr>
<tr>
<td><strong>Change</strong></td>
<td>-0.3</td>
<td>-0.3</td>
<td>-0.3</td>
</tr>
</tbody>
</table>

Source: Ministry of Tourism
Ministry of Tourism renamed

One of the major highlights of the year was Ministry of Tourism, Arts and Culture being renamed as Ministry of Tourism. Following the newly elected government in November 2013, arts and culture sector was separated from Ministry of Tourism, in order to give more emphasis on developing the tourism sector efficiently. The then Minister of Tourism, Arts and Culture, Hon. Mr. Ahmed Adeeb Abdul Gafoor was appointed as the Minister of Tourism on 17th November 2013.

Launching of Fourth Tourism Master Plan

The Maldives Fourth Tourism Master plan was launched on the World Tourism Day 2013 by the then President of Maldives Dr. Mohamed Waheed Hassan Manik. The aim of this Fourth Tourism Master plan (4TMP) is to articulate a 5-year strategic agenda and action plan agreed by both public and private players in the tourism industry.

NaCTSO Training on Security in the Tourism Industry

A continuation of the Training on Security in the Tourism Industry which was conducted in February 2012 was carried out on 28 January 2013. The training was organized by the Ministry of Tourism in collaboration with British High Commission and National Counter Terrorism Security Office (NaCTSO) of United Kingdom. The seminar provided valuable information to the participants on proper mechanisms to be undertaken and on how to be well organized and prepared to minimize risks and damages in the event of disastrous situations.

A multimedia simulation exercise with a detailed crisis scenario was included as one of the component of the program which drew key issues pertaining to the prevention, handling and business continuity after a disaster.

The training is expected to increase awareness, assess vulnerability and enhance the level of preparedness for contingencies within the tourism sector. The NaCTSO Training on Security is a part of the initiative taken by the Government of Maldives to undertake precautionary measures to protect the destination from various security threats.
Feasibility Study on Implementation of a TSA in the Maldives

Ministry of Tourism conducted a feasibility study for the possible implementation of Tourism Satellite Account (TSA) in the Maldives with technical expertise and assistance from the UNWTO. The study was conducted from 15th - 21st December 2013 by Dr. Rumolo Virola, a consultant assigned by the UNWTO, who is with immense knowledge is this field. One to one meetings were held with key tourism statistics generators in the Maldives such as the Maldives Monetary Authority, Department of National Planning, and Maldives Inland Revenue Authority. A half day workshop was carried out to present the findings of Dr. Virola’s study and share his recommendations with stakeholders.

Capacity building for the Quality Assurance Officers of the Ministry of Tourism

The Ministry of Tourism in collaboration with UNDP organized a “Capacity Building Training for Quality Assurance Officer at the Ministry from 23rd June 2013 to 14th February 2014. The objective of the training programme was to develop the capacity of the quality assurance officers to carry out the inspection and monitoring functions of the Ministry. Hostis Investment Pvt Ltd was assigned to carry out the consultancy project.

Customer Relations Training

A Customer Relations Training of Trainers program was carried out for selected officials of Department of Immigration and Emigration, Maldives Customs Services and Airport Aviation Security to improve the service provided by them for the tourists. This program was conducted by the Ministry of Tourism in collaboration with Four Seasons Resort Landaa Giraavaru from 17th to 21st October 2013.

Work-Visa Information Dissemination Session

In collaboration with Department of Immigration & Emigration, the Ministry of Tourism conducted a dissemination session for HR personnel’s of tourist facilities. This session was carried out to provide information on work visa and steps which should be taken to solve problems regarding work permit issues. The session took place at Coastguard Building on 3rd September 2013.
UNWTO’s 20th General Assembly

The General Assembly of the World Tourism Organization (UNWTO) is the most important meeting of senior tourism officials and high-level representatives of the private sector from all over the world. Held every two years, the 20th General Assembly (GA) which was held from 24th to 29th August 2013, was attended by delegates from full and associate members, and representatives from affiliate members of the UNWTO. The GA was held at the UNESCO heritage site Victoria Falls, shared by Zambia and Zimbabwe, who co-hosted the event.

The assembly was declared by UNWTO secretary general, Taleb Rifai as the best attended in the history of the organization with a record 900 delegates from the media fraternity, 121 full delegates from the member states, 140 delegates from all over the world, 49 foreign ministers and 750 other delegates.

After five days of high-level deliberations on issues that posed impediments to tourism development such as pricing regimes, communication connectivity and political will, participants also committed themselves to adopting policies and technologies that make it easy for tourists to travel to any part of the world undisturbed as a long-term solution. The 20th session of the UNWTO general assembly also approved important recommendations on accessible tourism for all, by taking appropriate measures to ensure that persons with disabilities have access on an equal basis with others, to all travel and tourism services infrastructure.

The Maldives was represented at this Assembly by Dr. Ahmed Salih, Permanent Secretary of the Ministry of Tourism.

World Tourism Day 2013

The official World Tourism Day (WTD) celebrations, was held in Kurumba Maldives on 27th September 2013, under the theme “Tourism and Water – Protecting our Common Future”, in line with the United Nations International Year of Water Cooperation.

As part of the WTD celebrations, in collaboration with the UNWTO, a World Tourism Day Think Tank Seminar was held on the topic Tourism and Water. The Think Tank Seminar aimed to examine water consumption in the tourism sector, the challenges facing water management, the measures being undertaken by the UNWTO to raise awareness and ensure access and the preservation of water resources worldwide & to increase the understanding of the importance of tourism and its contribution to major global challenges.
Conference / Seminars / Trainings

International Workshop – Utilizing Marine Protected Areas to Support Marine Economic Development

A workshop on Utilizing Marine Protected Areas to Support Marine Economic Development was held from 30th March to 2nd April 2013 in Jakarta, Indonesia. The Maldives was represented at the workshop by Deputy Director General of Ministry of Tourism, Mr. Moosa Zameer Hassan.

