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Republic of Maldives

Tourism Yearbook

2006

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Tourism Yearbook 2006

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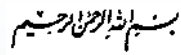
Introduction

Introduction

Tourism Yearbook - 2006 has been prepared by the Research Section of the Ministry of Tourism and Civil Aviation. This is the 2006 edition of Tourism Statistics book published annually by this Ministry. The name of the publication has been changed from Tourism Statistics to Tourism Yearbook, in order to reflect its coverage.

This publication briefly illustrates the development of tourism in the Maldives and analyses the overall performance and trends of the leading source markets to the country. In addition to all the available national tourism statistics for the past five years (2001 – 2005), the book contains some important highlights of the industry performance of Maldives in the preceding year. Explanatory notes are provided along with tables and figures, in order to make the data more comprehensive. Attempt is made to reflect the important role of the tourism industry played in the overall economic development of the Maldives.

In addition to the introductory section, this publication consists of 8 major sections, namely; 1. Industry Outlook, 2. Tourist accommodation in the Maldives, 3. Tourist arrival trends, 4. Airline Statistics, 5. Economic indicators of tourism, 6. Tourism Highlights, 7. Tourism Awards, 8. Anex. It also includes a map of Maldives providing details on tourism expansion.



Foreword by the Minister of Tourism & Civil Aviation

Dr. Mahmood Shougee

It is with great pleasure that I present the Tourism Yearbook 2006. This annual publication by the Ministry of Tourism and Civil Aviation highlights the key tourism indicators of the Maldives during the past year and provides heaps of other information on the Maldives tourism industry. We hope that the Yearbook meets the information needs of all including the government and private sector organizations, institutions and individuals.

Following the 2004 tsunami, the Maldives experienced a significant negative growth in the tourist arrivals to the country in the first three quarters of 2005, and the total arrivals declined by 35.9%. Yet, the effort of the Government and the private sector to revive the industry has shown very positive results. The figures for the First Quarter of 2006 indicates that we have had a 97% growth in international tourist arrivals, and we anticipate to end the year by a new record in arrivals, beating the 616,716 tourists recorded for 2004.

Following strategic decisions on regional expansion of tourism as outlined in the Second Tourism Master Plan, and to cater for the continuous bed shortage that the Maldives has been experiencing during the peak season, 35 new islands are to be developed as resorts.

Regardless of its fragility, the tourism industry has shown overwhelming resilience and ability to bounce back even after crushing crises, as we have witnessed in the past few years. Such resilience can, of course, be attributed to the concerted efforts of the Government and the private sector, and the loyalty of the tourists who adore the irresistible Maldives. The future of the Maldives tourism industry looks bright from both the supply and demand perspective as can be seen from the information in this volume of the Tourism Yearbook.

Tourism Yearbook 2006 is the combined results of the inputs of many Government and private sector organizations, institutions and individuals. I acknowledge with deep gratitude the valuable contribution and support rendered by respective Government and private sector organizations. We believe that this volume would provide useful information for future development and planning purposes not only for tourism industry but also for other tourism related activities and for those who have research interests in the Maldives tourism industry.

Country Fact Sheet

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

2005

POPULATION (Census)	
Total Population (Census 2006 preliminary result)	298,842
Economically Active Population	87,987
EMPLOYMENT	
Government Employees	34,033
Direct Tourism Industry Employees	22,000
Direct Tourism Industry Employees - Locals	12,000
HEALTH	
No. of Hospital Beds	784
Population per Hospital Bed	375
Population per practising Staff Nurse	486
Population per practising Doctor	775
EDUCATION	
Total No. of Students	102,073
No. of Educational Institutes	334
Literacy Rate (2000) (%)	98.94
FISHERIES & AGRICULTURE	
Total Catch ('000 metric tons)	186.0
Growth in Fish Catch (%)	17.3
Exports ('000 metric tons)	129.6
Contribution to GDP (%)	6.8

	2005
TOURISM	
No. of Tourist Resorts	87
Tourist Arrivals	395,320
Total Bed Capacity	20,198
Tourism Revenue (million Rufiya)	909.3
Tourism Expenditure (million Rufiya)	90.6
Contribution to GDP (%)	22.9
TRANSPORT & COMMUNICATION	
Total No. of International Flights	
Scheduled Flights	7,400
Chartered Flights	742
Non Scheduled Flights	983
Passenger Movement of International Flights	
Arrivals	513,796
Departure	501,025
Direct Transit	147,434
Sea Transport	
No. of Yacht Dhoni	80
No. of Launches	1,035
No. of Boats	367
Land Transport	
No. of Motor Cars	2,082
No. of Motor/Auto Cycles	18,289
Increase rate of all Types of Vehicles (%)	23.9
Communication	
International Telephone Calls ('000 mins)	8,909
Mobile Calls ('000 mins)	102,671
Mobile phone accessible Atolls	All Atolls
FOREIGN TRADE	
Exports	
Total exports (f.o.b value in '000 US\$)	104,223
Imports	
Total imports (c.i.f value in '000 Rf)	9,534,267
NATIONAL ACCOUNTS	
G.D.P Growth Rate (%)	-5.5
G.D.P Per Capita at 1995 constant basic prices (US\$)	2,271.0

Source: Ministry of Planning & National Development

Section 1 - Industry Outlook

Introduction

As we face the 35th year of tourism development in the Maldives, tourism industry has become the driving force of the Maldives economy contributing over 30% to the GDP, 27% to the government revenue, 70% of foreign currency earnings, and over 22,000 direct jobs.

As of end June 2006, there were a total of 225 tourist accommodating establishments: 88 resorts, 108 safari vessels (live aboard) 8 hotels, and 21 guest houses. The total number of registered bed capacity in these establishments is 19,913. The major share of the beds are in resorts (87 %), followed by Safari Vessel (8 %), Hotels (3 %) and Guest Houses (2 %).

Tourism in the Maldives started in a commercially significant way in 1972, with just 270 beds in 2 resorts. Even though only 1000 tourists arrived to the Maldives in 1972, now Maldives attracts over 600,000 tourists.

It is expected that the proposed new developments would further strengthen the Maldives as a destination in the global market. With ever increasing global competition in tourism, the Maldives has intensified its marketing and promotional activities with a special focus on the new and emerging markets.

Tourist Arrivals

Compared to 2003, tourist arrivals increased by 9.4% in 2004. However, in 2005 there was a decline of 35.9% in tourist arrival due to the tsunami of December 2004. Although tourist arrivals showed a negative growth in 2005, average stay of 8.3 days remained constant. Year 2006 started with a promising bounce back and an 84.3% growth in arrivals was recorded for end June 2006.

Europe remains to be the market leader for Maldives tourism with a market share of 78.9% of total arrivals (end June 2006). Italy, United Kingdom, Germany, France and Japan respectively are the top five markets to the Maldives as of end June 2006.

New Developments & Tourism Expansion

With the tourism capacity and spatial expansion that is being implemented, as advocated in the Second Tourism Master Plan (1996-2005), tourism would spread to all corners of the Maldives thereby increasing the direct benefits of tourism to the whole community and also enriching the visitor experience.

Under the new expansion, 35 new islands would be developed. This includes 10 resorts targeted to the up-market (716 beds), 10 resorts targeted to the middle-market (1,880 beds); and 15 resorts (3000 beds) to be allocated to the newly formed public company Maldives Tourism Development Corporation (MTDC), with 45% government shares and 55% public shares. These 35 new islands, together with resorts that are already in the process of being developed and the forecasted growth in the safari vessels, hotels and guest houses, it is anticipated that the total bed capacity of the Maldives would reach 29,500 within the next 3-5 years.

This capacity increase is in line with the tourism growth projection of 6.5% in the Maldives by PATA. In order to entertain such a growth in arrivals and capture our market share of global tourists the Maldives requires adding at least 1,200 beds to the industry each year.

This year it is anticipated that the Maldives would receive over 620,000 tourists, creating a new record in annual arrivals. A significant change to the market share composition of the generating markets are anticipated as in the coming 3-5 years the Maldives seeks to capitalize more on the new markets of China, Russia and India in order to further smoothen the seasonal variation of tourist arrivals.

Section 2 - Tourist Accommodation in the Maldives

Scattered across the Indian Ocean with white sandy beaches and crystal clear lagoons, Maldives started its journey towards tourism in 1972, with the opening of a resort in Kaafu Atoll just about 3 kilometers away from the only international airport existed, in the country. Since then new resorts continued to be developed increasing the bed capacity. Accommodation to tourists in the Maldives are mainly provided in resort islands and live-aboard safari vessels. However, there are few hotels and guest houses located in Male', the capital, providing accommodation facilities to visitors.

Table 1: Number of Accommodation Establishments and their Bed Capacity, 2001 - 2005

Category	2001		2002		2003		2004		2005	
	No	Beds	No	Beds	No	Beds	No	Beds	No	Beds
Tourist Resorts / Marinas	87	16,318	87	16,400	87	16,444	87	16,858	88	17,348
Hotels	9	688	8	670	8	670	8	636	8	636
Guest Houses	20	367	17	282	24	360	28	425	28	425
Safari Vessels	92	1,392	96	1,475	113	1,636	113	1,676	121	1,789
Total	208	18,765	208	18,827	232	19,110	236	19,595	245	20,198

Source: Ministry of Tourism & Civil Aviation

Being the first atoll to open a resort in the Maldives, and having the advantage of being closest to the Male' International Airport, Kaafu Atoll, also known as Male' Atoll, continues to be the atoll with most beds in the Maldives. It constitutes 48 percent of the resort bed capacity with 8,316 beds. Next to Kaafu is Alifu Atoll contributing 29% with a bed capacity of 4,978. Lhaviyani and Baa Atoll have almost equal number of beds with a share of 6.8 and 6.0 percent respectively. The 50 beds in Haa Alif Atoll is in the new resort marina that came into operation during 2005. Though no new resorts were opened during the past five years, a resort marina came into operation during the year 2005 with a bed capacity of 50. By the end of 2005, the total registered bed capacity of the Maldives increased to 20,198 in 245 establishments. Thus increase is mainly due to existing resorts developing additional capacity.

Table 2: Distribution of Resorts and Beds by Atolls, 2001 - 2005

Atoll	2001		2002		2003		2004		2005	
	Beds	% Share	Beds	% Share	Beds	% Share	Beds	% Share	Beds	% Share
Kaafu	7,888	48.3	7,910	48.2	7,954	48.4	8,038	47.7	8,316	47.9
Alifu (North & South)	4,654	28.5	4,708	28.7	4,708	28.6	4,938	29.3	4,978	28.7
Vaavu	294	1.8	294	1.8	294	1.8	294	1.7	350	2.0
Lhaviyani	1,090	6.7	1,090	6.6	1,090	6.6	1,150	6.8	1,180	6.8
Baa	1,028	6.3	1,034	6.3	1,034	6.3	1,034	6.1	1,034	6.0
Dhaalu	304	1.9	304	1.9	304	1.8	324	1.9	324	1.9
Meemu	380	2.3	380	2.3	380	2.3	400	2.4	400	2.3
Faafu	250	1.5	250	1.5	250	1.5	250	1.5	250	1.4
Raa	430	2.6	430	2.6	430	2.6	430	2.6	466	2.7
Haa Alif	-	-	-	-	-	-	-	-	50	0.3
Total	16,318	100.0	16,400	100.0	16,444	100.0	16,858	100.0	17,348	100.0

Source: Ministry of Tourism & Civil Aviation

Table 3: No of Resorts and their Bed Capacity by Airport Distance, 2005

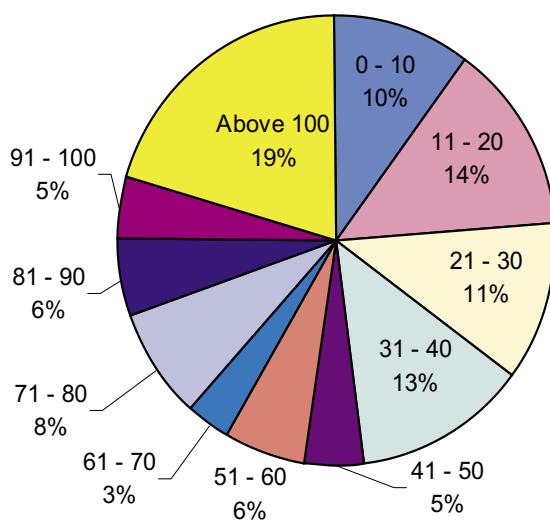
Distance from Airport (Km)	No. of Resorts	Beds	% Share
0 - 10	9	2,576	14.8
11 - 20	12	2,012	11.6
21 - 30	10	1,482	8.5
31 - 40	11	1,816	10.5
41 - 50	4	732	4.2
51 - 60	5	1,244	7.2
61 - 70	3	490	2.8
71 - 80	7	802	4.6
81 - 90	5	568	3.3
91 - 100	4	1,568	9.0
Above 100	18	4,058	23.4
Total	88	17,348	100.0

Source: Ministry of Tourism & Civil Aviation

Resorts are concentrated closer to the Male’ International Airport. As seen from the table and the graph below, there are 18 resorts above 100 km from the Airport. The spread will increase with the development of 35 new resorts. However, many of the resorts in outer atolls are easily accessible via regional airports or sea planes or super-speed boats.

Figure 1

Resorts by Distance from Airport, in Killometers



All the Islands in the Maldives are owned by the Government and they are leased by the Government to private parties for resort development. Table 4 and 5 show the distribution of resorts and their bed capacity by type of lease holders and operators. Most number of resorts and also number of beds are owned and operated by Maldivians. Though the number of resorts with local lease holders remained the same during 2004 and 2005, resorts with local operators have decreased from 49 in 2004 to 44 in 2005. Number of resorts with foreign lease holders increased from 5 in 2005 to 6 in 2006, and resorts with foreign operators have also increased during the last two years. Joint venture companies have also increased their participation during 2005.

The three resorts with a bed capacity of 616 indicated in Others category in table 4 are Club Med Faru, Villivaru and Biyadhoo Island Resorts. These islands had no Lease Holder in 2004 as they were operated under a management agreement made between the Ministry of Tourism & Civil Aviation and their operators.

