

MALDIVES FIFTH TOURISM MASTER PLAN 2023–2027

GOALS AND STRATEGIES

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Maldives Fifth Tourism Master Plan 2023–2027: Goals and Strategies

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Foreword



Maldives marked the Golden Jubilee of Tourism in 2022 with celebratory events highlighting the industry's impressive growth and success, including several outstanding achievements for individuals, businesses, and the destination itself. Maldives was named the World's Leading Destination at the World Travel Awards 2022 for the third consecutive year.

The Fifth Tourism Master Plan (5TMP)—which was drawn up with support from the Asian Development Bank—sets out the vision, policy priorities, and strategies for the industry over the next 5 years and beyond.

5TMP was developed with the help of comprehensive consultations—in-person and virtually over some 70 meetings—with industry stakeholders. Field visits were conducted in various regions for the project consultants to gain in-depth experience of Maldives' tourism product, which includes resorts, tourist guesthouses, and safari vessels.

5TMP examines priority areas for developing the tourism industry. These include the business environment, human resource development, environmental conservation, information and communication technology, the social and cultural environment, safety and security, and the legal environment. By incorporating recommendations from the UN Sustainable Development Goals and international best practices, 5TMP's vision is to position Maldives as the world's leading destination in sustainable tourism with a special focus on making Maldives an accessible tourism destination.

I thank the Asian Development Bank for its generous assistance, the project consultants, our team at the Ministry of Tourism, and industry partners. I hope that with 5TMP's successful implementation, Maldives can finally establish itself as a truly sustainable tourism destination.

Abdulla Mausoom
Minister, Ministry of Tourism

Preface



The Fifth Tourism Master Plan (5TMP) aims to strengthen Maldives' position as a competitive and sustainable destination, enabling the industry, which has been the driving force in transforming the economy over the last 50 years, to continue leading the country's growth.

5TMP highlights priority areas for policy decisions on the tourism industry over the 2023–2027 plan period. 5TMP used the World Economic Forum's Travel & Tourism Competitiveness Index as the benchmark for analysing the current state of the industry and as a starting point for the policy recommendations in the master plan, which were developed by the project team after wide-ranging discussions with industry stakeholders on the issues, challenges, and opportunities facing tourism in Maldives.

5TMP's findings concur with previous master plans in regarding the business environment, human capital development, and environmental sustainability as the priority areas for the sustainable development of tourism. The post-pandemic world is already focusing more attention on health and safety and security in rebuilding tourism industries. Consequently, 5TMP presents a plethora of goals and strategies representing the relevant pillars of the Travel & Tourism Competitiveness Index to strengthen Maldives as a globally competitive tourist destination.

I thank the teams at the Asian Development Bank and Ministry of Tourism, and the project consultants, for a well-documented tourism master plan.

Naushad Mohamed

Deputy Minister, Ministry of Tourism and 5TMP lead supervisor

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The Ministry of Tourism (MOT) with the support of the Asian Development Bank put together a team to draw up the Fifth Tourism Master Plan (5TMP). A lead consultant and a group of local consultants were hired for the following areas:

- Lead consultant, Scott Wayne
- Tourism policy, Simad Saeed
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- Sociocultural development, Nashiya Saeed
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- Tourism business development and economic planning, Ahmed Munawar
- Legal consultant, Shabab Rasheed
- Marine and safari vessels consultant, Mareer Husny
- Tourism security consultant, Aly Naashid

MOT expresses its sincere gratitude to the Asian Development Bank and the consultants, and acknowledges the invaluable contributions of the department's senior officials in preparing 5TMP.

Special thanks go to Minister of Tourism Abdulla Mausoom for strategic guidance in formulating 5TMP.

We thank the members of the supervision team—Deputy Minister Naushad Mohamed, Director General Aishath Ali, and Deputy Director General Ali Shinan—for their expertise and dedication to the project, which greatly contributed to its successful completion.

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MOT expresses its sincere appreciation to the industry stakeholders, government stakeholders, and all those involved for their cooperation in 5TMP.

Abbreviations

5TMP	Fifth Tourism Master Plan
COVID-19	Coronavirus Disease 2019
FDI	foreign direct investment
GDP	gross domestic product
MMA	Maldives Monetary Authority
MNDF	Maldives National Defence Force
MOT	Ministry of Tourism
MWp	megawatt peak
NGO	nongovernment organisation
PRC	People's Republic of China
PV	photovoltaic
SMEs	small and medium-sized enterprises
SUPP	single-use plastic product



Maldives Fifth Tourism Master Plan

Tourism is key to Maldives' economic prosperity, human wellbeing, and development success. At the end of 2019, the country's tourism industry was enjoying record visitor numbers and spending. But COVID-19 delivered an unprecedented shock. When Maldives closed its borders from 27 March to 15 July 2020 to contain the spread of the virus, tourism was the hardest hit industry due to the abrupt halt in international tourist arrivals and internal mobility restrictions. The border closure hit jobs, incomes, livelihoods, and government revenue harder in tourism than other sectors of the economy.

The industry quickly bounced back, demonstrating a high level of resilience to the economic shock of COVID-19. In 2021, visitor arrivals were at 80% of the pre-pandemic level, far outpacing similar tourist destinations. Tourism continues to create jobs, support businesses, promote island development, and generate trade and investment. Maldives' brand as a premium tourism destination is higher than ever. The country was named the World's Leading Destination at the World Travel Awards for a third consecutive year in 2022, and the tourism industry is expected to grow rapidly over the next 5 years.

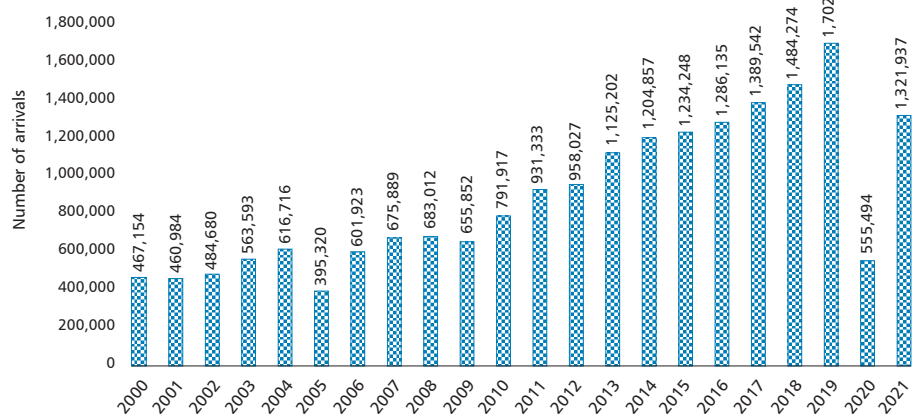
The Fifth Tourism Master Plan (5TMP) provides the vision, policy priorities, and strategies for the tourism industry and the government. Having a robust national tourism master plan that prioritises travel and tourism across all sectors of the economy sets the strategic direction for stakeholders over the 2023–2027 plan period. Bringing them and the government together will be vital for ensuring the industry's continued success.

5TMP identifies the tourism industry's challenges and opportunities. It focuses on the long term, addressing existing challenges, community expectations, new opportunities, and emerging trends to ensure the industry is resilient, innovative, and competitive. 5TMP will be delivered through the engagement and action of all industry stakeholders, the whole of government, and at all levels (i.e., island, atoll, and nationally). 5TMP will be reviewed in late 2025 to check on the progress made against the targets set, and to design the priority actions for the rest of the plan period.

Tourism Industry

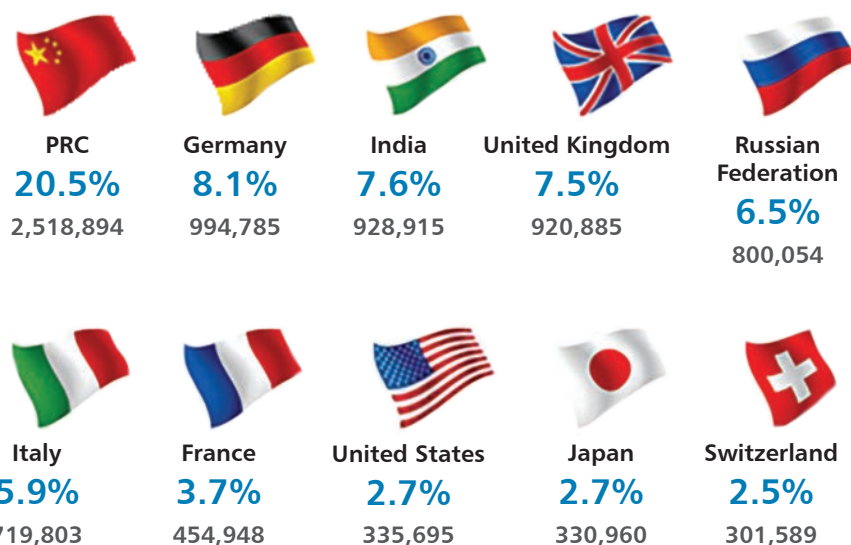
International tourist arrivals to Maldives rebounded in 2021. After slumping to 555,494 arrivals in 2020, an 18-year low due to COVID-19, arrivals totalled 1,321,937 in 2021, albeit down from pre-pandemic 2019's 1,702,887 (Figure 1). Over the last 20 years, annual tourist arrivals to Maldives have increased except for 2020, 2009, 2005, and 2001. The drop in 2009 was because of the global financial crisis, 2005 because of the Asian tsunami, and 2001 because of 9/11.

Figure 1: Tourist Arrivals to Maldives, 2000–2021



Source: Ministry of Tourism.

Ten nationalities accounted for two thirds of tourist arrivals to Maldives over 2012–2021. The market was dominated by the People's Republic of China (PRC), accounting for one in five visitors (Figure 2).

Figure 2: Top 10 Countries by Tourist Arrivals to Maldives, 2012–2021

PRC = People's Republic of China.

Source: Ministry of Tourism.

Maldives attracted tourists from upcoming and new markets to supplement shortfalls in arrivals from previously high-performing markets hit by COVID-19. India and the Russian Federation were the leading markets in 2021, accounting for 22.1% and 16.8% of total tourists, respectively (Table 1). Arrivals from the main pre-pandemic Asian markets plummeted in 2021, when the PRC had just 2,238 arrivals (0.2% of total arrivals), Japan 937 (0.1%), and the Republic of Korea 6,849 (0.5%).

Table 1: Top 10 Tourist Arrivals to Maldives by Country in 2021 versus 2019 Levels

Rank 2021	Country	2021		2019	
		Arrivals	Market Share (%)	Arrivals	Market Share (%)
1	India	291,787	22.1	166,030	9.7
2	Russian Federation	222,422	16.8	83,369	4.9
3	Germany	95,358	7.2	131,561	7.7
4	United Kingdom	62,777	4.7	126,199	7.4
5	United States	55,760	4.2	54,474	3.2
6	Saudi Arabia	40,014	3	25,865	1.5
7	Spain	37,354	2.8	36,064	2.1
8	Ukraine	35,073	2.7	13,253	0.8
9	France	30,068	2.3	59,738	3.5
10	Italy	27,309	2.1	136,343	8.0
Total		897,922	67.9	832,896	48.9
Total arrivals to Maldives		1,321,937		1,702,887	

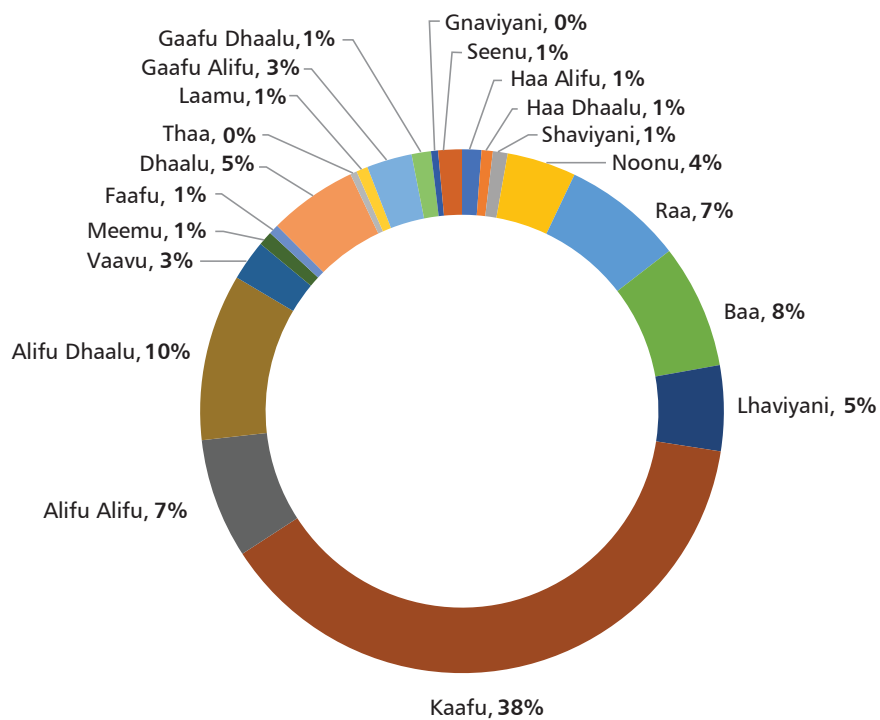
Source: Ministry of Tourism.

