



Data Collection Survey on Recovery of Tourism affected by COVID-19 in the Republic of Maldives

Volume 3

Appendixes

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Table of Contents

Appendix 1: Inception Report of the Project.....2

Appendix 2: Project Work Plan.....30

Appendix 3: Proposal of workshops and the list of participants of workshops and materials used.....33

Appendix 4: Meeting Agenda of the first Steering Committee Meeting 133

Appendix 5: Meeting notes of the first Steering Committee Meeting 135

Appendix 6: Meeting Agenda of the Second Steering Committee Meeting 139

Appendix 7: Indicative Summary of Component 2 141

Attachment 1: Recommendations to JICA for recovery projects in the Maldives..... 153

Appendix 1: Inception Report of the Project



Data Collection Survey on Recovery of Tourism affected by COVID-19

Inception Report

**Prepared by UNWTO
for the Japan International Cooperation Agency and the Ministry of
Tourism of the Maldives**

April 2021

1. Introduction

On 16 February 2021, the Japanese International Cooperation Agency (JICA) and the World Tourism Organization (UNWTO) signed an agreement for the implementation of a project on tourism recovery for the Maldives, titled “Data Collection Survey on Recovery of Tourism affected by COVID-19”. In the second semester of 2020, JICA and UNWTO had actively collaborated to prepare the project proposal for said project, which is largely based on selected components presented in the UNWTO Technical Assistance Package for COVID-19 Tourism Recovery. Immediately upon signature of the agreement, UNWTO has started actively working on the implementation of the project with a view to successfully completing project activities by 31 October 2021, as foreseen in the project agreement. In the first month of 2021, UNWTO officials actively exchanged information and held various online meetings with representatives from JICA and the Ministry of Tourism of the Maldives to exchange information on the planning and implementation of the project, including the project kick-off meeting on 6 April 2021 with participation from JICA, the Ministry of Tourism of the Maldives and UNWTO.

Based on the project proposal, UNWTO will deploy a team of experts to assist with the tourism recovery process for the Maldives. The experts will work together with officials from JICA and the Ministry of Tourism to implement the various components of the tourism recovery project for the Maldives.

This inception report presents the background of the project, the approach and methodology that will be adopted during the implementation of the project, and the expected outputs of the project.

2. Project background

THE IMPACT OF THE COVID-19 PANDEMIC ON THE GLOBAL TOURISM SECTOR

The world is facing an unprecedented global health crisis, the repercussions of which are being felt throughout all sectors of society. Governments and health institutions worldwide are doing their utmost to combat and contain the spread of the virus, which this has resulted in widespread lockdown measures, including the closure of hotels, restaurants, retail, cultural and natural attractions, and the temporary closure of borders, or reduced access. This has had devastating effects on the economy, with the tourism sector being one of the most severely impacted.

Prior to the COVID-19 pandemic, tourism represented 30% of the world’s export of services (US\$ 1.5 trillion), with 45% in developing countries. In May 2020, UNWTO already forecasted that the impacts of COVID-19 would result in international tourist

arrivals dropping by 60% to 80% when compared with 2019 figures, and the final figures for 2020 indeed showed a decline of 73%. International tourist arrivals further plunged by 87% in January 2021, amid new outbreaks and tighter travel restrictions. This follows a decline of 85% in the last quarter of 2020. Putting this into context, UNWTO notes that in 2009, on the back of the global economic crisis, international tourist arrivals declined by 4%, while the SARS outbreak led to a decline of just 0.4% in

2003.

This being said, in the past decades tourism has also shown a strong resilience to adapt, innovate and recuperate from adversity. Tourism has a tremendous ability to rapidly transform into a much-needed source of income for public and private stakeholders alike, and lead in areas ranging from consumer confidence, entrepreneurship, women and youth employment to technological innovation.