Table 4: Tourist Resorts by Type of Lease Holders 2004 - 2005

	2004				2005				
	Resorts		Beds		Resorts		Beds		
	Nos	% Share	Nos	% Share	Nos	% Share	Nos	% Share	% Change
Local	68	78.2	13,282	78.8	68	78.2	13,758	79.6	3.6
Foreign	5	5.7	548	3.3	6	6.9	716	4.1	30.7
Joint Venture	11	12.6	2,412	14.3	13	14.9	2,806	16.2	16.3
Others *	3	3.4	616	3.7	-	-	-	-	-
Total	87	100.0	16,858	100.0	87	100.0	17,280	100.0	2.5

Note: * Resorts without any lease holders, and operated under a management agreement

Source: Legal Affairs & Registration Section
Ministry of Tourism & Civil Aviation

Table 5: Tourist Resorts by Type of Operators 2004 - 2005

	2004				2005				
	Resorts		Beds		Resorts		Beds		
	Nos	% Share	Nos	% Share	Nos	% Share	Nos	% Share	% Change
Local	49	56.3	10,344	61.4	44	50.6	9,892	57.2	-4.4
Foreign	25	28.7	3,774	22.4	27	31.0	4,176	24.2	10.7
Joint Venture	13	14.9	2,740	16.3	16	18.4	3,212	18.6	17.2
Total	87	100.0	16,858	100.0	87	100.0	17,280	100.0	2.5

Source: Legal Affairs & Registration Section
Ministry of Tourism & Civil Aviation

Tourist Bednights and Occupancy rate have been increasing steadily since 2001. However, average duration of stay has slightly declined from 8.5 in 2001 to 8.4 in 2002 and maintained at a constant 8.3 since 2003. This shift in the average duration of stay can be attributed to the increased share of arrivals from the Asian market. The decline in Bed nights and Occupancy rate in 2005 is due to the December 2004 Asian Tsunami, which affected the whole region.

Table 6: Tourist Bednights, Occupancy Rate and Average Duration of Stay, 2001 - 2005

Year	Tourist Bednights	Bednight growth (%)	Occupancy Rate (%)	Average Duration of Stay (days)
2001	3,932,748	-0.1	65.6	8.5
2002	4,066,640	3.4	69.0	8.4
2003	4,704,601	15.7	77.2	8.3
2004	5,110,587 *	8.6	83.9	8.3
2005	3,300,125	-35.4	64.4	8.3

Source: Ministry of Tourism & Civil Aviation

Note: * Revised

The average annual occupancy rate of Maldives has been maintained above 60 percent during the last 5 years. As seen from the table below the monthly occupancy rates have also been maintained above 50 except for the month of June. The December 2005 tsunami caused the dramatic decline in the occupancy rate in January 2005.

Table 7: Monthly Average Occupancy Rates in Resorts and Hotels, 2001 - 2005 (Percent)

Month	2001	2002	2003	2004	2005
January	86.6	67.1	90.4	100.5	32.6
February	89.9	81.8	95.5	100.8	64.9
March	83.3	79.3	87.3	97.9	73.7
April	76.7	70.0	80.3	90.6	61.9
May	51.5	56.4	55.8	68.0	52.1
June	42.6	42.0	46.6	57.4	46.3
July	57.4	57.0	63.4	73.5	60.7
August	69.9	77.1	84.6	92.3	77.5
September	60.0	68.4	72.1	80.9	68.0
October	53.8	73.6	76.4	83.8	75.3
November	55.5	76.8	87.3	87.0	85.1
December	60.2	78.1	87.0	74.5	74.5
Annual Average	65.6	69.0	77.2	83.9	64.4

Source: Ministry of Tourism & Civil Aviation

Section 3 - Tourist Arrival Trends

Tourist arrival to the Maldives has been increasing steadily at an average of 8 percent per year over the last 10 years. The dramatic decline in arrivals during the year 2005 was due the December 2004 Asian Tsunami, when many resorts had to close down their operation temporarily. However, by December 2005 tourist arrival had begun to rise and by mid 2006 arrivals had reached pre-tsunami levels.

Table 8: Tourist Arrivals by Month, 2001 - 2005

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2001	50,459	48,987	50,488	48,100	29,450	25,593	35,461	38,744	31,726	31,209	30,341	40,426	460,984
2002	36,211	47,024	49,280	42,647	31,529	23,641	34,341	41,243	39,760	42,579	42,310	54,115	484,680
2003	54,503	56,706	56,441	48,742	31,119	26,915	38,076	48,431	44,951	48,357	51,087	58,265	563,593
2004	61,861	59,692	63,855	55,396	42,197	33,835	43,527	55,843	46,838	52,511	56,656	44,505	616,716
2005	18,747	29,391	35,742	29,714	25,309	22,590	29,860	38,366	33,748	40,543	44,461	46,849	395,320

Source Data: Department of Immigration and Emigration

Table 9: Growth Trends of Monthly Tourist Arrivals, 2001 - 2005

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2001	11.4	0.0	11.2	10.7	9.0	6.5	7.4	-4.5	-14.0	-20.1	-22.2	-9.1	-1.3
2002	-28.2	-4.0	-2.4	-11.3	7.1	-7.6	-3.2	6.5	25.3	36.4	39.4	33.9	5.1
2003	50.5	20.6	14.5	14.3	-1.3	13.8	10.9	17.4	13.1	13.6	20.7	7.7	16.3
2004	13.5	5.3	13.1	13.7	35.6	25.7	14.3	15.3	4.2	8.6	10.9	-23.6	9.4
2005	-69.7	-50.8	-44.0	-46.4	-40.0	-33.2	-31.4	-31.3	-27.9	-22.8	-21.5	5.3	-35.9

Source Data: Department of Immigration and Emigration

Top 10 Markets of 2005

Europe continues to lead as the major market contributor to the Maldives over the years. It contributed 77 percent of the total tourist arrivals to the Maldives in 2005 with a total of 306,856 tourists. Hence, seven markets in the top ten list are from Europe. For five years Italy was the number one market. However, after the Tsunami Disaster in 2005, arrivals from Italy declined and United Kingdom overtook Italy and became the number one market sharing 22% of arrivals in 2005. The three markets that made it to the top ten list in Asian region are Japan, China and India, with Japan holding 4th position in 2005 with a market share of 5.9%.

Table 10: Tourist Arrivals and Market Share of Top Ten Markets of 2005

Rank 2005	Country	2001		2002		2003		2004		2005	
		Arrivals	Market Share (%)	Arrivals	Market Share (%)	Arrivals	Market Share (%)	Arrivals	Market Share (%)	Arrivals	Market Share (%)
1	United Kingdom	77,151	16.7	80,377	16.6	93,989	16.7	113,991	18.5	87,264	22.1
2	Italy	115,740	25.1	114,955	23.7	140,304	24.9	131,044	21.2	70,115	17.7
3	Germany	66,149	14.3	63,212	13.0	70,762	12.6	72,967	11.8	55,782	14.1
4	Japan	41,895	9.1	43,705	9.0	42,081	7.5	46,939	7.6	23,269	5.9
5	France	30,542	6.6	31,228	6.4	41,055	7.3	46,156	7.5	21,640	5.5
6	Switzerland	28,313	6.1	31,707	6.5	30,787	5.5	29,252	4.7	19,321	4.9
7	Russia	3,983	0.9	7,550	1.6	12,108	2.1	18,075	2.9	14,582	3.7
8	China	7,342	1.6	12,092	2.5	15,021	2.7	20,599	3.3	11,609	2.9
9	India	8,511	1.8	11,377	2.3	11,502	2.0	10,999	1.8	10,260	2.6
10	Austria	10,494	2.3	10,480	2.2	12,391	2.2	13,059	2.1	9,358	2.4
Global Total		460,984		484,680		563,593		616,716		395,320	

Source Data: Department of Immigration and Emigration

1. United Kingdom

Visits abroad by United Kingdom residents rose by 4 percent during 12 months ending August 2005, to 65.6 million trips. It is estimated that 57 percent of UK tourists will take 3+ holidays in 2005/06. This market remains a very attractive source of visitors for tourism destinations. Significant growth of European low cost airlines has focused holiday-makers on value.

Many 'new' destinations are aggressively looking to UK consumers with significant budgets, including Abu Dhabi, Dubai, Croatia, South Africa. Continued and persistent presence in the market is essential to protect and build a destination's position in the UK.

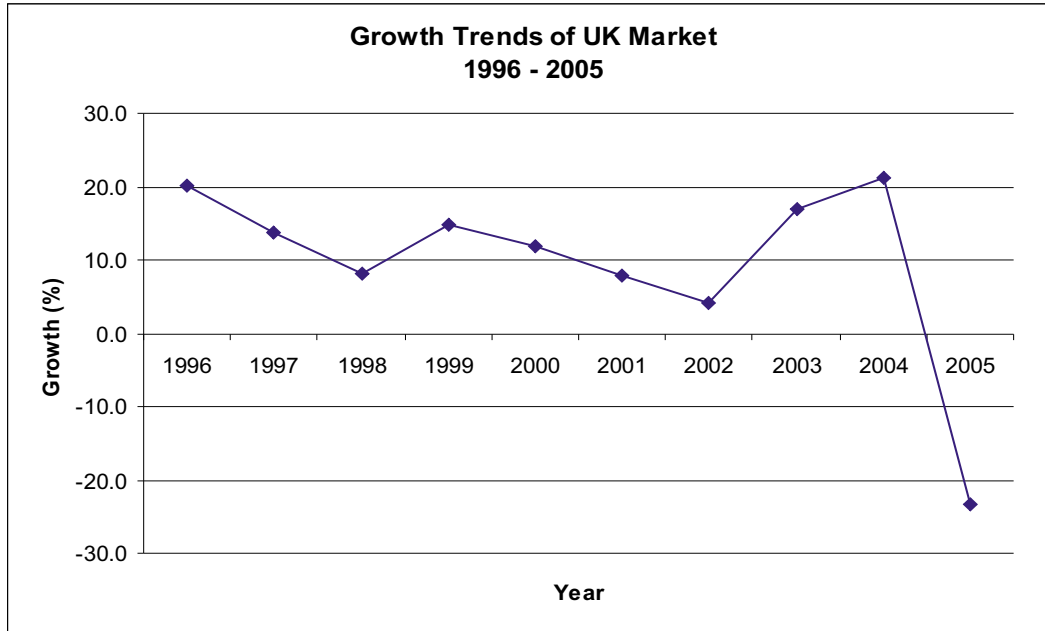
Table 11: Tourist Arrivals from United Kingdom 1996 - 2005

Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	45,288	51,552	55,729	63,919	71,440	77,151	80,377	93,989	113,991	87,264
Market Share (%)	13.4	14.1	14.1	14.9	15.3	16.7	16.6	16.7	18.5	22.1

Source Data: Department of Immigration and Emigration

Since 2001, the United Kingdom has been recorded as the second highest generating market to the Maldives. With a total arrival of 87,264 tourists for the year 2005, it captured a market share of 22.1 percent, becoming the number one market by end 2005. The UK market has shown positive growth trends over the past years as shown in the graph. The sudden decline in the growth rate is due to the tsunami that hit the Maldives at the end of December 2004. This is one market that has picked up and continues to grow.

Figure 2



Lots of marketing activities have been carried out in UK. These activities include advertising in magazines such as Condè Nast Traveller, Tatler, Tatler Travel Guide, Stag and Groom, Diver, A B T A Maldives Special Supplement, bus advertising in London and Manchester, as well as arranging familiarization trips for media and trade. Also MTPB had done joint promotions with tour operators like Kuoni, Elegant Resorts, Tradewinds and Hayes and Jarvis.

As in previous years, Maldives Tourism Promotion Board, in collaboration with the private sector, participated in the World Travel Market held in London, which played a key role in promoting the destination and maintaining the destination’s image.

2. Italy

Italy was one of the fastest growing outbound travel markets in Europe during the 1990s. However, in the last four years, growth has slowed and the market has even gone into decline in some sectors. Only long haul travel has defined tourism from Italy.

Table 12: Toursit Arrivals from Italy 1996 - 2005

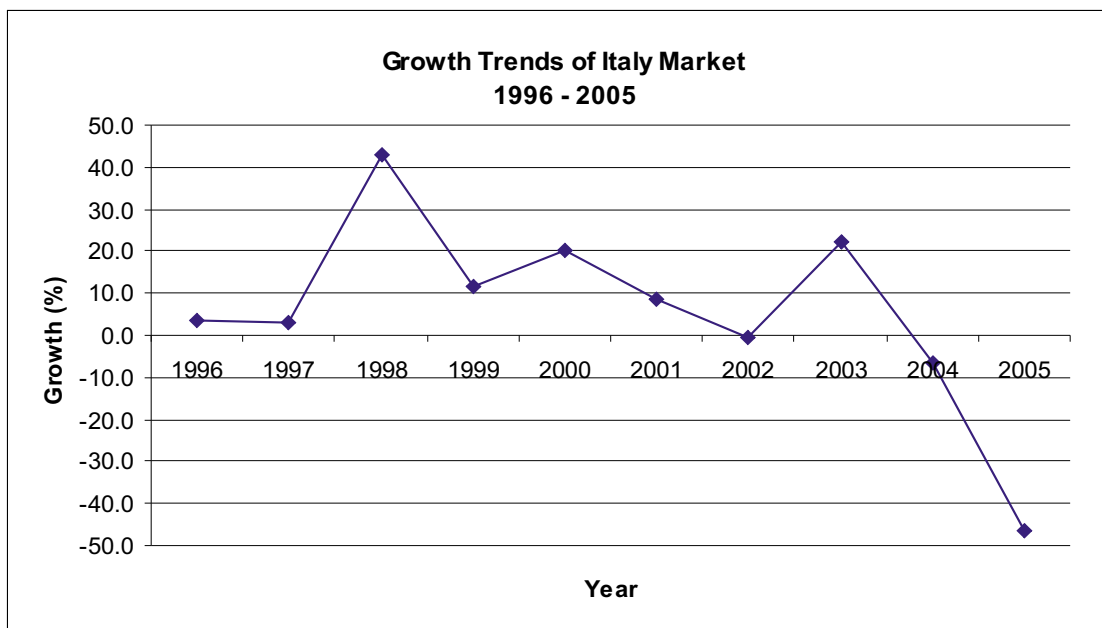
Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	53,932	55,443	79,301	88,697	106,451	115,740	114,955	140,304	131,044	70,115
Market Share (%)	15.9	15.2	20.0	20.6	22.8	25.1	23.7	24.9	21.2	17.7

Source Data: Department of Immigration and Emigration

The Italian market has always been one of the major players in the Maldivian tourism industry. It has been the second most tourist generating market to the Maldives till 1998. After that it overtook Germany and became the dominating market. However, in 2004 it showed a slight negative growth.