The average stay increased by 2.4 days since 2019. Ministry of Tourism (MOT) data show this rose to 8.7 days in 2021 from 6.3 days in 2019. Some 60% of international visitors to Maldives come for rest and relaxation; 25% are on honeymoon. Domestic visitors—which include nationals and residents travelling within Maldives—are emerging as a new industry segment. No data are available on domestic visitors or on how much they spend, however.

Some 59,753 tourist beds were available for international visitors in December 2022. Two out of every three beds registered for international visitors in 2022 came under the ‘one island, one resort’ concept. By April 2022, of Maldives’ 1,190 islands in 20 atolls, 176 were registered as resorts. The 168 resorts on these islands had 41,049 beds. The Tourism Act (Law No. 02/99) permits four different types of accommodation facilities: resorts, hotels, tourist guesthouses, and vessels.

Some 28.5% of beds registered in tourist guesthouses and hotels are in islands where locals live. In these islands, there are 14,146 beds in 874 tourist guesthouses and 13 hotels (Figure 3). Beds registered in tourist guesthouses have risen 13-fold since 2008. About 5% of registered tourist beds are in safari vessels (2,941 beds) and three registered marinas provide accommodation for international visitors.

Figure 3: Regional Distribution of Tourist Accommodation in Maldives, 2022



Source: Ministry of Tourism.

About 40% of beds registered for international visitors in 2022 were in Kaafu Atoll and the Greater Male' Region. All these beds are in tourist establishments near Velana International Airport. Six out of the 20 atolls have 5% or more of these beds: Alifu Dhaalu (10%), Alifu Alifu (7%), Baa (7%), Raa (7%), Dhaalu (5%), and Lhaviyani (5%). One of every three resort beds are in Kaafu Atoll. Of Maldives' 168 resorts and marinas, 55 are in Kaafu Atoll.

More airlines are flying to Maldives. By June 2021, Maldives had air connectivity to 39 destinations in 25 countries via 36 airlines. In 2019, 34 airlines connected Velana International Airport to 35 destinations in 19 different countries. Emirates, SriLankan Airlines, and Qatar Airways accounted for 38.3% of the international passenger arrivals in 2019 (Table 2). Of the 2.0 million passenger arrivals, 1.7 million were international visitors for leisure.

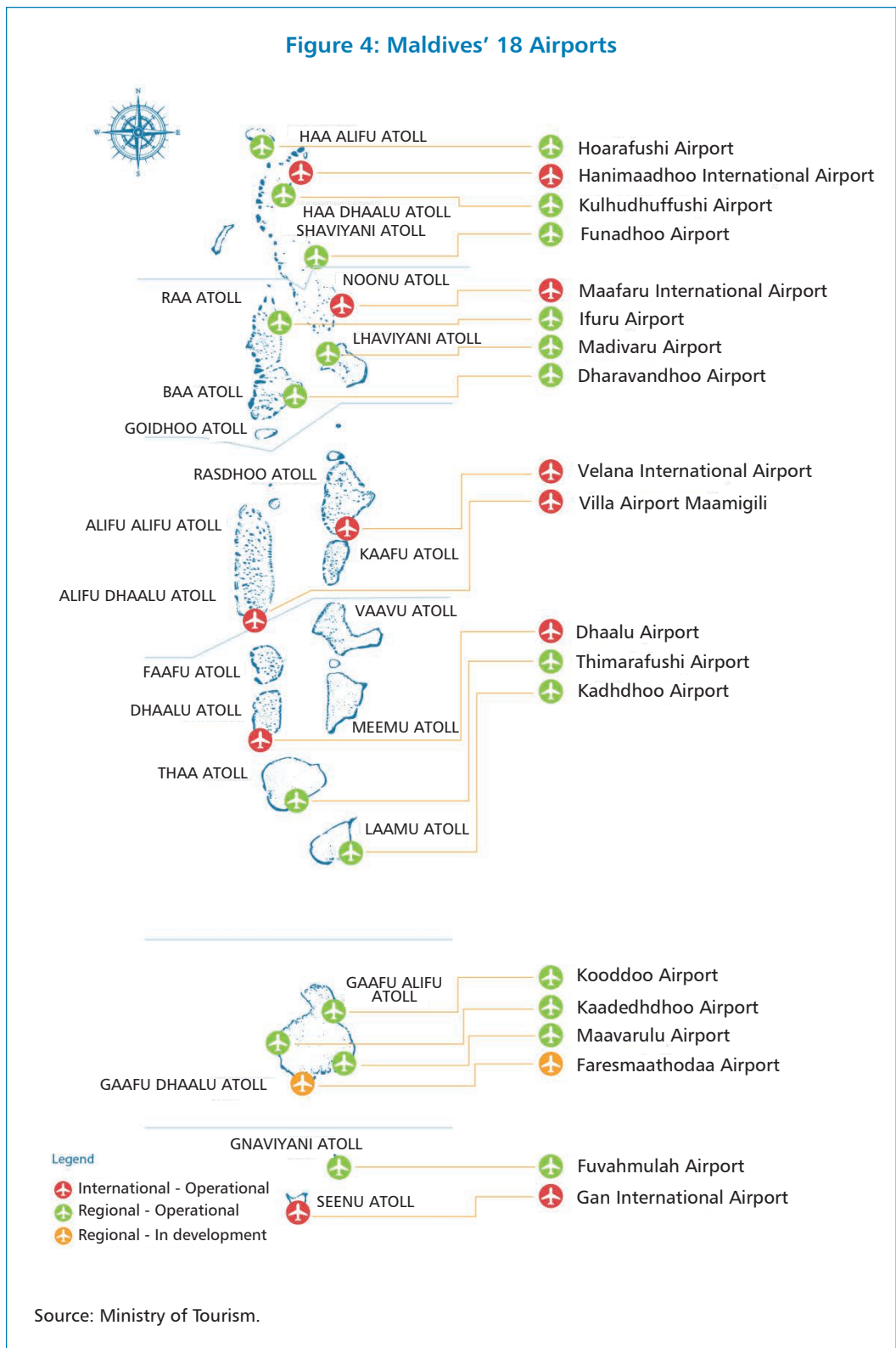
Table 2: Top 15 Airlines Flying to Maldives by Arrivals, 2019

No.	2019		
	Airlines	Arrivals	Share (%)
1	Emirates	358,289	17.7
2	SriLankan Airlines	251,377	12.4
3	Qatar Airways	165,987	8.2
4	IndiGo	96,525	4.8
5	Singapore Airlines	83,901	4.2
6	AirAsia	77,966	3.9
7	Maldivian	72,248	3.6
8	Etihad Airways	70,669	3.5
9	Aeroflot	69,645	3.4
10	Indian Airlines	67,031	3.3
11	SilkAir	66,541	3.3
12	China Eastern Airlines	62,848	3.1
13	Turkish Airlines	61,218	3.0
14	AirAsia Thailand	50,408	2.5
15	Beijing Capital Airlines	37,060	1.8

Source: Ministry of Tourism.

About 40% of tourist arrivals are transferred by domestic carriers from Velana International Airport to their place of stay. Seaplanes are operated by Trans Maldivian Airways, Maldivian, and Manta Air; airplanes operated by Maldivian, Fly Me, and Manta Air fly to 18 atoll airports (Figure 4). One out of two tourists use speedboats to reach their place of stay from Velana International Airport. Marine transport businesses are an important part of the national economy, and they are also important to atoll economies by generating jobs and providing essential amenities to residents.

Figure 4: Maldives' 18 Airports



In Maldives, 556 travel agencies and 193 dive centres are registered with MOT. Most dive centres are in resorts and offer good employment opportunities for young people. Some 90% of registered travel agencies are small-scale operators with less than five employees.

Maldives has some 2,000 food services businesses. These include 525 restaurants and 1,550 cafes and tea shops; 154 restaurants and 51 cafes and tea shops are registered in resorts. Some 360 restaurants and 1,500 cafes and tea shops are in inhabited islands. Most food businesses in inhabited islands have fewer than 20 employees. The prevalence of small businesses has important implications for capability development and innovation.

3

Tourism's Importance

Tourism is the engine that propelled Maldives from a least developed country to an upper-middle-income one in the span of 40 years. In 1980, per capita gross domestic product (GDP) was USD 268 (GDP USD 42.5 million). Maldives was classified an upper-middle-income country in 2010, and GDP per capita in 2019 was USD 10,561 (GDP USD 5.6 billion).¹ Tourism not only enabled Maldives to narrow the income gap with more advanced small island economies but the industry continues to be the main contributor to growth and is the largest generator of jobs, government revenue, and investment. The industry's GDP comprises three main segments: resorts (25.3%), other accommodation (3.1%), and food and beverage services (0.8%). Tourism and related services, such as travel agencies, entertainment, and transport, directly contribute 40% of GDP. Tourism also makes significant contributions to the communication, trade, construction, finance, fisheries, agriculture, and professional services industries (Figure 5).

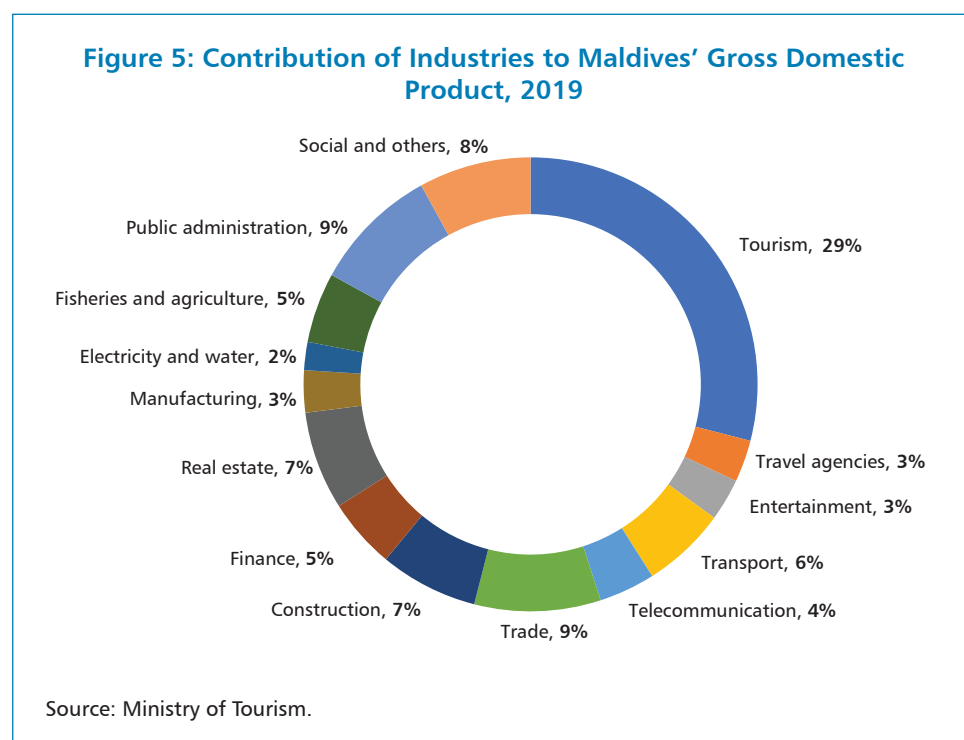
Tourism generated a record USD 3.5 billion in receipts in 2021 and the industry is the biggest export earner (80%). Tourism receipts—the spending by tourists in Maldives—increased from USD 2.0 billion in 2012 to USD 3.5 billion in 2021, a 77% increase. International visitor arrivals doubled from 791,917 in 2010 to 1,702,887 in 2019. Tourism is the biggest employer—one in every five workers. It is estimated the industry employed over 70,000 workers directly in 2020 for jobs in resorts, tourist guesthouses, hotels, restaurants, cafes, travel agents, airlines, airports, and other passenger transportation services. With an estimated 333,777 people working in Maldives, including 20,000 expatriate workers, tourism accounts for about 20% of total employment.

Tourism revenue accounts for 35.4% of total government revenue in 2019 and 42.9% in 2021. The tourism goods and services tax is the main single source of revenue for the government, totalling MVR 4.9 billion in 2019. Land rent is the second main contributor from tourism, totalling MVR 1.5 billion in 2019. The green tax contributed MVR 851 million. The airport service charge and development fee, totalling MVR 731 million and MVR 733 million, respectively, reflect the industry's buoyancy. The industry's performance has direct implications for other tax and nontax revenue streams. For example, import duty—the second-largest source of revenue—comes mainly from tourism and construction, contributing MVR 3.4 billion in 2019. Business and property taxes also reflect the robustness of the tourism industry, with the business profit tax totalling MVR 2.8 billion in 2019.

Tourism is a major driver of foreign direct investment in Maldives. According to the 2020 *World Investment Report*, Maldives had record inflows of USD 565 million in 2019, up 5% from 2018. The key foreign direct investment (FDI)

¹ World Bank. Data. <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD?locations=MV>.

sectors were tourism, information and communication technology, and transport services. The tourism industry's share of declared greenfield projects in FDI inflows was about 80% in 2019. Net inflows from direct investment totalled USD 443.5 million in 2021, slightly higher than 2020's USD 440.7 million.²



COVID-19 was the biggest shock to tourism in the industry's 50-year history. In 2020, international visitor arrivals fell 67.4%, the industry's contribution to GDP dropped 62.5%, and 70% of industry jobs were lost. Fewer visitors meant lower revenue from tourism, which fell to MVR 5.4 billion in 2020, a 50% decline compared to pre-pandemic 2019 in the contribution to GDP from tourism.

