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Ministry of Tourism, Arts and Culture
Republic of Maldives

Tourism Yearbook 2011
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Foreword

Welcome to the Tourism Yearbook 2011! It is with great pleasure that we present to you this annual publication of the Ministry of Tourism, Arts and Culture.

The Tourism Yearbook is published with the objective of providing comprehensive and up dated statistical information on the tourism industry, for the use of relevant Government authorities as well as private sector, institutions and individuals. This annual publication highlights key tourism indicators of the Maldives for the past five years and provides information on the performance of the Maldives tourism industry in 2010.

Year 2010 had been a year of recovery for world tourism. While international tourist arrivals increased by 6.7 percent, the Maldives experienced a healthy growth of 20 percent. Tourist arrivals reached and exceeded the expected 700,000 target for the year with a record figure in arrivals for the country. Indeed, Maldives welcomed the 750,000th visitor on 15 December 2010.

With regard to regional growth, Europe was the main generating region with 9.4 percent growth. The Chinese market became the highlight of the year, overtaking all the traditional markets, which resulted in a strong positive growth of 52.9 percent for Asia & the Pacific region.

We are confident of the strong foothold of Maldives in the international tourism arena with a steady European presence and rapidly emerging new markets. It is estimated that 957,000 tourists will visit the Maldives in 2011.

Tourism Yearbook 2011 is the result of the collaboration of many. Therefore, we acknowledge and appreciate the Government institutions and the private sector for providing continued support.

We hope that the readers find this publication a vital source of information.

Mariyam Zulfa
Minister of Tourism, Arts and Culture

Male', September 2011

Acknowledgements

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

The Ministry of Tourism, Arts and Culture (MOTAC) wishes to express its gratitude to the Department of Immigration and Emigration for providing data on arrivals to the Maldives, the Department of National Planning, Ministry of Finance and Treasury, Maldives Inland Revenue Authority & Maldives Monetary Authority for providing data on economic indicators of the Maldives. MOTAC also acknowledges with appreciation the Maldives Customs Services, Faculty of Hospitality and Tourism Studies, Maldives Marketing and Public Relations Corporation and the Maldives tourism industry for their continued cooperation and assistance in the compilation of data for this publication.

Preface

Tourism Yearbook 2011, has been produced and published by the Statistics & Research Section of the Ministry of Tourism, Arts and Culture. This publication briefly presents the overall performance of the tourism industry of the Maldives through 2006 to 2010. In addition to all the available national tourism statistics for the past five years, the publication contains major highlights of the tourism industry's performance for 2010 as well as forecasts for 2011 to 2014

This publication is divided into 5 sections

1. Tourist Accommodation
2. Tourist Arrival Trends
3. Forecasts
4. Airlines Statistics
5. Economic Indicators of Tourism *and*
6. Tourism Highlights 2010

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

Table of Contents

ECONOMIC INDICATORS

AIRLINE STATISTICS

ADDITIONAL TABLES

TOURIST ACCOMMODATION

TOURIST ACCOMMODATION IN THE MALDIVES

Tourism in the Maldives started with the opening of its first resort, Kurumba Village in Vihamanaafushi Island now known as Kurumba Maldives, with only 60 beds on 3rd October 1972. Since then, with the unique one-island-one resort development concept, resorts have become the traditional and most popular form of tourist accommodation in the Maldives.

Although, resorts provide the most commonly used form of accommodation in the Maldives, accommodation is also available in hotels and guest houses, mostly situated in the capital Male' and live-aboard floating vessels known as safari vessels (refer Table: 1).

Table: 1 **Number of Accommodation Establishments & their Bed Capacity 2006 - 2010**

Type of Establishment	2006		2007		2008		2009		2010	
	Nos	Beds	Nos	Beds	Nos	Beds	Nos	Beds	Nos	Beds
Resorts / Marinas	89	17,802	92	19,028	94	19,860	97	20,942*	98	21,342
Hotels	9	713	11	836	13	1,110	15*	1,368*	17	1,449
Guest Houses	21	391	24	400	24	400	22	462	25	476
Safari Vessels	116	1,599	133	1,923	143	2,094	145	2,206	156	2,434
Total	**235**	**20,505**	**260**	**22,187**	**274**	**23,464**	**279**	**24,978**	**296**	**25,701**

Source: Ministry of Tourism, Arts & Culture *Note: * Revised*

As seen in Table 1, at the end of 2010, there were 21,342 beds registered in 98 resorts in the Maldives. which was 83% of the total bed capacity of the Maldives. The resort bed capacity has been increasing at an annual average rate of 4% over the last five years.

In the year 2010, the safari sector shared 9.5% of the total bed capacity of the Maldives. The bed capacity of safari vessels has increased from 2,206 in 2009 to 2,434 in 2010. With the increasing popularity of safari vessels, a significant increase in the number of safari vessels was recorded over the last five years with 116 vessels in 2006 to 156 at the end of 2010.

Hotels and Guesthouses together contributed 8% to the total beds. With the opening of two new hotels in 2010, bed capacity of Hotels increased from 1,368 in 2009 to 1,449 at the end of 2010. Although 3 new Guesthouses were opened in 2010, due to the closure of some existing guesthouses, bed capacity in hotels and guest houses showed only a slight increase in 2010.

Resort Bed Distribution

During the early days of tourism in the Maldives, due to the difficulty in transportation of tourists from the airport to resorts, islands within close proximity to the only existing international airport, Male' International Airport (now named Ibrahim Nasir International Airport), were developed as tourist resorts. Thus, Kaafu Atoll was centralized as the first tourism zone and resort development in this atoll had been speedy. Alifu Atoll, which is the next closest atoll to Male' International Airport, was developed subsequently.

The Third Tourism Master Plan (TTMP) of the Maldives which was implemented in 2005 highlighted the importance of expanding tourism to all atolls of the country. Hence the government adopted a new policy on tourism development, by shifting from a zonal development to a country wide expansion. Under this new policy islands were leased to develop resorts in all the atolls of the country (refer Table 2).

Table: 2 **Distribution of Resort Beds by Atolls, 2006 - 2010**

Atoll	2006		2007		2008		2009		2010	
	Beds	% Share	Beds	% Share	Beds	% Share	Beds	% Share	Beds	% Share
Haa Alifu	90	0.5	390	2.0	432	2.2	432	2.1	456	2.1
Noonu	-	-	-	-	400	2.0	490	2.3	542	2.5
Raa	470	2.6	470	2.5	470	2.4	470	2.2	470	2.2
Baa	1,240	7.0	1,240	6.5	1,240	6.2	1,240	5.9	1,398	6.6
Lhaviyani	1,196	6.7	1,276	6.7	1,294	6.5	1,336	6.4	1,336	6.3
Kaafu	8,450	47.5	8,724	45.8	8,914	44.9	8,982 *	42.9	9,050	42.4
Alifu (North & South)	5,032	28.3	5,058	26.6	5,240	26.4	5,526 *	26.4	5,574	26.1
Vaavu	350	2.0	350	1.8	350	1.8	350	1.7	350	1.6
Meemu	400	2.2	400	2.1	400	2.0	400	1.9	400	1.9
Faafu	250	1.4	250	1.3	250	1.3	250	1.2	250	1.2
Dhaalu	324	1.8	324	1.7	324	1.6	436	2.1	436	2.0
Gaafu Alifu	-	-	-	-	-	-	200	1.0	250	1.2
Seenu	-	-	546	2.9	546	2.7	830	4.0	830	3.9
Total	**17,802**	**100.0**	**19,028**	**100.0**	**19,860**	**100.0**	**20,942**	**100.0**	**21,342**	**100.0**

Source: Ministry of Tourism, Arts & Culture

*Note: * Revised*

As seen in Table 2, in the year 2010, while Kaafu Atoll occupied 42.4% to the resort bed capacity with 9,050 beds, Alifu Atoll shared 26.1% with 5,574 beds. Next to these two atolls, Baa and Lhaviyani Atoll had the most number of beds with 1,398 and 1,336 sharing 6.6% and 6.3% respectively.

At the end of 2010, there were 3 resorts in Haa Alifu Atoll with a total bed capacity of 456 and a share of 2.1%. With two resorts, Noonu Atoll had 542 beds contributing 2.6% to the total capacity. Raa Atoll having only one resort, bed capacity remained constant over the last five years. Vaavu Atoll with 350 beds, Meemu Atoll with 400 beds and Faafu Atoll with 250 beds contributed 1.6%, 1.9% and 1.2% respectively to the total beds in resorts. Dhaalu Atoll supplied 2.0% to the resort bed capacity with 436 beds. Tourism was introduced to Gaafu Alifu Atoll in 2009 with 200 beds in two resorts. Bed capacity of this atoll increased to 250 by the end of 2010. Seenu, the southernmost atoll of the country, contributed 3.9% of the total capacity of resorts with 830 beds.

Type of Lease Holders and Operators

Uninhabited islands in the Maldives are selected for resort developments by the Government of the Maldives. These islands have been publicly tendered and leased to the highest bidder for a pre defined period of time. Now, the opportunity exists to apply to the National Planning Council (NPC) to develop resorts for an accquisition cost or provision of a CSR component. The lease holder of a resort could be a local, a foreigner or a joint venture company formed between a local and a foreign company (refer Table 3).

Table: 3 **Tourist Resorts by Type of Lease Holders, 2006 - 2010**

	2006			2007			2008			2009			2010		
	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds
Local	68	13,796	77.5	70	14,716	77.3	74	15,882	80.0	73	16,192 *	77.3	74	16,562	77.6
Foreign	7	922	5.2	8	1,122	5.9	8	1,086	5.5	8	1,180 *	5.6	10	1,382	6.5
Joint Venture	14	3,084	17.3	14	3,190	16.8	12	2,892	14.6	16	3,570	17.0	14	3,398	15.9
Total	**89**	**17,802**	**100.0**	**92**	**19,028**	**100.0**	**94**	**19,860**	**100.0**	**97**	**20,942**	**100.0**	**98**	**21,342**	**100.0**

Source: Ministry of Tourism, Arts & Culture *Note: * Revised*

As seen in Table 3, at the end of 2010 there were 74 resorts leased to local companies with a total bed capacity of 16,562, which is 77.6% of the resort bed capacity. Number of resorts leased to foreign companies increased from 8 in 2009 to 10 in 2010. Bed capacity of resorts leased to joint venture companies captured 16% of the total capacity of resorts during the year 2010.

Table: 4 **Tourist Resorts by Type of Operators, 2006 - 2010**

	2006			2007			2008			2009			2010		
	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds	Nos	Beds	% Share of Beds
Local	42	9,442	53.0	44	10,146	53.3	44	10,322	52.0	42	10,354	49.4	43	10,642	49.9
Foreign	30	4,924	27.7	31	5,340	28.1	33	5,706	28.7	35	5,960 *	28.5	37	6,302	29.5
Joint Venture	17	3,436	19.3	17	3,542	18.6	17	3,832	19.3	20	4,628 *	22.1	18	4,398	20.6
Total	**89**	**17,802**	**100.0**	**92**	**19,028**	**100.0**	**94**	**19,860**	**100.0**	**97**	**20,942**	**100.0**	**98**	**21,342**	**100.0**

Source: Ministry of Tourism, Arts & Culture *Note: * Revised*

The number of resorts operated by local companies has varied between 42 and 44 over the last 5 years (refer Table 4). While in 2009, 42 resorts with 10,354 beds were managed by local companies, in the year 2010 the number of resorts increased to 43 with a bed capacity of 10,642, which was 50% of the resort bed capacity. While 29% of resort bed capacity is managed by foreign companies, nearly 21% is managed by Joint venture companies in 2010. The bed capacity of resorts managed by foreign companies increased from 5,960 in 2009 to 6,302 in 2010.

Bed Nights, Bed Capacity & Average Duration of Stay

All tourist accommodating establishments in the Maldives are required to submit their bed occupancy reports to the Ministry of Tourism, Arts and Culture. Although there are four types of accommodation establishments in the Maldives, due to some technical difficulties, bed nights of safari vessels and guest houses have not been recorded in the past. However, with the increasing popularity among tourists for the safari sector and the number of tourists visiting the capital continuing to increase, extra efforts were put to collect data from these establishments from 2010. For the purpose of comparison and analysis, only data for resorts and hotels are presented in Table 5 and Table 6.

Table: 5

Bed Nights, Occupancy Rate & Average Duration of Stay, 2006 - 2010 (Resorts & Hotels)

Year	Tourist Bed Nights	Bed Night Growth (%)	Bed Night Capacity	Bed Capacity in Operation (annual average)	Occupancy Rate (%)	Average Duration of Stay (days)
2006	4,826,372	46.2	5,929,397	16,244	81.4	8.0
2007	5,293,224	9.7	6,400,167	17,533	82.8	8.5
2008	5,446,937	2.9	6,996,640	19,117	77.8	8.0
2009	5,150,688 *	-5.4	7,338,221	20,137	70.2	8.6
2010	5,829,218	13.2	7,861,955	21,541	74.2	7.6

Source: Ministry of Tourism, Arts & Culture

*Note: * Revised*

Out of the 98 resorts and 16 hotels that were registered, on an average 90 resorts and 15 hotels were in operation during the year 2010. The combined bed capacity of these two types of establishments was 21,541 in 2010, which was an increase of 7% compared with 2009. With this increase in operational bed capacity, the bed night-capacity of tourist resorts and hotels during the year 2010 was 7,861,955.

As shown in Table 5, a total of 5,829,218 bed nights were recorded in 2010 registering a huge growth of 13.2% compared with 2009, where a negative growth of 5.4% was recorded. The negative growth in 2009 reflects the decline in arrivals due to the world economic recession. While occupancy rate increased by 4% in 2010 compared with 2009 (refer Table 5), the average duration of stay recorded a declined from 8.6 in 2009 to 7.6 at the end of 2010. One of the main reasons for this decline in average stay may be the different patterns of stay habits recorded as a result of diversification of generating markets to the Maldives.

Table: 6

Monthly Average Occupancy Rates, 2006 - 2010 (Resorts & Hotels)

Month	2006	2007	2008	2009	2010
January	94.4	94.8	90.0	86.5	83.5
February	96.8	100.1	95.9	85.9	92.5
March	93.7	94.3	95.7	81.6	82.6
April	92.2	92.6	88.2	75.2	74.2
May	67.1	70.4	70.4	59.1	64.5
June	56.7	58.9	54.2	47.5	50.2
July	68.8	72.0	65.3	56.7	63.5
August	86.1	84.4	76.0	66.0	73.1
September	73.1	73.6	66.0	62.7	67.6
October	81.4	81.2	75.7	73.0	79.8
November	84.1	85.7	78.1	74.6	81.4
December	82.5	85.1	78.4	73.8	77.7
Annual Average	**81.4**	**82.8**	**77.8**	**70.2**	**74.2**

Source: Ministry of Tourism, Arts & Culture

The occupancy rate of resorts and hotels is maintained above 70% from October to April, low occupancy rates are registered for the months from May to September (refer Table 6). Europe being the market leader to the Maldives, the peak tourist season of the Maldives coincides with the European Winter and New Year Holidays.

TOURIST ARRIVAL TRENDS

GLOBAL ARRIVAL TRENDS

Figures released by the World Tourism Organization (UNWTO) show that in 2010, international tourist arrivals increased by nearly 7% with 935 million arrivals world wide (refer Table 7). According to the February 2011 edition of UNWTO, World Tourism Barometer (WTB), world tourism recovered faster than expected from the shock it suffered in 2008 and 2009 due to the global financial crisis and economic recession, which followed an incomparable 4% decline in 2009.

Table: *7* **International Tourist Arrivals, 2009 - 2010**

	Tourist Arrivals (in millions)			
	2009	2010*	% Change	% Share 2010 *
Europe	457.2	472.7	3.4	50.5
Asia & the Pacific	181.0	203.8	12.6	21.8
Americas	140.5	150.4	7.1	16.1
Africa	45.9	48.8	6.4	5.2
Middle East	52.3	59.3	14.2	6.4
World	**877**	**935**	**6.7**	**100.0**

Source: Ministry of Tourism, Arts & Culture

Table adapted from UNWTO World Tourism Barometer, February 2011 edition

*Note: * Data as collected by UNWTO, February 2011*

While Europe shared almost 51% of the arrivals world wide, this region posted the lowest increase during 2010 with just 3.4%. According to the WTB, Europe being the hardest hit region, the effects of crisis although fading away slowly, closure of its airspace in April 2010 and uncertainty about the economy have not helped to speed up the recovery in this region.

Asia and the Pacific registered a double digit growth of 12.6% in 2010 with 203.8 million arrivals securing 22% share of the international tourism market. As per WTB, this was the first region to recover the crisis, and has been growing rapidly boosted by strong developments of the local economies.

Americas grew by 7% sharing 16% of the world wide arrivals. The WTB highlighted that the growth from this region was explained by the signs of recovery from US economy and the vitality of Latin American countries.

Africa posted a growth of 6.4% with nearly 49 million arrivals. This region also posted positive results during the crisis of 2009. According to the WTB, the worldwide exposure created by the FIFA World Cup, hosted by South Africa, helped the region maintain its momentum in 2010.

The highest growth was registered from the Middle East region with 14.2% in 2010. The rapid growth from this region was boosted by intraregional travel favoured by high oil prices, reported the WTB February 2011 edition.

TOURIST ARRIVALS TO THE MALDIVES

The Maldives received only 1,097 tourists in 1972, the first year of tourism in the Maldives. Since then tourist arrivals had been increasing rapidly from year to year. By 1985, arrival numbers reached 100,000 for the first time. In 2003, Maldives welcomed half a million tourists in a year with special celebrations. The following year was yet another year of success for Maldives tourism, although the year ended with the Asian Tsunami crisis. Maldives tourism was strongly affected by the tsunami, which led to a huge decline in arrivals of nearly 40% in 2005.

Table: 8 **Tourist Arrivals to the Maldives by Month, 2006 - 2010**

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2006	58,332	54,741	54,596	55,983	40,961	33,037	42,776	49,968	44,593	54,721	53,594	58,621	**601,923**
2007	64,570	65,224	64,491	63,171	46,602	38,457	51,025	53,168	48,468	58,706	56,797	65,210	**675,889**
2008	64,621	67,963	71,623	62,670	48,764	40,283	47,675	51,824	50,687	56,363	57,961	62,578	**683,012**
2009	61,531	58,520	62,127	57,186	43,154	36,205	44,332	52,388	50,396	62,432	61,986	65,595	**655,852**
2010	67,478	77,063	74,975	60,742	58,324	44,050	57,232	66,315	62,524	74,707	74,252	74,255	**791,917**

Source: Ministry of Tourism, Arts & Culture *Data provided by Department of Immigration & Emigration*

Tourist arrivals to the Maldives have been increasing at an average rate of 15%, over the last five years. After the world economic crisis which started in mid 2008 and continued till the end of first half of 2009, leading to a negative growth of 4% for 2009, the year 2010 has been remarkable for the Maldives. Tourist arrivals reached and exceeded the expected 700,000 target for the year, with a total of 791,917 tourists by the end of 2010. This was a record figure in tourist arrivals to the Maldives (refer Table 8).

