Inbound Tourism Statistics in The Maldives

- Started in 1972
- One island one resort concept
- Free visa on arrival
- No restriction on any nationalities
- Contributes over 35% to the GDP
- Number one foreign exchange earner
- Major employment generator
All establishments are required to register at Ministry of Tourism, Arts and Culture (MOTAC), under Tourism Act, Law No. 2/99.

Islands are leased for resort development by the Government (MOTAC).

Leased for a period of 50 years.

Inventory of all establishments maintained by MOTAC.

types of accommodation

- Resort Islands (one island one resort)
- Hotels
- Guest Houses
- Live-aboard Safari Vessels (floating beds)
Nos. and bed capacity by type (end January 2012)

<table>
<thead>
<tr>
<th>Type of Establishment</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012 (end Jan)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Nos</td>
<td>Beds</td>
<td>Nos</td>
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<td>Beds</td>
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<tr>
<td>Resorts</td>
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<td>Hotels</td>
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<td>886</td>
<td>13</td>
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<td>1,603</td>
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<tr>
<td>Guest Houses</td>
<td>24</td>
<td>400</td>
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<td>400</td>
<td>22</td>
<td>462</td>
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<td>25</td>
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<td>43</td>
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<td>Safari Vessels</td>
<td>133</td>
<td>1,923</td>
<td>143</td>
<td>2,094</td>
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<tr>
<td>Total</td>
<td>260</td>
<td>22,237</td>
<td>274</td>
<td>23,464</td>
<td>279</td>
<td>24,978</td>
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</table>

Inbound Tourism

Bed capacity contribution by types of accommodation (end January 2012)

- Resorts: 82%
- Hotels: 6%
- Guest Houses: 3%
- Safari Vessels: 9%
Accommodation Statistics

- All accommodation establishments are required to submit data on bed occupancy to MOTAC
  - Occupancy rates generated from the bed night data submitted by the establishments
  - Can submit online / email or fax

Arrival Statistics

- Major Source of inbound tourism statistics
  - Arrival/departure card (monthly/annual)
  - Maldives Visitor Survey (once a year)
Ministry of Tourism, Arts and Culture (MOTAC) publishes monthly and annual reports on tourist arrivals to the country.

Daily data provided to MOTAC by Department of Immigration & Emigration.

Data collected through arrival/departure cards of immigration.

Tourist arrivals to the country is compiled by air only, with two ports of entry.

Cruise passengers (tourists arrivals by sea) are currently not compiled.

Data collected from Arrival/Departure Card.

**Arrival**
- Nationality
- Gender
- Age (D.O.B)
- Place of Residence
- Purpose of visit
- Length of stay

**Departure**
- Nationality
- Gender
- Place of stay in Maldives
Arrival Statistics

Arrival/Departure Card

Arrival data available by
- Nationality
- Gender
- Age group

Time series
- Monthly
- Annually
**Arrival Statistics**

**Top 5 Markets 2011**

- Major Markets to the Maldives
  - Europe (57.7%)
  - Asia & Pacific (37.5%)
  - Americas (2.5%)
  - Middle East (1.6%)
  - Africa (0.7%)


**Arrival Statistics**

- Maldives Visitor Survey
  - Exit survey
  - Targeted to tourists only
  - Conducted once a year

**Arrival Statistics**

- Data collected through Maldives Visitor Survey
  - Nationality
  - Country of residence
  - Duration of visit
  - Purpose of visit
  - Perception of tourists
  - Expenditure details
**Arrival Statistics**

Some of the findings from Maldives Visitor Survey 2011

- **Duration of stay**
  - 4-7 nights: 60%
  - 8-11 nights: 16%
  - 12-15 nights: 12%
  - 16-19 nights: 12%
  - 20+ nights: 0%

**Activities Enjoyed**

- **Land Based Sports**
- **Local Island Visit**
- **Water Sports**
- **Diving**
- **Spa**
- **Snorkelling**

- **Inbound Tourism**
  - A tourist arrival forecasting model being developed
  - Will be implemented this year
Tourism Receipts compiled by the Maldives Monetary Authority (Central Bank) for the purpose of Balance of Payments

Previously used a model based estimation

- Includes tax returns and expenditure made by tourists in the resorts, souvenir shops, local transport, etc...
- Calculations were mainly based on a small scale survey
Revenue & Expenditure Statistics

- Goods and Service Tax (GST) introduced in 2011
  - Administrative records or Maldives Inland Revenue Authority (MIRA) used for the estimation of tourism receipts
  - Tourism receipts in 2011 was around US$ 2 billion

- BOP re-stated
  - Current account – improved
  - Coverage of Services account improved

Revenue & Expenditure Statistics

- Tourism Revenue compiled by Maldives Inland Revenue Authority
  - Lease rent of tourist resorts
  - Bed tax (US$ 8 per bed night)

- Lease rent formula revised in 2011
  - Changed from a bed based rent to a land rent
  - US$ 8 per square meter
**Challenges**

- Budget constraints
  - Surveys cannot be conducted
- Lack of human resource
- Unable to retrieve most of the data collected by the Arrival/Departure card
  - New system developed for border control not being able to implement
- Language barrier
  - Sudden shift in major market segment (Chinese market)

**Developments since 2010**

- Conducted the Maldives Visitor Survey
  - Added new questions to the questionnaire on expenditure details of visitors
- Implemented a regulation for accommodation establishments to submit the data
- Implemented an online system to submit the data
**Plans for the Future**

- Conduct the Visitor Survey more regularly
  - twice a year (high season and low season)
- To conduct a detailed inbound expenditure survey
- Discussions going on to use and implement the UNWTO Accommodation Kit
- Implement the tourist arrival and tourism receipt forecasting models to be developed with technical assistance from the World Bank for the Maldives

Thank you!