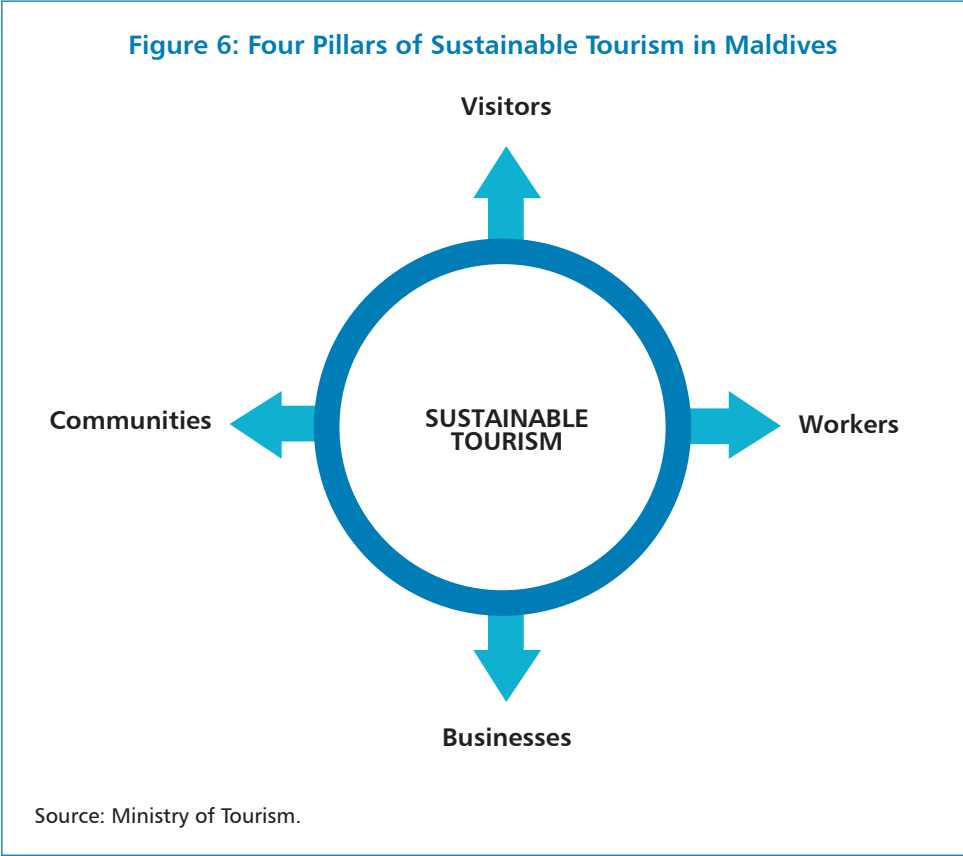
² Maldives Monetary Authority. 2021. *Annual Report 2021*. Male'. p 65.

4

Vision for Tourism

5TMP addresses priority areas of the tourism industry. These include business environment, human resource development, environment conservation, information and communication technology, social and cultural environment, safety and security, and the legal environment. By incorporating recommendations from the UN Sustainable Development Goals and international best practices, 5TMP will position Maldives as a world-leading destination in sustainable tourism.

Maldives strives to lead the world in sustainable tourism. It does this by providing the world’s best tourism services and memorable experiences to visitors, while ensuring the industry is able to bring substantial and lasting benefits to the community, workers in the industry, and tourism and related businesses. This vision has four key pillars: visitors, communities, workers, and businesses (Figure 6).



Visitors experience unparalleled natural beauty, rich coral reef biodiversity, unique marine megafauna, outstanding tourism services, and innovative tourism products.

Communities enjoy the benefits of tourism through employment, economic opportunities, social development, and convenience provided by high quality infrastructure.

Workers get enriched by their jobs, skills, career growth, and contribution to community wellbeing.

Businesses are profitable, globally competitive, and can go after rewarding growth by diversifying markets and products, and using modern business practices.

Tourism Receipts Target

To achieve the vision of sustainable tourism, Maldives needs to continuously improve performance and competitiveness. It is in this context that 5TMP has the target of USD 6 billion a year in international tourism receipts by 2027—a target that industry stakeholders, the government, and communities need to work towards (Table 3). It can be achieved through a balanced approach to meet environmental, social, and economic needs. The target was set by MOT in consultation with the Ministry of Finance, Maldives Association of Tourism Industry, and other tourism industry stakeholders, based on latest data and information from the Maldives Bureau of Statistics and the Maldives Monetary Authority (MMA). As a priority, MOT will work with the Ministry of Finance, Ministry of Economic Development, Ministry of Environment, Climate Change and Technology, and the MMA to recommend additional industry performance indicators. The target and its indicators will be reviewed annually and amended if needed.

Table 3: Tourism Receipts and Arrivals in Maldives, 2015–2021

Year	Receipts per Tourist (USD)	Receipts (USD million)	Annual Change in Receipts (%)	Arrivals	Annual Change in Arrivals (%)
2021	2,654.0	3,508.4	148.5	1,321,937	138.0
2020	2,516.4	1,397.9	(55.7)	555,494	(67.4)
2019	1,854.0	3,157.1	4.3	1,702,887	14.7
2018	2,040.1	3,028.1	10.0	1,484,274	6.8
2017	1,974.5	2,743.7	9.5	1,389,542	8.0
2016	1,949.0	2,506.7	(2.4)	1,286,135	4.2
2015	2,081.5	2569.1	(4.8)	1,234,248	2.4

() = negative.

Source: Ministry of Tourism.

The USD 6 billion target will be achieved through increases in tourism's contribution to GDP, tourism revenue, and higher net exports. The Ministry of Finance's Maldives Macro Economic Policy Coordination Committee estimates tourism receipts in 2023 at USD 4.2 billion. Tourist bed nights are forecast to grow at an average of 8.8% a year from 13.0 million in 2023 to 18.0 million in 2027, up from 11.9 million in 2022.

Increased investment in accommodation and the utilisation of current accommodation capacity will be needed to meet the USD 6 billion target. The primary focus will be on increasing yields and occupancy rates, and to rely less on volume. Particular attention will be given to bridging occupancy gaps in off-season months. New tourist beds will be needed mainly in the northern and southernmost atolls to improve the productivity and competitiveness of these atolls.

Aviation capacity will need to grow to meet the USD 6 billion target. International capacity needs to grow by 25%–40% and domestic capacity by 50%–60%. Airport master plans and transport industry strategies, and significant infrastructure investment in airports and aircraft, will be needed to achieve these levels of growth.

Meeting human resources and skills needs is the biggest challenge to growing the industry to meet 5TMP's targets. Significant growth in capacity and productivity is required. It is estimated that a significant amount of jobs will need to be created for the industry to grow to the level envisaged in 5TMP. The availability of local labour will be a major challenge. But if yields increase, the reliance on jobs growth will be lower.



Priority Goals for Tourism

To realise the vision for sustainable tourism, we will be taking an active and coordinated approach to tourism development. We will build more meaningful industry partnerships and 5TMP will apply a whole-of-government approach with intersecting strategies and action plans. The following 15 goals to rally the industry and government for priority action are at the core of 5TMP:

1. Maximise the benefits of tourism to all atoll communities
2. Communicate the full potential of Maldives to existing and new audiences
3. Offer new products and experiences
4. Build climate resilience and protect natural assets
5. Enhance energy security and achieve net zero emissions
6. Provide outstanding transport services
7. Attract and retain a world-class tourism workforce
8. Accelerate investment and innovative finance
9. Regulatory reform to make it easier to do business
10. Accelerate 360° digitisation
11. Whole-of-government prioritisation of tourism
12. Advance data analytics and insights
13. Strengthen health, safety, and security systems
14. Establish transformational tourism industry standards
15. Ensure tourism is accessible for all

5TMP PRIORITY GOALS

GOAL 1

MAXIMISE THE BENEFITS OF TOURISM TO ALL ATOLL COMMUNITIES

Investors, developers, and operators of tourism businesses will work responsibly and closely with island councils and communities to maximise visitor spending in all atolls.

KEY PERFORMANCE INDICATORS

- Increase in tourism beds in the atolls
- Increase in visitor dispersal
- Increase in total visitor spending in atolls
- Increase in income from tourism to locals by island and atoll, especially for women



STRATEGY 1 Incentivise the development of already leased islands and land

- Provide tax incentives to accelerate the development of already leased islands
- Communicate the national spatial development plan to investors
- Develop an investment financing plan for priority-tourism atolls
- Develop a strategy to incentivise and encourage operators and investors to diversify tourism infrastructure across all atolls
- Incentivise the transport industry to work more closely with communities to deliver transport infrastructure that meets the needs of communities and visitors

STRATEGY 2 Allocate government tourism revenue to accelerate the delivery of priority community infrastructure

- Build a quality health care system in atolls to enhance Maldives' reputation as the world's leading post-pandemic tourism destination
- Review the allocation of tourism land rent to tackle the critical development needs of local islands, such as water supply, sewerage, health care, roads, parks, and renewable energy
- Allocate green tax revenue for innovative green solutions to their environmental challenges
- Actively support community infrastructure development initiatives for education and training in tourism

STRATEGY 3 Create targeted 'iconic' atoll destinations

- Develop 10-year destination development strategies for all atolls to mobilise investments, plan tourism products, develop infrastructure, and train workers
- Develop targeted atoll marketing plans by capitalizing on unique selling propositions supported by sustainability and international quality standards
- Undertake regulatory reform and reduce red tape to enable destination development in the atolls



STRATEGY 4 Increase income generation opportunities through sustainable purchases and fair-trade initiatives for local communities

- Promote sustainable local seafood (e.g., tuna, reef fish, lobster) in tourist establishments
- Develop a branding and marketing strategy for exotic Maldivian fruits
- Promote the organic agricultural production of locally grown crops with a high market potential for the tourism industry

- Set up markets in regional tourism centres for buying local produce
- Promote organic tropical island fruit (e.g., papaya, banana, watermelon, passion fruit), local vegetables, and kurumba (young coconuts with sweet water and jelly-like pulp) in tourist establishments
- Share and communicate lessons from successful community partnerships with resorts and farmers' cooperatives
- Establish a digital marketplace to link producers, sellers, buyers, and transport providers for local produce and products
- Promote Maldivian cuisine and ensure the quality of food served in local islands

STRATEGY 5 Promote the fair trade of local art and crafts

- Establish quality standards for local handicrafts
- Enable microfinance for scaling up local handicraft production
- Promote community support initiatives by rewarding tourist establishments that buy locally produced art and craft
- Promote Authentic Maldives and other local labels and products throughout the country
- Encourage the sale of Authentic Maldives products and other local labels through the Authentic Maldives website and links to similar sites (e.g., Etsy.com, Bonanza.com, Localpurse.com, Amazon Handmade)



STRATEGY 6 Leverage the domestic market to promote tourism in island economies

The domestic market is particularly important for homestay and sharing-economy providers. Domestic visitors can be either locals or residents who travel away from their homes, including those travelling internally as part of an outbound international trip. For the purposes of 5TMP, nonresident international business and student visitors who are in Maldives for less than a year are considered domestic visitors, regardless of their length of stay, to promote domestic tourism.

- Use innovative marketing approaches to motivate Maldivians and residents to holiday in Maldives
- Develop new products and launch new experiences to suit domestic visitors, and improve awareness of domestic tourism options
- Undertake product adaptation for groups of families and friends to promote domestic tourism
- Develop an affordable connectivity strategy to drive visitor dispersal

STRATEGY 7 Incentivise the retention of tourism earnings in foreign currency by investors

- Conduct value-chain analysis for shopping, guiding, art and crafts, transport, fishing, restaurants, and agriculture
- Conduct assessments of the potential for economic linkages in the tourism value chain
- Modernise the FOREX legal framework to regulate the tourism industry to reduce currency leakage
- Develop a new and more rigid policy on foreign exchange license allocation
- Conduct handicraft quality assessments and capacity building programmes led by qualified designers
- Plan local tourist travel options (e.g., for island hopping)
- Introduce financial products, such as Treasury bills and bonds, and corporate bonds, to retain foreign exchange in Maldives
- Provide better alternative short-term investment opportunities

GOAL 2

COMMUNICATE THE FULL POTENTIAL OF MALDIVES TO EXISTING AND NEW AUDIENCES

Marketing needs clear objectives and strategies to drive tourism revenue, increase visitors, and balance the communication expectations of 'one island, one resort' with local inhabited islands.