On a month by month basis, tourist arrivals in 2010 are higher in all months compared to previous years from 2006 to 2009 except for April 2010 (refer Table 9). Europe being the leading market generator to the Maldives, the closure of the European airspace due to the eruption of Eyjafjallajökull volcano in Iceland during this month, could have been the most likely reason for the low arrivals during this month.

Table: 9 **Growth Trends of Tourist Arrivals by Month, 2006 - 2010**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2006	211.2	86.3	52.8	88.4	61.8	46.2	43.3	30.2	32.1	35.0	20.5	25.1	**52.3**
2007	10.7	19.2	18.1	12.8	13.8	16.4	19.3	6.4	8.7	7.3	6.0	11.2	**12.3**
2008	0.1	4.2	11.1	-0.8	4.6	4.7	-6.6	-2.5	4.6	-4.0	2.0	-4.0	**1.1**
2009	-4.8	-13.9	-13.3	-8.8	-11.5	-10.1	-7.0	1.1	-0.6	10.8	6.9	4.8	**-4.0**
2010	9.7	31.7	20.7	6.2	35.2	21.7	29.1	26.6	24.1	19.7	19.8	13.2	**20.7**

Source: Ministry of Tourism, Arts & Culture *Data provided by Department of Immigration & Emigration*

Major Markets

Europe continues to hold the position of traditional market leader in the Maldives tourism industry with nearly 64% of total arrivals in 2010 (refer Figure 1). However, over the last five years, Europe's share has decreased by 12% due to the emerging Asian markets. In 2006, Europe captured 76% of the market share. Although the market share declined, arrivals from this region registered a positive growth of 9.4% in 2010 compared with 2009. Main markets from this region include the United Kingdom, Italy, Germany, France, Russia and Switzerland.

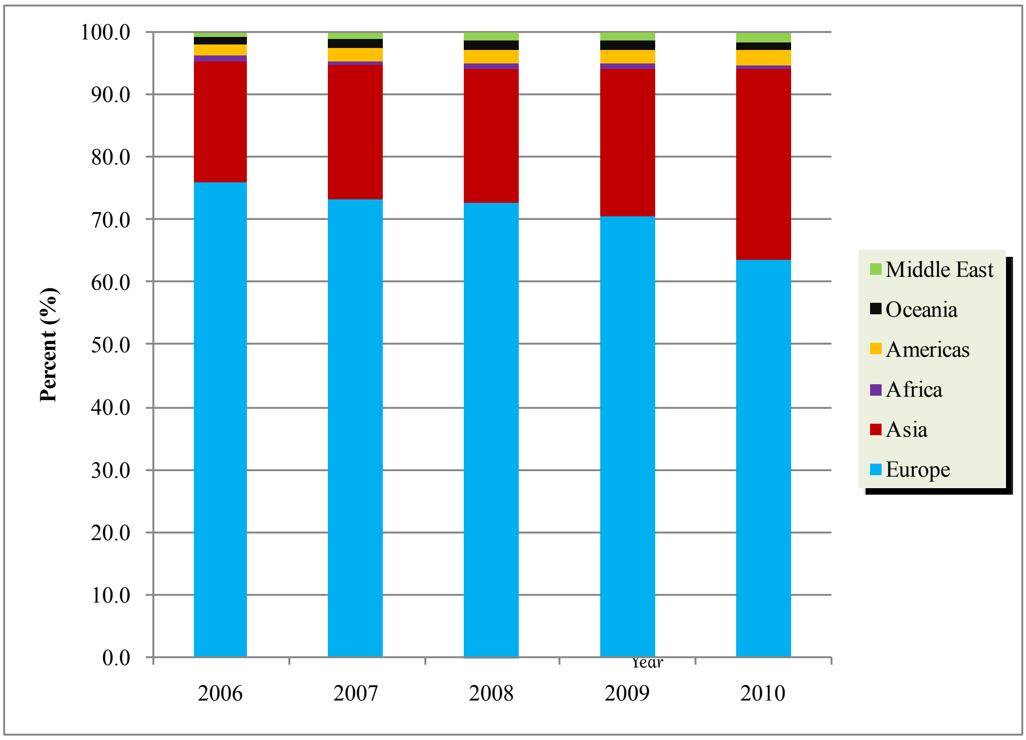
Arrivals to the Maldives from Asia & the Pacific region have been increasing rapidly over the years, with an annual average growth rate of nearly 31% from 2006 to 2010. Asian markets have been performing very well over the last five years. Its market share increased from 20.8% in 2006 to 31.6% at the end of 2010. The robust growth recorded from the Chinese market during the year 2010 accounts for the huge growth in Asian markets during the year. North East Asian countries such as China, Japan, and Korea lead this region in 2010.

While market share of African region remained consistent over the last five years, arrivals from this region registered a positive growth of 11.8% in 2010 compared with a negative growth of 11.6% in 2009.

Americas strengthened its market share from 1.8% in 2006 to 2.3% at the end of 2010. Americas have been performing well over the years registering positive growths. In 2010, the region registered a huge growth of 22.7%. Leading markets from this region include, U.S.A, Canada and Brazil.

The Middle East registered a growth of 22.1% in 2010 compared with 2009. Market share of Middle East region increased steadily from 2006 till 2009 and remained constant at the end of 2010. With a market share of 0.5% and a growth of over 33% in 2010, Saudi Arabia remained as the market leader in the Maldives from this region.

Figure 1: **Market Share by Regions, 2006 - 2010**



Source: Ministry of Tourism, Arts & Culture

Data provided by Department of Immigration & Emigration

Top Ten Markets 2010

With slight shifts in market positions, the top ten markets to the Maldives in 2010 remained unchanged, as that of 2009 as shown in Table 10.

Table: 10 **Tourist Arrivals and Market Share of Top Ten Markets of 2010**

Rank 2010	Country	2010 Arrivals	2010 Market Share (%)	2009 Arrivals	2009 Market Share (%)	Rank 2009
1	China	118,961	15.0	60,666	9.2	4
2	United Kingdom	114,158	14.4	105,950	16.2	1
3	Italy	89,596	11.3	89,292	13.6	2
4	Germany	77,108	9.7	69,085	10.5	3
5	France	54,789	6.9	50,373	7.7	5
6	Russia	49,111	6.2	40,014	6.1	6
7	Japan	38,791	4.9	36,641	5.6	7
8	Switzerland	27,766	3.5	26,783	4.1	8
9	India	25,756	3.3	15,850	2.4	10
10	Korea	24,808	3.1	16,135	2.5	9
	Global Total	**791,917**		**655,852**		

Source: Ministry of Tourism, Arts & Culture

Capturing 15% of the total shares, the Chinese market took a huge jump from 4th position in 2009 to 1st position in 2010 overtaking Germany, Italy and the United Kingdom. United Kingdom with 14.4% share, Italy with 11.3% share and Germany with 9.7%, was moved to the 2nd, 3rd and 4th positions respectively. While France, Russia, Japan and Switzerland maintained their ranks at 5th, 6th, 7th and 8th positions respectively, India and Korea switched their positions at 9th and 10th place (refer table 10). One of the major changes to the top ten market list over the last five years is the repalcement of Austrian market with the emerging Indian market in 2007 and since then the Austrian market share has been declining.

China

With a population of over 1.3 billion, China is said to be the most populous country in the world. The Chinese outbound travel market is one of the most significant and fastest growing markets in the world with its rising middle class incomes and a pent-up demand to see the rest of the world. It is estimated that a total of 56 million Chinese tourists travelled overseas during the year 2010. According to the PATA (Pacific Asia Travel Association) Annual Tourism Monitor 2011 early edition, China generated over 47 million trips to the Asia Pacific region in 2010, making it the largest outbound market for the region.

Figure 2: **Arrival Growth & Market Share of Chinese Market, 2006 - 2010**

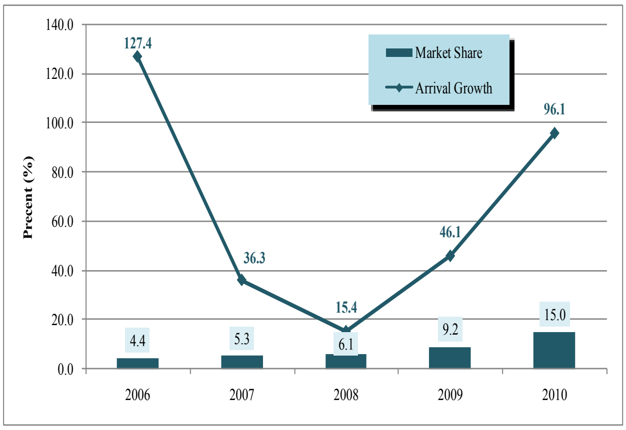
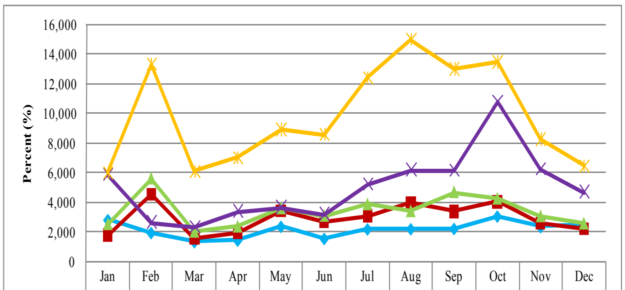


Figure 3: **Monthly Tourist Arrival Trends of the Chinese Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	2,852	1,985	1,376	1,479	2,406	1,595	2,230	2,244	2,262	3,090	2,382	2,495
2007	1,855	4,591	1,647	1,981	3,505	2,722	3,159	3,996	3,450	4,097	2,671	2,302
2008	2,569	5,638	2,065	2,408	3,631	3,133	3,903	3,440	4,724	4,286	3,101	2,613
2009	5,912	2,682	2,363	3,417	3,706	3,226	5,206	6,197	6,141	10,805	6,286	4,725
2010	6,069	13,345	6,144	7,060	8,964	8,615	12,449	14,998	13,028	13,476	8,313	6,500

Tourist arrivals to the Maldives from China have been increasing rapidly over the last three years (refer Figure 2). At the end of 2010, China became the first non-European market to be the top leading market to the Maldives with a total of 118,961 tourist arrivals. Over the last five years, Chinese arrivals increased at an average annual rate of 64%. Its market share increased from 4.4% in 2006 to 15% by 2010 (refer figure 2).

In 2005, Chinese arrivals to the Maldives recorded a heavy decline, due to the devastating effects of Asian Tsunami in December 2004. This decline was set off with a robust growth in 2006. From 2006 to 2008, although the slope shown in Figure 2 was on a downward trend which was due to the heavy growth recorded for 2006, the market performed with double digit growth increasing its market share. The Chinese market performed remarkably well in 2009 and 2010 gaining 15% of the total shares by end 2010 with a robust growth of 96% compared with 2009.

As seen in Figure 3, the seasonality of this market has been fluctuating over the years. The most visible similarity over the years is the drop in arrivals through October to December. While a sharp increase from January to February is observed for the years 2007, 2008 and 2010 in 2006 and 2009 arrivals dropped from January to February. The Chinese New Year holidays could be the reason for the sharp increase in February.

United Kingdom

The United Kingdom (UK), outbound travel market is the largest European market for the Asia and the Pacific region. According to the PATA Annual Tourism Monitor 2011 early edition, a total of 9.7 million UK visitors travelled to the Asia and the Pacific region in 2010 out of which 540,477 visited South Asia, which was a 9% increase compared with 2009.

Figure 4: **Arrival Growth & Market Share of UK Market, 2006 - 2010**

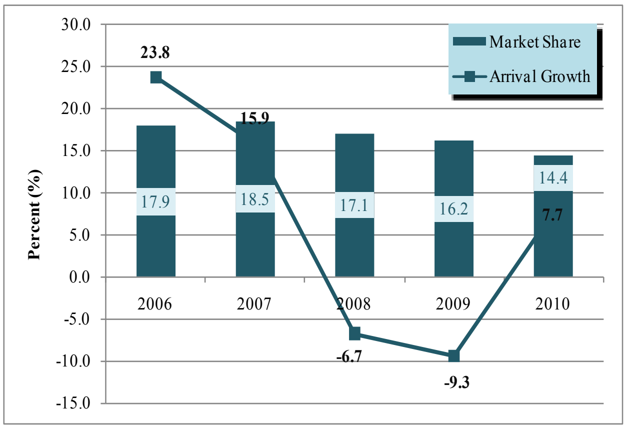
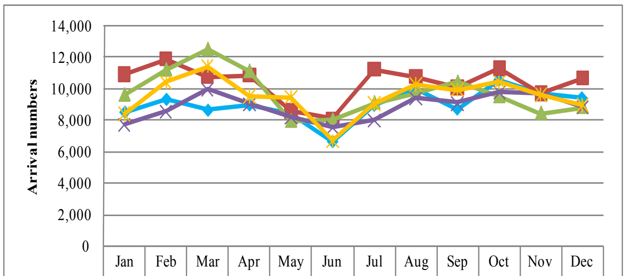


Figure 5: **Monthly Tourist Arrival Trends of UK Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	8,531	9,354	8,659	9,000	8,390	6,648	8,972	9,976	8,739	10,57	9,701	9,449
2007	10,95	11,91	10,78	10,91	8,599	8,109	11,27	10,78	10,09	11,33	9,719	10,68
2008	9,638	11,23	12,54	11,15	7,972	8,037	9,136	9,789	10,44	9,541	8,470	8,858
2009	7,751	8,573	9,973	9,014	8,200	7,558	7,994	9,399	9,100	9,805	9,726	8,857
2010	8,405	10,42	11,39	9,529	9,460	6,728	9,053	10,25	9,917	10,41	9,614	8,958

At the end of 2010, with a total of 114,158 tourist arrivals, the United Kingdom was the second most tourist generating market to the Maldives (refer Figure 4). UK remained as the market leader during the years through 2007 till 2009, however, lost its position to China in 2010. UK performed well in 2007 surpassing pre-tsunami levels. However, growth of this market has slowed down considerably, registering a five year annual average growth rate of 6.3%, which mostly accounts for the sharp growth recorded for 2006.

Although UK remained as the number one market from 2007 till 2009, it has been losing its market share over the last five years. Negative growths were recorded for the years 2008 and 2009 (refer figure 4).

The monthly arrival pattern of the UK market has been consistent over the last five years. While arrivals from UK is at its lowest in June, March is recorded to be the peak month (refer figure 5).

Italy

Data collected by the Pacific Asia Travel Association (PATA) indicates that a total of 2.1 million Italians travelled to the Asia Pacific region during the year 2010 which was a 1.8% growth compared with the previous year. Out of this 2.1 million Italians, 115,243 visited the South Asia region during the year 2010.

Figure 6: **Arrival Growth & Market Share of Italian Market, 2006 - 2010**

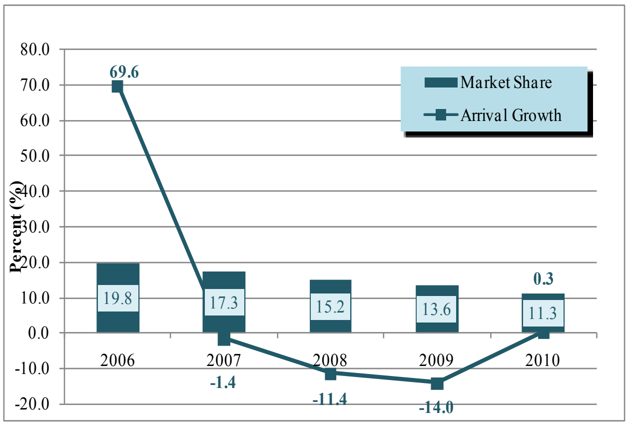
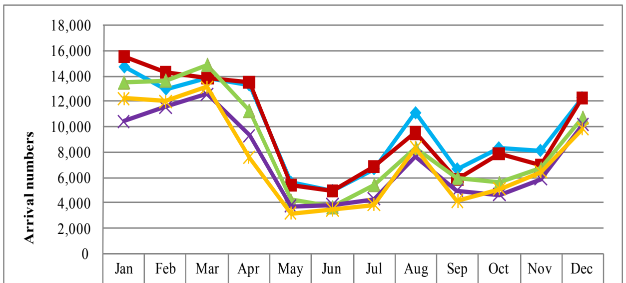


Figure 7: **Monthly Tourist Arrival Trends of Italian Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	14,70	12,97	13,86	13,29	5,683	5,020	6,733	11,10	6,718	8,368	8,168	12,29
2007	15,50	14,32	13,87	13,48	5,455	5,027	6,925	9,555	5,896	7,912	7,034	12,25
2008	13,47	13,63	14,86	11,24	4,212	3,683	5,432	8,305	5,972	5,579	6,711	10,71
2009	10,44	11,60	12,59	9,306	3,764	3,828	4,323	7,629	5,004	4,658	5,943	10,19
2010	12,27	12,00	13,15	7,577	3,213	3,495	3,882	8,351	4,167	5,153	6,506	9,845

Italy, with a total arrival of 89,596 was the third source market to the Maldives at the end of 2010 (refer Figure 6). The Italian market, which remained as the number one market to the Maldives for a consecutive period of 7 years from 1998 till 2004 lost its position to the UK market in 2005, and continued to decline till 2010.

The Italian market which has been performing with negative growths since 2007, showed slight signs of improvement in 2010 with a positive growth of 0.3% compared with 2009. However, Italy has been losing 2% of its shares each year over the last five years. From a healthy 19.8% shares in 2006, Italian market share has dropped to 11.3% in 2010.

The market although declining, has maintained its seasonality over the years. As seen in Figure 7, for the first three months of the year, Italian arrival remains stable and shows a steady decline from March till May. Followed by a sharp increase in August, arrivals from this market drops again in September, gains its momentum from October till December.

Germany

Germany is the second largest European market to the Asia Pacific region. Arrival from Germany to the region is reported to have surged up 4% to a 4.9 million in 2010, according to the PATA Annual Tourism Monitor 2011, early edition. Out of the 4.9 million a total of 166,970 Germans visited the South Asia region as per the Travel Monitor.