Italians are pioneers of tourism in the Maldives, and one of the largest generating markets which account for more than 17% of the total market share. While there had been some slowing down of growth from Italy, it picked up dramatically in 1995 & 1996, indicating greater interest by special segments of the Italian market on the unique quality experience that the Maldives offers today.

Figure 3



3. Germany

Germany is and has always been a market willing to travel with average consumers taking 2 holidays per year, making it one of the most potential markets to be targeted by destination promoters. They have a high propensity to travel, with two-thirds of them opting to travel abroad rather than travel within the country. Germany is estimated to generate 86.9 million travelers worldwide with the number growing at a steady space continuously year after year. Germans are looking for destinations with cleaner and beautiful environments and sun, sea and sand destinations, making Maldives a potential destination for them to spend their holiday.

Table 13: Tourist Arrivals from Germany 1996 - 2005

Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	74,688	76,073	76,317	86,497	77,642	65,956	63,212	70,762	72,967	55,782
Market Share (%)	22.0	20.8	19.3	20.1	16.6	14.3	13.0	12.6	11.8	14.1

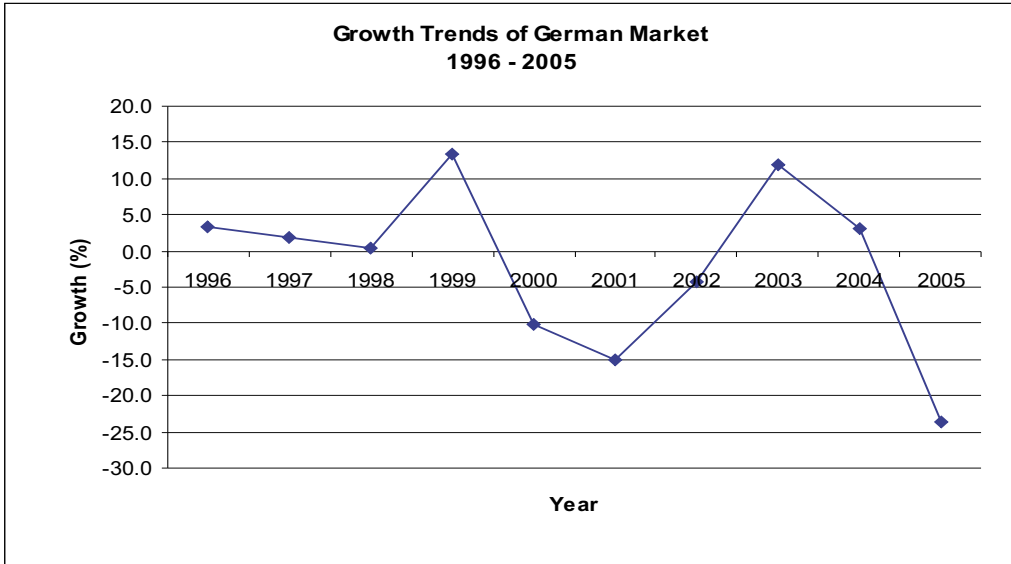
Source Data: Department of Immigration and Emigration

German market is considered to be a traditional market to the Maldivian tourism industry generating a high level of arrival figures. Maldives is very well established in the market. This market continued to be the most tourist generating market till the end of 1998. However, a heavy economic recession in Germany slowed the market giving the space for the Italian market to be the leader.

The arrival figures from Germany declined from 1999 – 2002, but Germany’s slow recovery of the economy brought about an increase in arrivals till the tragic tsunami which had a profound effect not only in the German market but to the total arrivals in the Maldives. Arrivals in 2005 in comparison to 2004 had a negative growth stressing the need for aggressive marketing activities for a fast recovery.

The market share of the Germany continued to decline, though it had always been among the best three generating markets. The popularity of the Maldives as the best holiday destination can still capture the German market a great deal more with more focused marketing activities. This is evident from the change of growth in 2002 (-4.4%) to 2003 (11.9%).

Figure 4



4. Japan

Japan is an important travel market. Despite its relatively small population size in Asia, Japan ranks among the top five travel markets in the world. In terms of spending, it is the fourth most important outbound market in the world, after USA, Germany and the UK. Many Japanese decide to go to destinations that have a good reputation and visited by many. Major segments that dominate the Japanese outbound travel market are well concerned with safety issues as well as with economic conditions and product pricing. The majority of Japanese travelers associate travel with escaping from the stresses of daily life or gaining a new experience from a different culture.

Table 14: Tourist Arrivals from Japan 1996 - 2005

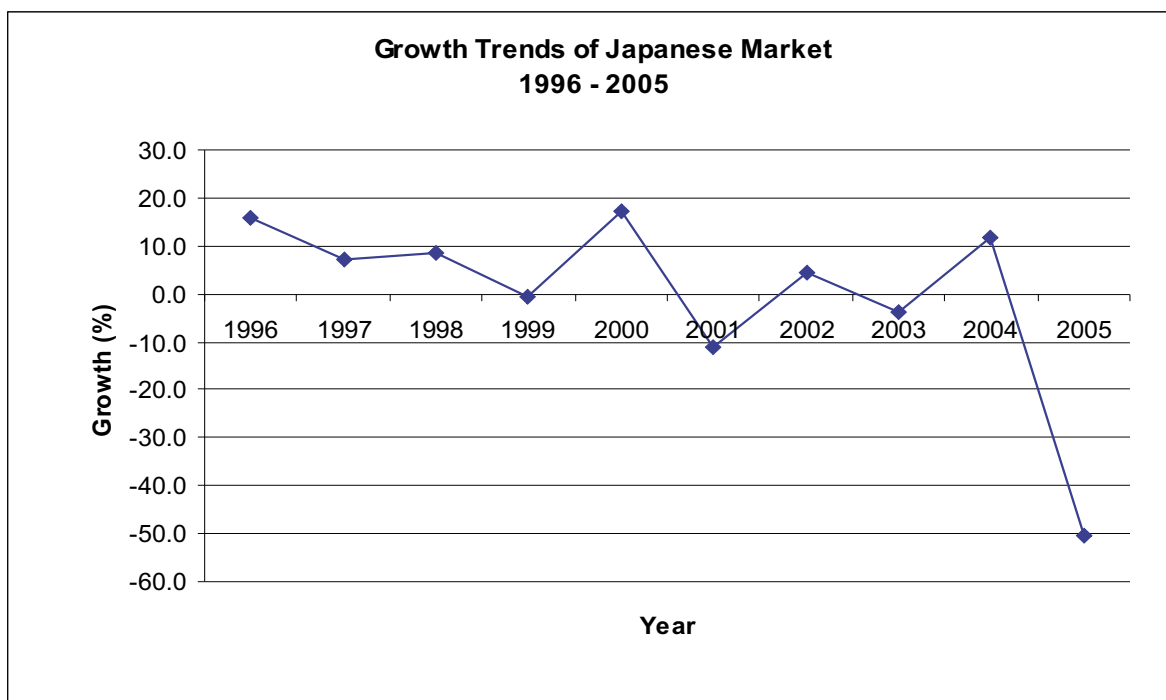
Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	34,804	37,298	40,514	40,230	47,180	41,895	43,705	42,081	46,939	23,269
Market Share (%)	10.3	10.2	10.2	9.4	10.1	9.1	9.0	7.5	7.6	5.9

Source Data: Department of Immigration and Emigration

Japanese market is one of the main tourism markets for Maldives, having positioned at the top fourth position next to Germany. Its market share was 8 percent and had a favorable growth rate of 12 percent in 2004 compared to a negative growth of -4 percent in 2003. In the last five years, Japanese arrivals decreased in 2001 by 11 percent and 4 percent in 2003. Nevertheless, growth in arrivals recovered to 12 percent in 2004, registering the total number of Japanese tourist arrivals at 46,939.

It is also the main source market generator from the Asian region. The overall tourist arrival growth from Japan declined by 50.4% during 2005 compared to 2004, as a result of the tsunami. The market share for the tourist arrivals in 2005 from Japan was 4.9%.

Figure 5



5. France

With 60 million inhabitants, France is ranked as the fourth European tourism market. The travel behavior of French tourists is different from that in other European countries. The importance of France as a source market for international travel is primarily due to the size of the population. The French prefer more to travel inside their borders than abroad. Outbound tourism from France is very low compared to their neighbors in Northern Europe.

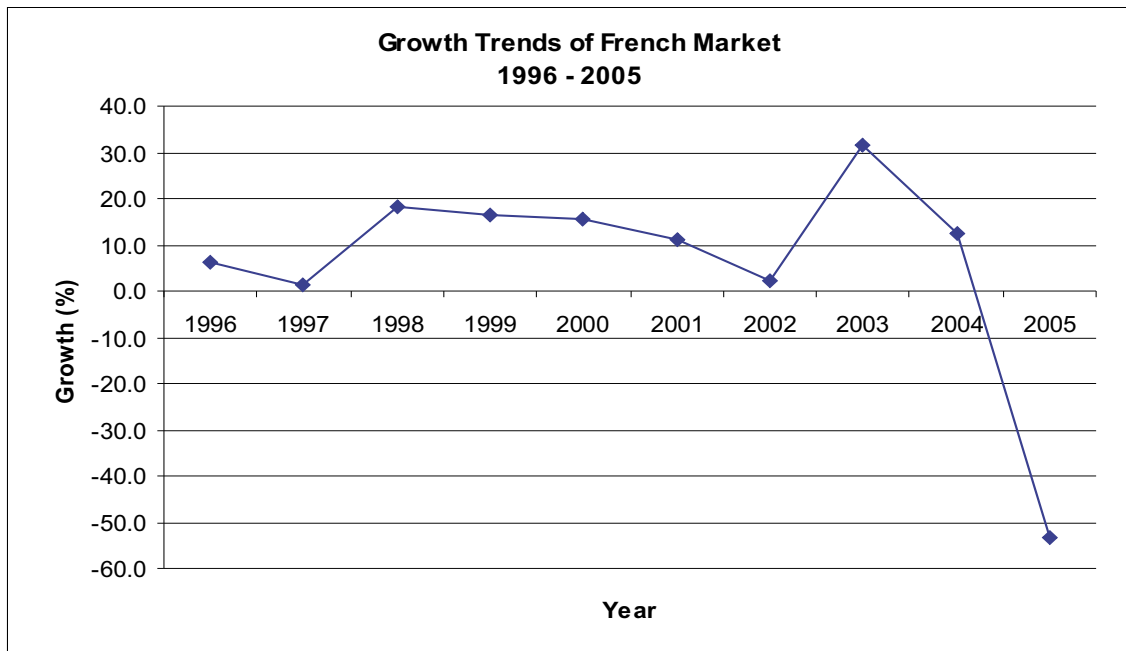
Table 15: Tourist Arrivals from France 1996 - 2005

Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	17,042	17,283	20,439	23,832	27,517	30,542	31,228	41,055	46,156	21,640
Market Share (%)	5.0	4.7	5.2	5.5	5.9	6.6	6.4	7.3	7.5	5.5

Source Data: Department of Immigration and Emigration

The French arrivals to the Maldives have been increasing since 1995. As seen from the graph below, there is a drastic increase in growth from 2002 to 2003. Up till year 2000, the French travelers arriving in the Maldives had an average annual growth of 12.7%. The Maldives is growing in popularity among the French every year and it is already the fifth-largest overseas market for the islands, which embody the typical paradise destination the French crave for. With the decline of arrivals in 2005 due the December 2004 Asian Tsunami, French arrivals showed a dramatic decline of 53.1 percent compared to that of 2004. Yet, France is a promising market.

Figure 6



6. Switzerland

Switzerland has a prosperous and stable modern market economy with low unemployment, a highly skilled labor force, and a per capita GDP larger than that of the bigger Western European economies. The Swiss in recent years have brought their economic practices largely into conformity with the EU to enhance their international competitiveness. Switzerland remains a safe haven for investors, because it has maintained a degree of bank secrecy and has kept up the franc's long-term external value.