KEY PERFORMANCE INDICATORS

- Increase in total tourism revenue
- Increase in occupancy of resorts, local islands, and safari vessels
- Increase in visitor numbers from top markets which have not recovered to pre-pandemic levels, namely the PRC, Italy, France, Japan, Australia, and the Republic of Korea
- Increase in visitor numbers from secondary and tertiary markets which has overperformed post-pandemic, namely Hungary, Ireland, Denmark, Spain, Israel, Brazil, Saudi Arabia, United Arab Emirates, Kuwait, Egypt, Qatar, and South Africa
- Increase in the number of visitors in the low season, especially June–September, and reduce the occupancy variance between peak and low season



STRATEGY 1 Develop all-round branding and messaging

The most important task for marketing in the next 5 years is to ensure that demand remains high enough for additional aircraft to arrive and fill existing and planned-for beds in resorts and local islands. An increase in the number of resorts poses potential issues because the only real and understood differentiation within Maldives is offered by the branding and experience of the resorts themselves. In order to grow the appeal and maintain the charm of Maldives, marketing efforts must diversify to broaden the communication of all Maldives' attractions. Over time, the single destination message—while remaining absolutely core to the delivery of a successful tourism economy—must also be part of a bigger campaign to include attractions, activities, accommodation (showcasing the diverse and wide choice, as well as the most outstanding and attractive resorts), local culture (e.g., food, history), and the regions, atolls, and even local islands.

- Conduct research on Sunny Side of Life to ensure that it is sufficiently flexible, meaningful, and motivating to attract more visitors and that it works well in communicating all the necessary messages just described
- Develop a campaign model and template that can be flexible enough to promote the message
- Conduct global research on the brand and image of Maldives in order to strengthen current perceptions and monitor progress and effectiveness of new messaging

STRATEGY 2 Develop local island destination positioning

Potential visitors need to know that Maldives is not just 'one' destination and that the country offers variety and diversity in location and type of accommodation and activities on land and sea. Local islands need a meaningful strategy and positioning to create awareness, and differentiated and motivating reasons to visit, especially as they rely more on online travel agents and tour operators than resorts, which depend more on traditional travel agents. The atolls and major islands need a communication strategy to raise awareness, ideally as part of a centrally branded messaging hierarchy. The website islands.mv is a tool that can be used to do this, but it either needs to work more closely with the destination marketing branding or create a strong and appealing sub-brand.

- Develop a communication strategy for local island marketing for visitors and the travel trade alike
- Review content for social media to ensure that the messages and visuals communicate the full Maldivian offering and experiences
- Review the role of islands.mv and incorporate it into the Master Brand Destination marketing

- Develop core motivating messages for resorts, recreational activities, and marine activities, including safari vessels and local islands

STRATEGY 3 Make Maldives a year-round destination

The low season is a big opportunity for Maldives and has historically been determined by the traditional western European winter-sun visitor and the perceived 'wet season.' Maldives has a pleasant and consistent year-round temperature. Rainfall over April–December is well below most other similar and competitive destinations. Attracting tourists to visit throughout the year will enable a significant increase in tourism without putting more strain on existing infrastructure, especially Velana International Airport.

- Identify low-season source markets, as distinct from the traditional winter markets. Historically, arrival numbers from India, Australia, Japan, and the PRC are very strong in the summer months. Regional markets, including the Middle East, South Asia, and Southeast Asia, are all good potential summer markets. Many markets, including eastern Europe, will also find lower, off-peak summer prices attractive
- Create a Maldives in Summer / Sunny Summer Side of Life campaign and activities
- Work with the trade in Maldives and abroad to build and fill the low season
- Track and monitor specific summer results, such as occupancy levels, spend per visitor, and length of stay

STRATEGY 4 Segment source markets

While traditional markets will remain strong source markets for Maldives, COVID-19 accelerated the increase and demand for visits from nontraditional markets. This will increase revenue, local island tourism, and the reputation of Maldives as more than 'just' a world class place to relax.

- Arrange segmentation of priority markets for resorts
- Arrange segmentation of priority markets for local islands
- Identify media messages and online travel agency partnerships for local island promotions

GOAL 3

OFFER NEW PRODUCTS AND EXPERIENCES

Provide unique new products and services that leverage the competitive advantages of Maldives' natural beauty, pristine atolls, friendliness of its people, high quality infrastructure, and local cultural attributes. We will differentiate by offering the highest quality services and experiences irrespective of segment, price, and product.

KEY PERFORMANCE INDICATORS

- Increase in the number of new products and experiences
- High customer satisfaction levels with new products and experiences
- Increase in domestic visitor satisfaction



STRATEGY 1 Leverage the brand positioning of Maldives' beaches, reefs, and marine megafauna to support related product development

Maldives offers outstanding beach, lagoon, coral reef, and marine megafauna attractions. Chief among these offerings is the ability to experience the world's best coral sand beaches. Through a range of actions aimed at enhancing beach experiences, 5TMP will promote sand banks and beaches, and align these actions with our offerings for the high-yield segment of travellers seeking luxury experiences. Maldives is renowned for its marine biodiversity and we will continue to leverage them. Marine megafauna sightings guaranteed with whale sharks, manta rays, turtles, and sharks in their natural habitat provide a unique point of difference for the visitors who choose Maldives over alternative destinations. We will promote visits by environmentally conscious visitors who love and respect wildlife, and are willing to pay for these unforgettable experiences.

- Develop a strategy to promote barefoot conferences
- Mobilise the resources and develop the facilities for Island Board Meetings
- Develop a marketing strategy for corporate getaways
- Conduct a feasibility study on sustainable fishing tours
- Develop a strategy for manta, whale shark, and turtle marine megafauna interactions
- Develop a strategy for island adventure tours

STRATEGY 2 Embrace a broader perspective of tourism and lay the foundation for a diversified visitor economy

Because people travel for many reasons, 5TMP will lay the foundations to harness Maldives as a destination for wellness, education, and business tourism. 5TMP will look beyond leisure to adapt to the changed circumstances brought about by the COVID-19 pandemic. Innovative approaches will be used to introduce quality products that harness the competitive advantages of Maldives that appeal to high-yield visitors in segments other than leisure.

- Develop a national strategy for the visitor economy
- Establish the institutional framework to promote and implement the visitor economy strategy
- Develop a branding and marketing strategy for wellness tourism
- Develop a strategy to attract international students to study tourism and hospitality in Maldives

STRATEGY 3 Develop and promote water sports and events to maximise visitation

Maldives' chief attraction is its marine environment—and visitors increasingly expect diverse activities. Because of this, the need is urgent to market and hold water sports events in a collaborative way that encourages visitor dispersal and repeat visits.

- Develop a national strategy for water sports development
- Set up facilities to train Maldivians for water sports tourism
- Develop modern marine water sports infrastructure to attract young people to the sport
- Develop a branding and marketing strategy for water sports tourism
- Hold regular international surfing events in Maldives
- Set up a Maldives yacht club and mobilise the resources to organise an annual yacht regatta
- Promote regular annual international body boarding events

STRATEGY 4 Promote Maldivian cuisine to international visitors

- Compile an inventory of local food and cuisine from different atolls
- Set quality and health and safety standards for Maldivian cuisine
- Develop branding and marketing strategy for Maldivian cuisine
- Increase access to finance for projects on speciality restaurants, cafes, and local delicacies
- Organise an annual Maldivian food festival with international culinary challenges
- Conduct culinary and plating skills training for island-based entrepreneurs in the culinary sector
- Organise an annual TV competition show of chefs working in the tourism industry to inspire local fine dining
- Make advanced Maldivian culinary programmes for YouTube

STRATEGY 5 Promote Maldivian culture and heritage to domestic and international visitors

- Develop a culture and heritage strategy for the tourism industry
- Identify and map cultural products, resources, and performers in all atolls
- Develop digital content to increase knowledge and awareness of Maldives' tangible and intangible culture
- Establish quality and brand guidelines for culture and heritage products
- Establish a digital marketplace to link producers, sellers, and buyers of authentic Maldivian products, souvenirs, local art and crafts, and music
- Train young people to express their artistic talent
- Develop innovative products based on Maldivian culture and heritage
- Establish visitor centres at national heritage sites in the atolls
- Develop a website and apps to promote culture and heritage sites and experiences

STRATEGY 6 Establish the spaces and services to enable work from anywhere

International visitors and those on extended business trips should be able to work remotely in local islands or resorts while enjoying leisure time.

- Introduce a Work from Island visa
- Facilitate the establishment of shared workspaces with high-speed internet connectivity across Maldives
- Create awareness on new digital technologies for office work
- Conduct training for wellness and revitalisation for young people
- Develop guidelines and digital content on Maldivian culture, values, and lifestyle
- Train aspiring chefs to develop varied healthy and flavourful cuisine in islands



GOAL 4

BUILD CLIMATE RESILIENCE AND PROTECT NATURAL ASSETS

Maldives' tourism industry has a responsibility to protect for perpetuity the beaches, sand banks, and marine life that makes the country the world's most desired tourism destination. To preserve the natural beauty of Maldives, the tourism industry will take action to eliminate unnecessary single-use plastic products (SUPPs) and collaborate with stakeholders and island councils to track food waste and implement measures to reduce it.

KEY PERFORMANCE INDICATORS

- More beaches with successful management plans
- Increase in the number of house reefs managed as Other Effective Area-based Conservation Measures
- Increase in the number of species-focused marine life management plans
- Reduction in imported SUPPs to Maldives
- Reduction in plastic water bottles and plastic bags
- Reduction in food waste generated per tourist bed night



STRATEGY 1 Improve planning guidelines and concept-approval processes to ensure sustainability is adequately addressed

- Publish guidelines for developing effective beach management in small islands
- Provide design and engineering guidance on how to manage beach erosion in a sustainable and aesthetically acceptable manner
- Introduce knowledge sharing on small island beach management best practices
- Integrate site-specific erosion assessments in concept plan submissions to justify the placement of coastal developments
- Hold regular tourism sector ‘engineers’ conferences to share knowledge on best practices and innovations in coastal management
- Develop industry guidelines for insurance policies on climate change, natural disasters, and other extreme events
- Introduce standards, guidelines, and incentives and disincentives to minimise impacts from tourism-related reclamation projects
- Revise concept approval processes to account for sustainability in new resort development projects by requiring the submission of evidence that environmental factors have been considered in the concept design and proposed construction methods

STRATEGY 2 Improve the management of common beach resources

- Draw up guidelines to limit overcrowding at high-demand sand banks
- Set caps on permanent beach allocations for tourism in each atoll; this includes uninhabited islands, sand banks, and beaches on local islands
- Increase the capacity of atoll councils to manage beaches in the atolls and regulate coastal developments
- Organise annual atoll conferences to share latest information and knowledge on beach management

STRATEGY 3 Scale up and improve the quality of management systems to increase the resilience and health of coral reefs

- Promote and incentivise Other Effective Area-based Conservation Measures for house reefs at partnering resort islands
- Draw up guidelines for Other Effective Area-based Conservation Measures in local islands for the co-management of house reefs by tourist guesthouses and communities

- Develop management plans for all marine-protected areas
- Design and implement the Responsible Visitor Programme as defined in 4TMP
- Develop future-generations stewardship initiatives for tourism (e.g., coral gardens and nurseries)
- Develop a small-grant scheme to support atoll-based community coral reef conservation initiatives with a particular focus on the participation of women in this effort
- Establish citizen science-based programmes for monitoring the health of coral reef ecosystems and other marine ecosystems
- Provide scholarships to train marine biologists and dive instructors with special quotas for women

STRATEGY 4 Develop guidelines to ensure wildlife interactions are sustainable and in line with Maldives' image and brand

- Draw up guidelines for marine wildlife interactions, particularly for megafauna, and diving and snorkelling, focusing on limiting impacts on biodiversity and improving tourist experiences
- Draw up guidelines to reduce overcrowding at high-demand dive sites and in marine protected areas
- Provide training for marine rangers
- Develop digital content to raise awareness and understanding of sustainable wildlife interactions
- Develop an interactive digital platform for tourists to share their wildlife interactions
- Develop an interactive digital platform to inspire and encourage young people to undertake research and monitoring on marine megafauna

STRATEGY 5 Improve planning guidelines, knowledge sharing, and access to finance to adapt to climate change and build climate resilience into tourism infrastructure

Building resilience and protecting critical assets from climate change is urgently needed because of the potentially dangerous and irreversible impacts on the tourism industry unless resilience is built in advance.

- Draw up and publish guidelines for critical near-term climate change impacts, including minimum heights for overwater structures, revised setback limits, and structural design considerations for coastal and critical infrastructure

- Facilitate a way to improve availability and access to high quality information for businesses to understand their climate risks and climate adaptation investment opportunities
- Establish a low-cost climate financing fund, supported by international initiatives like the Green Climate Fund and local inputs, to assist in-need tourism facilities to implement climate adaptation measures
- Policies to increase technical capacity and climate change research

STRATEGY 6 Eliminate the use of single-use plastic products in tourist establishments in line with national SUPP targets

The proliferation of SUPPs could affect the natural beauty of Maldives and the country's image of clear lagoons and clean seas. Water bottles, disposable toiletries, plastic bags and bin liners, food packaging, and cups are the tourism industry's top five most polluting SUPPs—and they are found everywhere. Products using SUPPs are sold by tourist businesses to tourists. Yet, the use of SUPPs is a growing concern to tourists to Maldives, who are aware of the harm that SUPPs can do to the environment and ecosystems. The government, in 2021, amended the Export-Import Act (Law No. 31/1979) to ban the import of eight SUPPs (drinking straws, plates, cutleries, stirrers, shopping bags, drinking cups, cotton buds, disposable toiletries, and water bottles).