Figure 8: **Arrival Growth & Market Share of German Market, 2006 - 2010**

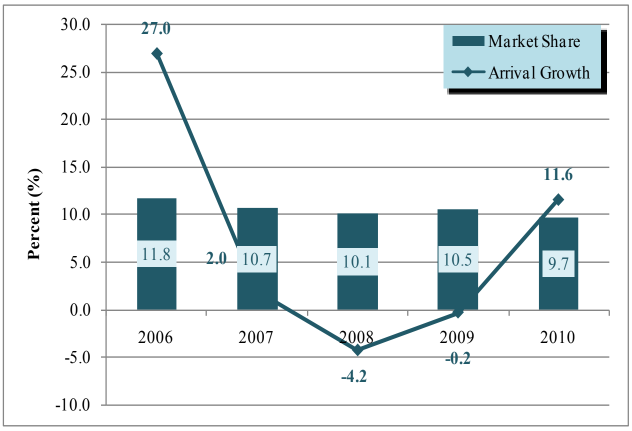
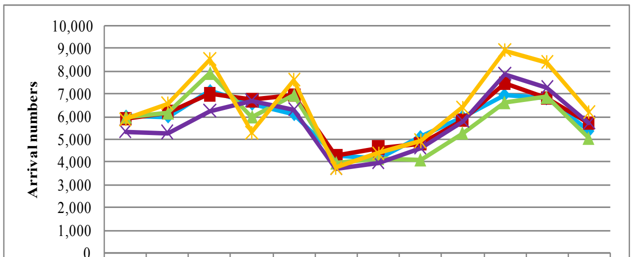


Figure 9: **Monthly Tourist Arrival Trends of German Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	6,044	6,032	7,170	6,591	6,133	4,293	4,191	5,135	6,026	6,991	6,829	5,395
2007	5,911	6,186	6,982	6,718	6,930	4,288	4,629	4,790	5,850	7,450	6,829	5,706
2008	6,000	6,182	7,949	6,015	6,983	3,964	4,163	4,103	5,292	6,647	6,880	5,062
2009	5,364	5,319	6,268	6,718	6,341	3,738	3,972	4,636	5,806	7,886	7,297	5,740
2010	5,890	6,602	8,554	5,317	7,634	3,748	4,402	4,943	6,412	8,937	8,444	6,225

Capturing a market share of 9.7% with 77,108 tourist arrivals, Germany was the fourth leading market to the Maldives in 2010. As with the case of UK and Italy, the German market has also been on the decline since 2004, the tsunami year. However, Germany has performed well in 2010 and surpassed the pre-tsunami levels with an impressive growth of 11.6% compared with 2009. Nonetheless, after maintaining at 10% share from 2007 till 2009, the market share dropped to 9.7% in 2010 (refer Figure 8).

Figure 9 shows seasonality of the German market to the Maldives from 2006 to 2010. As seen from the graph, the pattern is uniform over the last five years except for 2009 where a slight change during the month of April is observed. While in other years arrivals drop in April, in 2009 it is recorded to have a slight increment.

France

According to the PATA Tourism Monitor 2011, early edition, France is the third largest tourist market to the Asia Pacific region. In 2010 the region is reported to have attracted 4.5 million arrivals from France, out of which 119,983 visited South Asia. As per the Tourism Monitor, with the exception of the Pacific, all the sub-regions in Asia Pacific posted robust increases in arrivals from France. Furthermore, the long-haul low cost carriers connecting France and Malaysia this year is expected to further stimulate travel demand from France to this region reported the Tourism Monitor.

At the end of 2010, France maintained its market position as the fifth most tourist generating market to the Maldives. With a total of 54,789 tourist arrivals, France captured a market share of 6.9% in 2010 (refer Figure 10).

Figure 10: **Arrival Growth & Market Share of French Market, 2006 - 2010**

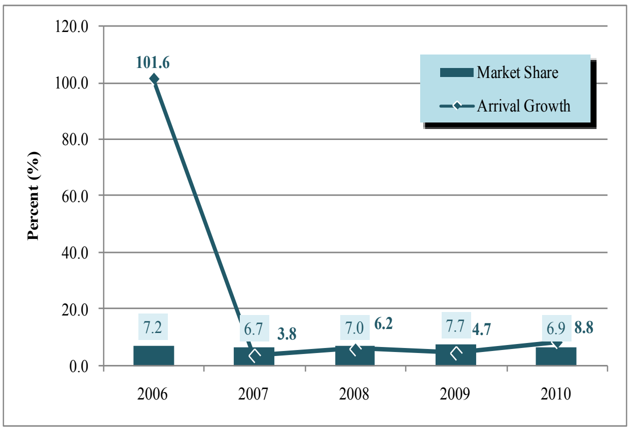
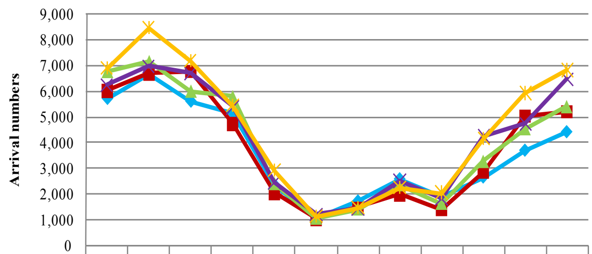


Figure 11: **Monthly Tourist Arrival Trends of French Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	5,712	6,690	5,605	5,145	2,366	1,069	1,735	2,594	1,927	2,662	3,703	4,419
2007	6,010	6,678	6,761	4,742	2,076	1,048	1,485	1,977	1,411	2,865	5,030	5,218
2008	6,784	7,163	6,019	5,801	2,437	1,096	1,455	2,393	1,674	3,295	4,565	5,418
2009	6,241	6,973	6,699	5,394	2,484	1,232	1,476	2,536	1,834	4,268	4,755	6,481
2010	6,899	8,464	7,190	5,459	2,920	1,155	1,464	2,257	2,061	4,159	5,930	6,831

Unlike other European markets, the French market has been relatively stable over the last five years. The market share varied between 6.7 and 7.7. While other European markets registered negative growths during the world economic crisis period, 2008 and 2009, the French market performed with positive growths.

As seen in Figure 11, arrivals to the Maldives from France is at its peak during the period from November till April with the month of February recording highest volume in arrivals. From May to September low arrivals is recorded from France, with June being the lowest.

Russia

The Russian market is also one of the major European markets to the Asia Pacific Region. According to the data gathered by Pacific Asia Travel Association (PATA), Russia supplied a total of 3.8 million tourists to Asia and the Pacific destinations in 2010, out of which 70,031 Russians visited the South Asia region. At the time of compilation, data for India was not available hence, 2010 regional data is exclusive of arrivals to India.

The Russian market remained as the 6th largest market to the Maldives at the end of 2010 (refer Figure 12). With a total of 49,111 touristarrivals capturing a market share of 6.2%, the Russian market registered a strong growth of 22.7% in 2010 compared with 2009.

Figure 12: **Arrival Growth & Market Share of Russian Market, 2006 - 2010**

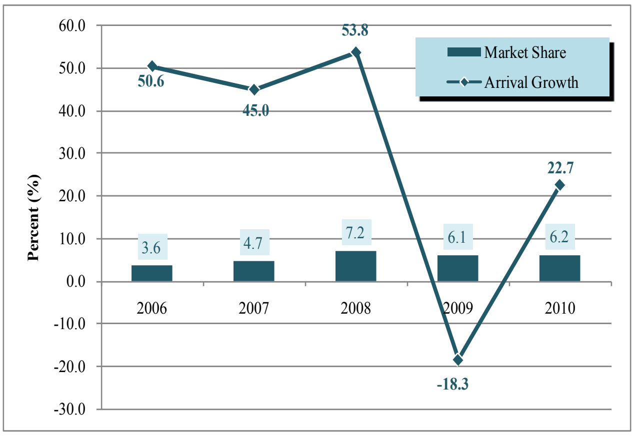
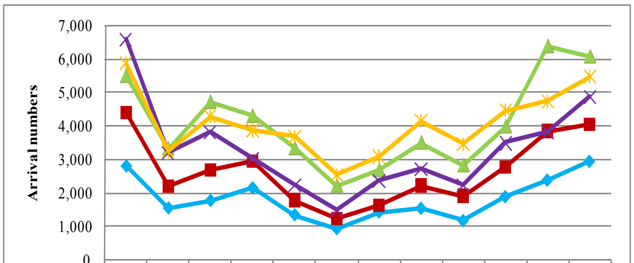


Figure 13: **Monthly Tourist Arrival Trends of Russian Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	2,812	1,553	1,779	2,157	1,348	932	1,431	1,543	1,174	1,889	2,386	2,951
2007	4,401	2,205	2,696	2,958	1,791	1,257	1,654	2,239	1,932	2,793	3,855	4,064
2008	5,507	3,339	4,730	4,313	3,345	2,225	2,691	3,511	2,834	3,997	6,397	6,089
2009	6,591	3,220	3,829	3,028	2,251	1,510	2,382	2,730	2,248	3,506	3,839	4,880
2010	5,873	3,285	4,301	3,899	3,704	2,569	3,098	4,176	3,488	4,482	4,750	5,486

The Russian market performed remarkably well from 2006 till 2008 increasing its market share from 3.6% to 7.2%. However, after the world economic crisis which started in mid 2008 and continued till late 2009, the market registered a heavy decline in 2009 dropping its market share to 6.1% that year (refer Figure 12).

Monthly arrival pattern from Russia remained consistent over the years. Unlike other European markets, tourist arrivals to the Maldives from Russia drops in February. As shown fin Figure 13, the seasonality of this market has been consistent over the last five years. A slight change was observed for the year 2008, where a drop was registered for the month of December. November, December and Janaury remains to be the peak season for Russian arrivals to the Maldives.

Japan

The Japanese market is one of the three key source markets from Asia to the Asia and Pacific destinations. According to the PATA Tourism Monitor 2011 early edition, a total of 17 million Japanese travelled within the Asia Pacific region, out of which 83,000 visited the South Asia region. The Travel Monitor however, explained that the pick-up in the Japanese visitor numbers was less robust, compared with other Asian markets.

Japan was the 7th largest market to the Maldives in 2010 (refer figure 14). With a total of 38,791 tourist arrivals capturing a market share of 4.9%, Japan maintained its market position. However, the Japanese market share recorded a considerable drop in 2010.

Figure 14: **Arrival Growth & Market Share of Japanese Market, 2006 - 2010**

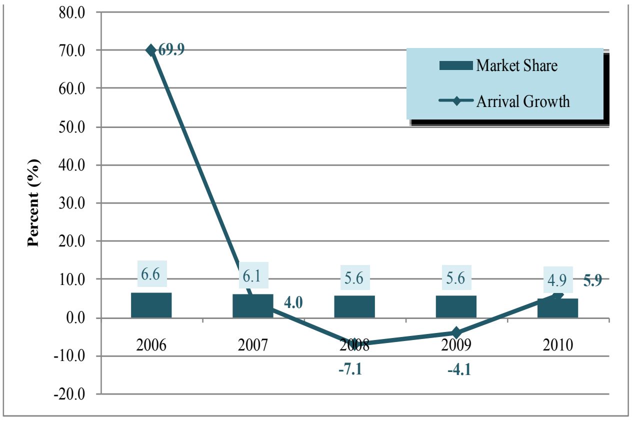
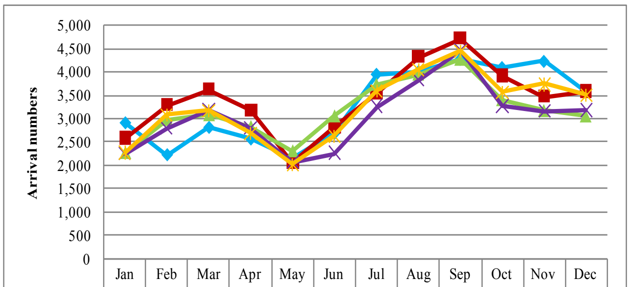


Figure 15: **Monthly Tourist Arrival Trends of Japanese Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	2,918	2,238	2,820	2,573	2,167	2,696	3,950	4,003	4,269	4,094	4,225	3,575
2007	2,586	3,293	3,623	3,173	2,057	2,822	3,554	4,322	4,714	3,913	3,477	3,587
2008	2,269	2,985	3,088	2,832	2,305	3,062	3,746	3,966	4,288	3,413	3,178	3,061
2009	2,255	2,802	3,204	2,796	2,080	2,270	3,274	3,838	4,474	3,280	3,179	3,189
2010	2,275	3,090	3,169	2,684	2,024	2,626	3,595	4,061	4,447	3,569	3,738	3,513

Japanese market which used to be the largest market from Asia to the Maldives have still not reached pre-tsunami levels. Arrival numbers are way below the 46,000 arrivals of 2004. Japan remained as the largest market from Asia till 2007, however, lost its position to China in 2008. While the Chinese market grew rapidly, the Japanese market kept sliding further and losing its market shares.

The monthly arrival pattern, as shown in Figure 15, is very consistent over the years. From January till March arrivals from Japan is on the up-swing and from March it starts slowing down until May. May is recorded to have the lowest count in arrivals from Japanese market. From May arrivals from this market starts to increase till September which is the peak month for this market. Afterwards the slope is again on the downward trend.

Switzerland

Although Switzerland has one of the most stable and modern economies in the world, Switzerland is not included among the key source markets to the South Asian destinations. Regional figures compiled by Pacific Asia Travel Association (PATA) shows that in 2010 a total of 1.1 million Swiss travelled to the Asia Pacific region, which was a 1.8% growth compared with 2009. In 2010, Swiss arrival to South Asian destinations was recorded to be 44,922.

Switzerland has remained as one of the leading markets to the Maldives over the years (refer Figure 16). After losing its position to Russia in 2007, the Swiss market firmly maintained its rank as the 8th largest source market to the Maldives. In 2010, the Maldives received 27,766 tourists from Switzerland, capturing 3.5%.of the market shares.

Figure 16: **Arrival Growth & Market Share of Swiss Market, 2006 - 2010**

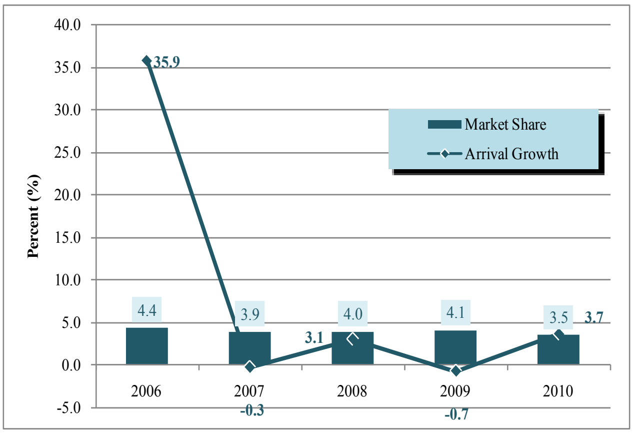
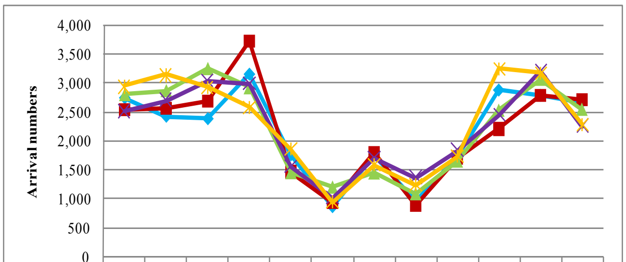


Figure 17: **Monthly Tourist Arrival Trends of Swiss Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	2,758	2,438	2,395	3,169	1,766	866	1,768	973	1,741	2,893	2,801	2,683
2007	2,551	2,581	2,702	3,731	1,478	956	1,817	904	1,726	2,221	2,792	2,724
2008	2,815	2,883	3,265	2,933	1,465	1,214	1,459	1,099	1,665	2,544	3,080	2,561
2009	2,522	2,715	3,055	3,010	1,559	1,025	1,711	1,382	1,848	2,464	3,221	2,271
2010	2,949	3,145	2,942	2,585	1,867	953	1,599	1,247	1,745	3,254	3,186	2,294

Swiss market share dropped significantly from 4.4% in 2006 to 3.5% in 2010. Arrival growth of this market has been inconsistent over the last five years. In contrast to other key markets to the Maldives, the Swiss market registered a negative growth in 2007, dropping its market share along with it. While most markets posted negative growths in 2008, the Swiss market performed with a positive growth that year (refer figure 16).

Over the last five years, from April to December seasonality remained consistent, with June and August registering low volume in arrivals. However, from January through April an irregular pattern was seen from this market (refer Figure 17).

India

Arrivals from India to Asia Pacific reached 5 million in 2010, which was an improvement of 23 percent over 2009, reported the PATA Tourism Monitor 2011 early edition. While Indian arrivals to all the sub regions in Asia Pacific posted double digit growths, a total of 301,688 Indians were reported to have visited the South Asian destinations.

The Indian market to the Maldives has performed very well during the year 2010 bringing in 25,756 tourists (refer Figure 18). Capturing a market share of 3.3%, India overtook Korea to become the 9th largest market to the Maldives as a whole and the third largest market from the Asia region in 2010.

Figure 18: **Arrival Growth & Market Share of Indian Market, 2006 - 2010**

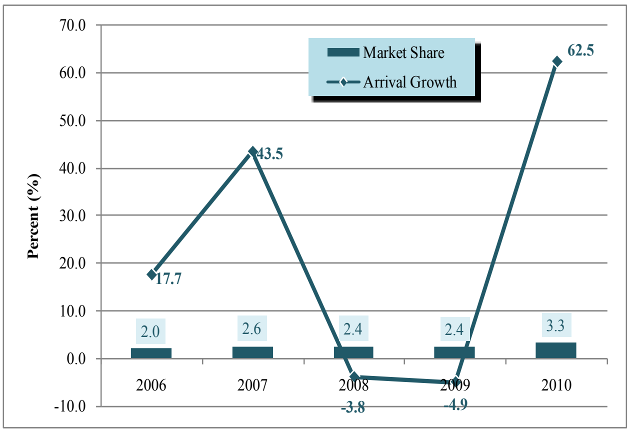
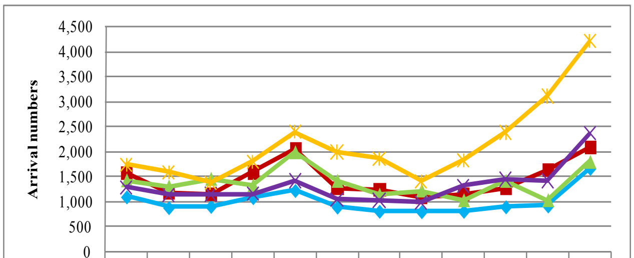


Figure 19: **Monthly Tourist Arrival Trends of Indian Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	1,104	889	915	1,089	1,231	901	817	809	816	906	923	1,671
2007	1,578	1,184	1,156	1,592	2,051	1,275	1,237	1,099	1,159	1,278	1,634	2,084
2008	1,436	1,313	1,467	1,337	2,001	1,425	1,147	1,231	1,036	1,425	1,037	1,808
2009	1,290	1,143	1,163	1,165	1,425	1,058	1,032	999	1,328	1,462	1,421	2,364
2010	1,742	1,594	1,385	1,802	2,400	1,999	1,871	1,419	1,838	2,387	3,110	4,209

The market has been growing at an average annual rate of 23% over the last five years. The huge annual growth rate recorded for this market is due to the heavy growths registered in 2007 and 2010. As with the case in most of other major markets, India also registered negative growths of -3.8% and -4.9% in 2008 and 2009 respectively, during the world economic crisis period (refer figure 18).