Table 16: Tourist Arrivals from Switzerland 1996 - 2005

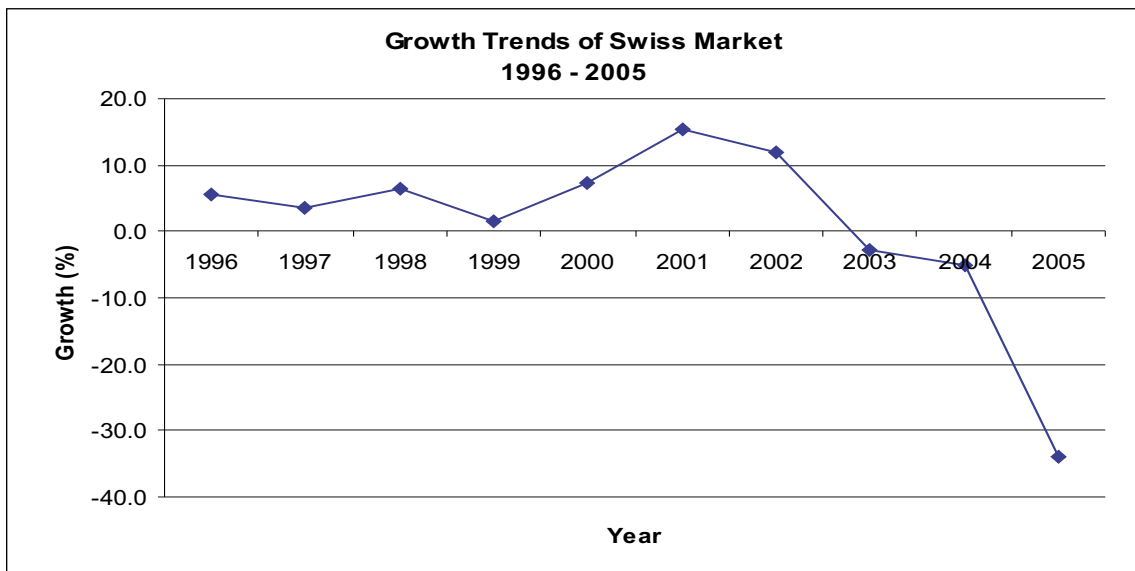
Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	20,467	21,167	22,514	22,856	24,528	28,313	31,707	30,787	29,252	19,321
Market Share (%)	6.0	5.8	5.7	5.3	5.3	6.1	6.5	5.5	4.7	4.9

Source Data: Department of Immigration and Emigration

The Swiss arrival figures show a positive performance, from 1998 up until 2002. However, since 2003 the market performance has been declining with a negative growth of 19.1 percent in 2005. The Swiss market was placed as the sixth leading market in the European region since 2003. The market share contribution from Switzerland in 2005 was 4.9%. Swiss market is now the fifth largest market share contributor among the European market segments. Total arrivals from Switzerland had declined to 30,787, from an annual growth rate of 12.0 percent in 2002 to 19,321 arrivals with 19.1 decline in 2005.

The main factors contributing to the decline of the Swiss market were adverse economic situations, the spread of SARS in some Asian countries and the December 2004 Asian Tsunami. The reduction in direct flights from Switzerland to certain destinations and the economic recession in the country during the years also account for the decline.

Figure 7



7. Russia

Russia is a vast country with a wealth of natural resources, a well-educated population, and a diverse industrial base. However it continues to experience formidable difficulties in moving from its old centrally planned economy to a modern market economy. Russia’s outbound travel sector is much larger than its inbound travel sector, and is driven by air traffic expansion. Outbound expenditure by Russians is more than the country’s inbound tourism receipts.

Within Russia there is increased recognition of tourism’s economic importance, but it is not even in all policy circles. Investor confidence has consequently fallen, despite the potential.

Table 17: Tourist Arrivals from Russia 1996 - 2005

Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	5,525	4,904	4,166	3,428	3,608	3,983	7,550	12,108	18,075	14,582
Market Share (%)	1.6	1.3	1.1	0.8	0.8	0.9	1.6	2.1	2.9	3.7

Source Data: Department of Immigration and Emigration

Russian market is considered to be a fast growing market and Russian arrivals have been increasing tremendously over the past 3-4 years. Maldives recorded 7,550 tourists from the Russian market in 2002 which is a 89.6% increase compared to previous year. The 18,075 arrivals in 2004 registering an increase of 49.3% proved that the Russian market was becoming one of the most promising markets for the Maldives. However, after the tsunami there was a negative growth of 19.3% which was still, a better figure compared to other major markets. The rise in arrivals also has been faster with 6,144 arrivals by end of March 2006, which is a 89.8% increase compared to the same period in 2005.

While demand from Russians for holidays in the Maldives remained high in 2005, even in the months following the tsunami, growth was hampered by a lack of airline connectivity, since most charter carriers and some scheduled airlines suspended or reduced services in the aftermath of the disaster.

8. China

Chinese outbound travel emerged more conspicuously in 1990, when self-paid tours to Singapore, Malaysia and Thailand were authorized. Taiwan and Philippines were later added to these destinations. To handle these tour groups, the Government designated nine outbound travel agents. In 1997 the State Council gave approval for “Mainland Chinese outbound travel on self-finance mode” and gave approval to 67 outbound tour operators. With this the outbound travel received greater official recognition, and China became an internationally recognized potential market.

Chinese outbound travel is based on a system called Approved Destination Status (ADS). According to this system, Chinese nationals can travel to ADS countries only. The Maldives became an ADS country at the end of 2002.

Table 18: Tourist Arrivals from China 1996 - 2005

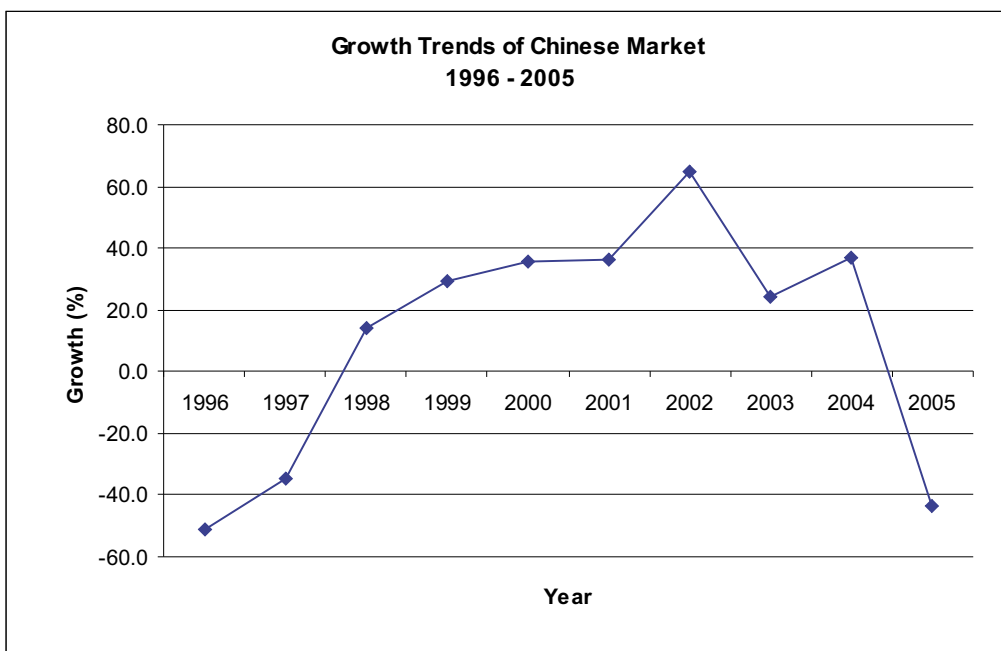
Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	4,127	2,686	3,067	3,973	5,380	7,342	12,092	15,021	20,599	11,609
Market Share (%)	1.2	0.7	0.8	0.9	1.2	1.6	2.5	2.7	3.3	2.9

Source Data: Department of Immigration and Emigration

As shown below, there has been a tremendous growth in the Chinese market for the past seven years, partly, due to the Approved Destination Status (ADS) and also the new found freedom for Chinese citizens to travel. After the Maldives became an ADS country, the arrivals from China increased tremendously.

However, due to the Tsunami of 2004 arrivals dropped tremendously compared to the projections for 2005. The last few months have registered a fluctuating growth rate of 59.3 percent raising China to the second place in the regional market with a share contribution of 2.6 percent of the total tourist arrivals into the Maldives.

Figure 8



9. India

India is one of the world's fastest growing economies with a GDP growth of more than 8 percent in 2003-4. It is the world's 4th largest economy in terms of purchasing power parity. The Indian outbound travel market is also an important market with a volume of over a million travelers every year. India has been identified as the second largest travel market in the world. Indian outbound market growth is expected to be high in South Asia and ASEAN region, with the West and other parts of the world accounting for 40-45 percent of the total outbound from India.

Table 19: Tourist Arrivals from India 1996 - 2005

Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	10,239	12,106	11,734	11,621	10,616	8,511	11,377	11,502	10,999	10,260
Market Share (%)	-19.1	18.2	3.0	2.7	2.3	1.8	2.3	2.0	1.8	2.6

Source Data: Department of Immigration and Emigration

The tourist arrival figures to the Maldives indicate that India being the second largest Asian market to the Maldives is potentially an important market for the destination. This market has performed relatively well in the Maldives although the growth percentage has been rather erratic. A high percentage of Indians visit the Maldives for business and mainly stays in Male'. The Maldives as a holiday destination is little known in India and improved marketing and promotion can capture a larger share of the market.

Figure 9

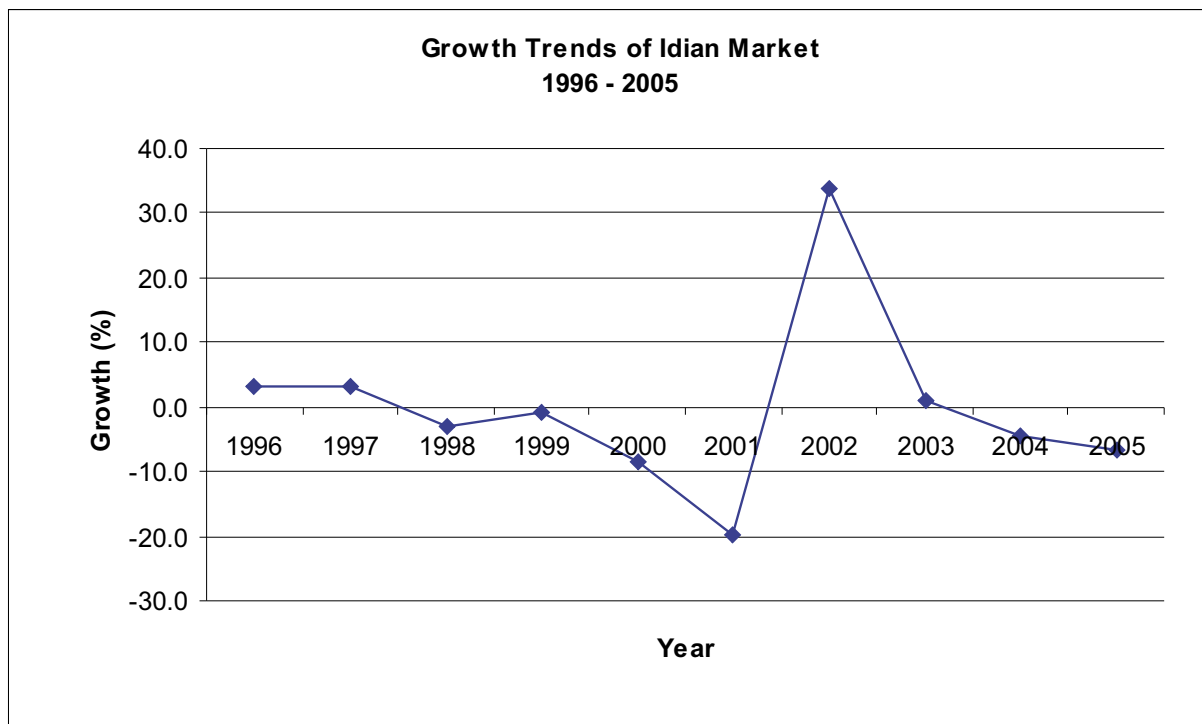
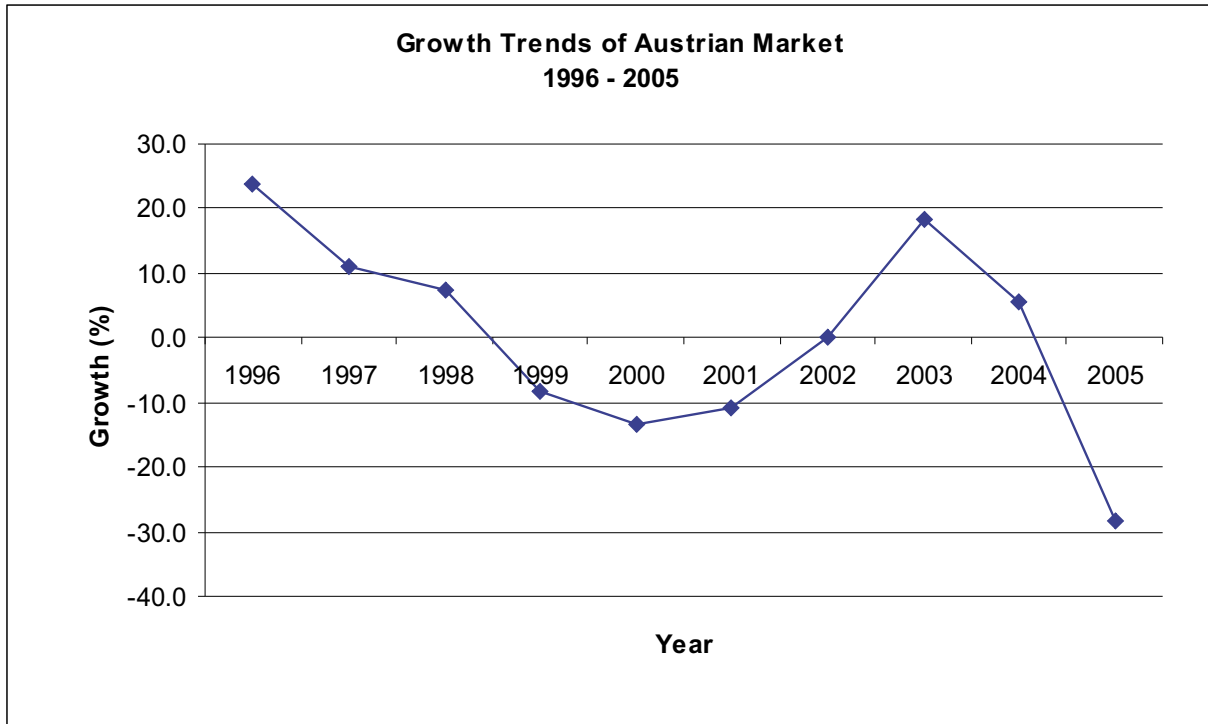


Figure 10



10. Austria

Austria, with its well-developed market economy and high standard of living, is closely tied to other EU economies, especially Germany. Austria is the 4th richest country within the European Union having a GDP (PPP) per capita of approximately 33,000 USD, with Luxembourg, Ireland and Denmark leading the list. Tourism is an important part of Austria’s services sector. Tourism is a principal industry and a source of foreign exchange. In fact, Austria’s per capita tourist revenue is the highest in the world.