- Develop alternatives for tourist establishments for the eight banned SUPPs
- Reduce the use of single-serve products with refillable dispensers by 75% in all tourist establishments
- Develop and implement SUPP-elimination plans and integrate them into business strategies for brand standards and procurement
- Conduct advocacy programmes for behaviour change to eliminate unnecessary SUPP use rather than replace these products with alternative materials
- Develop a strategy to collaborate within the tourism industry and across other industries to sustainably manage unavoidable SUPPs
- Identify SUPP leakages and hidden hotspots that need to be tackled

STRATEGY 7 Reduce waste and develop and operationalise waste collection and processing infrastructure

Globally, tourists generate waste at higher rates than when at home. It is estimated that a tourist produces between 3.5 kg and 7.2 kg of waste a day—this is almost twice as much as the waste generated by locals. Under 5TMP, the

industry will prioritise the reduction of food waste. Sustainable Development Goal 12.3 aims to halve food waste and reduce food loss by 2030. In tourist establishments, the tourism industry will, under 5TMP, advocate meaningful action to reduce food waste.

The industry and the government will collaborate to operationalise waste collection and processing. Both will also collaborate on the planning and development of recycling infrastructure in tourism zones. To enable recycling, the industry will advocate for the proper labelling of products and innovative ways of funding recycling suitable to the small island environment of Maldives.

- Develop and implement a food waste strategy for tourism facilities
- Conduct an industry-wide awareness campaign to reduce food waste with a particular focus on reducing this waste in resorts
- Operationalise the Thilafushi Waste Management site to receive residual waste from tourism facilities
- Build and operationalise regional waste management centres to receive waste from tourism facilities
- Set up recyclable collection and storage systems in all atolls for plastic, glass, cardboard, and aluminium
- Build and operationalise waste management systems and infrastructure (compost, bottle crushers, compact cans) in local islands with more than 50 tourist beds
- Introduce the polluter pays principle for tourist establishments in local islands so that they bear the costs of managing and disposing of the waste they produce
- Build waste oil reception facilities in all atolls
- Work with atoll councils through public–private partnerships to establish waste management facilities in strategically located local islands for the disposal of waste by safari vessels

STRATEGY 8 Develop a framework to renew and rejuvenate coconut palms and native vegetation

- Incentivise setting up nurseries across atolls in strategic locations to increase the availability of local vegetation for landscaping new tourism facilities
- Develop community collaboration initiatives for the landscaping and propagation of coconut palms
- Inform communities on the opportunities and scope for landscaping in tourism facilities

GOAL 5

ENHANCE ENERGY SECURITY AND ACHIEVE NET ZERO EMISSIONS

Ensure the continuous availability of efficient, affordable, and clean energy to all tourist establishments by enabling the rapid adoption of proven renewable energy technologies and energy storage.

KEY PERFORMANCE INDICATORS

- Increase in energy efficiency measures
- Increase in renewable energy installed
- Increase in energy storage systems
- Increase in e-transport for guest transfer operations
- Increase in return on investment from renewable energy and battery energy storage systems



STRATEGY 1 Develop policies, regulations, and guidelines for transforming energy sources to renewables

During peak occupancy months, resorts consume on average 46 litres of diesel a day per room. Of this, 85% is for electricity generation. There is a significant opportunity for resorts to adopt and expand renewable energy systems, and here accelerated scaling up is needed. Resorts with large land or lagoon areas can install solar panels if roof and space requirements are within the limits allowed in built-up areas. To tackle land and roof-space availability limitations in resorts for large-scale PV (photovoltaic) systems, integrating these systems with floating solar will be necessary in most resorts.

- Add new provisions to tourism development guidelines and develop regulations to enable the integration of PV systems in the design stage
- Develop a policy and regulatory framework to enable the adoption of floating PV systems in tourism facilities
- Develop quality assurance mechanisms for PV installations and battery storage for investors and service providers
- Develop a strategy for net zero emissions in local islands

STRATEGY 2 Share knowledge within the tourism industry on renewable energy solutions and best practices

The optimal sizing of diesel generator sets will be an important component of future PV, battery energy storage, and diesel hybrid systems. Micro grid technology is promising, because it has the potential for connecting micro grids between islands and resorts which share the same lagoon with renewable energy systems and energy storage. Beyond PV, other forms of renewable energy could also be explored, including wind, wave, and ocean power, to understand their feasibility, as relying solely on PV technology may not be enough. Vertical axis wind turbines with curved blades, for one, offer an innovative way for resorts to use renewable energy.

- Provide practical information to resort owners and investors to scale up rooftop PV systems
- Implement training programmes and installer certification to assure the quality of PV installations
- Maximise value creation for local economies from PV systems through the development of design, procurement, installation, and operation capabilities of local businesses
- Organise in partnership with the private sector an annual product and services fair to promote the net zero emissions programme

- Demonstrate the use of mini PV and battery energy storage to reduce CO₂ emissions
- Demonstrate electricity and fuel savings from desalination plants and freezers in resorts

STRATEGY 3 Develop a policy framework to promote and regulate energy efficiency

Significant scope exists for energy efficiency in resorts, as 60% of energy consumption is due to energy use by appliances and buildings. Cooling is the most energy-intensive operation in resorts. Higher energy efficiency in desalination will be vital for the tourism industry to achieve net zero emissions. Significant scope also exists for reducing the carbon footprint of resort laundries, and resorts are shifting to energy efficient washing machines. To reduce energy consumption from water heating, some resorts are already using solar water-heating systems, heat pump boilers, heat-recovery systems from generator sets through built-in heat exchangers, and water heaters connected to an AC outdoor unit for heat recovery. Over 90% of the lighting in resorts is from LED lights.

- Develop policies and standards for energy efficiency in tourist establishments
- Promote the energy star rating system for resorts
- Develop an incentives package to speed up energy efficiency in tourist establishments

STRATEGY 4 Harness local finance to sustain local benefits from the transition to net zero emissions

Tourism accounts for about 40% of Maldives' total greenhouse gas emissions and the combustion of diesel, making it the country's main source of these emissions. By the end of 2021, 33 resorts had invested in 15.7 megawatt peak (MWp) and 2.4 megawatt-hour batteries. A further 13.5 MWp was planned to have been installed by the end of 2022 in 11 resorts. About USD 2 billion will be needed to achieve net zero emissions through existing hybrid PV and battery energy storage technologies. Power purchase agreements in foreign currency are the finance model used for PV installations in resorts. A tourism net zero emissions market offers an important opportunity for local institutional investors to manage risk-adjusted foreign currency returns.

- Develop a national tourism net zero emissions investment strategy
- Seek impact investing for net zero emissions
- Establish a low-cost financing fund— supported by international initiatives like the Green Climate Fund and domestic inputs—to assist tourism facilities to achieve net zero emissions

- Establish a financing model to enable resorts to switch to energy efficient appliances in renovation projects

STRATEGY 5 Develop a policy framework to promote and regulate e-transport in tourism

In resorts, seven litres of petrol get consumed on average per room per day during peak occupancy months. Of this, over 90% is for marine transport. The technology and innovative designs already exist to make the transition to net zero emissions in tourism transport. Electric vehicles have been used by resorts for several years. And hybrid and electric speedboats are now available in the market for marine passenger transport.

- Develop national guidelines for the use of electric vehicles in tourist establishments
- Conduct technical and financial feasibility studies for using hybrid electric speedboats for guest transfers
- Promote public–private partnerships to establish tourism service centres at the regional level to reduce the need for long-distance cargo supply trips



GOAL 6

PROVIDE OUTSTANDING TRANSPORT SERVICES

Deliver high-quality connectivity infrastructure to satisfy visitor needs, including accessibility requirements

KEY PERFORMANCE INDICATORS

- Increase in the number of international airline routes and seats to Maldives
- Increase in the volume and quality of transport infrastructure in the north and south
- Increase in visitor satisfaction with transport connectivity
- Increase in environmentally sustainable transport services
- Increase in accessibility features at airports, ports, and ferry terminals





STRATEGY 1 Reduce congestion and waiting times, and improve passenger comfort, at Velana International Airport

- Develop a change-management strategy to ensure seamless connectivity and premium passenger services from the new runway, seaplane terminal, and new terminal for commercially important passengers
- Engage with international airlines to maximise schedule efficiency
- Develop a strategy with domestic carriers to reduce waiting times and avoid night layovers near the airport before tourists reach their place of stay
- Start planning for the next phase of the airport's development to ensure that the scale of assets meet demand
- Develop a customer service plan to ensure airport assets are of the highest quality and well maintained to deliver the best visitor arrival/departure experience that matches the brand value of Maldives
- Develop a transition plan to ensure the highest quality passenger experiences in the intervening period before the new passenger terminal opens
- Establish space and facilities for private jet parking
- Go fully digital and meet the expectations of passengers, workers, airlines, and suppliers for rapid and efficient round-the-clock services

STRATEGY 2 Provide new and refreshed international aviation infrastructure and services in the northern and southern atolls

Major physical infrastructure is needed, including building and upgrading runways, and operationalising seaplane transfers. Terminal building services need to be improved so that they provide premium visitor experiences. Airports in the northern and southern atolls will offer high quality services to ensure the long-term financial viability of airport operations and contribute to job creation and economic growth. Airport infrastructure will be developed in such a way that it provides amenities to island communities by improving international air connectivity and, once completed, this will bring considerable benefits to local communities.

- Develop seaplane connectivity infrastructure in Gan, Seenu Atoll, Hanimaadhoo, and Maafaru Islands
- Develop transit hotel facilities in Gan, Seenu Atoll, Hanimaadhoo, and Maafaru Islands
- Develop lounge services in Gan, Seenu Atoll, Hanimaadhoo, and Maafaru Islands
- Extend the runway on Hanimaadhoo Island
- Build and upgrade road infrastructure in Gan, Hanimaadhoo, and Maafaru Islands

- Offer support and incentives to airlines to boost international capacity in Gan, Seenu Atoll, and Hanimaadhoo Islands

STRATEGY 3 Ensure connectivity in all atolls through access to safe, sustainable, and competitive aviation services

- Develop a national master plan to make domestic air connectivity safe, affordable, and reliable for domestic and international visitors
- Establish night-landing facilities in all regional airports
- Provide ferry terminal facilities in all regional airports
- Develop lounge facilities in all regional airports
- Provide new or enhanced ferry links from regional airports to major population centres
- Ensure the strategic development of new airports meets tourism industry needs, and prioritise the airports in Meemu and Faafu Atolls
- Prioritise and offer supporting measures to help attract investment to strengthen seaplane links within larger atolls, such as Huvadhoo and Kolhumadulu

STRATEGY 4 Develop regional hubs for safari vessels

- Develop a harbour and mixed-use terminal with associated facilities near Velana International Airport for safari vessels near Dhiyaneru Reef
- Develop hub and harbour facilities for safari vessels in regional centres
- Develop ferry terminals and supporting infrastructure that improve water transport connectivity experiences in all atolls

STRATEGY 5 Establish high quality infrastructure and services for the cruise market

The opportunity to grow the cruise market in Maldives is considerable. Under 5TMP, the government and industry will work together to unlock this potential. Without a cruise berth and accompanying terminal, the country is missing an opportunity to receive large cruise ships and potentially significant day-visitor spending.

- Build high quality port infrastructure and a mixed-use terminal for cruise market in Male' and the north and south
- Develop facilities to make Male' more welcoming for visitors
- Develop a strategy to convert cruise visits to Maldives into spend in local islands
- Conduct awareness workshops to convert visitation into yield for island communities by cruise passengers

STRATEGY 6 Modernise marine transportation laws and enter into bilateral arrangements for regional cooperation

- Enact a regulation on sailing and cruising to improve the quality of the experience and environmental sustainability
- Draw up safety regulations for marine transport
- Incorporate provisions of the International Convention for the Prevention of Pollution from Ships into national laws
- Sign bilateral arrangements or memorandums of understanding on intraregional cooperation to expand marine tourism



GOAL 7

ATTRACT AND RETAIN A WORLD CLASS TOURISM WORKFORCE

Our tourism industry needs a world class workforce of sufficient size to provide the exceptional internationally competitive services expected from brand Maldives and withstand shocks to the industry.

KEY PERFORMANCE INDICATORS

- Increase in workforce numbers in the tourism industry
- Increase in young Maldivian workers entering the tourism industry
- Increase in the participation of women in the tourism industry
- Increase in the number of Maldivians in executive and managerial jobs in the tourism industry
- Increase in visitor satisfaction with industry skills levels
- Increase in employee satisfaction levels



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STRATEGY 1 Elevate tourism as a career of choice for young Maldivians

5TMP wants to attract young people to tourism as a career by improving knowledge on the industry for this demographic. Maldivian youth are entering the labour market in increasing numbers, but youth unemployment is alarmingly high compared to global norms—and it will not be easy to create entry-level jobs for this rapidly expanding working-age demographic. 5TMP will encourage the industry to proactively attract young people to work in tourism by improving pay and conditions. A strong and vibrant education system is needed to provide the right foundations to build a highly skilled and dynamic tourism workforce. Current educational outcomes, however, do not meet the demands of the tourism industry.