As shown in Figure 19, while the seasonality has been maintained over the years, during the year 2010, from August till December arrivals have increased significantly.

Korea

Korea is identified as one of the key markets that led the tourism recovery in Asia Pacific during the year 2010. The PATA Annual Tourism Monitor 2011 early edition reported that the Korean visitor numbers to the region picked up strongly with improved economic conditions. According to the Tourism Monitor a total of 12.8 million Koreans visited the region during 2010 registering over 37% growth compared with 2009. Although over 12 million Koreans travelled within the Asia Pacific region, only 47,997 Koreans are reported to have visited South Asian destinations in 2010.

Korea, which was the 9th largest source market to the Maldives in 2009, went down to the 10th position by the end of 2010 (refer Figure 20). Korea captured a market share of 3.1% in 2010, with a total arrival of 24,808 tourists in 2010, which was more than half of the total Koreans who visited South Asian destinations that year.

Figure 20: **Arrival Growth & Market Share of Korean Market, 2006 - 2010**

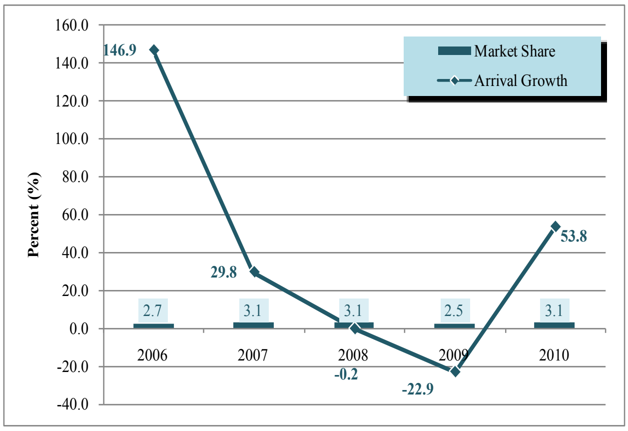
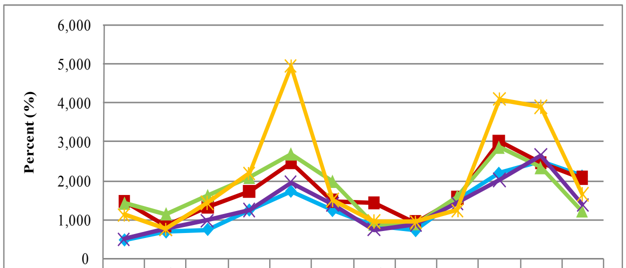


Figure 21: **Monthly Tourist Arrival Trends of Korean Market, 2006 - 2010**



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2006	489	694	760	1,260	1,745	1,248	866	729	1,513	2,207	2,511	2,135
2007	1,492	862	1,344	1,749	2,484	1,496	1,454	947	1,574	3,019	2,472	2,083
2008	1,438	1,164	1,632	2,103	2,705	2,001	898	911	1,610	2,879	2,353	1,240
2009	523	768	987	1,264	1,985	1,417	763	878	1,442	2,032	2,673	1,403
2010	1,128	772	1,442	2,194	4,942	1,517	969	943	1,243	4,102	3,898	1,658

After two weak years, the Korean market did well in 2010 with a strong positive growth of 53.8%. Five year annual growth rate for the market was registered to be 42%, which is mainly due to the heavy growth recorded for the year 2006.

As seen in Figure 21, the seasonality of this market has been maintained over the years except for the year 2010. The sharp growth recorded for May, October and November 2010 was due to the direct flights operated by Korean Air between Seoul and Male' during these months.

FORECASTS

Global Forecasts

After the world economic recession in 2008 and 2009, the year 2010 was a year of global recovery for the international tourism sector. According to the February 2011 edition of UNWTO, World Tourism Barometer (WTB), growth is expected to continue in 2011, but at a slower pace. UNWTO forecasts an increase in international tourist arrivals of between 4% and 5% in 2011 (refer Table 11).

Table: 11 **Outlook for International Tourist Arrivals 2011**

Region	Real year, change (%)			2011
	2008	2009	2010	Projection between (%)
Europe	0.5	-4.9	3.4	2 and 4
Asia & the Pacific	1.1	-1.7	12.6	7 and 9
Americas	2.7	-4.9	7.0	4 and 6
Africa	2.7	3.4	6.4	4 and 7
Middle East	19.2	-6.4	14.0	7 and 10
World	**2.1**	**-4.0**	**6.7**	**4 and 5**

Source: World Tourism Organization, UNWTO World Tourism Barometer (WTB), February 2011 edition

According to the WTB, growth rates for Europe are expected to remain below the world average between 2% and 4%. Asia and the Pacific is expected to remain solid, at a projected growth rate of between 7% and 9%. While Americas' growth rate is expected to be close to the world average at 4% to 6%, forecast for Africa is between 4% and 7%. With the highest forecasted rate, Middle East is expected to grow between 7% and 10%.

Table: 12

Maldives Tourism Outlook 2011 - 2014

	Real	Projection			
	2010	2011	2012	2013	2014
Tourist Arrivals (000's)	792	957	1,030	1,100	1,215
% Growth	*20.7*	*20.9*	*7.6*	*6.8*	*10.4*
Average Stay (days)	7.4	7.2	7.1	7.0	6.7
Tourist Bed nights (000's) (R & H)	5,830	6,818	7,324	7,702	8,137
Bed night capacity (R & H)	7,862	8,142	8,353	9,033	9,371
Occupancy rate (%) (R & H)	74.2	83.8	87.7	85.5	87.0
No. of Resorts & Hotels (R & H)	115	120	127	135	140
Bed Capacity (end year total, R & H)	22,791	23,729	24,749	26,549	27,679

Source: Ministry of Tourism, Arts & Culture

Note: Forecasts end August 2011

At the end of July 2011, the number of tourist arrivals to the country was recorded to be 520,483, which was an increase of 18.3% compared with the same period 2010. Based on the five year monthly arrival pattern, for the remaining months of the year, it is estimated that with a 20.9% growth, over 957 thousand tourists will arrive in the Maldives by the end of 2011 (refer Table 12).

In 2012, with an increase of 7.6% the Maldives is expected to receive over 1 million tourists. In 2013 and 2014 the growth rates are estimated to be 6.8% and 10.4% respectively with 1.1 million and 1.2 million arrivals.

The average stay is expected to remain at 7.2 days at the end of 2011. As it is observed that the average stay of tourists in the country has been declining with the changes occurring in generating markets to the country, the average stay is expected to further decline over the next 3 years. While in 2012 average stay is estimated to be 7.1 days, it is expected to be 7.0 days in 2013 and 6.7 days in 2014.

It has been observed during the last two years, that the bed night growth rate has the tendency to slow down with increased Chinese arrivals and increase with increase in European arrivals. As it is expected that the Chinese market, which is known to stay for a very short period of time, will keep growing, the bed night growth rates are expected to slow down. In 2012 bed night growth is expected to be 7.4%, in 2013 it is 5.2% and in 2014 it is 5.7%.

The occupancy rate is expected to maintain between 83% and 87% through 2011 to 2014.

At the end of July 2011, there were 78 new projects leased to develop tourist resorts / hotels. Out of which, as per their work progress a total of 23 projects are expected to be operational by end 2014 a bed capacity of 4,420 increasing the total bed capacity to 27,679 .

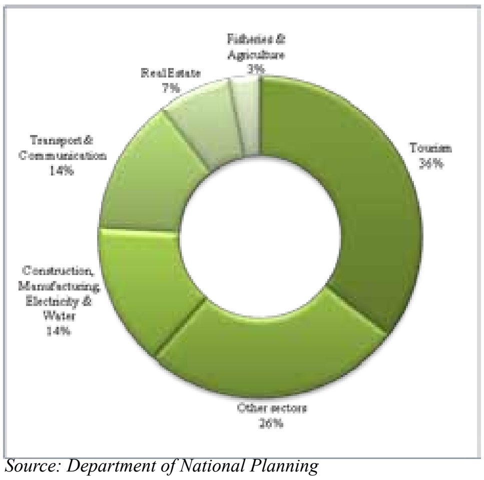
Out of the 5 islands that are expected to open in 2011, two have already commenced its operation. The remaining three islands with a total bed capacity of 470 are expected to open during November and December this year. Hence, by the end of 2011 the number of resorts/hotels is expected to reach 120 with a total bed capacity of 23,729. In 2012 it is expected that 7 new resorts will commence its operation opening of 1,020 additional beds to the supply totaling the resort/hotel bed capacity to 24,749.While in 2013 it is expected that 8 resorts will complete their construction and will be made available to the market, in 2014 the number of resorts expected to complete and commence operation is 5, adding 1,800 and 1,130 new beds to the existing capacity, respectively.

ECONOMIC INDICATORS

Tourism's Contribution to the Economy

The Maldives economy is strongly dependent on tourism, with over one third of the country's GDP dependent on tourism (refer Figure 22). Apart from being the major foreign currency supplier for the country, tourism also plays a leading role in creating employment, both directly and indirectly.

Figure 22: **GDP Contribution by Major Economic Sectors, 2010**



Source: Department of National Planning

The national accounts series on the Maldives was rebased for the second time. The initial base year was 1985, which was rebased to 1995, after more than ten years, the GDP estimates are now rebased to the year 2003.

Table: 13 **Tourism's Contribution to Gross Domestic Product (GDP), 2006 - 2010 (in Million Rufiyaa at 2003 constant prices)**

Year	GDP	GDP Growth %	Tourism Contribution	% Share of Tourism Contribution
2006	15,121.0	21.4	4,680.0	31.0
2007	16,954.0	12.1	5,373.0	31.7
2008	18,986.0	12.0	5,816.0	30.6
2009	17,757.0	-6.5	5,749.0	32.4
2010	19,508.0	9.9	6,957.0	35.7

Source: Department of National Planning

The rebased GDP figures show that tourism has been contributing over 30% to the country's GDP over the last five years (refer Table 13). While in 2006 tourism contribution to GDP was 31%, in 2007 tourism's share of GDP increased by 0.7%. With the slowdown in arrivals in 2008 due to the global economic recession during the year, although the tourism contribution in terms of Rufiyaa increased, the share of contribution recorded a decline in 2008. However, in 2009 the reverse scenario was observed. In 2010, with a total of 6,957 million Rufiyaa tourism shared over 35% to the total GDP of the country.

Table: 14

Tourism Revenue and Tax, 2006 - 2010
(in Million Rufiyaa)

Year	Government Revenue	Tourism Revenue	% Share of Tourism Revenue	Tourism Tax	% Share of Tourism Tax to Tourism Revenue
2006	5,286.7	1776.9	33.6	495.7	27.9
2007	6,527.2 _/	2,216.0 _/	34.0	547.3 _/	24.7 _/
2008	6,939.3 _/	1,969.8	28.4	566.6	28.8
2009	5,313.3 _/	1,429.8	26.9	531.4	37.2
2010	6,087.9	1,711.3	28.1	602.7	35.2

Source: Ministry of Finance & Treasury *Note: _/ revised*

Tourism revenue refers to the revenue received by the government as the rent of islands leased for resort development and the US$ 8 per bed per night tax collected from all resorts, hotels, guest houses and safari vessels for all tourists staying in these establishments.

As seen in Table 14, while a huge increase was recorded for tourism revenue in 2007, it declined in 2008 and 2009, due to the decline in arrivals followed by the global economic recession. In 2010, tourism generated 1.7 billion Rufiyaa as revenue, out of which 602.70 million was received as tourism tax.

Table: 15

Government Expenditure on Tourism, 2006 - 2010
(in Million Rufiyaa)

Year	Government Expenditure	Tourism Expenditure	% Share of Tourism Expenditure
2006	7,066.2	100.8	1.4
2007	8,325.4 _/	108.2 _/	1.3
2008	10,342.4 _/	93.3 _/	0.9
2009	11,104.3 _/	56.6 _/	0.5
2010	9,976.1	45.4	0.5

Source: Ministry of Finance & Treasury *Note: _/ revised*

A very small amount of the government money is spent on tourism. As seen in Table 15 the government expenditure on tourism has been decreasing over the last five years except for the year 2007, where a slight increase was recorded. While in 2006 tourism expenditure on tourism was 100.80 million Maldivian Rufiyaa, the amount was reduced by more than half to 45.40 million in 2010.

Table: 16

Tourism Receipts, 2006 - 2010
(in Million US Dollars)

Year	Tourism Receipts 1_/	Growth Rate (%)	Exports, FOB	Imports, CIF
2006	512.4	78.8	135.1	922.9
2007	602.4	17.5	107.8	1,092.0
2008	663.6	10.2	125.9	1,382.1
2009	608.3 2_/	-8.3	76.4	962.5
2010	713.6 3_/	17.3	73.9	1,090.9

Source: Maldives Monetary Authority
Maldives Customs Services

Note: 1_/ based on estimates of tourism expenditure in the Maldives
2_/ revised
3_/ estimates as at end Jan 2011

Tourism receipts is the expenditure made by tourists during their stay in the Maldives, hence calculated in US Dollars. Over the last five years, tourism receipts increased steadily with double digit growth rates, except for the year 2009 where a decline was registered, which accounts for the decline in arrivals that year. In 2010, with an increase of 17.3%, the Maldives received 713.6 million US dollars as tourism receipts.

AIRLINE STATISTICS

Table: 17 **Passenger Arrivals by Type of Carriers, 2006 - 2010**

Type of Carrier	2006		2007		2008		2009		2010	
	Arrivals	% Share	Arrivals	% Share	Arrivals	% Share	Arrivals	% Share	Arrivals	% Share
Scheduled	592,971	80.7	669,219	80.3	694,718	80.8	696,925	83.8	837,027	83.0
Charter	141,762	19.3	164,217	19.7	164,587	19.2	134,999	16.2	171,716	17.0
Total	**734,733**	**100.0**	**833,436**	**100.0**	**859,305**	**100.0**	**831,924**	**100.0**	**1,008,743**	**100.0**

Source: Department of Civil Aviation

With over 1 million passengers, the total visitor arrivals to the Maldives recorded a 21% growth in 2010, compared with 2009 reflecting the growth in tourists arrivals during 2010. As seen in Table 17, while passenger arrivals from Scheduled flights recorded a positive growth of 20%, 83% of total passengers arrived in Maldives by Scheduled flights. A 27% growth was registered for the Charter passengers which contributed 17% to the total arrivals.

Table: 18 **Traffic by International Carriers, 2006 - 2010**

Operator	2006		2007		2008		2009		2010	
	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In
International Schedule	**8,114**	**592,971**	**9,414**	**669,219**	**9,993**	**694,718**	**10,855**	**696,925**	**13,624**	**837,027**
Aeroflot	4	585	-	-	26	2,492	36	2,981	38	3,431
Air Berlin	-	-	-	-	-	-	144	16,019	224	25,948
Air Sahara	66	1,680	264	8,575	-	-	-	-	-	-
Austrian Airlines	158	11,482	110	7,827	42	3,342	44	3,794	48	5,146
Bangkok Airways	18	741	224	9,142	256	8,872	210	8,569	224	8,302
British Airways	-	-	-	-	-	-	58	3,325	308	26,336
China Eastern Airlines	-	-	280	7,075	217	7,690	-	-	134	6,387
Condor	260	27,431	258	28,512	252	27,949	254	30,364	260	30,317
Czech Airlines	-	-	-	-	-	-	-	-		
Emirates	1,336	103,911	1,242	109,713	1,234	128,053	1,232	127,357	1,948	172,016
Eurofly	444	50,049	487	50,476	522	52,787	506	45,700	84	8,595
Indian Airlines	820	52,433	1,258	68,425	1,326	63,836	1,234	52,203	1,274	56,701
Jet Air Fly	-	-	-	-	-	-	-	-	10	281
Jazeera Airways	-	-	38	641	30	498	102	12,438	-	-
L. T. U	310	38,206	314	37,859	258	29,896	-	-	-	-
Lauda Air - Italy / Livingston	190	23,268	190	23,219	138	13,209	-	-	-	-
Malaysia Airlines	312	21,984	333	15,297	422	27,162	441	35,811	588	46,021
Maldivian	-	-	-	-	991	25,028	2,082	48,923	2,665	61,888
Martin Air	152	4,616	56	1,229	-	-	-	-	-	-
Meridiana Fly	-	-	-	-	-	-	-	-	326	28,387
Mihin Lanka	-	-	208	10,229	116	4,603	-	-	26	1,828
Oman Air	-	-	-	-	-	-	76	1,845	416	8,785
Qatar Airways	734	52,202	736	65,891	732	62,263	772	59,411	1,096	64,019
Shangai Airlines	-	-	-	-	-	-	-	-	62	5,938
Singapore Airlines	540	63,893	730	90,472	735	83,569	667	80,375	731	82,774
Srilankan Airlines	2,184	140,276	1,893	132,406	2,252	153,469	2,623	167,810	2,738	193,927
Viva Macau	6	214	70	2,231	-	-	-	-	-	-
Srilankan Airlines (Cargo)	388	0	186	0	4	0	-	-	-	-
Expo Aviation (Cargo)	192	0	537	0	440	0	374	0	424	0

Table: 18 Cont....