Table 20: Tourist Arrivals from Austria 1996 - 2005

Year	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Arrivals	12,388	13,758	14,775	13,550	11,725	10,476	10,480	12,391	13,059	9,358
Market Share (%)	3.7	3.8	3.7	3.2	2.5	2.3	2.2	2.2	2.1	2.4

Source Data: Department of Immigration and Emigration

Tourist arrivals trend to Maldives from Austria has been irregular in the past 10 years. The market performance declined from 1996 till 2001. In 2002 it had a slight positive growth compared to the previous year. After having negative growth for almost 5 consecutive years, Austrian market performed very well in 2003 with a positive growth of 18%. However, in 2005 tourist arrivals dropped to -28.3%, reflecting the downturn following the tsunami of 2004.

Section 4 -Airline Statistics

In 2005, two major scheduled flights stopped their operation to the Maldives, namely Aeroflot and Air Europe - Italy. Furthermore, many scheduled flights reduced their frequencies into the country. However, two airlines, Krasair and Martin Air started operating scheduled flights to the Maldives in 2005. Martin Air stopped its scheduled flights in 2002 to the Maldives and started again in 2005.

The Number of charter flights into the Maldives in 2005 were also less compared to 2004. In 2004, a total of 20 charters operated to the Maldives, while in 2005 there were only 15 charter flights that brought tourists to the Maldives.

Table 21: Passenger Arrivals by Type of Carrier, 2001 - 2005

Type of Carrier	2001		2002		2003		2004		2005	
	Share	%	Share	%	Share	%	Share	%	Share	%
Scheduled	417,291	79.5	466,114	84.4	510,492	80.9	578,147	81.3	419,271	81.6
Chartered	107,903	20.5	85,852	15.6	120,334	19.1	133,241	18.7	94,525	18.4
Total	525,194	100.0	551,966	100.0	630,826	100.0	711,388	100.0	513,796	100.0

Source Data: Department of Civil Aviation

Table 22: Traffic by International Carriers, at Malé International Airport, 2001 - 2005

Operator	2001		2002		2003		2004		2005	
	No. of Movements	Passenger In	No. of Movements	Passenger In	No. of Movements	Passenger In	No. of Movements	Passenger In	No. of Movements	Passenger In
Scheduled International Flights	6,296	417,291	7,226	466,114	7,609	510,483	9,074	578,147	7,400	419,271
Aeroflot	22	868	60	2,196	46	2,340	54	3,320	-	-
Air Europe - Italy	182	21,194	438	55,705	556	64,546	400	48,491	-	-
Air Seychelles	8	155	216	2,621	244	3,803	384	5,343	44	785
Austrian Airlines	72	5,464	140	10,888	194	11,255	206	11,379	130	7,368
Bangkok Airways	-	-	-	-	-	-	50	1,333	26	359
Belair	150	13,416	-	-	-	-	-	-	-	-
Condor	272	27,690	222	24,749	226	25,480	228	25,695	220	23,060
Czech Airlines	-	-	-	-	-	-	4	19	28	147
Emirates	1,167	55,641	1,241	74,563	1,250	87,438	1,656	99,045	1,390	74,411
Eurofly	312	29,450	246	25,961	354	37,793	446	52,974	372	39,317
Indian Airlines	585	35,146	735	38,338	734	37,640	734	42,036	736	45,678
Krasair	-	-	-	-	-	-	-	-	12	772
Kuwait Airways	-	-	2	24	24	139	-	-	-	-
L. T. U	504	41,733	380	37,487	324	40,963	340	39,858	306	29,068
Lauda Air - Italy	158	16,803	170	19,050	100	10,174	98	9,365	98	10,700
Lauda Air - Vienna	72	4,641	14	790	4	320	-	-	-	-
Malaysia Airlines	213	14,347	207	13,743	210	11,905	208	14,090	288	16,822
Martin Air	26	888	-	-	-	-	-	-	18	802
Qatar Airways	12	396	435	16,637	569	22,192	740	31,409	722	31,768
Singapore Airlines	728	50,067	730	51,365	602	50,834	540	62,699	404	35,916
Srilankan Airlines	1,691	99,392	1,734	91,997	1,756	103,661	2,500	131,091	2,176	102,298
Srilankan Airlines (Cargo)	-	-	-	-	204	0	296	0	350	0
Expo Aviation (Cargo)	122	0	256	0	212	0	190	0	80	0

Operator	2001		2002		2003		2004		2005	
	No. of Movements	Passenger In	No. of Movements	Passenger In	No. of Movements	Passenger In	No. of Movements	Passenger In	No. of Movements	Passenger In
International Charters	770	107,903	596	85,852	922	120,334	1,123	125,919	742	92,707
Aeris	-	-	4	341	36	2,837	-	-	-	-
Air 2000/First Choice Airways	54	7,966	54	7,804	54	7,759	58	7,168	62	7,053
Air Europe (Italy)	144	21,536	-	-	-	-	-	-	-	-
Air Italy	-	-	-	-	-	-	-	-	2	212
Air Luxor	-	-	-	-	40	4,283	2	0	-	-
Air Plus Comet	-	-	-	-	-	-	36	3,130	-	-
Air Slovakia	-	-	-	-	22	807	46	1,455	-	-
Air Tours International	56	8,095	34	5,721	-	-	-	-	-	-
AOM - Minerve	34	2,411	-	-	-	-	-	-	-	-
Belair	4	353	52	4,723	52	5,883	52	5,269	24	1,662
Blue Panorama Airlines	-	-	8	1,044	136	14,566	38	3,555	12	733
Britannia Airways/Thomson Fly	-	-	-	-	18	2,645	50	6,358	50	6,528
Cathay Pacific	-	-	-	-	-	-	14	1,126	-	-
City Bird	14	486	-	-	-	-	-	-	-	-
Corse Air International	42	6,538	50	8,443	40	9,784	40	4,850	20	3,194
Domodedovo Airlines	-	-	-	-	-	-	12	530	4	234
Eagle Aviation	-	-	-	-	-	-	14	729	-	-
Edelweiss	154	21,406	170	22,721	168	21,096	166	19,779	122	14,447
Kras Air	-	-	-	-	-	-	51	1,225	20	535
Lauda Air - Italy	76	8,348	-	-	-	-	-	-	-	-
LTE International Airways	-	-	36	2,750	-	-	-	-	-	-
Malev - Hungarian Airlines	-	-	-	-	2	189	12	798	4	139
Monarch Airlines	192	30,764	156	27,897	174	30,291	264	41,523	214	35,945
My Travel Airways	-	-	18	3,071	52	8,487	52	7,957	16	2,139
Neos Spa	-	-	-	-	-	-	6	225	96	10,732
Star Airlines	-	-	-	-	20	3,557	56	9,179	4	623
Transaero Airlines	-	-	14	1,337	82	6,992	122	10,019	92	8,531
Travel Services	-	-	-	-	22	791	32	1,044	-	-
Volare	-	-	-	-	4	367	-	-	-	-
Other Internationals	625	5,240	633	5,493	645	5,560	849	7,322	983	1,818
Total	7,691	530,434	8,455	557,459	9,176	636,377	11,046	711,388	9,125	513,796

Source: Civil Aviation Department
Ministry of Tourism & Civil Aviation

Table 23: Percentage Share of Passenger Arrivals by International Carriers, 2001 - 2005

Operator	2001	2002	2003	2004	2005
Scheduled International Flights	78.7	83.6	80.2	81.3	81.6
Aeroflot	0.2	0.4	0.4	0.5	-
Air Europe -Italy	4.0	10.0	10.1	6.8	-
Air Seychelles	0.0	0.5	0.6	0.8	0.2
Austrian Airlines	1.0	2.0	1.8	1.6	1.4
Bangkok Airways	-	-	-	0.2	0.1
Belair	2.5	-	-	-	-
Condor	5.2	4.4	4.0	3.6	4.5
Czech Airlines	-	-	-	0.0	0.0
Emirates	10.5	13.4	13.7	13.9	14.5
Eurofly	5.6	4.7	5.9	7.4	7.7
Indian Airlines	6.6	6.9	5.9	5.9	8.9
Krasair	-	-	-	-	0.2
Kuwait Airways	-	0.0	0.0	-	-
L. T. U	7.9	6.7	6.4	5.6	5.7
Lauda Air - Italy	3.2	3.4	1.6	1.3	2.1
Lauda Air - Vienna	0.9	0.1	0.1	-	-
Malaysia Airlines	2.7	2.5	1.9	2.0	3.3
Martin Air	0.2	-	-	-	0.2
Qatar Airways	0.1	3.0	3.5	4.4	6.2
Singapore Airlines	9.4	9.2	8.0	8.8	7.0
Srilankan Airlines	18.7	16.5	16.3	18.4	19.9
Srilankan Airlines (Cargo)	-	-	0.0	0.0	0.0
Expo Aviation (Cargo)	0.0	0.0	0.0	0.0	0.0
International Charters	20.3	15.4	18.9	17.7	18.0
Aeris	-	0.1	0.4	-	-
Air 2000/First Choice Airways	1.5	1.4	1.2	1.0	1.4
Air Europe (Italy)	4.1	-	-	-	-
Air Italy	-	-	-	-	0.0
Air Luxor	-	-	0.7	0.0	-
Air Plus Comet	-	-	-	0.4	-
Air Slovakia	-	-	0.1	0.2	-
Air Tours International	1.5	1.0	-	-	-
AOM - Minerve	0.5	-	-	-	-
Belair	0.1	0.8	0.9	0.7	0.3
Blue Panorama Airlines	-	0.2	2.3	0.5	0.1
Britannia Airways/Thomson Fly	-	-	0.4	0.9	1.3
Cathay Pacific	-	-	-	0.2	-
City Bird	0.1	-	-	-	-
Corse Air International	1.2	1.5	1.5	0.7	0.6
Domodedovo Airlines	-	-	-	0.1	0.0
Eagle Aviation	-	-	-	0.1	-
Edelweiss	4.0	4.1	3.3	2.8	2.8
Kras Air	-	-	-	0.2	0.1
Lauda Air - Italy	1.6	-	-	-	-
LTE International Airways	-	0.5	-	-	-
Malev - Hungarian Airlines	-	-	0.0	0.1	0.0
Monarch Airlines	5.8	5.0	4.8	5.8	7.0
My Travel Airways	-	0.6	1.3	1.1	0.4
Neos Spa	-	-	-	0.0	2.1
Star Airlines	-	-	0.6	1.3	0.1
Transaero Airlines	-	0.2	1.1	1.4	1.7
Travel Services	-	-	0.1	0.1	-
Volare	-	-	0.1	-	-
Other Internationals	1.0	1.0	0.9	1.0	0.4
Total	100.0	100.0	100.0	100.0	100.0

Source: Civil Aviation Department
Ministry of Tourism & Civil Aviation

Table 24: Traffic by Domestic carriers, at Malé International Airport, 2001 - 2005

Operator	2001		2002		2003		2004		2005	
	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										
Air Equator	-	-	-	-	-	-	256	3,076	175	2,263
Island Aviation Services	3,113	28,612	3,565	39,198	3,674	41,161	4,535	45,754	5,470	55,694
Maldivian Air Taxi	24,093	191,263	21,288	192,042	28,295	166,549	34,762	163,048	25,150	136,569
Ocean Air	615	8,065	65	399	-	-	-	-	-	-
Trans Maldivian Airways	12,659	60,828	15,955	48,868	17,733	77,855	21,186	109,144	14,753	63,950
Other Domestic *	878	0	832	0	847	0	1,347	0	1,443	0
Total	41,358	288,768	41,705	280,507	50,549	285,565	62,086	321,022	46,991	258,476

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

Source: Civil Aviation Department
Ministry of Tourism & Civil Aviation

Section 5 - Economic Indicators of Tourism

Revenue from Tourism is the major source of foreign currency earnings to the country. Tourist bed tax and lease rent from resorts account for most part of the revenue from tourism.

The percent share of tourism revenue to the Government revenue has been declining since 2002 with 32.9% in 2002 to 20.1% in 2005.

Table 25: Tourism Revenue and Tax, 2001 - 2005 (Million Rufiyaa)

Year	Government Revenue	Tourism Revenue	% Share of Tourism Revenue	Tourism Tax	% Share of Tourism Tax to Tourism Revenue
2001	2,310.90	715.85	31.0	292.70	40.9
2002	2,714.90	892.10	32.9	305.25	34.2
2003	3,061.80	899.65	29.4	359.80	40.0
2004	3,424.70 _/	921.47	26.9	409.50	44.4
2005	4,542.60 *	911.80	20.1	345.20	37.9

Note:

_/ Revised

* Budget Estimates

Source:

Ministry of Finance & Treasury
Department of Inland Revenue

Tourism contribution to GDP has been increasing steadily over the years. However, due to the decline in tourist arrivals in 2005 the tourism contribution to GDP has also declined from 33.5% in 2004 to 22.7% in 2005.

Table 26: Tourism Contribution to GDP, 2000 - 2004 (Million Rufiyaa, at 1995 constant prices)

Year	GDP	GDP Growth %	Tourism Contribution	% Share of Tourism Contribution
2001	6,564.40	3.4	2,093.50	31.9
2002	6,849.90	4.3	2,162.40	31.6
2003	7,581.10	4.2	2,479.02	32.7
2004	8,248.80	8.8	2,763.35	33.5
2005	7,934.00	-3.8	1,798.10	22.7

Source:

Ministry of Planning & National Development

Tourism receipts refer to the expenditure made by tourist, which is associated with tourist bed nights, duration of stay and room rates in resorts. Tourism receipts grew significantly in 2003 and 2004 by 26.1 % and 17.3% respectively. However, in 2005 it showed a decline of 39.2% compared to the previous year. As it is related to tourist arrivals the decline in tourism receipts was due to the decline in arrivals that year.