- Integrate tourism and hospitality values, concepts, and knowledge into all school subjects in years 1 to 10 through new learning formats and captivating learning experiences
- Enable the integration of skills development into the national curriculum for years 11 and 12
- Reform vocational education and training so that it aligns better to the needs of the tourism industry
- Organise Tourism is Everybody's Business industry-led awareness campaigns for high school students, parents, and teachers
- Organise regular familiarisation tours and engagement activities with tourist establishments

STRATEGY 2 Increase tourism apprenticeship programmes and tourism education and training opportunities

- Create an online inventory of tourism apprenticeship programmes
- Create a human capital resources 'centre' page on MOT's website and provide links to public and private tourism education websites
- Organise local career fairs with representatives from the tourism industry
- Increase satellite and digital training for tourism-related vocational education and training at the island-level
- Increase digitalization of tourism-related education and training
- Expand satellite classrooms and online courses
- Increase digital access points in vocational training institutions
- Provide internships for locals interested in tourism
- Promote education institutions partnering with tourist establishments in regions to provide in-house internships and training
- Inform communities of employment opportunities in tourism in their region

STRATEGY 3 Strike the right balance between a local and expatriate tourism workforce

5TMP will address workforce volume challenges by taking immediate steps to attract young Maldivians to choose careers in tourism, while enabling the return of expatriate workers to Maldives. 5TMP will enable skilled migration to support the tourism workforce's capability and diversification, which can strengthen Maldives' ability to set new benchmarks for high quality visitor experiences.

- Review and revise the employment quota system
- Exclude categories from the quota system for which locals are in short supply
- Introduce a 'tourism talent visa' to attract the best qualified and highly skilled workers in the industry by incentivising them to work and live in Maldives

STRATEGY 4 Match tourism education and training with industry needs and requirements

The tourism industry needs skilled and experienced workers to cater to the needs and demands of the modern tourist. Being able to meet this is pressing given the rapid expansion of tourism in Maldives and to ensure the country remains the world's leading destination. Because of this, it is essential that Maldives ranks among the leaders hosting world class tourism and hospitality training institutions, attracting local and international students. Being able to do this will be an integral part of improving the quality and capacity of the institutional framework to cater for industry needs with an emphasis on management training. It is widely agreed that the former School of Hotel and Catering Services under MOT—which is now a faculty of Maldives National University—was more focused and effective in this regard and in meeting the training needs of the tourism industry when it was a standalone and an independent institution.

- Conduct a skills needs assessment study to identify industry training needs
- Establish a national fund for hospitality training
- Expand the capacity of local tourism and hospitality institutions through partnerships with international tourism and hospitality institutions
- Establish independent vocational education for tourism and hospitality training through public-private partnerships
- Attract foreign students to help improve the quality of vocational and skills training in tourism and hospitality over the long term
- Enable the establishment of world class tourism and hospitality training institutions in Maldives

- Allocate more funds to increase the number of students graduating from tourism and hospitality training institutions
- Increase the number of institutions, specifically private, ones, offering vocational training programmes for tourism and hospitality
- Increase the capacity of tourism and hospitality institutions
- Provide access, support, and resources to establish an international presence in hospitality education

STRATEGY 5 Increase job opportunities, enhance skills, and create new opportunities for women in the tourism industry

It is essential to ensure opportunities—either direct or indirect—for women in the tourism industry. Doing this will maximise the benefits of tourism to the wider community. Introducing and supporting flexible work can alleviate most of the issues preventing women from participating in the industry. Flexible work will help women overcome working away from home for long periods, an uneven work-life balance, difficulties commuting to work, and the lack of essential services at work. 5TMP will drive national gender equality goals in the industry.

- Explore new approaches, such as independent contracting, freelancing, and gig-economy principles, to attract women to marketing, sales, human resources, accounts, and finance, among other areas in the tourism industry
- Conduct a study to identify opportunities and challenges for women in the tourism industry
- Develop digital platforms to enable women to engage in hybrid work from home for marketing, accounts, and human resources
- Provide child support for school-age children of mothers working in the tourism industry who are away from their families
- Offer additional incentives and benefits to local women who join the industry
- Provide targeted scholarships for women for hospitality and tourism industry-related studies
- Conduct training workshops with tourism stakeholders and Women's Development Committee members to create awareness on opportunities for women
- Provide full scholarships for women living in remote islands to study management, marketing, and vocational subjects to study in Male' and other local islands

STRATEGY 6 Address human resource challenges in the tourism industry for locals at the executive and management levels

The government will seek public–private partnerships to attract leading hospitality management training institutions to establish management schools in Maldives. These partnerships will turn out world class graduates, both local and expatriate, in tourism and hospitality studies. The aim of these schools will be to provide the highest quality and most up-to-date courses that will held by leading instructors to prepare the next generation of executives and managers in the industry, as well as providing on-the-job training in the best tourism brands of the world.

- Harmonise salary and benefits among foreign and local management staff
- Adopt a policy to train locals for management positions
- Develop a training programme for human resources directors and managers
- Establish a training fund which receives a predetermined proportion of the salaries and allowances paid to expatriate managers
- Arrange internships for local graduates of tourism and hospitality studies abroad
- Provide international exposure for tier 2 and 3 levels of employees in tourist establishments

STRATEGY 7 Address the long-term structural challenge of working away from family and home

As an immediate priority, MOT will explore ways with island councils to:

- Establish a vibrant real estate market in atolls with a high number of tourism workers
- Encourage public–private partnerships to establish easy and reliable commuting to and from resorts to urban centres in atolls

GOAL 8

ACCELERATE INVESTMENT AND INNOVATIVE FINANCE

The pace and scale of investments need to rise substantially in new resorts in the north and south and for interventions to achieve net zero emissions, greater energy efficiency, climate adaptation, digitisation, and connectivity.

KEY PERFORMANCE INDICATORS

- Increase in tourism investments in the northern and southern atolls
- Increase in investments in new resort development
- Increase in tourism businesses listed on the Maldives Stock Exchange
- Increase in the total value of investments in interventions to achieve net zero emissions
- Increase access to finance for small and medium-sized enterprises (SMEs)



STRATEGY 1 Create a pro-investment sunset strategy to address distressed assets in the tourism industry

A major challenge facing the industry is inadequate access to finance for developing leased islands, especially in the north and south (i.e., away from Velana International Airport). Because of global and national economic challenges, several resort developments that were assigned in these atolls were unsuccessful. This came at a heavy economic and social cost to the government and communities through lost employment opportunities, loss of potential tourism receipts and tax revenue, and delayed lease-rent revenue.

- Establish an interagency committee and conduct a detailed audit and analysis of distressed tourism properties and the causes of their distress
- Enact a policy that can be suspended or written-off by the President; the priority for this would be based on completed percentages, financial liquidity, and the financial potential of the property development
- Facilitate a financial arrangement with commercial banks to help distressed tourism properties which are over 50% developed
- Enact regulations on procedures that will allow the government to repossess islands if developers fail to start resort development within a stipulated period

STRATEGY 2 Innovative finance mechanisms to meet the demand for resort development

Although the capacity of local commercial banks has continuously improved, and credit extended to the tourism industry by banks accounts for 40% of total lending to the private sector, the local financial system does not have adequate capital and assets to fund multiple resort developments. Commercial banks lend for the renovation of resorts and building new ones in foreign currency, while credit is extended as working capital in the rufiyaa and foreign currency. The sizable demand to borrow operating capital from banks means there is a shortage of investment capital, resulting in unattractive terms of lending and a much higher cost of finance compared to external financing. Consequently, the development of new resorts is largely funded by FDI and offshore banks and financial institutions.

- Conduct a detailed study of the funding requirements of the tourism industry, and current practices and challenges, and recommend regulatory and systematic changes that need to be made
- Establish an investment bank with government, public, and foreign investment bank equity to help finance resort development

- Implement the prudential and regulatory changes required to accommodate larger loans to resorts
- Introduce tax holidays for tourism and tourism-related investors above certain thresholds and special tourism zones according to the government's spatial development plan
- Showcase market opportunities for resort developments by holding annual investment events in Maldives by inviting large investment banks and other targeted investors
- Set up a dedicated digital platform and a desk at MOT for assisting investment inquiries and for registering investors in the industry
- Establish a framework to regularly update investments in the industry, including recording private sector debt and other forms of external borrowing
- Develop a means to ensure safari vessels are recognised as an asset during the loan-approval process
- Launch an awareness campaign among banks in Maldives on financing for safari vessels
- Develop a comprehensive foreign investment portfolio for marine tourism products in Maldives
- Develop a regulatory framework to enable innovative venture capital financing, business angels, and crowdfunding for investment in tourism development

STRATEGY 3 Bring vibrancy and confidence to the tourism segment of the local securities market

According to Jones Lang LaSalle, USD 450 million worth of resort transactions were completed in 2019, reflecting Maldives' position as a highly attractive destination for international investors in tourism. Although resorts themselves are not participating in the local capital market, several international resorts operating in Maldives are listed companies on stock exchanges overseas.

- Incentivise raising funds on the local capital market using debt instruments which could also be listed on stock exchanges overseas
- Encourage the listing of private resorts on the Maldives Stock Exchange
- Build the capacity to establish a pool of investment advisors, lawyers, and financial intermediaries with international hospitality experience
- Explore ways to enable the movement of regional capital to enhance the private sector's access to finance
- Establish investment banking services

STRATEGY 4 Improve access to finance for SMEs in the tourism industry and increase access to capital for new tourism businesses

Access to finance, the high cost of borrowing, and high collateral requirements are major challenges for SMEs in the tourist guesthouse segment and for businesses launching new tourism products. Meeting the financing demands of SMEs will require the participation of the public and private sector.

- Expand the funding capacity of SME Development Finance Corporation
- Relax collateral requirements to increase access to finance for entrepreneurs and micro businesses
- Encourage growth in the micro, small, and medium-sized tourism market
- Partner with development banks to increase the capital offered to SMEs
- Develop structured and sustained mechanisms for micro and small investment lending at the community level
- Coordinate with nongovernment organisations (NGOs) to provide awareness training on finance and access to finance for small entrepreneurs
- Enable microfinancing for scaling up local handicraft production
- Improve bankruptcy regulatory and initial public offering frameworks to improve access to finance for new tourism businesses



GOAL 9

REGULATORY REFORMS TO MAKE IT EASIER TO DO BUSINESS

Reduce red tape, develop business friendly regulations, ensure fair enforcement of regulations, and encourage innovation and competition by limiting the regulatory regimes that make it difficult for firms to enter the tourism market, regulate anti-competitive behaviour, and build strong enforcement institutions.

KEY PERFORMANCE INDICATORS

- Increase in investor confidence levels in Maldives
- Increase in Maldives' ranking on the Ease of Doing Business Index
- Increase in the satisfaction level of businesses with the business climate



STRATEGY 1 Remove barriers hampering the tourism industry's development

STMP will strive to make it easier to do business in the tourism industry by reducing red tape for registering property and getting an electricity connection. Business friendly regulations will be introduced for trading across borders, protecting minority investors, and getting credit. Delays and other hurdles in starting and registering a business, and doing business, caused by red tape will be dealt through streamlining processes. Investment processes will be simplified to help attract more FDI into the tourism industry.

- Establish a single window for the clearance and registration of tourism projects
- Clarify and enforce laws relating to businesses
- Enhance and promote the Ministry of Economic Development's website, and increase the transparency of processes through publications and investor forums
- Develop a digital platform to process tourism permits and licenses efficiently and transparently

STRATEGY 2 Develop business friendly laws and regulations

Many business-climate challenges are related to business regulation issues. Investors need clear investment policies and regulations that protect their legal rights. The government will accelerate revisions to the Company Act (Law No. 10/1996) and introduce a legal framework for bankruptcy laws and solvency. The government will build the capacity of the judiciary system and the judiciary to resolve fairly commercial contract disputes. Regulations will be strengthened to enforce commercial contracts and protect investor rights.

- Amend foreign investment-related laws to introduce a rules-based transparent system, providing more protection to investments
- Modernise the mortgage legal framework to enhance legal protection to secure lending
- Introduce insolvency and bankruptcy protection laws to enhance legal protection to assist troubled companies
- Introduce a trademark law
- Amend the Copyrights Act (Law No. 23/2010) to enhance intellectual property protection
- Reform the Company Act

STRATEGY 3 Bring transparency and predictability to the tourism tax regime

The tax regime is important for the tourism industry. Maldives ranked 119 out of 190 countries in the 2020 Doing Business Report on taxation. To make the country's taxation regime more business friendly and supportive of sustainable growth in the tourism industry, consultations are needed with stakeholders on tax schedules and providing adequate time for businesses to be able to adjust to any changes in the tax regime. The green tax needs to be transparent so that tourists know what projects are being funded by tax.

- Assess all revenue—tax and nontax—levied on the tourism industry and recommend comprehensive reforms that can further simplify the tax regime without compromising revenue
- Introduce a minimum 5 years for tax and nontax planning and scheduling
- Mandate a minimum 2-year grace period before any major changes to tax and nontax policies
- Strengthen the capacity of the tax authority to monitor and deter transfer pricing and other tax-avoidance practices
- Expand the tax base with the projected growth of the tourism industry including support from the expansion of international airports
- Introduce a capital gains tax on the sale of tourist properties

STRATEGY 4 Imbue a service culture among tourism industry regulators

The lack of coordination between regulatory authorities that issue tourism permits and licenses, a lack of service culture, and inadequate service quality need to be addressed. Streamlined and efficient regulatory services are needed for investors in tourism.