Operator	2006		2007		2008		2009		2010	
	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In
International Charter	**2,356**	**141,762**	**3,231**	**164,217**	**3,508**	**164,587**	**2,927**	**134,999**	**3,242**	**171,716**
Air 2000/First Choice Airways	169	19,502	-	-	-	-	-	-	-	-
Air Italy	38	3,263	72	7,723	8	925	72	7,313	54	5,187
Atlant Soyuz	-	-	-	-	34	2,927	49	4,272	-	-
Belair	20	1,509	52	4,430	78	5,899	64	4,882	-	-
Blue Panorama Airlines	98	9,186	84	9,317	96	9,339	-	-	-	-
Britannia Airways/Thomson Fly	34	4,913	18	2,001	76	9,106	238	27,690	244	28,549
China Southern Airlines	-	-	-	-	-	-	-	-	206	22,391
Condor	-	-	-	-	24	781	-	-	-	-
Corse Air International	38	8,543	-	-	-	-	-	-	-	-
Edelweiss	158	20,403	156	18,194	158	18,956	174	19,467	194	18,659
First Choice	-	-	210	25,172	180	21,406	-	-	-	-
Korean Air	-	-	-	-	-	-	-	-	84	8,602
Kras Air	-	-	40	3,575	131	13,463	-	-	-	-
Malev - Hungarian Airlines	20	1,376	18	937	-	-	-	-	-	-
Monarch Airlines	158	27,433	226	33,728	190	30,243	109	17,058	88	13,411
My Travel Airways	38	4,194	72	8,558	-	-	-	-	-	-
Neos Spa	162	18,600	78	7,950	82	9,099	160	18,508	190	21,477
Star Airlines/XL Airways	56	7,431	110	16,651	110	16,000	101	12,628	112	15,608
Swiss Air									6	80
Transaero Airlines	80	11,262	140	14,746	122	15,406	124	16,520	210	27,299
Travel Services	-	-	2	45	8	410	-	-	-	-
Tuifly Nordic	-	-	-	-	10	1,394	-	-	-	-
Ukraine International	-	-	-	-	-	-	-	-	8	237
Vaso Airlines	-	-	7	303	-	-	-	-	-	-
Volare	4	189	40	3,785	60	4,070	-	-	-	-
Other Internationals	1,283	3,958	1,906	7,102	2,141	5,163	1,836	6,661	1,846	10,216
Grand Total	**10,470**	**734,733**	**12,645**	**833,436**	**13,501**	**859,305**	**13,782**	**831,924**	**16,866**	**1,008,743**

Source: Department of Civil Aviation

Three new airlines started scheduled flights to Maldives in 2010, which includes Jet Airfly arriving from Brussels via Colombo, Meridiana Fly, arriving from Malpensa through Colombo and Shanghai Airlines coming directly from Shanghai.

With over 2,700 flight movements, the Srilankan Airlines supplied 15.6% of all passengers and 23% of scheduled flight passengers to the Maldives in 2010. Emirates, the next major airline to the Maldives, supplied 20% of scheduled flight passangers in 2010 recording 1,948 flight movements. Other major scheduled flights to Maldives in 2010 include Singapore Airlines with 10% and Qatar Airways with 8% shares in 2010 in terms of passenger arrivals.The Oman Air recorded a huge growth in its flight movements in 2010.

From the Charter sector, former Britannia Airways now known as Thomson Fly which operates direct flights between Male'/ London and Male'/ Manchester brought in most number of passengers in 2010 with a total of 28,549 tourists. With 27,299 passengers, the Transaero Airlines operating direct flights between Male' and Moscow was the second charter that carried most number of tourists to the country in 2010. While Neos Spa, which operates direct flights between Male' and Malpensa, brought in 21,477 passengers to the Maldives in 2010, Edelweiss, a Swiss airliner, operating direct flights between Zurich and Male' brought in 18,659 tourists to the country that year.

A new charter, China Southern Airlines, started operating direct flights between Guangzhou and Male' in 2010. With a total of 206 flight movements, the China Southern brought in 22,931 tourists to the country that year. Another new charter that started in 2010 was the Korean Air operating direct flights between Seoul and Male' brought in 8,062 passengers that year. While these two new charters commenced in 2010, one of the major charter flights to the Maldives, Belair, which operated direct flights between Zurich and Male' stopped its operation in 2010.

Air Italy, which operates direct flights between Rome and Male' via Malpensa, Edelweiss operating Direct fligts between Zurich and Male' and XL Airways operating direct flight between Paris and Male' are also major charters to Maldives with continuous flight movements over the last five years.

Table: 19 **Traffic by Domestic Carriers at Male' International Airport, 2006 - 2010**

Operator	2006		2007		2008		2009		2010	
	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In	No. of Movements (Take off / Landing)	Passenger In
Domestic										
Island Aviation Services	7,378	72,272	9,139	93,244	9,311	90,557	8,621	114,069	7,955	127,813
Maldivian Air Taxi	35,859	186,522	38,959	195,361	39,570	204,413	38,256	196,775	41,668	216,593
Mega Maldives	-	-	-	-	-	-	-	-	2	52
Trans Maldivian Airways (Scheduled)	-	-	-	-	1,538	21,408	328	4,145	-	-
Trans Maldivian Airways	22,152	96,221	26,798	109,825	25,856	101,624	24,802	93,614	34,392	157,617
Other Domestic *	2,028	0	-	-	-	-	-	-	2,214	-
Total	**67,417**	**355,015**	**74,896**	**398,430**	**76,275**	**418,002**	**72,007**	**408,603**	**86,231**	**502,075**

Source: Department of Civil Aviation

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

The domestic flight movements increased by 20% in 2010 compared with 2009, increasing the number of passengers by 23% that year (refer Table 19).

The Island Aviation Services, which is the only airline carrying locals, had a drop in its flight movements. However, the number of passenger arrivals from this carrier registered a growth of 12% in 2010 compared with 2009.

The Maldivian Air Taxi (MAT) and Trans Maldivian Airways (TMA), operating seaplanes mainly catering for the tourism industry, transporting tourists to and from airport to the resorts, had a huge increase in their flight movements as well as number of passengers carried.

ADDITIONAL TABLES

TABLES

Table: 20 **Bed Capacity of Tourist Resorts, 2006 - 2010**

	Name of the Resort	Atoll & Island Name	Airport Distance (Km)	Year of Initial Operation	Initial Bed Capacity	2006	2007	2008	2009	2010
1	Adaaran Prestige Vaadhu	K. Vaadhu	8.0	1978	18	66	66	66	100	100
2	Adhaaran Club Rannaalhi	K. Rannalhi	34.0	1978	34	232	232	256	256	256
3	Adhaaran Select Hudhuranfushi	K. Lhohifushi	22.5	1979	40	274	354	354	354	354
4	Adhaaran Select Meedhupparu	R. Meedhupparu	130.3	2000	430	470	470	470	470	470
5	Alila Villas Hadahaa	G.A Hadahaa	405.0	2009	100	-	-	-	100	100
6	Alimatha Aquatic Resort	V. Alimatha	48.0	1975	20	260	260	260	260	260
7	Anantara Resort & Spa Maldives	K. Dhigufinolhu	40.0	1980	24	220	220	220	220	220
8	Angaaga Island Resort and Spa	A.Dh. Angaga	85.0	1989	100	140	140	140	140	140
9	Angsana Resort & Spa Maldives, Ihuru	K. Ihuru	17.0	1978	20	90	90	90	90	90
10	Angsana Resort and Spa Maldives - Velavaru	Dh. Velavaru	125.0	1998	50	168	168	168	236	236
11	Asdhu Sun Island	K. Asdhu	32.0	1981	36	60	60	60	60	60
12	Athurugau Island Resort	A.Dh. Athurugau	90.0	1990	79	98	98	98	98	146
13	Bandos Island Resort and Spa	K. Bandos	8.0	1972	220	450	450	450	450	450
14	Banyan Tree Maldives Vabbinfaru	K. Vabbinfaru	12.0	1977	24	96	96	96	96	96
15	Baros Holiday Resort	K. Baros	16.0	1973	56	150	150	150	150	150
16	Bathala Island Resort	A.A. Bathala	48.3	1983	20	90	90	90	90	90
17	Beach House Maldives, The Waldorf Astoria Collection	H.A Manafaru	337.0	2007	100	-	100	142	142	166
18	Biyaadhu Island Resort	K. Biyaadhoo	18.0	1982	192	192	192	192	192	192
19	Centara Grand Island Resort & Spa Maldives	A.Dh. Machchafushi	95.0	1992	96	128	128	128	224	224
20	Chaaya Island Dhonveli	K. Kanuoiy Huraa	13.0	1981	20	176	292	292	296	296
21	Chaaya Lagoon Hakuraa Huraa	M. Hakuraa Huraa	128.7	1999	72	160	160	160	160	160
22	Cinnamon Island Alidhoo	H.A. Alidhoo	300.0	2007	66	-	200	200	200	200
23	Club Faru, Farukolhufushi	K. Farukolhufushi	2.0	1973	112	304	304	304	304	304
24	Coco Palm Boduhithi	K. Boduhithi	29.0	1979	50	206	206	206	206	206
25	Coco Palm Dhunikolhu	B. Dhunikolhu	124.0	1998	192	200	200	200	200	200
26	Coco Palm Kudahithi	K. Kudahithi	27.4	1984	12	14	14	14	14	14
27	Cocoa Island	K. Makunufushi	30.0	1981	12	70	70	70	70	70
28	Conrad Maldives Rangali Island	A.Dh. Rangalifinolhu	96.6	1992	80	304	304	304	304	304
29	Constance Halaveli Resort	A.A. Halaveli	36.0	1982	30	112	112	112	172	172
30	Deva Maldives	A.Dh. Dhidhdhufinolhu	104.0	1988	180	282	282	394	394	394
31	Dhiggiri Tourist Resort	V. Dhiggiri	32.0	1982	50	90	90	90	90	90
32	Dream Island Maldives	K. Villivaru	29.0	1981	120	120	120	120	120	120
33	Ellaidhu Tourist Resort	A.A. Ellaidhoo	54.0	1985	32	156	176	224	224	224
34	Emboodhu Village	K. Emboodhu	8.0	1979	44	236	236	236	236	236
35	Eriyadhu Island Resort	K. Eriyadhu	40.0	1982	40	114	114	114	114	114

Table: 20 Cont...

	Name of the Resort	Atoll & Island Name	Airport Distance (Km)	Year of Initial Operation	Initial Bed Capacity	2006	2007	2008	2009	2010
36	Fihalhohi Island Resort	K. Fihaalhohi	28.0	1981	90	300	300	300	300	300
37	Filitheyo Island Resort	F. Filitheyo	120.7	1999	250	250	250	250	250	250
38	Four Seasons Resort Maldives at Kuda Huraa	K. Kuda Huraa	12.9	1977	32	212	212	212	212	212
39	Four Seasons Resort Maldives at Landaa Giraavaru	B. Landaa Giraavaru	120.0	2006	206	206	206	206	206	206
40	Full Moon Beach Resort	K. Furanafushi	5.6	1973	112	312	312	312	312	312
41	Fun Island Resort	K. Bodufinolhu	38.0	1980	44	200	200	200	200	200
42	Gangehi Island Resort	A.A. Gangehi	77.2	1987	50	50	50	72	72	72
43	Gasfinolhu Island Resort	K. Gasfinolhu	23.0	1980	18	80	80	80	80	80
44	Giraavaru Tourist Resort	K. Giraavaru	11.3	1980	40	132	132	132	132	132
45	Herethere Island Resort	S. Herethere	480.0	2007	106	-	546	546	546	546
46	Helengeli Island Resort	K. Helengeli	46.7	1979	20	100	100	100	100	100
47	Hilton Maldives - Irufushi Resort & Spa	N. Medhafushi	238.0	2008	200	-	-	300	390	442
48	Holiday Island	A.Dh. Dhiffushi	93.0	1994	284	284	284	284	284	284
49	Huvafenfushi	K. Nakatchafushi	25.7	1979	80	102	102	102	102	102
50	Huvandhumaafushi	G.A Funamauddua	400.0	2009	100	-	-	-	100	150
51	Island Hideaway at Dhonakulhi Maldives, Spa Resort & Marina	H.A. Dhonakulhi	250.0	2005	50	90	90	90	90	90
52	Island of Bolifushi	K. Bolifushi	12.0	1982	64	110	110	110	110	110
53	Kandooma Tourist Resort	K. Kandoomafushi	27.4	1985	98	204	204	322	322	322
54	Kanifinolhu Tourist Resort	K. Kanifinolhu	19.3	1978	18	444	444	444	444	448
55	Kihaadhufaru Tourist Resort	B. Kihaadhuffaru	104.6	1999	200	200	200	200	200	200
56	Komandoo Maldive Island Resort	Lh. Komandoo	128.7	1998	90	120	120	120	120	120
57	Kudarah Island Resort	A.Dh. Kudarah	88.5	1991	50	60	60	60	60	60
58	Kuramathi Tourist Resort	A.A. Kuramathi	56.3	1977	48	580	580	580	580	580
59	Kuredhdhu Island Resort	Lh. Kuredhdhu	128.7	1978	18	660	740	746	768	768
60	Kurumba Maldives	K. Vihamanaafushi	3.2	1972	60	362	362	362	362	362
61	Lily Beach Resort	A.Dh. Huvahendhoo	85.0	1994	168	170	170	170	250	250
62	Maayafushi Tourist Resort	A.A. Maayafushi	63.0	1983	48	150	150	150	150	150
63	Madoogali Resort	A.A. Madoogali	77.2	1989	70	112	112	112	112	112
64	Makunudhoo Island	K. Makunudhu	38.6	1983	58	74	74	74	74	74
65	Medhufushi Island Resort	M. Medhufushi	128.7	2000	240	240	240	240	240	240
66	Meeru Island Resort	K. Meerufenfushi	37.0	1978	128	518	570	570	570	570
67	Mirihi Island Resort	A.Dh. Mirihi	112.6	1989	36	72	72	72	72	72
68	Moofushi Island Resort	A.Dh. Moofushi	80.0	1990	84	124	124	124	124	124
69	Nika Island Resort	A.A. Kudafolhudhu	69.2	1983	30	76	76	76	76	76
70	Olhuveli Beach & Spa Resort	K. Olhuveli	51.5	1979	36	268	268	268	268	332
71	One & Only Kanuhura, Maldives	Lh. Kanuhuraa	125.5	1999	200	200	200	200	200	200

TABLES

Table: 20 Cont...

	Name of the Resort	Atoll & Island Name	Airport Distance (Km)	Year of Initial Operation	Initial Bed Capacity	2006	2007	2008	2009	2010
72	One & Only Reethi Rah, Maldives	K. Medhufinolhu	64.4	1979	24	264	264	264	268	268
73	Palm Beach Island	Lh. Madhiriguraidhoo	128.7	1999	200	216	216	228	248	248
74	Palm Tree Island	K. Veligandu Huraa	27.0	1986	32	112	138	138	138	138
75	Paradise Island Resort & Spa	K. Lankanfinolhu	9.6	1979	24	520	520	568	568	568
76	Ranveli Village	A.Dh. Villingilivaru	77.0	1991	112	112	112	112	112	112
77	Reethi Beach Resort	B. Fonimagoodhoo	104.6	1998	200	200	200	200	200	248
78	Rihiveli Beach Resort	K. Mahaanaelhi Huraa	40.2	1980	40	100	100	100	100	100
79	Royal Island	B. Horubadhoo	110.0	2001	304	304	304	304	304	304
80	Shangri - La Villingili Resort & Spa	S. Villingili	478.0	2009	284	-	-	-	284	284
81	Soneva Fushi By Six Senses	B. Kunfunadhoo	104.6	1983	50	130	130	130	130	130
82	Soneva Gili By Six Senses	K. Lankanfushi	9.7	1980	12	94	94	94	94	94
83	Summer Island Village	K. Ziyaaraifushi	35.0	1983	58	216	216	216	216	216
84	Sun Island Resort & Spa	A.Dh. Nalaguraidhoo	99.8	1998	700	852	852	852	852	852
85	Taj Exortica Resort & Spa Maldives	K. Embudhu Finolhu	12.9	1983	20	128	128	128	128	128
86	Thulhaagiri Island Resort	K. Thulhaagiri	11.0	1980	44	138	138	138	172	172
87	Thundufushi Island Resort	A.Dh. Thundufushi	80.5	1990	74	94	94	94	94	94
88	Twin Island Resort	A.Dh. Maafushivaru	54.7	1991	60	94	98	98	98	98
89	Vakarufalhi Island Resort	A.Dh. Vakarufalhi	90.0	1994	100	100	100	100	150_/	150
90	Velassaru Maldives	K. Velassaru	11.3	1974	90	258	258	258	258	258
91	Velidhoo Island Resort	A.A. Velidhoo	80.5	1989	22	200	200	200	200	200
92	Veligandu Island	A.A. Veligandu	51.0	1984	34	146	148	148	148	148
93	Vilamendhoo Island Resort	A.Dh. Vilamendhoo	48.3	1994	200	282	282	282	282	282
94	Villu Reef Beach & Spa Resort	Dh. Meedhuffushi	128.7	1998	136	156	156	156	200	200
95	Vivanta by Taj - Coral Reef, Maldives	K. Hembadhoo	32.2	1982	68	132	132	132	124_/	124
96	W. Retreat & Spa Maldives	A.A. Fesdhu	72.4	1982	90	164	164	164	164	164
97	Zitahli Resort & Spa, Kudafunafaru	N. Kudafunafaru	180.0	2008	100	-	-	100	100	100
Total						17,802	19,028	19,860	20,942	21,232

Source: Ministry of Tourism, Arts & Culture

Note: _/ Revised figures

Table: 21

New Islands Leased for Resort/Hotel Development & their Estimated Opening Dates

	Island	Lease Holder	No. of resorts	Bed Capacity	Estimated Opening Date
Mathi Uthuru Province (Upper North Province)			**19**	**3,626**	
Haa Alif Atoll			**7**	**1,056**	
Existing			**3**	**456**	
Upcoming			**4**	**600**	
1	Berinmadhoo	Mr. Ahmed Ibrahim Didi, Ma Niyaz Villa, Buruzu Magu		200	NA
2	Kelaa	Ahmed Shafeeg, H. Orchidmaage		200	NA
3	Naridhoo	Mr. Ali Zahir, H. Iruvelige		100	NA
4	Uligamu (CITY HOTEL)	Maldives Tourism Development Corporation PLC		100	NA
Haa Dhaal Atoll			**6**	**1,500**	
Existing			**0**	**0**	
Upcoming			**6**	**1,500**	
5	Hanimaadhoo	Ms. Fathimath Thasleema, M. Maafannu Villa		200	NA
6	Hondaafushi	Mr. Abdulla Ali, H. Girithereyge, Hithafinivaa Magu		200	June 2014
7	Kudamuraidhoo	J.H Resorts Pvt Ltd		250	December 2014
8	Naagoashi	Maldives Tourism Development Corporation PLC		600	April 2013
9	Nolhivaranfaru	Nalaveli Maldives Pvt.Ltd		200	NA
10	Dhipparufushi			50	NA
Shaviyani Atoll			**6**	**1,070**	
Existing			**0**	**0**	
Upcoming			**6**	**1,070**	
11	Dholhiyadhoo	Mr. Mohamed Latheef, H. Baraboamaage		200	December 2011
12	Farukolhu North	Airport Investments Maldives Pvt. Ltd.		200	NA
13	Farukolhu South	Airport Investments Maldives Pvt. Ltd.		200	NA
14	Gaakoshibi	Mr. Hussain Waheed, Huvandhumaage, Sh. Foakaidhoo		200	December 2012
15	Kabaalifaru	Mr. Ali Shareef, M. Anaa Villa		200	April 2014
16	Vagaru	Vagaru Holdings Pvt. Ltd.		70	November 2011
Uthuru Province (North Province)			**35**	**6,666**	
Noon Atoll			**9**	**1,722**	
Existing			**2**	**542**	
Upcoming			**7**	**1,180**	
17	Ekulhivaru	Maldives Tourism Development Corporation PLC		180	NA
18	Fushivelaavaru	Gladonia Maldives Pvt Ltd.		200	July 2013
19	Huvandhumaavattaruesort	Noonu Hotels & Resorts Development Pvt. Ltd.		200	NA
20	Maafaru Trasit Hotel	Noonu Hotels & Resorts Development Pvt. Ltd.		200	NA
21	Maavelaavaru	Athama Investments Pvt.Ltd		100	April 2012
22	Raafushi	Exotic properties Pvt.Ltd		200	NA
23	Randheli	I & T Management Pvt. Ltd.		100	July 2012

TABLES

Table: 21 Cont...