Table 27: Tourism Receipts and Growth Rates 2001 - 2005 (Million US Dollars)

Year	Tourism Receipts	Growth Rate (%)	Exports, FOB	Imports, CIF
2001	327.10	2.0	72.9	369.0
2002	318.40	-2.7	90.4	390.2
2003	401.60	26.1	112.5	469.0
2004	470.90 *	17.3	122.4	639.3
2005	286.50	-39.2	103.8	742.0

Note: * Revised

Source:

Maldives Monetary Authority
Maldives Customs Services

With the decline in tourist arrivals, extra effort was needed to bring back the industry to the pre-tsunami level. Intensive marketing campaigns were needed. To boost tourist arrivals after the tsunami, the Government increased marketing and promotion budget.

Table 28: Government Expenditure on Tourism 2001 - 2005 (Million Rufiyaa)

Year	Government Expenditure	Tourism Expenditure	% Share of Tourism Expenditure
2001	2,912.10	31.40	1.1
2002	3,117.30	35.90	1.2
2003	3,428.40	37.50	1.1
2004	3,582.60 _/	56.30 _/	1.6
2005	5,739.90 *	90.60 *	1.6

Note:

_/ Revised

* Budget Estimates

Source:

Ministry of Finance and Treasury

Section 6 - Tourism Highlights 2005

New Portfolios

On 14th July 2005, the former Ministry of Tourism was renamed the Ministry of Tourism and Civil Aviation. The expansion of the mandate of the Ministry to include civil aviation will help in increasing and expanding the air-connectivity that is so important for the tourism industry.

Dr. Mahmood Shougee was sworn in as the new Minister of Tourism & Civil Aviation on 14th July 2005. Dr. Shougee who was the former Minister of Education expressed keen interest to work with the tourism sector and stated that he will fully support the interests of the tourism industry as it emerges from set-backs resulting from the December 2004 tsunami.

Mr. Abdul Hameed Zakariyya was appointed as the Deputy Minister of Tourism & Civil Aviation soon after Shougee's appointment.

Mr. Mohamed Saeed, former Deputy Minister of Tourism, was appointed as the Minister of Transport and Communication on 14th July 2005. Mr. Saeed had been the Deputy Minister of Tourism since October 1996 and during nearly a decade of service as the Deputy Minister of Tourism, he had made invaluable contribution to the tourism sector of the Maldives.

President Clinton meets with Maldivian Corporate Representatives

United Nations' Secretary General's Special Envoy for Tsunami Recovery, former President of the United States, Bill Clinton, met with representatives of the Maldivian corporate community at Kurumba Maldives on 29th May 2005.

At the meeting with Mr. Clinton, tourism industry representatives discussed the financing and investment issues facing the tourism industry as a result of post-tsunami reconstruction and marketing requirements.

Discussions were also held on the future of the Maldivian tourism industry. Issues discussed included product diversification to cater for new markets, such as by offering health tourism products for the retired market, the importance of utilizing renewable energy systems in tourist resorts and the importance of knowledge and technology transfer for better human resource development and training.

The tourism industry was represented by the Minister of Tourism, Dr. Mustafa Lutfi, Chairman of MATI, Mr. Mohamed Umar Maniku and the Secretary General of MATI, Mr. Sim Ibrahim Mohamed.

Ministry of Tourism Hosts Post-Tsunami Review Seminar

The tourism sector banded together to develop a series of actions that would improve the safety of visitors and called for increased Government support for the country's tourism industry, that was badly hit by the tsunami of 2004.

In an impressive display of unity, some 150 representatives of resorts, tour operators, aviation companies, travel agencies and Government officials concluded a Post Tsunami Review Seminar at the Dharubaaruge. Results of the meeting and a series of four preparatory workshops were to go on to form the basis for a Crisis Management Plan for the tourism sector.

The tsunami has caused an estimated US\$300 million in losses to the tourism sector, including structural damage to resorts and lost revenues from the downturn in visitors.

Among the action areas identified in the seminar were:

- Safeguarding Malé International Airport with additional protection for the runway and navigational equipment, back up communication systems and emergency supplies of first aid, food, water and blankets.
- Improving telecommunication means among resorts, tour operators, emergency agencies and all the country's airports, by installing back up systems to be used in case of failure of the microwave based telephone network.
- Enhancing Early Warnings by speeding up alerts, broadcasting them in various languages and providing more detailed instructions on what to do in case disaster strikes.
- Upgrading resort safety plans with satellite communication systems, emergency supplies, safe disaster shelters, evacuation plans and staff training.
- Recovering visitor confidence by boosting communications on safety improvements and by launching an aggressive promotional campaign in major generating markets.
- Providing sectoral relief through fiscal measures that help tourism businesses survive the crisis recovery period and encourage new investment in the tourism sector.

While the Maldives tourism industry had prospered in the past 30 years with good planning, contributing significantly to national development, participants agreed that the time had come to seek increased Government assistance to make sure that the future would be equally bright.

New Developments

Hotel at Gnaviyani Atoll Fuvahmulah

The Ministry of Tourism & Civil Aviation called for interested bidders to submit bids for the development of a 50 - 200 bed resort at Fuvahmulah, Gnaviyani Atoll, on 19 October 2005. It was decided that the initial bed capacity of the hotel could start from 50. Deadline to submit bids was 21st November 2005. A pre-bid meeting was held on 7 November 2005 at Nasandhura Palace Hotel. Bids received for this hotel was opened on 21 November 2005. These bids were evaluated by a special committee and the successful bidder was issued with the notification award on 27 November 2005. One and Half Degree Maldives Pvt. Ltd. won the bid for this resort.

Resort at Hankede, Seenu Atoll

Development of a resort in Addu Atoll Hankede was announced and bids for it invited on 26th October 2005. A pre-bid meeting was held on 15th November 2005. A total of 19 bids were received on 30th November 2005. Thoodu Pvt. Ltd won the bid.

11 New Islands Awarded in 2005

No.	Island	Beds	Winner
1	HA. Alidhoo	200	Tranquility Pvt. Ltd, Maldives
2	HDh. Hondaafushi	200	Mr. Abdulla Ali, H. Girithereyge, Male', Maldives
3	Sh. Dholhiyadhoo	200	Mr. Mohamed Latheef, H. Baraboomaage, Male', Maldives
4	N. Randheli	100	Malaky Hotels and Resorts Pvt. Ltd, Maldives
5	N. Maavelavaru	100	Big Island Resort Pvt.Ltd, Maldives
6	Th. Kalhufahalafushi	200	Mr. Shabeer Ahmed, H. Millennia, Male', Maldives
7	L. Oihuveli	200	Mr. Mohamed Ibrahim Didi, Neeravali, Gn. Fuvahmulah, Maldives
8	GA. Funamaudua	100	Summer Season Maldives Pvt. Ltd, Maldives
9	GA. Hadahaa	100	Driftwood Maldives Pvt.Ltd, Maldives
10	GDh. Konotta	100	Crystal Lagoon Resorts Pvt.Ltd, Maldives
11	GDh. Lonudhuahutta	100	One and Half Degree Maldives Pvt. Ltd, Maldives

Source: Ministry of Tourism & Civil Aviation

Marketing & Promotion Activities 2005

::Introduction

The year 2005 was a year of recovery for Maldivian tourism following the negative effects associated with the Tsunami of 26 December 2004. A survey made by VISA/PATA at the end of August 2005 reported that Maldives was one of the destinations that suffered the most because of the tsunami with a decrease of visitor arrivals of – 46,9% (January- July 2005) with key tour operators announcing a decrease of bookings in the Indian Ocean destinations. Hence, all efforts from the Maldives Tourism Promotion Board concentrated on reviving the consumer confidence and tourist arrival from all major markets as well as potential and emerging markets.

In an effort to overcome any further negative impacts resulting from the aftermath of the Tsunami, MTPB, with the full cooperation and support from the private tourism industry initiated a vigorous marketing campaign including public relations and media activities during the year 2005 in all major and emerging markets targeting consumers and travel trade. The following promotional activities were organised in 2005 in this regard.

Media and Travel Trade familiarization trips:

The majority of promotional efforts during the early months of 2005 were aimed at modifying any wrong perceptions the travelers may have and reviving tourist arrival numbers by emphasizing that the Maldives is still one of the unique natural island destinations of the world. Over 195 international media and travel trade familiarization visits were organised by the MTPB in the major international markets as well as potential and emerging markets. It is estimated that more than 350 familiarisation tours were organised in total with the initiation and sponsorship by private parties in the tourism industry.

List of International Awards received by resorts / travel agents / vessels / dive bases & dive sites 2005

	Awarded to	Name of Award	Type	Organisation / Publication that presented the Award
1	Angaga Island Resort & Spa	Best Diving School Award of 2004	voted by readers	Tauchen Magazine, Germany
2	Coco Palm Resort & Spa (Dhunikelhu)	Best Resort Overseas		The Dive Travel Awards
3	Coco Palm Resort & Spa (Dhunikelhu)	Second Best Water Villa	Voted by readers, Marine Diving Magazine	The Dive Travel Awards
4	Coco Palm Resort & Spa (Dhunikelhu)	Third Best Beach, Overseas	Voted by readers, Travel Diver	The Dive Travel Awards
5	Coco Palm Resort & Spa (Dhunikelhu)	Sixth Best Snorkelling Area, Overseas	Voted by readers, Marine Photo	The Dive Travel Awards
6	Maldives	Best Diving Area, Overseas	Readers' choice	Dive & Travel Awards
7	Maldives	Best Resort Area, Overseas	Readers' choice	Dive & Travel Awards
8	Maldives	Dreaming Area	Readers' choice	Dive & Travel Awards
9	Maldives	Runner – Up, Favourite Island	Readers' Travel Awards	Conde Nast Travellers (UK)
10	Maldives	Indian Ocean's Leading Destination		World Travel Awards
11	MTPB	region's Leading Tourist & Convention Bureau		World Travel Awards
12	Male' International Airport	Indian Ocean's Leading Airport		World Travel Awards
13	One&Only Kanuhura	Leading Maldives Hotel		World Travel Awards
14	Soneva Fushi	Indian Ocean's Leading Spa Resort		World Travel Awards
15	Hilton Rangali Island	Best Hotel Worldwide		Sunday Times Travel Awards

Promotional fairs:

MTPB and representatives of the tourism industry participated in the following tourism fairs to create a strong presence of Maldives as a premium holiday destination by reviving current strongholds and establishing new partnerships in the respective markets.

	Name of Fair	City/Country	Dates	Type of Fair
1	Vakantiebeurs	Utrecht, Netherlands	11 - 16 January	Trade & Consumer
2	Fitur	Madrid, Spain	26 - 30- January	Trade & Consumer
3	BIT	Milan, Italy	12 -15 February	Trade & Consumer
4	ITB (Internationale Tourismus-Börse/ International Tourism-Exchange)	Berlin, Germany	11-15 March	Trade & Consumer
5	MITT	Moscow, Russia	23 -26 March	Trade & Consumer
6	Marine Diving Fair	Tokyo, Japan	1 - 3 April	Dive
7	Arab Travel Market	Dubai, U.A.E	3 - 6 May	Trade & Consumer
8	ITE , Hong Kong	Hong Kong	9 - 12 June	Trade & Consumer
9	Tour Expo	Osaka, Japan	14-16 July	
10	JATA World Travel Fair	Yokohama, Japan	22 - 24 September	Trade & Consumer
11	Top Resa	Deauville, France	22 - 24 September	Trade
12	World Travel Market	London, UK	14 -17 November	Trade & Consumer
13	China International Travel Mart (CITM)	Kunming, China	24 - 27 November	Trade & Consumer
14	(International Luxury Travel Market ILTM)	Cannes, France	5-8 December	Luxury Travel Trade

Participation by Maldives Government Tourist Information Office (MGTIO) in Frankfurt

	Name of Fair	City/Country	Dates	Type of Fair
1	Boot	Dusseldorf, Germany	15-23 January	Dive
2	L'Tur Travel Market	Baden Baden, Germany	23-Apr	Trade
3	IMEX (Exhibition for Incentive Travel)	Frankfurt, Germany	19 - 21 April	Incentive Travel (Meetings & Events)
4	TTG INCONTRI	Riva del Garda, Italy	14 - 16 October	Trade
5	Travel Trade Workshop (TTW)	Montreux, Switzerland	25 - 27 October	Trade
6	LTU Reisesommer 2006	Bonn, Germany	27-31 October	Trade
7	Thomas Cook/Neckermann Fair	Frankfurt, Germany	12 - 13 November	Trade only
8	Reisemarket Koln International	Koln, Germany	25 - 27 November	Trade & Consumer

Advertising

The Maldives was advertised and featured in advertorials in over 37 international magazines in major and emerging markets targeting travel, weddings, honeymoon, diving, spa, and MICE audiences.

An aggressive advertising campaign of Maldives was run on CNN, BBC international, Sky News, National Geographic Channel Europe, and A1 Europe throughout the year 2005. Other global advertising promotions include inserting the Maldives 30 second video advertisement in major channels in the UK, United Airlines, BBC website, and BBC World Weather.

Billboards were also used as an effective marketing tool for promoting the destination in major events in main markets such as ITB in Berlin, BIT in Milan, and Paris, as well as in transit centres such as Colombo International Airport, London underground tube panels and on jumbo trams in Italy.

Several advertising campaigns were also organised jointly with major tour operators in main markets such as Thomas Cook - Germany, Kuoni UK and Kuoni France.

Travel trade and media promotions

Several product seminars and road shows targeting travel trade and media professionals were organised in all major markets as well as in potential and emerging markets with the intention of providing the latest updates about the Maldivian tourism industry to the relevant stakeholders.

Special events

The internationally acclaimed O'neill Deep Blue Open World Qualifying Series was organised in the Maldives in June to create international awareness about the Maldives as a surfing destination and to create positive publicity about the uniqueness of the island nation.

Promotional material

The Maldives Visitor's Guide was produced in English, German, Italian, Spanish, Russian, and French language with the aim of disseminating high quality information with respect to the consumer profile of each individual market.

Website

The official website of Maldives www.visitmaldives.com was launched 8 different languages in December 2005 to provide the most comprehensive and up to date information of the Maldives tourism for interested visitors and trade partners.