- Set up a one-stop digital service to issue permits and licenses
- Set up a regulatory coordinating taskforce among key regulatory agencies active in compliance functions
- Enter into service agreements between regulatory authorities and publish client charters
- Engage independent third parties to assess the quality of regulatory services for the tourism industry

STRATEGY 5 Streamline and strengthen the tendering of additional tourism facilities

Under 5TMP, tourist bed capacity increases will be carefully planned in consultation with stakeholders. Decisions on new revenue measures have resulted in an oversupply of islands for tourism in some atolls, resulting in a decline in the acquisition costs of new resorts by about 30% and lower revenue for the government.

- Differentiate lease rates of resorts based on the national spatial plan and the availability of key infrastructure
- Announce new resort developments based on a longer-term plan aligning the cluster-development objectives of the national plan
- Make the bidding process of additional resorts more market-oriented and transparent by applying stringent prequalification requirements based on financial qualifications and proof of funds



GOAL 10

ACCELERATE 360° DIGITISATION

Transform digital capability to create competitive businesses in the tourism industry which deliver high quality products and services. Optimise the uptake of digital applications to improve the delivery of services and business efficiency. 5TMP will encourage and enable the industry to fully embrace advances in digital technologies that have driven many innovations so that the industry can be more competitive and resilient.

KEY PERFORMANCE INDICATORS

- Increase in islands with access to high-speed fibre internet
- Increase in businesses completing visitor journey transactions via digital applications
- Increase in resorts who offer smartphone-based digital visitor journeys
- Increase in SMEs competent with digital technologies
- Increase in the level of user satisfaction with smart regulatory and management services





STRATEGY 1 Enhance visitor journey experiences and improve business efficiency through advanced mobile technology and digital applications

Tourists these days expect a seamless digital experience, and visitor behaviour has shifted at an astonishing speed for researching and booking travel and concluding transactions—and doing this on smartphones. International visitors who book travel online now spend more time looking at travel content on mobile devices than on laptops and desktops. Although the tourism industry benefits from the speed of transactions and innovation, it needs to be continually alert to privacy and cybersecurity threats.

STRATEGY 2 Develop a digital one-stop service for registering tourist establishments, accessing regulatory information, and coordinating between authorities

- Develop a digital platform for a one-stop digital service to process tourism permits and licenses
- Set up and operationalise a digital system for collecting and managing regulatory information
- Establish a digitised compliance monitoring system for all tourism industry regulatory agencies
- Integrate regulatory information management systems
- Hold online regulators' forums to share regulatory experiences and challenges
- Digitalise audit and quality assurance, including safety and security audits
- Set up the digital services necessary for emergency preparedness and response

STRATEGY 3 Explore opportunities for predictive analytics and to digitise customer journeys

Machine learning, video recognition, the Internet of Things, and chatbots offer established solutions for digitising customer journeys and making tourism services available via smartphones.

STRATEGY 4 Invest in digital infrastructure, reduce internet costs, and offer better and more reliable tourism services

High-speed fibre internet is available in 82 islands and 82% of households on these islands. Even so, 18% of the population live on outer islands and atolls that do not have fixed broadband, which constrains access to digital services, transactions, and economic opportunities.

STRATEGY 5 Develop a legal framework for electronic transactions and combating cybercrime

Having laws to do this will be instrumental for digitalising government services for the tourism industry and protecting users of these services.

STRATEGY 6 Improve digital literacy to tackle low technology adoption

Digital literacy is needed for the optimal use of e-wallets, mobile payment platforms, and blockchain. The young need mentoring and preparation for information and communication technology jobs, and SMEs need to be empowered to access new markets and new ways of financing. Under 5TMP, the government will deliver digitisation support to SMEs who need it most.

STRATEGY 7 Digitise human resources development and management

- Establish an online inventory of tourism apprenticeship programmes
- Create a human capital resource 'centre' page on MOT's website
- Link public and private tourism human resources-related websites
- Expand satellite classrooms and online courses
- Increase digital access points in vocational training institutions
- Develop digital platforms to enable hybrid work from home for marketing, accounts, and human resources

GOAL 11

WHOLE-OF-GOVERNMENT PRIORITISATION OF TOURISM

Government ministries, uniformed services, atoll and island councils, and state-owned enterprises will collaborate across and within the public sector to prioritise the tourism industry so that it can continue to lead and grow the economy and become more sustainable.

Maldives' tourism industry is a complex and interconnected system of many national and international stakeholders. It therefore requires strong national leadership and effective whole-of-government collaboration to ensure all stakeholders act in concert to support achieving Maldives' vision for tourism. The industry also requires superior levels of collaboration across all tourism sectors and innovative approaches to addressing existing and emerging issues on supply and demand.

5TMP will establish a comprehensive institutional framework for prioritising tourism and the collaboration needed to do this. It will empower ministries and councils to cooperatively exercise the authority available to them to create the conditions in which the industry can continue to flourish across all atolls. It will build on the effective engagement mechanisms in the government's institutional framework with innovative and improved mechanisms.

KEY PERFORMANCE INDICATORS

- Increase in the level of industry stakeholder satisfaction with the level of engagement and collaboration of all government agencies
- Councils, expert groups, and forums established under 5TMP deliver on their terms of reference
- Action plans for whole-of-government interventions to prioritise tourism are developed and implemented collaboratively and effectively





STRATEGY 1 Strengthen the national consultative mechanism for the tourism industry's strategic development

Ministers with portfolio responsibilities for tourism, business, health, higher education, sports, and culture will meet at regular intervals to advance the industry's diversification and to provide strategic direction for a comprehensive visitor economy.

- Establish a council of visitor economy ministers to advance policy transformation and accelerate teamwork across government agencies
- Institutionalise a tourism advisory board of industry leaders and senior officials to advise MOT on achieving profitable and sustainable long-term tourism growth
- Set up working groups of experts to tackle sustainability issues on the economy, environment, society and community, and human resources in the tourism industry, as well as transport, accessibility and inclusivity, safety and security, and tourism data and analysis
- Set up a senior officials' forum to maximise coordination across government agencies
- Amend the Tourism Act to recognise national consultative mechanisms for developing the tourism industry

STRATEGY 2 Expand MOT's capacity for tourism industry development and marketing

- Determine MOT's organisational needs to serve the industry through an in-depth organisational analysis
- Draw up an organisational plan with a detailed budget based on industry performance and expansion expectations
- Develop a performance measurement framework for MOT based on tourism receipts, tourism's contribution to GDP, and the number of locals employed in the industry
- Set up secretariat services to coordinate and monitor the implementation of tourism master plans

STRATEGY 3 Address government institutional framework gaps in sustainable tourism

- Set up a homeland security function to establish the regulatory framework, implementation, and monitoring of safety and security in the tourism industry
- Strengthen the collection of economic and social data that will enhance research on the tourism industry
- Strengthen the institutional framework to promote and regulate marine transport (super yachts, safari vessels, cruise ships)
- Set up an institutional framework to improve the quality of outbound travel for locals, expatriates, and their families
- Develop a national strategy to improve the experiences of Hajj and Umrah for nationals
- Improve policy and linkages with Ministry of Arts, Culture and Heritage, other heritage stakeholders, and the tourism industry to enable the shared protection of culture and heritage for the development of new tourism experiences and services

STRATEGY 4 Strengthen regulatory agencies to provide a predictable legal and regulatory environment

This is needed to ensure laws and regulations are introduced or changed in a planned and consultative manner, and to strengthen the regulatory functions of complementing government agencies.

- Institute regulatory support partnership memorandums of understanding between tourism regulatory agencies
- Develop research and evidence-searching capability to back laws and regulations
- Conduct regulatory impact analysis for new and amended laws and regulations
- Conduct public consultations on proposed laws and regulations
- Conduct ex post evaluations on the effectiveness of industry laws and regulations
- Develop annual joint monitoring and enforcement programmes
- Conduct an organisational and regulatory capacity assessment of tourism regulatory partners
- Develop a training and skills development plan for regulatory agencies

- Introduce a regulatory training course in partnership with the Civil Service Training Institute, universities, colleges, and other educational institutes

STRATEGY 5 Enable atoll councils to facilitate the vertical and horizontal collaboration needed by tourism industry

The active participation of all atoll and island councils, local communities, and sectors of the economy is needed to ensure the tourism industry achieves its goals for visitors, businesses, communities, and workers. The collaboration and engagement of local governments is vital because they intersect with the industry in many ways, including the facilitation and regulation of infrastructure development.

- Establish a network of atoll council presidents for tourism to work with all levels of government
- Allocate collaborative responsibilities, such as destination and innovative product development, tourism services quality assurance, environmental sustainability, safety and security, and the coordinated marketing of atoll councils
- Conduct annual atoll tourism managers' dialogues whereby managers of tourism businesses meet with their island councils.
- Decentralise tourism safety and security auditing monitoring and compliance by recruiting MOT-approved auditors in all atoll and city councils

STRATEGY 6 Comprehensive capacity building to support island councils to deliver maximum economic and community development through sustainable tourism

5TMP acknowledges that collaborating at the island level is complex because of the large number of island councils across Maldives and lack of human capital at the desired levels. MOT will work with the Local Government Authority and the Ministry of Finance to decentralise tourism administration and provide the necessary human, digital, and financial resources at the atoll level to deliver 5TMP's tourism vision.

- Conduct training on destination development and management for atoll and island councils
- Provide sociocultural sustainability education and training to local island councils and tourism operators on islands
- Conduct training on environmental sustainability standards and procedures
- Provide digital competency training for island and atoll council staff
- Build the capacity of island and atoll council staff for tourism-related data collection, storage, maintenance, and analysis
- Empower atoll councils to conduct safety- and security-implementation programmes and audits
- Conduct training sessions for atoll and island councils on the implementation of rules and regulations and audit mechanisms
- Build the capacity of the NGO community
- Offer training to island councils, tourist guesthouse owners and operators, and managers of tourism services on local islands on the need for increased cultural sensitivity by visitors

GOAL 12

ADVANCED DATA ANALYTICS AND INSIGHTS

Produce appropriate and well-timed data, develop advanced analytics capabilities, and generate insights which will enhance visitor experiences, streamline customer services, improve business processes, and accelerate industry growth.

KEY PERFORMANCE INDICATORS

- High stakeholder satisfaction over the quality and timeliness of statistical reports and research
- Increase in the availability of granular data on international visitor spending
- Increase in the availability of granular travel market data for predictive analysis



STRATEGY 1 Strengthen collaboration among government ministries and local councils to leverage and share data

Timely data and cost-effective insights are critical tools for decision-making, industry growth, and investor confidence. Data are important for measuring industry performance, monitoring trends, and informing government policy. Granular data are needed to guide specific business activities and for growth in certain atolls. Under 5TMP, the government will develop and deliver the data needed to inform tourism decision-making. MOT will collaborate with the MMA, Maldives Bureau of Statistics, Ministry of Economic Development, Ministry of Finance, and Maldives Inland Revenue Authority to define data requirements and explore mechanisms to collect, collate, analyse, and report data. For the first phase of 5TMP, an expert group on tourism data analytics will be established.

- Conduct a comprehensive survey to identify tourism industry data gaps
- Enact a data protection and privacy law on the collection, use, and disclosure of private sector tourism data
- Establish a shared database of tourism employees and income earners registered by establishment using the International Standard Classification of Occupations
- Develop and integrate security data management systems into the tourism industry to enable the sharing of security-related information with stakeholders

STRATEGY 2 Establish tourism intelligence

Multiple virtual storage datasets will be aggregated, maintained, and supplemented by additional data to provide comprehensive insights for improving service quality, destination promotion, new product development, investment decisions, and policy making. Under 5TMP, higher quality and more granular data, captured more frequently and analysed quickly, will be used by the tourism industry for quicker responses to emerging concerns and to capture new opportunities.

- Enhance and sustain multiple virtual storage historic datasets as a source of foundation data and insights into visitor perceptions
- Set up a database of visitor travel and expenditure in atolls
- Establish mechanisms to collect data on outbound travel in Maldives
- Improve the research and analysis of tourism-related publications
- Appoint a research officer post responsible for desk-based research

STRATEGY 3 Begin the comprehensive use of big data to measure, monitor, and manage tourism performance

Globally, the big data landscape is expanding rapidly, and big data has enormous potential to inform comparative performance and predictive analysis. Under 5TMP, the government will engage with leading online travel agencies, and metasearch and big data marketing platforms, to access data that can assist businesses and government marketing agencies to better target markets and, for the government, to implement policy. Improvements in the granularity of international visitor spend data will help tourism operators and government agencies design strategies to attract the highest-yield visitors and offer high-yield products to meet visitors' expectations.

- Establish international partnerships to strengthen evidence-based decision-making
- Subscribe to international databases for data on source markets and related data

STRATEGY 4 Develop tools and methods for monitoring and evaluating 5TMP

A comprehensive set of tourism indicators that can be used to monitor and report on the performance of 5TMP will be defined in the first phase of 5TMP's implementation. MOT will engage with government data providers and industry operators to gather the data, and report data that indicate the progress and success of 5TMP to help ensure sustainable tourism.