	Island	Lease Holder	No. of resorts	Bed Capacity	Estimated Opening Date
	Raa Atoll		**9**	**910**	
	Existing		**1**	**470**	
	Upcoming		**8**	**440**	
24	Eththigili	Amin Construction Pvt. Ltd.		200	June 2013
25	Ifuru	Ifuru Inestments Pvt. Ltd		NA	NA
26	Kudakurathu			50	NA
27	Lundhufushi	Silver Tides Pvt Ltd.		40	NA
28	Maanenfushi	Ms. Nasra Abdul Sattar, M. Maavina, Male’		150	NA
29	Madivaafaru	Ifuru Inestments Pvt. Ltd.		NA	NA
30	Muravandhoo	Ifuru Inestments Pvt. Ltd.		NA	NA
31	Ufulandhoo	Airport Investments Maldives Pvt. Ltd.		200	NA
	Baa Atoll		**12**	**2,398**	
	Existing		**7**	**1,398**	
	Upcoming		**5**	**1,000**	
32	Dharavandhoo / Finolhas	Coastline Hotels & Resorts Pvt. Ltd.		200	June 2014
33	Dharavandhoo / Mudhdhoo	Coastline Hotels & Resorts Pvt. Ltd.		200	June 2013
34	Kanufushi			200	NA
35	Muthaafushi			200	NA
36	Vakkaru	Efzy Holdings Pvt. Ltd.		200	NA
	Lhaviyani Atoll		**5**	**1,636**	
	Existing		**4**	**1,336**	
	Upcoming		**1**	**300**	
37	Kanifushi	Mr. Mohamed Nasheedh, H. Fodhdhooge		300	NA
Medhu Uthuru Province (North Central Province)			**75**	**15,418**	
	Male’ (Capital)		**18**	**1,547**	
	Existing		**17**	**1,347**	
	Upcoming		**1**	**200**	
38	Male’ Hotel	Male’ Investments Pvt. Ltd.		200	NA
	Kaaf Atoll		**44**	**9,250**	
	Existing		**43**	**9,050**	
	Upcoming		**1**	**200**	
39	Kaashidhuffaru	Ahmed Shafeeg, H. Orchidmaage		200	NA
	Alif Alif Atoll		**12**	**2,000**	
	Existing		**12**	**2,000**	
	Upcoming		**0**	**0**	
	Alif Dhaal Atoll		**16**	**3,768**	
	Existing		**16**	**3,768**	
	Upcoming		**0**	**0**	
	Vaav Atoll		**3**	**400**	
	Existing		**2**	**350**	
	Upcoming		**1**	**50**	
40	Fottheyo			50	NA

Table: 21 Cont...

	Island	Lease Holder	No. of resorts	Bed Capacity	Estimated Opening Date
Medhu Province (Central Province)			**10**	**1,816**	
Meem Atoll			**3**	**460**	
Existing			**2**	**400**	
Upcoming			**1**	**60**	
41	Dhekunu Boduveli, Gasveli, Kudausfushi	Mr. Mohamed Manik, M. Villa Dhashuge		60	
Faaf Atoll			**1**	**250**	
Existing			**1**	**250**	
Upcoming			**0**	**0**	
Dhaal Atoll			**6**	**1,106**	
Existing			**2**	**436**	
Upcoming			**4**	**670**	
42	Embudhufuhi & Olhuveli	Maldives Tourism Development Corporation PLC		220	December 2012
43	Kudahuvadhoo Transit Hotel	Airport Investments Maldives Pvt. Ltd.		200	NA
44	Maafushi	Airport Investments Maldives Pvt. Ltd.		200	NA
45	Vohmuli			50	NA
Medhu Dhekunu Province (South Central Province)			**8**	**1,174**	
Thaa Atoll			**3**	**580**	
Existing			**0**	**0**	
Upcoming			**3**	**580**	
46	Elaa	Mr. Abbas Mohamed, H. Merry Rose	280	280	October 2014
47	Kalhufahalafushi	Asia Resorts Pvt.Ltd.	200	200	January 2013
48	Male'Fushi	Maalefushi Investment Company Pvt. Ltd.	100	100	December 2012
Laam Atoll			**5**	**594**	
Existing			**1**	**194**	
Upcoming			**4**	**400**	
49	Bodufinolhu & Gasgan'du finolhu (Training Resort)	Premier Equity Pvt. Ltd.		150	April 2013
50	Gan (Training Hotel and Training Facility)	Premier Equity Pvt. Ltd.		150	NA
51	Kadhdhoo (Hotel)	Mr. Ali Ibrahim, Finivaage, Adh. Fenfushi		200	NA
52	Vadinolhu	Olhuveli Laamu Holdings Pvt. Ltd.		50	NA
Mathi Dhekunu Province (Upper South Province)			**20**	**2,740**	
Gaaf Alif Atoll			**11**	**1,486**	
Existing			**3**	**288**	
Upcoming			**8**	**1,198**	
53	Dhigurah	Ahmed Shiyam, H. Vaaly Villa		200	NA
54	Falhumaafushi	Bonaventure (Maldives) Pvt.Ltd		200	June 2012
55	Kondeymatheelaabadhu	Maldives Tourism Development Corporation PLC		100	NA
56	Maanagala (Matu)			50	NA
57	Mahadhdhoo	Mahadhdhoo Investment Pvt. Ltd.		100	April 2013
58	Munandhuvaa	Clear Sand Pvt. Ltd.		48	NA
59	Raaverehaa (Transit Hotel)	Airport Investments Maldives Pvt. Ltd.		200	NA
60	Vodamulaa	Maldives Tourism Development Corporation PLC		300	NA

Table: 21 Cont...

	Island	Lease Holder	No. of resorts	Bed Capacity	Estimated Opening Date
	Gaaf Dhaal Atoll		**9**	**1,254**	
	Existing		**0**	**0**	
	Upcoming		**9**	**1,254**	
61	Gazeera	Gazeera Pvt. Ltd.		44	NA
62	Kaadedhdhoo (Hotel)	Dream Ocean Holidays Pvt. Ltd.		200	NA
63	Kaishidhoo	Kaishidhoo Resorts Pvt. Ltd.		60	NA
64	Konotta	Crystal Lagoon Resorts Pvt.Ltd		100	December 2012
65	Lonudhuahuttaa	One and Half Degree Maldives Pvt. Ltd		100	NA
66	Maavedhdhoo Transit Hotel	Airport Investments Maldives Pvt. Ltd.		200	NA
67	Magudhdhuvaa	Maldives Tourism Development Corporation PLC		200	November 2011
68	Odegalla	Airport Investments Maldives Pvt. Ltd.		200	NA
69	Vatavarrehaa	Yacht Tours Maldives Pvt. Ltd.		150	March 2013
Dekunu Province (South Province)			**6**	**1,316**	
	Gnaviyani Atoll		**1**	**120**	
	Existing		**0**	**0**	
	Upcoming		**1**	**120**	
70	Fuvahmulah	One and Half Degree Maldives Pvt. Ltd.		120	NA
	Seenu Atoll		**5**	**1,196**	
	Existing		**3**	**986**	
	Upcoming		**2**	**210**	
71	Hankede	Thoodu Pvt. Ltd.		160	NA
72	Dhoogas / Gan			50	NA
	Total Existing		**119**	**23,271**	
	Total Upcoming		**72**	**11,032**	
Grand Total			**191**	**34,303**	

Source: Ministry of Tourism, Arts & Culture *Data as of June 2011*

Table: 22 Graduates from Faculty of Hospitality & Tourism Industry, 2006 - 2010

Year	Full Time Courses			Other Courses			Grand Total
	Male	Female	Total	Male	Female	Total	
2006	70	25	**95**	151	26	**177**	**272**
2007	63	16	**79**	104	71	**175**	**254**
2008	75	49	**124**	64	13	**77**	**201**
2009	48	15	**63**	95	54	**149**	**212**
2010	76	24	**100**	13	11	**24**	**124**
Total	**332**	**129**	**461**	**427**	**175**	**602**	**1,063**

Source: Faculty of Hospitality & Tourism Industry

Table: 23 Inbound & Outbound Travel, 2006-2010 (Locals Only)

Year	Arrivals	% change	Departure	% change
2006	82,243	9.5	74,348	26.3
2007	100,575	22.3	101,842	37.0
2008	121,287	20.6	123,008	20.8
2009	120,328	-0.8	121,464	-1.3
2010	129,286	7.4	129,608	6.7

Source: Department of Immigratoin & Emigration

Table: 24 Seasonal Variation of Tourist Arrivals, 2006-2010 (Seasonal Indices)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Seasonality Ratio
2006	116	109	109	112	82	66	85	100	89	109	107	117	**1.2**
2007	115	116	114	112	83	68	91	94	86	104	101	116	**1.2**
2008	114	119	126	110	86	71	84	91	89	99	102	110	**1.3**
2009	108	103	109	100	76	64	78	92	89	110	109	115	**1.2**
2010	102	117	114	92	88	67	87	100	95	113	113	113	**1.2**

Source: Ministry of Tourism, Arts & Culture

Table: 25 Tourist Arrivals & Market Share by Major Markets, 2006 - 2010

REGION / NATIONALITY	2006		2007		2008		2009		2010	
EUROPE	**457,535**	**(76.0)**	**495,371**	**(73.3)**	**497,560**	**(72.8)**	**462,192**	**(70.5)**	**505,421**	**(63.8)**
CENTRAL / EASTERN EUROPE	**36,419**	**(6.1)**	**51,101**	**(7.6)**	**72,726**	**(10.6)**	**62,849**	**(9.6)**	**75,435**	**(9.5)**
Belarus	489	(0.1)	583	(0.1)	742	(0.1)	812	(0.1)	898	(0.1)
Bulgaria	451	(0.1)	784	(0.1)	965	(0.1)	902	(0.1)	1,051	(0.1)
Czech Republic	2,295	(0.4)	2,766	(0.4)	3,811	(0.6)	3,851	(0.6)	5,137	(0.6)
Hungary	2,661	(0.4)	2,568	(0.4)	2,052	(0.3)	1,848	(0.3)	2,434	(0.3)
Kazakhstan	595	(0.1)	1,294	(0.2)	1,656	(0.2)	1,756	(0.3)	1,572	(0.2)
Poland	1,844	(0.3)	2,659	(0.4)	3,325	(0.5)	3,357	(0.5)	3,795	(0.5)
Romania	661	(0.1)	1,128	(0.2)	1,225	(0.2)	1,247	(0.2)	1,290	(0.2)
Russia	21,955	(3.6)	31,845	(4.7)	48,978	(7.2)	40,014	(6.1)	49,111	(6.2)
Slovakia	944	(0.2)	1,469	(0.2)	1,916	(0.3)	1,970	(0.3)	2,348	(0.3)
Ukraine	2,427	(0.4)	3,545	(0.5)	5,399	(0.8)	4,643	(0.7)	5,445	(0.7)
Other Central / Eastern Europe	2,097	(0.3)	2,460	(0.4)	2,657	(0.4)	2,449	(0.4)	2,354	(0.3)
NORTHERN EUROPE	**116,123**	**(19.3)**	**134,927**	**(20.0)**	**128,591**	**(18.8)**	**116,491**	**(17.8)**	**126,222**	**(15.9)**
Denmark	1,499	(0.2)	1,819	(0.3)	1,834	(0.3)	1,722	(0.3)	2,422	(0.3)
Finland	518	(0.1)	789	(0.1)	865	(0.1)	1,088	(0.2)	1,281	(0.2)
Ireland	2,648	(0.4)	3,148	(0.5)	2,884	(0.4)	2,420	(0.4)	2,514	(0.3)
Norway	1,613	(0.3)	1,808	(0.3)	2,596	(0.4)	2,120	(0.3)	2,153	(0.3)
Sweden	1,800	(0.3)	2,149	(0.3)	3,542	(0.5)	3,165	(0.5)	3,638	(0.5)
United Kingdom	107,995	(17.9)	125,158	(18.5)	116,821	(17.1)	105,950	(16.2)	114,158	(14.4)
Other Northern Europe	50	(0.0)	56	(0.0)	49	(0.0)	26	(0.0)	56	(0.0)
SOUTHERN EUROPE	**134,445**	**(22.3)**	**137,227**	**(20.3)**	**123,637**	**(18.1)**	**109,308**	**(16.7)**	**111,165**	**(14.0)**
Greece	3,584	(0.6)	4,850	(0.7)	4,926	(0.7)	5,406	(0.8)	4,630	(0.6)
Italy	118,929	(19.8)	117,246	(17.3)	103,823	(15.2)	89,292	(13.6)	89,596	(11.3)
Portugal	3,655	(0.6)	4,188	(0.6)	4,150	(0.6)	4,822	(0.7)	4,555	(0.6)
Slovenia	796	(0.1)	1,204	(0.2)	1,372	(0.2)	1,324	(0.2)	1,647	(0.2)
Spain	6,678	(1.1)	8,798	(1.3)	8,217	(1.2)	7,279	(1.1)	8,912	(1.1)
Other Southern Europe	803	(0.1)	941	(0.1)	1,149	(0.2)	1,185	(0.2)	1,825	(0.2)
WESTERN EUROPE	**167,474**	**(27.8)**	**168,062**	**(24.9)**	**167,424**	**(24.5)**	**169,027**	**(25.8)**	**185,433**	**(23.4)**
Austria	14,100	(2.3)	13,673	(2.0)	13,462	(2.0)	13,274	(2.0)	14,944	(1.9)
Belgium	3,990	(0.7)	3,552	(0.5)	3,368	(0.5)	3,437	(0.5)	4,386	(0.6)
France	43,627	(7.2)	45,301	(6.7)	48,100	(7.0)	50,373	(7.7)	54,789	(6.9)
Germany	70,830	(11.8)	72,269	(10.7)	69,240	(10.1)	69,085	(10.5)	77,108	(9.7)
Netherlands	8,050	(1.3)	6,479	(1.0)	5,595	(0.8)	5,355	(0.8)	5,682	(0.7)
Switzerland	26,251	(4.4)	26,183	(3.9)	26,983	(4.0)	26,783	(4.1)	27,766	(3.5)
Other Western Europe	626	(0.1)	605	(0.1)	676	(0.1)	720	(0.1)	758	(0.1)
EAST MEDITERRANEAN EUROPE	**3,074**	**(0.5)**	**4,054**	**(0.6)**	**5,182**	**(0.8)**	**4,517**	**(0.7)**	**7,166**	**(0.9)**
Israel	846	(0.1)	1,308	(0.2)	1,588	(0.2)	1,380	(0.2)	2,113	(0.3)
Turkey	2,044	(0.3)	2,442	(0.4)	3,235	(0.5)	2,758	(0.4)	4,637	(0.6)
Other East Mediterranean Europe	184	(0.0)	304	(0.0)	359	(0.1)	379	(0.1)	416	(0.1)

Table: 25 Cont...