25th CSA/CAP Joint Meeting & UNWTO Conference on Sustainable Tourism Development

The 25th Joint Meeting of the UNWTO Regional Commission for South Asia and the UNWTO Regional Commission for East Asia and the Pacific was held in Hyderabad, India from the 12th – 14th April 2013. The Meeting was held in conjunction with a one-day, regional conference on Sustainable Tourism Development, which examined the environmental, socio-cultural and economic longevity of the travel and tourism industry in light of its rapid growth, both internationally and domestically.

The events gathered senior tourism executives from over 20 UNWTO Member States, who were joined by representatives of India’s state governments, union territories and private stakeholders. The Maldives was represented by Dr. Ahmed Salih, Permanent Secretary of the Ministry of Tourism.

7th UNWTO Asia/Pacific Executive Training Program on Tourism Policy and Strategy

As a first step towards achieving better governance and effective tourism management for the Member States, the 7th UNWTO Asia/Pacific Executive Training Program on Tourism Policy and Strategy was held in Busan, Korea from 3rd to 6th June 2013. With great support from the Ministry of Culture, Sports and Tourism of the Republic of Korea, this training program served as a forum for executives in the tourism sector of each Member State to share their knowledge and experiences in successful policy making and implementation which can later on become models for other Member States.

Mr. Ali Shinan, Assistant Director of Ministry of Tourism participated in this training from the Maldives.
The 1st UNWTO Regional Conference on Tourism Partnerships: *Future Tourism for Asia and the Pacific*

The 1st UNWTO Regional Conference on Tourism Industry Partnerships: Future Tourism for Asia and the Pacific was held in Seoul, Korea from May 31 to June 2, 2013. The conference was jointly organized by the Korea Tourism Organization (KTO) and the World Tourism Organization (UNWTO), in collaboration with the Ministry of Culture, Sports and Tourism of the Republic of Korea.

With special emphasis on Asia and the Pacific region, the main objective of the Conference was to create a platform for the participants to dialogue and share their vision on how to advance tourism in the context of a technology-driven world with the inclusion of ethical and sustainable development strategies.

About 180 people, including representatives from affiliate member organizations of the two tourism bodies, members of Korean tourism agencies and experts participated in the conference. The Maldives was represented by Mr. Ali Shinan, Assistant Director of the Ministry of Tourism.

**PATA Annual Summit**

The Pacific Asia Travel Association (PATA) 2013 Annual Summit was held in Bangkok, Thailand from 25th to 28th April 2013. The 2013 Summit which was held under the theme "Embracing the Complete Visitor Economy" addressed the following four key sessions:

- Why Visitor Economy is key for jobs and societal development
- Ministerial view of investing in the complete Visitor Economy
- Connecting the complete Visitor Economy across functions and cultures
- Strengthening weak links in the Visitor Economy

The Summit brought together hundreds of leaders from the hospitality industry including tour operator, carrier and government sectors, along with senior media representatives, such as CNN, Travel Channel and publications such as the International Herald Tribune, and leading travel trade journalists.

The Maldives was represented at the Summit by Dr. Ahmed Salih, Permanent Secretary of the Ministry of Tourism.
Definitions

Definitions in this publication are used as per World Tourism Organization’s (UNWTO) recommendations. However, some of the terminologies are specific to the use of data provided in this publication itself.

Following are some of the UNWTO definitions.

Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

International visitor refers to any person traveling to a country other than the one in which he/she has his/her usual residence, but outside his/her usual environment, for less than 12 consecutive months and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.

Tourist (overnight visitor) is a visitor who stays at least one night in a collective or private accommodation in the country visited.

Nationality of a visitor is that of the government issuing his/her passport or other identification document, even if he/she normally resides in another country.

Tourist accommodation refers to any facility that regularly or occasionally provides overnight accommodation for tourists.

Occupancy rate refers to the proportion of the rooms or bed-places in a collective tourism establishment that is occupied over some period of time, such as night, month or year.

Duration of stay refers to the time spent during a visit measured from the stand point of the receiving country or place.

Tourism receipts are defined as expenditures of international inbound visitors including their payments to national carriers for international transport. They also include any other prepayments or payments afterwards made for goods and services received in the destination country.

Apart from the above UNWTO definitions, the following definitions from the Maldives Tourism Act (Law No. 2/99) are adopted for this publication.

Tourist resort refers to an island or a designated area of an island that has been developed to accommodate tourists and to provide board and lodging facilities for them.

Tourist hotel refers to an establishment, other than a tourist resort or a tourist guesthouse that has been developed to provide board and lodging or [only] lodging for tourists for a payment decided at a certain rate per day of stay.

Tourist guesthouse refers to an establishment, other than a tourist hotel, that has been developed, in compliance with standards determined by the Ministry of Tourism, to provide board and lodging or [only] lodging for tourists for a payment decided at a certain rate per day of stay.

Tourist vessel (safari vessel) refers to seagoing vessel that has been developed, in compliance with standards determined by the Ministry of Tourism, to provide board and lodging for tourists for a payment decided at a certain rate per day of stay on board such vessel.

Marina refers to harbors developed for anchoring yachts and such vessels and to provide various services to those vessels. A Marina is also associated with accommodation facilities.