GOAL 13

STRENGTHEN HEALTH, SAFETY, AND SECURITY SYSTEMS

Maintain the highest standards of health, safety, and security; and build a culture of safety and security through education and building capacity and capabilities.

KEY PERFORMANCE INDICATORS

- Increase in visitor satisfaction levels with health care facilities and services
- Increase in the confidence of visitors on safety in Maldives
- Increase in the confidence level of security in Maldives
- Reduction in safety and security incidents





STRATEGY 1 Develop policies and implement measures to enhance the confidence of visitors on health and safety

- Install hyperbaric chambers with required treatment in strategic locations in Maldives in relation to tourist beds
- All tourist establishments should have access to the minimum medical services for minor first aid, general medical requirements, and emergencies.
- Ensure all airports comply with International Civil Aviation Organization standards
- Establish actions to ensure minimum measures for attending to visitor incidents, including domestic evacuations and financial measures for international evacuations.

STRATEGY 2 Improve safety and security standards in the tourism industry

Safety and security standards need to be at the highest possible level for Maldives to retain its position as one of the world's leading tourism destinations. Under 5TMP, tourism officials at every level of government will coordinate with other government officials, the tourism industry, local councils, and NGOs on the importance of following safety and security standards. The tourism industry must be vigilant, taking extra precautions and applying necessary protocols to increase safety and security standards to ensure the safety of guests and employees. The Maldives National Defence Force (MNDF), MNDF Coast Guard, and Maldives Police Service need high-endurance vessels, trained personnel, and the finance to improve the response to safety and security incidents.

- Set up a national tourism safety and security committee
- Establish regulations, policies, and procedures on safety and security in the tourism industry
- Revise recruitment processes for workers in the tourism industry to improve safety and security
- Conduct regular audits to ensure compliance on safety and security standards and regulations in the tourism industry
- Inform the international travel trade on safety and security issues
- Identify security threats through coordination with security managers
- Conduct joint exercises on safety and security among tourism industry partners
- Share best practices among industry stakeholders
- Conduct joint crisis management training for police and industry stakeholders.
- Ensure coordination among stakeholders in response to safety and security incidents

STRATEGY 3 Prevent and counter violent incidents, strengthen response mechanisms, and regulate the private security sector

The nature of the threats facing the tourism industry in Maldives has changed over the years. The main security challenges these days are safeguarding tourist establishments from unauthorised access and organised crime. Having regulations to cover these and other security risks is crucial. Because Maldives is located in a strategic gateway in the Indian Ocean, the possibility of transnational crimes being committed within Maldives' waters is high. Strengthening perimeter security will be critical for protecting against potential threats.

- Establish data collection and reporting mechanisms for safety and security in the tourism industry
- Conduct training and awareness about incidents of violence to tourism industry stakeholders
- Develop a mechanism to share best practices on safety and security among tourism industry stakeholders
- Train skilled and competent security officers
- Conduct joint drills and crisis management training for government officials and tourism stakeholders
- Enact legislation on the private security industry
- Develop protocols for the private security sector to detect and report activities related to incidents of violence

STRATEGY 4 Improve the regulatory framework, hazard identification, preparedness, and response mechanism for fire safety in the tourism industry

Fires in tourist establishments are on the increase, and some incidents have caused prolonged closures. All tourist establishments should have fire safety procedures in compliance with local fire regulations. Fire safety is considered to be costly when it is part of the design of tourist establishments. But the level of fire safety also depends on how tourism facilities are run, the level of staff training in fire safety, and the behaviour of guests.

- Enhance the regulatory framework on fire safety, protocols, and procedures
- Develop guidelines for the planning and placement of hazardous materials in tourism facilities
- Conduct regular audits to monitor compliance of fire safety regulations

- Establish requirements for regular fire drills and fire incident training for industry stakeholders
- Conduct capacity building programmes on fire safety for industry stakeholders
- Train volunteer firefighters in local islands
- Establish a framework for sharing best practices on fire safety

STRATEGY 5 Improve water safety and emergency preparedness and response mechanisms for water safety incidents

Water safety in tourism facilities is essential because water sports and activities are one of the most common causes of tourist deaths in Maldives. To reduce these incidents, tourist facilities will be required to display information on water safety and easy access to safety equipment.

- Review current water safety regulations
- Introduce a sustainable audit mechanism for water safety
- Conduct regular audits to ensure compliance on water safety standards and regulations in the tourism industry
- Develop a standardised guidance package on water safety for tourists
- Train skilled and competent first responders
- Undertake capacity building of water safety programmes for industry stakeholders
- Procure machinery and equipment for water safety emergencies for the MNDF Coast Guard and Maldives Police Service



GOAL 14

ESTABLISH TRANSFORMATIONAL TOURISM INDUSTRY STANDARDS

Sustainability is the strategic driver for 5TMP, and transformational standards will be essential to achieve the vision of Maldives leading the world in sustainable tourism. Sustainability standards will lead, guide, and focus actions at all levels, especially among managers of tourist establishments and chief executives of airlines and airports, for achieving the sustainability goal.

KEY PERFORMANCE INDICATORS

- Establish an industry organisation to provide sustainability leadership to the tourism industry
- Increase in the understanding of national standards for sustainable tourism by stakeholders
- Increase in the number of certified accommodation providers and destinations
- Increase in the number of businesses undertaking environmental, social, and governance reporting
- Increase in the level of understanding of sustainability issues among tourism workers



STRATEGY 1 Establish a framework for leadership on sustainable tourism

Tourists are more aware and concerned about the impact their choices and behaviour have on the environment. Tourists are not only concerned about the negative impacts of the industry on the environment but also on the impacts on local communities and the protection of human rights. Agile leadership and adaptive governance are needed to position a sustainability agenda as a strategic focus for all tourist establishments, drive systemic changes, and promote sustainability in all tourism operations. High quality leadership at the industry level will be essential to drive inclusive participatory approaches to deliver systemic change and create value for businesses and the betterment of society. We will utilise visitor-facing experiences to learn about their sustainability concerns and wishes, and convert insights into leadership practices.

- Establish a tourism sustainability council to make on progress the sustainability agenda
- Regularly assess the concerns of visitors to Maldives and communicate them to industry leaders
- Generate sustainability insights to be integrated into the corporate strategies of tourism businesses, and contribute to the co-creation of thriving tourism communities

STRATEGY 2 Strengthen tourism industry sustainability standards

The 17 Sustainable Development Goals and the 169 targets champion change and provide the direction for collaboration and the co-creation of transformative standards for more sustainable tourism. 5TMP's focus will be on ensuring equitable standards are introduced for all tourism products to support the monitoring and enforcement of sustainability across all tourist establishments and activities.

- Establish tourism sustainability standards and criteria for resorts, tourist guesthouses, hotels, and vessels
- Draw up sustainable destination criteria for islands and atolls
- Establish national standards for the certification of transport providers and tour operators
- Develop guidelines and standards for water sports
- Draw up standards for spa and wellness tourism
- Develop guidelines on excursions for residential islands
- Review and update operational standards for all tourist establishments

STRATEGY 3 Set carrying capacity and planning standards for islands

The guidelines and knowledge to understand carrying capacity and planning standards to mitigate the negative impacts on the local community are insufficient, and standards need to be set.

- Develop guidelines for planned and sustainable tourism development on local islands to meet the physical, social, and cultural carrying capacity of these islands
- Develop guidelines for island tourism plans
- Develop quality standards for island tourism
- Develop regulations to enforce sustainability standards in island tourism
- Develop regulations and guidelines using international best practices to mitigate and manage social, cultural, and environmental impacts of local island tourism on local communities

STRATEGY 4 Enable voluntary self-assessments of tourism industry standards and strengthen audit system compliance

5TMP will strive to establish a reporting, certification, and monitoring system for tourism sustainability. Tools for monitoring and voluntary self-reporting of sustainability impacts will also be developed. Priority will be given to defining environmental, social, and governance metrics for tourism, and connecting them with corporate business strategies and reporting standards that match sustainability leadership domains. Doing this will help enable the tourism industry to be able to fully assess the collective environmental footprint and to integrate climate change and related issues into business strategies supporting the national transition to a low-carbon economy and strengthening resilience to climate risks.

- Develop self-assessment toolkits
- Enact regulation to facilitate third party and independent assurance services
- Register and license assessors to support oversight functions
- Introduce compliance rating schemes

STRATEGY 5 Prioritise comprehensive sustainability in education and training

Ongoing investment in sustainability in education and training is necessary at all levels, including corporate board members and managers. Under 5TMP, special attention will be given to ensuring that sustainability attributes and impacts are integrated into staff development plans, appraisals, and reward mechanisms.

- Provide cultural sensitivity training
- Organise an annual international forum to share lessons on sustainable tourism
- Conduct regular training programmes on tourism sustainability
- Organise workshops to sensitise industry stakeholders on regulatory standards



GOAL 15

ENSURE TOURISM IS ACCESSIBLE FOR ALL

5TMP is committed to inclusive tourism. Tourists with disabilities and senior citizens often face challenges accessing tourism services and infrastructure. Accessible tourism is necessary to achieve the vision of Maldives leading the world in sustainable tourism. Under 5TMP the government will pursue inclusive policies to enhance the level of accessibility of our tourism offerings for everyone. Accessible tourism will help Maldives enhance product differentiation, attract new audiences, and improve the scope of employment opportunities.

KEY PERFORMANCE INDICATORS

- Increase in the understanding of national standards for accessible tourism by stakeholders
- Increase in the number of certified accessible tourist establishments
- Increase in the number of businesses undertaking environmental, social, and governance reporting
- Increase in the level of understanding of advantages of accessible tourism among workers in the industry



STRATEGY 1 Increase awareness and education on accessible tourism

Under 5TMP, the government will prioritise eliminating barriers for tourists and locals to enjoy and benefit from the country's tourism facilities, sites, and attractions. Raising awareness among government officials, tourism industry stakeholders, and the public on the functional diversity of people and the advantages of accessible tourism is key to a successful inclusive tourism policy.

- Conduct social media-based awareness campaign for accessible tourism
- Conduct awareness workshops for owners of tourism businesses on the social and economic advantages of accessible tourism
- Provide training to managers of tourist establishments on the principles, processes, and application of Universal Design
- Provide training to human resource professionals and managers in the tourism industry on the inclusion of people with disabilities in the workforce
- Conduct nationwide awareness campaigns to harmonise accessible tourism across all islands

STRATEGY 2 Establish the standards and legal framework for accessible tourism

A sound legal framework is necessary to enforce inclusive tourism standards that are human-rights compliant across the entire tourism industry. Under 5TMP special attention will be given to improve air, marine, and land transport access for inclusive tourism. Accessibility standards will be developed for beach, snorkelling, diving, and water sports. The dissemination of information using clear and simple language with easy-to-read fonts and clear images and symbols will be prioritised.

- Enact a law for the implementation of accessibility requirements in the tourism and transport industries
- Establish a Maldives national standard on accessible tourism
- Develop regulations on accessible tourism for different types of tourist establishments, transport infrastructure, products, and services
- Conduct comprehensive consultations and engage with industry at all levels on phasing in accessibility standards
- Draw up a strategy to incentivise accessibility standards in tourism and transport
- Draw up a change management plan for accessible tourism
- Establish penalties for non-compliance and false advertising

STRATEGY 3 Invest in accessible infrastructure, products, and services

Under 5TMP, the government will improve access to finance and incentivise investments for accessible tourism. The government will identify the strategic priorities for funding and provide information on the objectives for providing financial assistance.

- Develop a funding strategy and investment plan for accessible tourism
- Allocate a budget for accessible transport infrastructure and services
- Incentivise tourist establishments and businesses to invest in improving existing infrastructure and services
- Support SMEs to boost accessibility in local islands

STRATEGY 4 Set up a management system for accessible tourism

Under 5TMP, the government will mobilise the entire political and administrative framework to take action to make inclusive tourism for all a reality. Special attention will be given to integrating accessibility into government decision-making, strategic planning, research, and communicating accurate information on accessible tourism offerings.

- Set up a working group on accessible tourism with organisations of persons with disabilities and technical experts
- Conduct research to deepen knowledge of the market, behaviour, holiday patterns, and socioeconomic profile of tourists
- Adopt a national strategy and framework to ensure accessible tourism
- Draw up marketing and promotion plans for accessible tourism
- Provide detailed accurate information on accessible tourism resources
- Develop a reward system to encourage good practices and to replicate success stories

STRATEGY 5 Establish quality control mechanisms for accessible tourism

5TMP will strive to develop a monitoring system for accessible tourism. Tools for monitoring and voluntary self-reporting will also be developed. Priority will be given to defining the relevant criteria.

- Draw up protocols to collect feedback on accessible tourism from tourists and their travel companions
- Set up processes to monitor and review the implementation of action plans to improve accessible tourism offerings
- Establish the indicators for measuring the performance of an accessible tourism policy
- Compile data on accessible tourism from surveys, audits, complaints, and feedback systems
- Communicate the performance results and lessons of accessible tourism with industry stakeholders