Section 7 - Tourism Awards

President of Maldives Green Resort Award

His Excellency the President Maumoon Abdul Gayyoom while addressing the nation during the commemoration of the World Tourism Day 1997 and Visit Maldives Year 1997 to celebrate 25 years of sustainable development of tourism in the country, emphasized the need for environmental protection in the tourism industry. In the same meeting, an annual award by the President of the Maldives for the most environmentally outstanding tourist resort was announced by the Minister of Tourism.

The President of Maldives Green Resort Award aims to generate environmental awareness, encourage development and operation of environment friendly tourist resorts and thereby facilitate sustainable tourism development in the Maldives.

Table 29: President of Maldives Green Resort Award Winners, 1999 - 2005

Year	Resort
1999	Sun Island Resort (A.Dh. Nalaguraidhoo)
2000	Sonevafushi Resort & Spa (B. Kunfunadhoo)
2001	Coco Palm Resort & Spa (B.Dhunikolhu)
2002	Angsana Resort & Spa (K. Ihuru)
2003	Sun Island Resort (A.Dh. Nalaguraidhoo)
2004	Banyan Tree Maldives (K. Vabbinfaru)
2005	Sonevafushi Resort & Spa (B. Kunfunadhoo)

Source: Ministry of Tourism & Civil Aviation

President of Maldives Human Resource Award

In tourism, one of the most important assets is human resources. Well trained hosts can enhance the holiday experiences of guests. Qualified resource managers can make a difference to the bottom-line. Hence, the importance of human resources cannot be over emphasized. But to get the best out of this valuable resource investments are necessary. Continuous training and progressive improvements in staff wellbeing is essential. Recognizing the importance of human resources, the Government established in the year 2000 a prestigious annual award, to offer recognition to tourist establishments which undertake the best initiatives and programmes to develop human resources.

All resorts may contest for this award. The applicants are evaluated on two major criteria;

1. The training component
2. Human resource development efforts other than training.

Table 30: President of Maldives Human Resource Award Winners, 2001 - 2005

Year	Resort
2001	Four Seasons Resort Maldives at Kuda Huraa
2002	Four Seasons Resort Maldives at Kuda Huraa
2003	Bandos Island Resort
2004	Four Seasons Resort Maldives at Kuda Huraa
2005	Laguna Beach Resort

Source: Ministry of Tourism & Civil Aviation

President of Maldives Occupancy Award

The main objective of the President of Maldives Occupancy Award is to recognize the market performance of the tourism industry in the country. It was first initiated in the year 1995 and thereafter it has been presented annually. This prestigious award possesses the pride of being the first award given by the President of Maldives to the tourism industry.

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

1. Resorts / Hotels with beds less than 100
2. Resorts / Hotels with beds between 100 and 199
3. Resorts / Hotels with beds over 200

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

Table 31: President of Maldives Occupancy Award Winners, 1995 - 2004

Year	Resort/Hotel with beds less than 100			Resort/Hotel with beds between 100 - 199			Resort/Hotel with beds over 200		
	Name	Beds	Occ. Rate	Name	Beds	Occ. Rate	Name	Beds	Occ. Rate
1995	Thundufushi Island Resort	84	98.7	Veligandu Island Resort	110	96.0	Fun Island Resort	200	93.0
1996	Mirihi Marina Luxury Resort	70	102.7	Alimatha Aquatic Resort	140	94.5	Rangali Island Resort	200	92.1
1997	Mirihi Marina Luxury Resort	70	99.5	Veligandu Island Resort	110	108.4	Holiday Island	284	95.4
1998	Mirihi Marina Luxury Resort	70	91.2	Reethi Rah Resort	120	106.1	Fun Island Resort	200	96.4
1999	Athuruga Island Resort	92	97.8	Lily Beach Resort	154	100.3	Kandooma Tourist Resort	206	94.4
2000	Dhiggiri Tourist Resort	90	88.3	Lily Beach Resort	170	94.5	Vilamendhoo Island Resort	282	89.2
2001	Athuruga Island Resort	92	77.9	Vilu Reef Resort	136	101.4	Meeru Island Resort	454	91.6
2002	Athuruga Island Resort	92	86.4	Vilu Reef Beach & Spa Resort	136	94.9	Meeru Island Resort	454	99.9
2003	Athuruga Island Resort	92	83.5	Veligandu Island	146	99.8	Alimatha Aquatic Resort	204	98.5
2004	Thundufushi Island Resort	94	93.7	Thulhaagiri Island Resort	138	98.6	Velidhoo Island Resort	200	95.7

Source: Ministry of Tourism & Civil Aviation

Section 8 - Annex

Annex 1

Tourist Arrivals by Selected Markets, 2001 - 2005

By Nationality	2001	2002	2003	2004	2005
Europe	364,105	373,428	443,093	475,707	306,856
Austria	10,494	10,480	12,391	13,059	9,358
Belgium	3,719	2,606	2,795	3,085	1,595
Denmark	891	938	1,073	1,256	1,095
Finland	304	388	614	788	357
France	30,542	31,228	41,055	46,156	21,640
Germany	66,149	63,212	70,762	72,967	55,782
Greece	1,775	2,446	2,287	2,949	1,703
Italy	115,740	114,955	140,304	131,044	70,115
Netherlands	4,097	4,662	5,047	6,639	4,151
Norway	577	772	987	1,331	1,141
Portugal	3,526	2,785	3,379	3,608	2,238
Russia	3,983	7,550	12,108	18,075	14,582
Spain	4,203	5,160	6,323	7,561	3,510
Sweden	2,112	1,749	1,940	2,482	1,318
Switzerland	28,313	31,707	30,787	29,252	19,321
United Kingdom	77,151	80,377	93,989	113,991	87,264
Other countries	10,529	12,413	17,252	21,464	11,686
Asia	80,825	94,986	101,806	117,008	71,902
Bangladesh	321	241	313	667	643
China	7,342	12,092	15,021	20,599	11,609
India	8,511	11,377	11,502	10,999	10,260
Japan	41,895	43,705	42,081	46,939	23,269
Korea	6,708	7,696	8,417	9,672	6,543
Malaysia	1,478	2,240	2,251	2,908	2,366
Pakistan	1,017	1,329	1,942	1,529	565
Philippines	346	405	376	499	940
Singapore	2,227	2,520	4,653	3,016	3,258
Sri Lanka	6,902	6,909	7,296	8,351	7,165
Thailand	1,350	2,002	3,009	3,289	1,114
Other countries	2,728	4,470	4,945	8,540	4,170
Africa	2,060	3,002	3,984	5,325	3,460
South Africa	1,368	1,914	2,929	3,846	2,392
Other countries	692	1,088	1,055	1,479	1,068
Americas	6,814	7,489	7,665	9,390	7,244
Argentina	148	93	113	148	78
Canada	1,442	1,569	1,649	2,069	1,426
U.S.A	4,435	5,030	5,005	5,999	4,833
Other countries	789	797	898	1,174	907
Oceania	7,180	5,775	7,045	9,286	5,858
Australia	6,435	5,063	6,110	8,216	5,087
New Zealand	672	633	754	993	697
Other countries	73	79	181	77	74
Global Total	460,984	484,680	563,593	616,716	395,320

Source Data: Department of Immigration and Emigration

Annex 2

Growth Trends of Selected Markets, 2001 - 2005 (Percent)

By Nationality	2001	2002	2003	2004	2005
Europe	0.5	2.6	18.7	7.4	-35.5
Austria	-10.5	-0.1	18.2	5.4	-28.3
Belgium	-26.7	-29.9	7.3	10.4	-48.3
Denmark	15.4	5.3	14.4	17.1	-12.8
Finland	-13.1	27.6	58.2	28.3	-54.7
France	11.0	2.2	31.5	12.4	-53.1
Germany	-14.8	-4.4	11.9	3.1	-23.6
Greece	-0.1	37.8	-6.5	28.9	-42.3
Italy	8.7	-0.7	22.1	-6.6	-46.5
Netherlands	-43.7	13.8	8.3	31.5	-37.5
Norway	-38.9	33.8	27.8	34.9	-14.3
Portugal	-17.5	-21.0	21.3	6.8	-38.0
Russia	10.4	89.6	60.4	49.3	-19.3
Spain	-21.0	22.8	22.5	19.6	-53.6
Sweden	-5.5	-17.2	10.9	27.9	-46.9
Switzerland	15.4	12.0	-2.9	-5.0	-33.9
United Kingdom	8.0	4.2	16.9	21.3	-23.4
Other countries	-6.5	17.9	39.0	24.4	-45.6
Asia	-6.6	17.5	7.2	14.9	-38.5
Bangladesh	0.0	-24.9	29.9	113.1	-3.6
China	36.5	64.7	21.1	37.1	-43.6
India	-19.8	33.7	1.1	-4.4	-6.7
Japan	-11.2	4.3	-3.7	11.5	-50.4
Korea	16.2	14.7	9.4	14.9	-32.4
Malaysia	-19.2	51.6	0.5	29.2	-18.6
Pakistan	-3.1	30.7	46.1	-21.3	-63.0
Philippines	9.1	17.1	-7.2	32.7	88.4
Singapore	-12.0	13.2	84.6	-35.2	8.0
Sri Lanka	-18.0	0.1	5.6	14.5	-14.2
Thailand	34.1	48.3	50.3	9.3	-66.1
Other countries	27.2	57.2	18.8	72.7	-51.2
Africa	-10.9	45.7	32.7	33.7	-35.0
South Africa	-22.6	39.9	53.0	31.3	-37.8
Other countries	27.2	57.2	-3.0	40.2	-27.8
Americas	-4.1	9.9	2.4	22.5	-22.9
Argentina	-15.9	-37.2	21.5	31.0	-47.3
Canada	9.6	8.8	5.1	25.5	-31.1
U.S.A	-7.5	13.4	-0.5	19.9	-19.4
Other countries	-3.9	1.0	12.7	30.7	-22.7
Oceania	-20.4	-19.6	22.0	31.8	-36.9
Australia	-20.5	-21.3	20.7	34.5	-38.1
New Zealand	-26.2	-5.8	19.1	31.7	-29.8
Other countries	386.7	8.2	129.1	-57.5	-3.9
Global Total	-1.3	5.1	16.3	9.4	-35.9

Source Data: Department of Immigration and Emigration

Annex 3

Market Share of Selected Markets, 2001 - 2006
(Percent)

By Nationality	2001	2002	2003	2004	2005
Europe	79.0	77.0	78.6	77.1	77.6
Austria	2.3	2.2	2.2	2.1	2.4
Belgium	0.8	0.5	0.5	0.5	0.4
Denmark	0.2	0.2	0.2	0.2	0.3
Finland	0.1	0.1	0.1	0.1	0.1
France	6.6	6.4	7.3	7.5	5.5
Germany	14.3	13.0	12.6	11.8	14.1
Greece	0.4	0.5	0.4	0.5	0.4
Italy	25.1	23.7	24.9	21.2	17.7
Netherlands	0.9	1.0	0.9	1.1	1.1
Norway	0.1	0.2	0.2	0.2	0.3
Portugal	0.8	0.6	0.6	0.6	0.6
Russia	0.9	1.6	2.1	2.9	3.7
Spain	0.9	1.1	1.1	1.2	0.9
Sweden	0.5	0.4	0.3	0.4	0.3
Switzerland	6.1	6.5	5.5	4.7	4.9
United Kingdom	16.7	16.6	16.7	18.5	22.1
Other countries	2.3	2.6	3.1	3.5	3.0
Asia	17.5	19.6	18.1	19.0	18.2
Bangladesh	0.1	0.0	0.1	0.1	0.2
China	1.6	2.5	2.7	3.3	2.9
India	1.8	2.3	2.0	1.8	2.6
Japan	9.1	9.0	7.5	7.6	5.9
Korea	1.5	1.6	1.5	1.6	1.7
Malaysia	0.3	0.5	0.4	0.5	0.6
Pakistan	0.2	0.3	0.3	0.2	0.1
Philippines	0.1	0.1	0.1	0.1	0.2
Singapore	0.5	0.5	0.8	0.5	0.8
Sri Lanka	1.5	1.4	1.3	1.4	1.8
Thailand	0.3	0.4	0.5	0.5	0.3
Other countries	0.6	0.9	0.9	1.4	1.1
Africa	0.4	0.6	0.7	0.9	0.9
South Africa	0.3	0.4	0.5	0.6	0.6
Other countries	0.2	0.2	0.2	0.2	0.3
Americas	1.5	1.5	1.4	1.5	1.8
Argentina	0.0	0.0	0.0	0.0	0.0
Canada	0.3	0.3	0.3	0.3	0.4
U.S.A	1.0	1.0	0.9	1.0	1.2
Other countries	0.2	0.2	0.2	0.2	0.2
Oceania	1.6	1.2	1.3	1.5	1.5
Australia	1.4	1.0	1.1	1.3	1.3
New Zealand	0.1	0.1	0.1	0.2	0.2
Other countries	0.0	0.0	0.0	0.0	0.0
Global Total	100.0	100.0	100.0	100.0	100.0

Source Data: Department of Immigration and Emigration

Annex 4

Seasonal Variations of Tourist Arrivals, 2001 - 2005 (Seasonal Indices)

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Seasonality Ratio
2001	131	128	131	125	77	67	92	101	83	81	79	105	1.3
2002	90	116	122	106	78	59	85	102	98	105	105	134	1.3
2003	116	121	120	104	66	57	81	103	96	103	109	124	1.2
2004	120	116	124	108	82	66	85	109	91	102	110	87	1.2
2005	57	89	108	90	77	69	91	116	102	123	135	142	1.4

Source Data: Department of Immigration and Emigration

Annex 5

Year	Arrivals	% change	Departure	% change
2001	41,307	-3.1	41,367	-2.3
2002	41,298	0.0	42,707	3.2
2003	43,199	4.6	44,091	3.2
2004	66,503	53.9	60,930	38.2
2005	72,831	9.5	76,977	26.3

Source Data:

Department of Immigration and Emigration

Annex 6

Graduates from Faculty of Hospitality & Tourism Studies 2001 - 2005

Year	Full Time Courses			Other Courses			Total
	Male	Female	Total	Male	Female	Total	
2001	10	2	12	206	43	249	261
2002	41	10	51	104	40	144	195
2003	104	33	137	200	54	254	391
2004	122	18	140	182	225	407	547
2005	90	28	118	104	110	214	332
Total	367	91	340	796	472	1,054	1,394

Note: Figures revised for 2003

Source: Faculty of Hospitality & Tourism Studies (FHTS)

Annex 7

Bed Capacity of Tourist Resorts & Distance from the Airport, 2001 - 2005

Name of the Resort	Atoll & Island Name	Year of Initial Operation	Airport Distance (Km)	Initial Bed Capacity	2001	2002	2003	2004	2005	
1	Alimatha Aquatic Resort	V. Alimatha	1975	48.0	20	204	204	204	204	260
2	Angaaga Island Resort	A.Dh. Angaga	1989	85.0	100	100	100	100	140	140
3	Angsana Resort & Spa Maldives, Ihuru	K. Ihuru	1978	17.0	20	90	90	90	90	90
4	Asdhu Sun Island	K. Asdhu	1981	32.0	36	60	60	60	60	60
5	Athurugau Island Resort	A.Dh. Athurugau	1990	90.0	79	92	92	92	98	98
6	Bandos Island Resort	K. Bandos	1972	8.0	220	450	450	450	450	450
7	Banyan Tree (Vabbinfaru)	K. Vabbinfaru	1977	12.0	24	96	96	96	96	96
8	Baros Holiday Resort	K. Baros	1973	16.0	56	150	150	150	150	150
9	Bathala Island Resort	A.A. Bathala	1983	48.3	20	90	90	90	90	90
10	Biyaadhu Island Resort	K. Biyaadhoo	1982	18.0	192	192	192	192	192	192
11	Club Faru, Farukolhufushi	K. Farukolhufushi	1973	2.0	112	304	304	304	304	304
12	Club Med Kanifinolhu	K. Kanifinolhu	1978	19.3	18	378	378	378	378	378
13	Club Rannalhi	K. Rannalhi	1978	2.0	34	232	232	232	232	232
14	Coco Palm Boduhithi	K. Boduhithi	1979	29.0	50	206	206	206	206	206
15	Coco Palm Dhunikolhu	B. Dhunikolhu	1998	124.0	192	200	200	200	200	200
16	Coco Palm Kudahithi	K. Kudahithi	1984	27.4	12	14	14	14	14	14
17	Cocoa Island	K. Makunufushi	1981	30.0	12	60	60	60	60	70
18	Dhigiri Tourist Resort	V. Dhigiri	1982	32.0	50	90	90	90	90	90
19	Dhigufinolhu Tourist Resort	K. Dhigufinolhu	1980	40.0	24	200	200	200	200	200
20	Dhonveli Beach & Spa Resort	K. Kanuoiy Huraa	1981	13.0	20	48	48	92	92	128
21	Dream Island Maldives	K. Villivaru	1981	29.0	120	120	120	120	120	120
22	Ellaidhu Tourist Resort	A.A. Ellaidhoo	1985	54.0	32	156	156	156	156	156
23	Emboodhu Village	K. Emboodhu	1979	8.0	44	236	236	236	236	236
24	Eriyadhu Island Resort	K. Eriyadhu	1982	40.0	40	114	114	114	114	114
25	Fihalhohi Island Resort	K. Fihaalhohi	1981	28.0	90	256	256	256	300	300
26	Filitheyo Island Resort	F. Filitheyo	1999	120.7	250	250	250	250	250	250
27	Four Seasons Resort Maldives at Kuda Huraa	K. Kuda Huraa	1977	12.9	32	212	212	212	212	212
28	Fullmoon Beach Resort	K. Furanafushi	1973	5.6	112	312	312	312	312	312
29	Fun Island Resort	K. Bodufinolhu	1980	38.0	44	200	200	200	200	200
30	Gangehi Island Resort	A.A. Gangehi	1987	77.2	50	50	50	50	50	50
31	Gasfinolhu Island Resort	K. Gasfinolhu	1980	23.0	18	80	80	80	80	80
32	Giraavaru Tourist Resort	K. Giraavaru	1980	11.3	40	132	132	132	132	132
33	Hakuraa Club	M. Hakuraa Huraa	1999	128.7	72	140	140	140	160	160
34	Halaveli Holiday Village	A.A. Halaveli	1982	36.0	30	112	112	112	112	112
35	Helengeli Tourist Resort	K. Helengeli	1979	46.7	20	100	100	100	100	100
36	Hilton Maldives Resort & Spa, Rangali Island	A.Dh. Rangalifinolhu	1992	96.6	80	296	304	304	304	304
37	Holiday Island	A.Dh. Dhiffushi	1994	93.0	284	284	284	284	284	284
38	Huvafenfushi	K. Nakatchafushi	1979	25.7	80	102	102	102	102	102
39	Island Hideaway at Dhonakulhi Maldives, Spa Resort, Dhonakulhi	R. Dhonakulhi	2005	250.0	50	-	-	-	-	50
40	Island of Bolifushi	K. Bolifushi	1982	12.0	64	110	110	110	110	110
41	Kandooma Tourist Resort	K. Kandoomafushi	1985	27.4	98	204	204	204	204	204
42	Kihaadhuffaru Resort	B. Kihaadhuffaru	1999	104.6	200	200	200	200	200	200
43	Komandoo Maldivian Island Resort	Lh. Komandoo	1998	128.7	90	90	90	90	90	120
44	Kudarah Island Resort	A.Dh. Kudarah	1991	88.5	50	60	60	60	60	60

Name of the Resort	Atoll & Island Name	Year of Initial Operation	Airport Distance (Km)	Initial Bed Capacity	2001	2002	2003	2004	2005	
45	Kuramathi Tourist Resort	A.A. Kuramathi	1977	56.3	48	548	580	580	580	580
46	Kuredhdhu Island Resort	Lh. Kuredhdhu	1978	128.7	18	600	600	600	660	660
47	Kurumba Maldives	K. Vihamanaafushi	1972	3.2	60	342	342	342	362	362
48	Laguna Beach Resort	K. Velassaru	1974	11.3	90	258	258	258	258	258
49	Lhohifushi Tourist Resort	K. Lhohifushi	1979	22.5	40	254	254	254	274	274
50	Lily Beach Resort	A.Dh. Huvahendhoo	1994	85.0	168	170	170	170	170	170
51	Maayafushi Tourist Resort	A.A. Maayafushi	1983	63.0	48	120	120	120	134	150
52	Machchafushi Island Resort	A.Dh. Machchafushi	1992	95.0	96	128	128	128	128	128
53	Madoogali Resort	A.A. Madoogali	1989	77.2	70	100	112	112	112	112
54	Makunudu Island	K. Makunudhu	1983	38.6	58	74	74	74	74	74
55	Medhufushi Island Resort	M. Medhufushi	2000	128.7	240	240	240	240	240	240
56	Meedhupparu Island Resort	R. Meedhupparu	2000	130.3	430	430	430	430	430	466
57	Meeru Island Resort	K. Meerufenfushi	1978	37.0	128	454	454	454	454	518
58	Mirihi Island Resort	A.Dh. Mirihi	1989	112.6	36	70	72	72	72	72
59	Moofushi Island Resort	A.Dh. Moofushi	1990	80.0	84	120	120	120	120	124
60	Nika Island Resort	A.A. Kudafolhudhu	1983	69.2	30	56	56	56	56	76
61	Olhuveli Beach & Spa Resort	K. Olhuveli	1979	51.5	36	250	250	250	250	268
62	One & Only Kanuhura, Maldives	Lh. Kanuhuraa	1999	125.5	200	200	200	200	200	200
63	One & Only Reethi Rah	K. Medhufinolhu	1979	64.4	24	120	120	120	120	264
64	Palm Beach Island	Lh. Madhiriguraidhoo	1999	128.7	200	200	200	200	200	200
65	Palm Tree Island	K. Veligandu Huraa	1986	27.0	32	112	112	112	112	112
66	Paradise Island Resort & Spa	K. Lankanfinolhu	1979	9.6	24	520	520	520	520	520
67	Raveli Village	A.Dh. Villingilivaru	1991	77.0	112	112	112	112	112	112
68	Reethi Beach Resort	B. Fonimagoodhoo	1998	104.6	200	200	200	200	200	200
69	Rihiveli Beach Resort	K. Mahaanaelhi Huraa	1980	40.2	40	100	100	100	100	100
70	Royal Island Resort & Spa	B. Horubadhoo	2001	110.0	304	304	304	304	304	304
71	Soneva Gili Resort & Spa	K. Lankanfushi	1980	9.7	12	88	88	88	88	94
72	Sonevafushi Resort	B. Kunfunadhoo	1983	104.6	50	124	130	130	130	130
73	Summer Island Village	K. Ziyaaraifushi	1983	35.0	58	216	216	216	216	216
74	Sun Island Resort & Spa	A.Dh. Nalaguraidhoo	1998	99.8	700	700	700	700	852	852
75	Taj Coral Reef Resort	K. Hembadhoo	1982	32.2	68	132	132	132	132	132
76	Taj Exortica Resort & Spa Maldives	K. Embudhu Finolhu	1983	12.9	20	128	128	128	128	128
77	Thulhaagiri Island Resort	K. Thulhaagiri	1980	11.0	44	116	138	138	138	138
78	Thundufushi Island Resort	A.Dh. Thundufushi	1990	80.5	74	94	94	94	94	94
79	Twin Island Resort	A.Dh. Maafushivaru	1991	54.7	60	76	76	76	94	94
80	Vaadhu Island Resort	K. Vaadhu	1978	8.0	18	66	66	66	66	66
81	Vakarufalhi Island Resort	A.Dh. Vakarufalhi	1994	90.0	100	100	100	100	100	100
82	Velavaru Island Resort	Dh. Velavaru	1998	125.0	50	168	168	168	168	168
83	Velidhu Island Resort	A.A. Velidhoo	1989	80.5	22	200	200	200	200	200
84	Veligandu Island	A.A. Veligandu	1984	51.0	34	146	146	146	146	146
85	Vilamendhu Island Resort	A.Dh. Vilamendhoo	1994	48.3	200	282	282	282	282	282
86	Villu Reef Beach & Spa Resort	Dh. Meedhuffushi	1998	128.7	136	136	136	136	156	156
87	W. Retreat & Spa Maldives	A.A. Fesdhu	1982	72.4	90	110	110	110	110	110
88	White Sand Resort & Spa	A.Dh. Dhidhdhufinolhu	1988	104.0	180	282	282	282	282	282
Total						18,319	18,402	18,447	18,862	19,353

Source: Ministry of Tourism & Civil Aviation

Annex 9

Tourism Growth, 2005 - 2006 (At end June 2006)

	Year	January	February	March	April	May	June	Jan - Jun Total
TOURIST ARRIVALS								
FRONTIER ARRIVALS	2005	18,747	29,391	35,742	29,714	25,309	22,590	161,493
	2006	58,332	54,741	54,596	55,983	40,961	33,037	297,650
	Growth %	211.2	86.3	52.8	88.4	61.8	46.2	84.3
SURFACE ARRIVALS	2005	793	724	843	281	12	25	2,678
	2006	316	506	143	422	38	26	1,451
	Growth %	-60.2	-30.1	-83.0	50.2	216.7	4.0	-45.8
BED NIGHTS								
Total								
RESORTS	2005	125,919	228,722	297,864	250,832	213,420	180,247	1,297,004
	2006	455,451	424,383	456,231	436,120	328,394	258,347	2,358,926
	Growth %	261.7	85.5	53.2	73.9	53.9	43.3	81.9
HOTELS	2005	9,664	8,843	8,992	8,512	7,609	6,756	50,376
	2006	12,975	11,299	11,380	10,210	7,512	6,445	59,821
	Growth %	34.3	27.8	26.6	19.9	-1.3	-4.6	18.7
TOTAL	2005	135,583	237,565	306,856	259,344	221,029	187,003	1,347,380
	2006	468,426	435,682	467,611	446,330	335,906	264,792	2,418,747
	Growth %	245.5	83.4	52.4	72.1	52.0	41.6	79.5
BED CAPACITY (Beds in Operation)								
Average								
RESORTS & MARINA	2005	12,788	12,440	12,802	13,322	13,038	12,814	12,867
	2006	15,250	15,320	15,458	15,506	15,506	14,938	15,330
	Growth %	19.3	23.2	20.7	16.4	18.9	16.6	19.1
HOTELS	2005	636	636	636	636	636	636	636
	2006	636	636	636	636	636	636	636
	Growth %	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL	2005	13,424	13,076	13,438	13,958	13,674	13,450	13,503
	2006	15,886	15,956	16,094	16,142	16,142	15,574	15,966
	Growth %	18.3	22.0	19.8	15.6	18.0	15.8	18.2
OCCUPANCY RATE (%)								
Average								
RESORTS	2005	31.8	65.7	75.1	62.8	52.8	46.9	55.8
	2006	96.3	98.9	95.2	93.8	68.3	57.6	85.0
	Change	64.6	33.3	20.2	31.0	15.5	10.8	29.2
HOTELS	2005	49.0	49.7	45.6	44.6	38.6	35.4	43.8
	2006	65.8	63.4	57.7	53.5	38.1	33.8	52.1
	Change	16.8	13.8	12.1	8.9	-0.5	-1.6	8.2
TOTAL	2005	32.6	64.9	73.7	61.9	52.1	46.3	55.3
	2006	95.1	97.5	93.7	92.2	67.1	56.7	83.7
	Change	62.5	32.6	20.1	30.2	15.0	10.3	28.5
AVG. DURATION OF STAY (Days)								
	2005	7.2	8.1	8.6	8.7	8.7	8.3	8.3
	2006	8.0	8.0	8.6	8.0	8.2	8.0	8.1
	Change	0.8	-0.1	0.0	-0.8	-0.5	-0.3	-0.2

Source: Statistics & Research Section

Ministry of Tourism & Civil Aviation

Last Updated Date: 11/06/06

Note: Surface Arrivals figures are not included in the national average count of Tourist Arrivals

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