REGION / NATIONALITY	2006		2007		2008		2009		2010	
ASIA & THE PACIFIC	**125,034**	(20.8)	**155,024**	(22.9)	**156,132**	(22.9)	**163,942**	(25.0)	**250,638**	(31.6)
NORTH EAST ASIA	**83,402**	(13.9)	**100,669**	(14.9)	**102,899**	(15.1)	**115,445**	(17.6)	**186,452**	(23.5)
China	26,396	(4.4)	35,976	(5.3)	41,511	(6.1)	60,666	(9.2)	118,961	(15.0)
Japan	39,528	(6.6)	41,121	(6.1)	38,193	(5.6)	36,641	(5.6)	38,791	(4.9)
Korea	16,157	(2.7)	20,976	(3.1)	20,934	(3.1)	16,135	(2.5)	24,808	(3.1)
Taiwan	1,281	(0.2)	2,018	(0.3)	2,233	(0.3)	1,975	(0.3)	3,831	(0.5)
Other North East Asia	40	(0.0)	578	(0.1)	28	(0.0)	28	(0.0)	61	(0.0)
SOUTH EAST ASIA	**10,896**	(1.8)	**13,344**	(2.0)	**13,678**	(2.0)	**14,097**	(2.1)	**16,818**	(2.1)
Indonesia	625	(0.1)	943	(0.1)	581	(0.1)	677	(0.1)	818	(0.1)
Malaysia	2,915	(0.5)	2,999	(0.4)	3,137	(0.5)	3,139	(0.5)	3,894	(0.5)
Philippines	666	(0.1)	982	(0.1)	871	(0.1)	979	(0.1)	1,066	(0.1)
Singapore	4,255	(0.7)	4,456	(0.7)	4,956	(0.7)	5,214	(0.8)	5,332	(0.7)
Thailand	2,251	(0.4)	3,663	(0.5)	3,952	(0.6)	3,813	(0.6)	5,397	(0.7)
Other South East Asia	184	(0.0)	301	(0.0)	181	(0.0)	275	(0.0)	311	(0.0)
SOUTH ASIA	**22,757**	(3.8)	**30,350**	(4.5)	**28,981**	(4.2)	**25,996**	(4.0)	**36,612**	(4.6)
Bangladesh	1,050	(0.2)	1,284	(0.2)	455	(0.1)	388	(0.1)	525	(0.1)
India	12,071	(2.0)	17,327	(2.6)	16,663	(2.4)	15,850	(2.4)	25,756	(3.3)
Pakistan	1,119	(0.2)	1,013	(0.1)	1,191	(0.2)	1,046	(0.2)	1,256	(0.2)
Sri Lanka	7,954	(1.3)	9,654	(1.4)	9,752	(1.4)	7,833	(1.2)	7,872	(1.0)
Other South Asia	563	(0.1)	1,072	(0.2)	920	(0.1)	879	(0.1)	1,203	(0.2)
OCEANIA	**7,979**	(1.3)	**10,661**	(1.6)	**10,574**	(1.5)	**8,404**	(1.3)	**10,756**	(1.4)
Australia	6,892	(1.1)	9,406	(1.4)	9,368	(1.4)	7,392	(1.1)	9,622	(1.2)
New Zealand	1,006	(0.2)	1,142	(0.2)	1,184	(0.2)	991	(0.2)	1,103	(0.1)
Other Oceania	81	(0.0)	113	(0.0)	22	(0.0)	21	(0.0)	31	(0.0)
Africa	**4,169**	(0.7)	**4,846**	(0.7)	**5,694**	(0.8)	**5,034**	(0.8)	**5,628**	(0.7)
South Africa	2,973	(0.5)	3,293	(0.5)	3,732	(0.5)	2,975	(0.5)	3,157	(0.4)
Other Africa	1,196	(0.2)	1,553	(0.2)	1,962	(0.3)	2,059	(0.3)	2,471	(0.3)
Americas	**10,813**	(1.8)	**14,198**	(2.1)	**14,485**	(2.1)	**15,159**	(2.3)	**18,601**	(2.3)
Brazil	564	(0.1)	708	(0.1)	1,327	(0.2)	1,304	(0.2)	1,761	(0.2)
Canada	2,196	(0.4)	2,851	(0.4)	2,966	(0.4)	3,043	(0.5)	3,815	(0.5)
U.S.A	7,150	(1.2)	9,348	(1.4)	8,853	(1.3)	9,438	(1.4)	11,482	(1.4)
Other Americas	903	(0.2)	1,291	(0.2)	1,339	(0.2)	1,374	(0.2)	1,543	(0.2)
Middle East	**4,372**	(0.7)	**6,450**	(1.0)	**9,141**	(1.3)	**9,525**	(1.5)	**11,629**	(1.5)
Kuwait	668	(0.1)	1,004	(0.1)	1,340	(0.2)	1,181	(0.2)	1,409	(0.2)
Lebanon	402	(0.1)	660	(0.1)	1,139	(0.2)	984	(0.2)	1,145	(0.1)
Saudi Arabia	1,530	(0.3)	1,940	(0.3)	2,747	(0.4)	3,036	(0.5)	4,040	(0.5)
United Arab Emirates	492	(0.1)	807	(0.1)	1,394	(0.2)	1,580	(0.2)	1,699	(0.2)
Other Middle East	1,280	(0.2)	2,039	(0.3)	2,521	(0.4)	2,744	(0.4)	3,336	(0.4)
Global Total	**601,923**		**675,889**		**683,012**		**655,852**		**791,917**	

Source: Department of Immigration & Emigration

TABLES

Table: 26 Growth Trends of Major Markets, 2006 - 2010 (in Percent)

REGION / NATIONALITY	2006	2007	2008	2009	2010
EUROPE	**49.1**	**8.3**	**0.4**	**-7.1**	**9.4**
CENTRAL / EASTERN EUROPE	***68.2***	***40.3***	***42.3***	***-13.6***	***20.0***
Belarus	70.4	19.2	27.3	9.4	10.6
Bulgaria	94.4	73.8	23.1	-6.5	16.5
Czech Republic	60.2	20.5	37.8	1.0	33.4
Hungary	136.7	-3.5	-20.1	-9.9	31.7
Kazakhstan	124.5	117.5	28.0	6.0	-10.5
Poland	81.0	44.2	25.0	1.0	13.0
Romania	116.0	70.7	8.6	1.8	3.4
Russia	50.6	45.0	53.8	-18.3	22.7
Slovakia	88.4	55.6	30.4	2.8	19.2
Ukraine	129.0	46.1	52.3	-14.0	17.3
Other Central / Eastern Europe	150.2	17.3	8.0	-7.8	-3.9
NORTHERN EUROPE	***25.3***	***16.2***	***-4.7***	***-9.4***	***8.4***
Denmark	36.9	21.3	0.8	-6.1	40.7
Finland	45.1	52.3	9.6	25.8	17.7
Ireland	82.4	18.9	-8.4	-16.1	3.9
Norway	41.4	12.1	43.6	-18.3	1.6
Sweden	36.6	19.4	64.8	-10.6	14.9
United Kingdom	23.8	15.9	-6.7	-9.3	7.7
Other Northern Europe	-5.7	12.0	-12.5	-46.9	115.4
SOUTHERN EUROPE	***71.0***	***2.1***	***-9.9***	***-11.6***	***1.7***
Greece	110.5	35.3	1.6	9.7	-14.4
Italy	69.6	-1.4	-11.4	-14.0	0.3
Portugal	63.3	14.6	-0.9	16.2	-5.5
Slovenia	39.9	51.3	14.0	-3.5	24.4
Spain	90.3	31.7	-6.6	-11.4	22.4
Other Southern Europe	59.0	17.2	22.1	3.1	54.0
WESTERN EUROPE	***49.0***	***0.4***	***-0.4***	***1.0***	***9.7***
Austria	50.7	-3.0	-1.5	-1.4	12.6
Belgium	150.2	-11.0	-5.2	2.0	27.6
France	101.6	3.8	6.2	4.7	8.8
Germany	27.0	2.0	-4.2	-0.2	11.6
Netherlands	93.9	-19.5	-13.6	-4.3	6.1
Switzerland	35.9	-0.3	3.1	-0.7	3.7
Other Western Europe	17.0	-3.4	11.7	6.5	5.3
EAST MEDITERRANEAN EUROPE	***104.0***	***31.9***	***27.8***	***-12.8***	***58.6***
Israel	49.2	54.6	21.4	-13.1	53.1
Turkey	135.2	19.5	32.5	-14.7	68.1
Other East Mediterranean Europe	159.2	65.2	18.1	5.6	9.8

Table: 26 Cont....

REGION / NATIONALITY	2006	2007	2008	2009	2010
ASIA & THE PACIFIC	**65.9**	**24.0**	**0.7**	**5.0**	**52.9**
NORTH EAST ASIA	***97.9***	***20.7***	***2.2***	***12.2***	***61.5***
China	127.4	36.3	15.4	46.1	96.1
Japan	69.9	4.0	-7.1	-4.1	5.9
Korea	146.9	29.8	-0.2	-22.9	53.8
Taiwan	87.0	57.5	10.7	-11.6	94.0
Other North East Asia	-9.1	1345.0	-95.2	0.0	117.9
SOUTH EAST ASIA	***36.7***	***22.5***	***2.5***	***3.1***	***19.3***
Indonesia	20.2	50.9	-38.4	16.5	20.8
Malaysia	23.2	2.9	4.6	0.1	24.1
Philippines	17.9	47.4	-11.3	12.4	8.9
Singapore	30.6	4.7	11.2	5.2	2.3
Thailand	102.1	62.7	7.9	-3.5	41.5
Other South East Asia	24.3	63.6	-39.9	51.9	13.1
SOUTH ASIA	***17.4***	***33.4***	***-4.5***	***-10.3***	***40.8***
Bangladesh	63.3	22.3	-64.6	-14.7	35.3
India	17.7	43.5	-3.8	-4.9	62.5
Pakistan	19.0	-9.5	17.6	-12.2	20.1
Sri Lanka	11.0	21.4	1.0	-19.7	0.5
Other South Asia	52.6	90.4	-14.2	-4.5	36.9
OCEANIA	***36.2***	***33.6***	***-0.8***	***-20.5***	***28.0***
Australia	35.5	36.5	-0.4	-21.1	30.2
New Zealand	44.3	13.5	3.7	-16.3	11.3
Other Oceania	9.5	39.5	-80.5	-4.5	47.6
Africa	**20.5**	**16.2**	**17.5**	**-11.6**	**11.8**
South Africa	24.3	10.8	13.3	-20.3	6.1
Other Africa	12.0	29.8	26.3	4.9	20.0
Americas	**49.3**	**31.3**	**2.0**	**4.7**	**22.7**
Brazil	31.5	25.5	87.4	-1.7	35.0
Canada	54.0	29.8	4.0	2.6	25.4
U.S.A	47.9	30.7	-5.3	6.6	21.7
Other Americas	62.4	43.0	3.7	2.6	12.3
Middle East	**81.9**	**47.5**	**41.7**	**4.2**	**22.1**
Kuwait	130.3	50.3	33.5	-11.9	19.3
Lebanon	68.9	64.2	72.6	-13.6	16.4
Saudi Arabia	121.4	26.8	41.6	10.5	33.1
United Arab Emirates	113.9	64.0	72.7	13.3	7.5
Other Middle East	34.0	59.3	23.6	8.8	21.6
Global Total	**52.3**	**12.3**	**1.1**	**-4.0**	**20.7**

Source: Department of Immigration & Emigration

Table: 27

Tourist Arrivals by Nationality (end July 2011)

REGION / NATIONALITY	January - July			
	2010	2011	% Change	% Share 2011
EUROPE	**289,051**	**313,573**	**8.5**	**60.2**
CENTRAL / EASTERN EUROPE	***41,518***	***53,195***	***28.1***	***10.2***
Belarus	491	650	32.4	0.1
Bulgaria	609	855	40.4	0.2
Czech Republic	2,822	3,911	38.6	0.8
Hungary	1,562	1,831	17.2	0.4
Kazakhstan	875	933	6.6	0.2
Poland	1,994	2,288	14.7	0.4
Romania	669	822	22.9	0.2
Russia	26,729	35,021	31.0	6.7
Slovakia	1,474	1,857	26.0	0.4
Ukraine	2,925	3,594	22.9	0.7
Other Central / Eastern Europe	1,368	1,433	4.8	0.3
NORTHERN EUROPE	***71,464***	***69,367***	***-2.9***	***13.3***
Denmark	1,352	1,786	32.1	0.3
Finland	689	918	33.2	0.2
Ireland	1,348	1,267	-6.0	0.2
Norway	1,316	1,606	22.0	0.3
Sweden	1,732	2,735	57.9	0.5
United Kingdom	64,991	61,021	-6.1	11.7
Other Northern Europe	36	34	-5.6	0.0
SOUTHERN EUROPE	***66,144***	***64,241***	***-2.9***	***12.3***
Greece	2,248	1,498	-33.4	0.3
Italy	55,599	53,493	-3.8	10.3
Portugal	2,286	2,542	11.2	0.5
Slovenia	949	1,003	5.7	0.2
Spain	4,137	4,473	8.1	0.9
Other Southern Europe	925	1,232	33.2	0.2
WESTERN EUROPE	***106,513***	***123,058***	***15.5***	***23.6***
Austria	8,806	10,165	15.4	2.0
Belgium	2,410	3,240	34.4	0.6
France	33,551	38,245	14.0	7.3
Germany	42,147	49,055	16.4	9.4
Netherlands / Holland	3,137	3,054	-2.6	0.6
Switzerland	16,040	18,760	17.0	3.6
Other Western Europe	422	539	27.7	0.1
EAST MEDITERRANEAN EUROPE	***3,412***	***3,712***	***8.8***	***0.7***
Israel	961	1,164	21.1	0.2
Turkey	2,302	2,392	3.9	0.5
Other East Mediterranean Europe	149	156	4.7	0.0

Table: 27 Cont...

REGION / NATIONALITY	January - July			
	2010	2011	% Change	% Share 2011
ASIA & THE PACIFIC	**131,114**	**182,505**	**39.2**	**35.1**
NORTH EAST ASIA	***97,203***	***136,814***	***40.8***	***26.3***
China	62,646	103,734	65.6	19.9
Japan	19,463	18,486	-5.0	3.6
Korea	12,964	11,525	-11.1	2.2
Taiwan	2,100	3,031	44.3	0.6
Other North East Asia	30	38	26.7	0.0
SOUTH EAST ASIA	***8,950***	***12,660***	***41.5***	***2.4***
Indonesia	433	633	46.2	0.1
Malaysia	1,985	3,081	55.2	0.6
Philippines	593	913	54.0	0.2
Singapore	2,737	4,047	47.9	0.8
Thailand	3,009	3,705	23.1	0.7
Other South East Asia	193	281	45.6	0.1
SOUTH ASIA	***18,837***	***25,107***	***33.3***	***4.8***
Bangladesh	245	821	235.1	0.2
India	12,793	16,834	31.6	3.2
Pakistan	692	973	40.6	0.2
Sri Lanka	4,396	5,390	22.6	1.0
Other South Asia	711	1,089	53.2	0.2
OCEANIA	***6,124***	***7,924***	***29.4***	***1.5***
Australia	5,510	7,095	28.8	1.4
New Zealand	593	817	37.8	0.2
Other Oceania	21	12	-42.9	0.0
AFRICA	**2,944**	**3,635**	**23.5**	**0.7**
South Africa	1,483	2,056	38.6	0.4
Other Africa	1,461	1,579	8.1	0.3
AMERICAS	**10,174**	**12,827**	**26.1**	**2.5**
Brazil	907	1,355	49.4	0.3
Canada	2,018	2,532	25.5	0.5
U.S.A.	6,403	7,742	20.9	1.5
Other Americas	846	1,198	41.6	0.2
MIDDLE EAST	**6,581**	**7,943**	**20.7**	**1.5**
Kuwait	742	962	29.6	0.2
Lebanon	561	650	15.9	0.1
Saudi Arabia	2,434	2,938	20.7	0.6
United Arab Emirates	954	1,258	31.9	0.2
Other Middle East	1,890	2,135	13.0	0.4
TOTAL TOURIST ARRIVALS	**439,864**	**520,483**	**18.3**	**100.0**

Source: Department of Immigration & Emigration

TABLES

Table: 28

Major Tourism Indicators (end July 2011)

		Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Jan-Jul Total
TOURIST ARRIVALS										
FRONTIER ARRIVALS (by air)		**2010**	67,478	77,063	74,975	60,742	58,324	44,050	57,232	**439,864**
		2011	79,493	87,392	80,732	79,947	64,456	55,947	72,516	**520,483**
		Growth %	17.8	13.4	7.7	31.6	10.5	27.0	26.7	**18.3**
SURFACE ARRIVALS (Cruise Passengers)		**2010**	0	534	0	0	0	0	0	**534**
		2010	181	0	0	0	0	0	0	**181**
		Growth %	100.0	-100.0	0.0	0.0	0.0	0.0	0.0	**-66.1**
REGISTERED CAPACITY 2011										**Average**
RESORTS	Nos.		98	98	99	100	100	100	100	**99**
	Beds		21,342	21,428	21,590	21,628	21,756	21,756	21,756	**21,608**
HOTELS	Nos.		17	18	18	18	18	18	18	**18**
	Beds		1,453	1,503	1,503	1,503	1,503	1,503	1,503	**1,496**
GUEST HOUSES	Nos.		25	27	27	29	30	31	32	**29**
	Beds		522	541	541	557	573	588	598	**560**
SAFARI VESSELS	Nos.		153	153	154	154	154	154	154	**154**
	Beds		2,414	2,402	2,440	2,440	2,440	2,440	2,440	**2,431**
TOTAL	**Nos.**		**293**	**296**	**298**	**301**	**302**	**303**	**304**	**300**
	Beds		**25,731**	**25,874**	**26,074**	**26,128**	**26,272**	**26,287**	**26,297**	**26,095**
OPERATIONAL CAPACITY										**Average**
RESORTS	Nos.	**2010**	88	91	92	92	91	89	89	**90**
		2011	90	92	92	93	93	93	92	**92**
	Beds	**2010**	19,562	20,312	20,486	20,550	20,322	19,974	19,974	**20,169**
		2011	20,512	20,850	20,990	21,184	21,142	21,074	20,494	**20,892**
HOTELS	Nos.	**2010**	13	13	15	15	15	15	15	**14**
		2011	16	17	17	17	17	17	17	**17**
	Beds	**2010**	1,344	1,344	1,368	1,368	1,368	1,368	1,368	**1,361**
		2011	1,423	1,473	1,473	1,473	1,473	1,473	1,473	**1,466**
GUEST HOUSES	Nos.	**2010**	19	16	21	21	21	21	21	**20**
		2011	22	25	26	26	24	26	25	**25**
	Beds	**2010**	427	325	464	464	464	464	464	**439**
		2011	458	525	531	527	483	507	476	**501**
SAFARI VESSELS	Nos.	**2010**	96	99	105	111	112	114	109	**107**
		2011	106	112	118	116	100	104	112	**110**
	Beds	**2010**	1,492	1,491	1,616	1,742	1,731	1,779	1,719	**1,653**
		2011	1,649	1,758	1,820	1,806	1,486	1,593	1,713	**1,689**
TOTAL	**Nos.**	**2010**	**216**	**104**	**107**	**107**	**106**	**104**	**104**	**121**
		2011	**234**	**246**	**253**	**252**	**234**	**240**	**246**	**244**
	Beds	**2010**	**22,825**	**21,656**	**21,854**	**21,918**	**21,690**	**21,342**	**21,342**	**21,804**
		2011	**24,042**	**24,606**	**24,814**	**24,990**	**24,584**	**24,647**	**24,156**	**24,548**

Table: 28 Cont...

BED NIGHTS	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Jan-Jul Total
RESORTS	2010	525,782	543,538	544,373	472,199	419,229	309,267	406,147	3,220,535
	2011	575,643	570,008	579,148	557,214	445,082	358,184	453,491	3,538,770
	Growth %	9.5	4.9	6.4	18.0	6.2	15.8	11.7	9.9
HOTELS	2010	15,313	17,339	15,775	15,435	14,489	11,837	14,242	104,430
	2011	19,917	21,429	19,438	17,693	15,428	13,551	16,889	124,345
	Growth %	30.1	23.6	23.2	14.6	6.5	14.5	18.6	19.1
GUEST HOUSES	2010	1,856	2,020	2,460	2,360	2,396	2,181	2,476	15,749
	2011	2,445	2,586	2,824	2,078	1,557	2,640	2,628	16,758
	Growth %	31.7	28.0	14.8	-11.9	-35.0	21.0	6.1	6.4
SAFARI VESSELS	2010	9,336	15,575	19,240	13,013	7,710	4,100	5,638	74,612
	2011	14,404	20,805	23,917	18,706	6,790	2,483	5,475	92,580
	Growth %	54.3	33.6	24.3	43.7	-11.9	-39.4	-2.9	24.1
TOTAL	2010	**552,287**	**560,877**	**560,148**	**487,634**	**433,718**	**321,104**	**420,389**	3,336,157
	2011	**612,409**	**614,828**	**625,327**	**595,691**	**468,857**	**376,858**	**478,483**	3,772,453
	Growth %	**10.9**	**9.6**	**11.6**	**22.2**	**8.1**	**17.4**	**13.8**	13.1
OCCUPANCY RATE (%)									Average
RESORTS	2010	86.7	95.6	85.7	76.6	66.5	51.6	65.6	75.5
	2011	90.5	97.6	89.0	87.7	67.9	56.7	71.4	80.1
	Change	3.8	2.1	3.3	11.1	1.4	5.0	5.8	4.6
HOTELS	2010	36.8	46.1	37.2	37.6	34.2	28.8	33.6	36.3
	2011	45.1	52.0	42.6	40.0	33.8	30.7	37.0	40.2
	Change	8.4	5.9	5.4	2.4	-0.4	1.8	3.4	3.8
GUEST HOUSES	2010	14.0	20.0	17.1	17.0	16.7	15.2	17.2	16.7
	2011	17.2	17.6	17.2	12.7	10.4	16.8	17.8	15.7
SAFARI VESSELS	2010	20.2	33.7	38.4	24.9	14.4	7.4	10.6	21.4
	2011	28.2	38.2	42.4	34.5	14.7	5.0	10.3	24.8
TOTAL	2010	**78.1**	**92.5**	**82.7**	**74.2**	**64.5**	**50.2**	**63.5**	72.2
	2011	**82.2**	**89.2**	**81.3**	**79.5**	**61.5**	**51.0**	**63.9**	72.6
	Change	**4.1**	**-3.3**	**-1.4**	**5.3**	**-3.0**	**0.8**	**0.4**	0.4
AVG. DURATION OF STAY (Days)	2010	8.2	7.3	7.5	8.0	7.4	7.3	7.3	7.6
	2011	7.7	7.0	7.7	7.5	7.3	6.7	6.6	7.2
	Change	-0.5	-0.2	0.3	-0.6	-0.2	-0.6	-0.7	-0.3

Source: Ministry of Tourism, Arts & Culture

TABLES

TOURISM HIGHLIGHTS 2010

Dr. Mariyam Zulfa Appointed as the New Minister of Tourism, Arts and Culture

Dr. Mariyam Zulfa was appointed as the Minister of Tourism, Arts & Culture on 7th November 2010. Her appointment came following the appointment of former Minister of Tourism, Arts and Culture Dr. Ahmed Ali Sawad as the Attorney General.

Dr Mariyam Zulfa is a graduate of law from the University of Western Australia. Her PhD, from Curtin Business School, Curtin University Australia examines the competitiveness of small island tourism destinations. Her other qualifications include Master of Business Administration and Bachelor of Urban & Regional Planning (Australia).

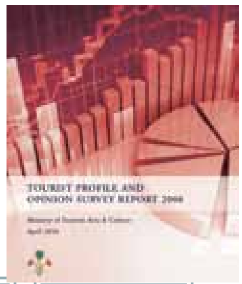
Dr Zulfa has worked in the government previously as a Director of Selected Islands Development and later as the Director of Non-Formal Education Centre prior to leaving the country for higher education in New Zealand and Australia. She is also the first lady minister appointed to the Ministry of Tourism.

Third Tourism Master Plan Review Process

The Third Tourism Master Plan (TTMP) is a five year plan formulated in 2006 commencing from 2007 to 2011. The TTMP remains as an important document for the private sector as a reference on policies of growth and development. It was formulated under a new constitution and prior to the term of the current administration. A Tourim Sector Action Plan has been initiated to extend the existing Master Plan to 2013 and in line with the government's Stretegic Action Plan and a complete review of the TTMP is ongoing.

The TTMP review is conducted with the assistance of a Review Group formulated from key stakeholders from the public sector. The review process involves examining the level of achievement of strategies and actions and specific deliverables in TTMP to meet its objectives. The process will also identify perormance on growth projection estimates, reflect current situations and project tourism sector growth. Reviewing institutional arrangements for the tourism sector and proposing actions to reflect the government manifesto and policies will also be among the objectives of the review process.

Launching of Tourist Profile and Opinion Survey 2008 Report



The report on Tourist Profile & Opinion Survey (TPOS) 2008 was launched on 25th August 2010 by then Attorney General Dr. Ahmed Ali Sawad.

TPOS is a periodic survey conducted by the Ministry of Tourism, Arts and Culture as part of the research on the quality of tourism services in the Maldives. The primary goal of these surveys is to contribute to the efforts to enhance the tourism industry in the Maldives by providing the industry and government with a resource which details the characteristics, preferences and expectations of tourists who visit the Maldives. The key areas studied in this research are the demographic, economic, social, and geographic profile of tourists who visit the Maldives, as well as their opinions and perceptions about their place of stay in the Maldives and the services offered to them. The report is available to download from the Ministry's website at http://www.tourism.gov.mv/downloads/surveys/TPOS.pdf

Maldives Welcomes 750,000th Visitor to the Country

The Ministry of Tourism, Arts & Culture, the Maldives Tourism Promotion Board which is now known as Maldives Marketing and Public Relations Coorporation (MMPRC) and the tourism industry met with the 750,000th tourist to the Maldives on 15th December 2010 with a colourful welcome ceremony. This was a significant landmark and a record for the Maldives. The 750,000th visiting tourist to the Maldives was Ms. Daniela Ruth Selig who was a British citizen. She arrived on British Airways with her husband and two children for a 7 day vacation at Anantara Dhigufinolhu. As the lukcy winner she was offered a free holiday in the Maldives.

During her stay, she was also invited to meet President Nasheed at his office. This was understandably a unique experience for the whole family!

Tourism Day Celebrations 2010

The Ministry of Tourism, Arts and Culture in collaboration with the tourism industry, associations and other government agencies celebrated the World Tourism Day 27th September 2010. Activities that highlighted the theme set by United Nations World Tourism Organisation (UNWTO), "Tourism and Biodiversity", planned for the Tourism Week; 27th Sept to 3rd Oct 2010, included the following:

Tourism Day Supplement:- The Tourism Day supplement included the address by the President H.E Mohamed Nasheed and the address by the Secretary General of UNWTO, Mr. Taleb Rifai. It also included messages from the tourism industry and various tourism related associations in the Maldives.

Cultural performances:- Boduberu was performed at Male' International Airport and Republic Square everyday during the Tourism Week.

"New 7 wonders" voting campaign:- The campaign was launched by the Maldives Tourism Promotion Board now known as Maldives Marketing and Public Relations Coorporation (MMPRC) at the Male' International Airport.

Panel Discussion:- A panel of environmental experts discussing Tourism & Biodiversity was aired by MNBC.

Awareness Lectures:- Lectures on the topic Tourism and Biodiversity was arranged by the National Library for it's members.

Cleanup Program:- Resorts and islands took part in the cleanup program which involved cleaning of dive sites, protected marine areas, and local community areas such as schools and play grounds.

Exposure Trips:- Exposure trips were arranged by resorts for students in nearby islands. The purpose of the exposure trips was for students to gain knowledge about the tourism industry and make them aware of the range of employment opportunities in the tourism sector.

Tourism Haveeru:- The tourism haveeru consisted of a children's evening and a music show for adults. This event was held at the artificial beach on 2nd October 2010

MARKETING AND PROMOTION ACTIVITIES

A Milestone for Maldivian Sailing

Upon the invitation of Maldives Marketing and Public Relations Corporation (MMPRC) the Oman sailing team of two yachts “A100 MAJAN” and “MUSANDAM” visited Maldives from 12 – 16th February 2011 as part of their “Indian Ocean’s 5 Cape’s Race”. Covering a total of 16,300 nautical miles, (30,200km), with 9 sailors. The “Indian Ocean’s 5 Capes Race” includes Middle East, Africa, Australia and South Asia. Mr. Mohsin Al Busaidi was also amongst the sailors, who was the first Arab to complete the world round tour last year in “MUSANDAM”.

The main purpose of the race was to embark on a new race for Asian sailing by forming the “Indian Ocean’s 5 Capes Race” for the Spring 2012 race. Departing from Muscat, the stopover ports included Maldives, South Africa (Cape Town), Australia (Fremantle) and Singapore.

MMPRC Organizes FAM Trip for BBC Fast Track

The Maldives Marketing and Public Relations Corporation (MMPRC) organized a FAM trip for the BBC fast:track during February 2010. The BBC fast:track is a programme which delivers the latest travel news from the industry itself with fascinating insights into the most exclusive and desirable places in the world to visit, as well as looking at issues affecting both the business and leisure traveller. fast:track is shown on the BBC World News Channel and reaches an audience of over 250m worldwide.

While in the Maldives, the crew made a story on the country and its tourism industry highlighting Maldives efforts to go carbon neutral and the schemes involved in preventing climate change. During their shooting in Male’ from 07 – 08th February, an interview was also conducted with His Excellency President Mohamed Nasheed. Resorts covered for the programme include Sonevafushi by Six Senses and Diva Maldives.

Maldives Receives Top Island Award at Condé Nast Traveler Awards

The Maldives has topped the polls in the 22nd Annual Condé Nast Traveler’s Readers’ Choice Awards 2010. This year, 25,008 readers responded the annual Condé Nast Traveler Reader’s Choice survey and the results were announced at the Readers’ Choice Awards gala which was held at New York City’s IAC Building.

Condé Nast Traveler’s annual reader awards are regarded as one of the most authoritative in the US tourism industry. The magazine has an unbending ‘truth in travel’ policy and is renowned for its editorial integrity. The questionnaire was available to all readers through a secure Web site and the results were collated and analysed by Mediamark Research, Inc., of New York City.

Maldives Wins "Best Diving Area" & "Best Dreaming Area" Award

The Maldives has been awarded the "Best Diving Area" and "Best Dreaming Area" in the Dive & Travel Awards 2010 held during the Marine Diving Fair, Tokyo, Japan from 02 – 04th April 2010. The voting was carried out amongst the readers of the both the magazines targeted to the divers; "Travel Diver" and "Marine Diving" , based on the "Reader's Choice Award"

Maldives won the "Best Diving Area" after competing with the world famous dive favourites Palau and Ishigaakee Island. The competitors for the "Best Dreaming Area" include Palau and French Polynesia.The awards were received on behalf of Maldives by Hon. Mr. Amir Khaleel, the Maldives High Commissioner in Japan.

Maldives Wins Top Prizes in the World Travel Awards

Maldives win top prizes in the World Travel Awards Africa and Indian Ocean Gala Ceremony held in Johannesburg, Africa. With 1200 senior tourism and travel industry professionals visiting the ceremony Maldives scooped the following awards for the destination and its resorts.

1. Maldives – Indian Oceans Leading Honeymoon Destination
2. Maldives – Indian Oceans Leading Cruise Destination
3. Cocoa Island – Indian Oceans Leading Boutique Hotel
4. Baros Maldives – Indian Oceans Leading Hotel
5. W Retreat & Spa – Indian Oceans Leading Spa Resort
6. Conrad Maldives Rangali Island – Indian Oceans Leading Resort
7. Vermillion International – Indian Oceans Leading Travel Agency
8. Baros Maldives – Indian Oceans Leading Villa
9. Adaaran Prestige Resorts – Indian Oceans Leading Water Villa Group
10. Kurumba Maldives – Maldives Leading Hotel
11. Sky Tours Pvt Ltd – Maldives Leading Luxury Tour Operator
12. Coco Palm Dhunikolhu – Maldives Leading Resort
13. Conrad Maldives Rangali Island – Maldives Leading Spa Resort
14. Anantara Resort Maldives – Maldives Leading Villa
15. Adaaran Prestige Water Villas – Maldives Leading Water Villas

The winners were selected based on an online polling system from the industry professionals. The main purpose of the awards which was established 17 years ago is to value and maintain quality standard of customer service and to improve the general standard of the business as a whole.

Maldives Commences Major Destination Rebranding Initiatives

The Republic of the Maldives is set to undergo a comprehensive destination branding initiative to enhance the Indian Ocean island nation's global image and broaden its appeal to wider markets. The rebranding will culminate in the development of a new logo, slogan, advertising strategy and worldwide campaign set to launch in 2011 or early 2012.

Spearheaded by the Maldives Marketing and Public Relations Corporation (MMPRC), the initiative will focus on enhancing the positioning of the nation's tourism product, strengthening its image in established key source markets while broadening its appeal to wider audiences and emerging niche markets.

Key to the rebranding initiative was the selection of an external brand strategy and communications agency to carry out the branding exercise and communications strategy. Through a global tender process that drew responses from agencies across the globe, Bangkok-based travel and tourism branding specialist agency KEEN was selected to develop the country's new identity.

While evolution of the country's tourism positioning will be a central driver of the rebranding, the Maldives will also seek to present itself as a destination offering a wider array of opportunities for business and investment, with the goal of spurring development and building a national image that its people will embrace with pride.

Maldives Chosen as the World's Most Romantic Destination 2010

The Maldives has been chosen as the World's Most Romantic Destination in the 17th Annual World Travel Awards Grand Final, held at Grosvenor House hotel in London on Sunday, 7 November 2010. Maldives won this award after successfully competing against world famous destinations such as Bali, Hawaii, Mauritius, New York City, Paris, Seychelles, Tuscany of Italy and Venice. The State Minister for Tourism, Arts and Culture received the award on behalf of the Maldives.

Maldives was also nominated as World's Leading Beach Destination, World's Leading Cruise Destination, World's Leading Destination, World's Leading Honeymoon Destination and World's Leading Island Destination. In addition Maldives Tourism Promotion Board was nominated in the World's Leading Tourist Board category.

Hailed as "The Oscars of the Travel Industry" by the Wall Street Journal, the World Travel Awards is recognised globally as the ultimate travel accolade.The World Travel award Grand Final marked the climax of a year-long search to find the very best travel companies in the world, and is based on the winners and nominations of the regional categories which were held in Dubai, Johannesburg, Antalya, Delhi and Jamaica.

This year's nominations featured 5,000 companies in 1,000 categories across 162 countries. The winners were selected by 183,000 travel professionals which include travel agencies, tour and transport companies and tourism organizations in over 160 countries across the globe who casted their votes online.

World Travel Awards was established 17 years ago and is committed to raising the standards of customer service and overall business performance throughout the international industry. Consumers are increasingly using the list of winners as a reliable guide and means of reassurance when choosing their holiday.

As in previous years, the Maldives Tourism Promotion Board (MTPB), together with tourism industry partners participated in major international tourism fairs and road shows.

BIT Fair - Milan, Italy

The Maldives Tourism Promotion Board and the Maldives tourism industry stakeholders participated in the 30th BIT fair which was held in Milan, Italy from 18 to 21 February 2010. 23 companies and 45 other tourism industry partners represented Maldives in the fair. The fair was a huge success as a lot of people visited the 200 square meter Maldives stand.

Activities which took place in the stand include campaigning for the "New 7 Wonders", giving information to visitors about Maldives and a survey regarding information on the Maldives. Visitors who took part in the survey were given the opportunity to enter a lucky draw. The prizes of the lucky draw winners were a 5 day holiday for 2 persons from Zitahli Resort and Spa, one week holiday for 2 persons from Albatross Holidays and a one week holiday for 2 persons in Paradise Island Resort and Spa by Villa Hotels. The winners of the lucky draw was announced on 20th February 2010 in the Maldives stand.

ITB Fair - Berlin, Germany

The Maldives Tourism Promotion Board and the Maldives tourism industry stakeholders participated in the ITB fair which was held in Berlin, Germany from 10 – 14 March 2010. The first 3 days of the fair was targeted for travel trade whereas the last 2 days were targeted for all visitors. The Maldives stand which had 405 square meters was designed to represent a Maldivian resort. A total of 171 people from 77 companies represented Maldives in the fair.

The President of the Maldives, HE. Mohamed Nasheed also participated in this fair. He addressed the German media and also participated in a news conference with the then Minister of Tourism, Arts & Culture, Dr. Ahmed Ali Sawad on 10th March 2010. In addition to these events a "Maldivian Night" was also held on 10th March 2010. The purpose of the "Maldivian night" is to bring together all stakeholders in the industry and establish a network with them. During this event the President launched the Maldives advertisement which is will be aired on National Geographic Channel.

World Travel Market - London, United Kingdom

The Maldives Tourism Promotion Board and representatives from Maldives tourism industry participated in the 31st World Travel Market (WTM) that was held from 8 to 11 November 2010 at ExCel London. This is the biggest travel trade event held in the United Kingdom.

The Maldivian delegation led by the State Minister of Tourism, Arts & Culture; Mr. Thoyyib Mohamed Waheed, comprised 177 participants from 75 organisations, namely resorts, hotels and tour operators that participated in WTM 2010 under the Maldives' banner. 35 companies represented resorts and hotels in the Maldives and also travel agencies selling resorts, hotels and live-aboards participated in this fair.

Other Promotional Activities

Apart from the three major fairs mentioned, the Maldives Tourism Promotion Board also participated in the following promotional fairs during the year 2009.

	Name of Fair	City/Country	Dates
1	Matka	Finland	21 - 24 January
2	Boot Fair	Dusseldorf, Germany	23 - 31 January
3	Fespo	Zurich, Switzerland	28 - 31 January
4	Fitur	Madrid, Spain	20 - 24 January
5	MITT	Moscow, Russia	17 - 20 March
6	Marine Diving Fair	Tokyo, Japan	2 - 4 April
7	Emirates Holiday World	Dubai, UAE	29 April - 2 May
8	Arab Travel Market	Dubai, U.A.E	4 - 7 May
9	Indaba	Durban, South Africa	8 - 11 May
10	JATA World Travel Fair	Tokyo Japan	23 - 26 September
11	Top Resa	Paris, France	21 - 24 September
12	TTG INCONTRI	Rimini, Italy	22 - 24 October
13	Dima Show	Orland	17 - 20 November
14	C.I.T.M	Shanghai, China	18 - 21 November

Explanatory Notes and Definitions

Explanatory notes and definitions in this publication are used as per United Nation's 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 good and services received in the destination country.

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.

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

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.

Bed Tax refers to the US$ 8 or equivalent in a foreign currency as tax payable to the Government of the Maldives from each tourist per day of stay at a tourist resort/hotel/guest house/vessel.

Bed Rent refers to the annual rent paid to the Government by tourist resorts per bed in the resort.