In order to assist Member States in developing this gradual approach to recovery, UNWTO has created a number of tools, policy recommendations, monitoring tools such as the UNWTO Dashboard, and designed the “**COVID-19 Tourism Recovery Technical Assistance Package**”. The package offers guidance to both public and private tourism sector stakeholders in their crisis response by, firstly, outlining UNWTO’s range of technical assistance, and, secondly, detailing potential areas of intervention, including impact assessment, roles and responsibilities. The Technical Assistance Package is structured around **three main pillars**:

- I. **ECONOMIC RECOVERY:** measuring the quantitative and qualitative impacts of COVID-19 on the tourism sector and preparing research-based recommendations for economic recovery and support to tourism-related businesses, particularly MSMEs.
- II. **MARKETING AND PROMOTION:** reviewing marketing and promotion strategies, identifying and targeting markets that can help accelerate recovery, addressing product diversification, and issuing recommendations and guidelines in terms of pricing and packaging.
- III. **INSTITUTIONAL STRENGTHENING AND BUILDING RESILIENCE:** assisting tourism governments and tourism businesses to build resilience and adapt their services to meet the post COVID-19 working conditions in terms of health, safety, and restoration of consumer confidence; and promote tourism governance, public- private partnerships and collaborative efforts for tourism recovery, including crisis preparedness and management systems, protocols and skills.

Each pillar outlined above contains a comprehensive list of technical assistance activities. For Maldives, the activities selected result from an active consultation between JICA, UNWTO, and Ministry of Tourism of the Maldives, and an assessment of specific country needs and interests, including tourism target markets, available attractions, tourism forecasts and strategic objectives, as detailed in country studies and policy papers.

COVID-19 IN THE MALDIVES

The first COVID-19 cases in the Maldives were reported on March 7, 2020, being two foreign visitors of a resort. Till mid-April, only a limited number of individual cases were reported in the country, but from late April onwards the virus rapidly spread. The WHO novel corona virus update for the Maldives of 13 January 2021 reported a total of 14,159 confirmed cases of COVID-19 and 49 deaths. Especially many cases have occurred in the densely populated capital Male, with also clusters of COVID-19 infections evolving on selected atolls. On 12 March, Maldives declared a public health emergency for a period of 30 days and it has been extended since then. Subsequently, a variety of measures were taken to try to curb the spread of COVID-19 in the country, including travel restrictions for international

visitors, a nationwide shut down of all guesthouses, city hotels and spas, the closure of government offices and educational institutes, and a lockdown for the Greater Male Region. During the public health emergency period, it is required for all residents over two years of age to wear facemasks in public places, except when exercising, and for establishments to ensure sanitation and social distancing. According to data from the IMF, the real GDP for the Maldives contracted with 32.2 percent in 2020, which is mostly due to the slump in tourism.

The WHO report on the Maldives Health System Response to COVID-19 lists the following initiatives by the Government to reduce socio-economic impact of the pandemic:

- Reduce government recurrent spending by MVR 1 billion (USD 65 million) as a precautionary measure to compensate for projected economic issues as a fallout of the spread of COVID-19.
- Salaries of all political appointees, including and Senior Heads of SOEs, to be reduced by 20%.
- Use of some inoperative resorts as possible alternative isolation facility locations that can be utilized with minimal restoration.
- Development of an economic stimulus package to ensure the continuation of jobs and survival of businesses. (To be eligible for this package will require to avoid large-scale layoffs and wage reductions).
- Efforts to ensure capital arrangements for SMEs at concessional rates and conditions.
- Bank of Maldives (BML) revealed that changes have been brought to loan eligibility requirements and also introduced short-term financing solutions in collaboration with the Ministry of Tourism and the Maldives Association of Tourism Industry (MATI) to counter the economic impact of Covid-19 on the Maldives' tourism sector. Resorts and guesthouses can request funding up to USD two million to be repaid within three years.
- To minimize the direct impact to the citizens, an Economic Recovery Package was developed, including arrangements of working capital for businesses through banks; subsidies for utility bills; principal and interest amount of loan repayments to BML to be deferred by 6 months to businesses and people who have been negatively impacted as a direct result of Covid-19; and reduction of the oil price sold from State Trading Organization.
- An Income Support Allowance (for 3 months) has been rolled out to provide a safety-net to affected and displaced workers due to COVID-19.
- Financial Aid for Maldivian students abroad for maximum of 2 months.

On June 8, 2020 the World Bank approved a 12.8 million COVID-19 Emergency Income Support Project to help Maldives mitigate the economic impact of the COVID-19 crisis on poor and vulnerable workers and their families. The project will largely finance the Government's COVID-19 Income Support Allowance scheme, by providing temporary support of up to MVR 5,000 (approximately \$322) per month to workers who have lost their jobs or income as a result of the coronavirus pandemic.

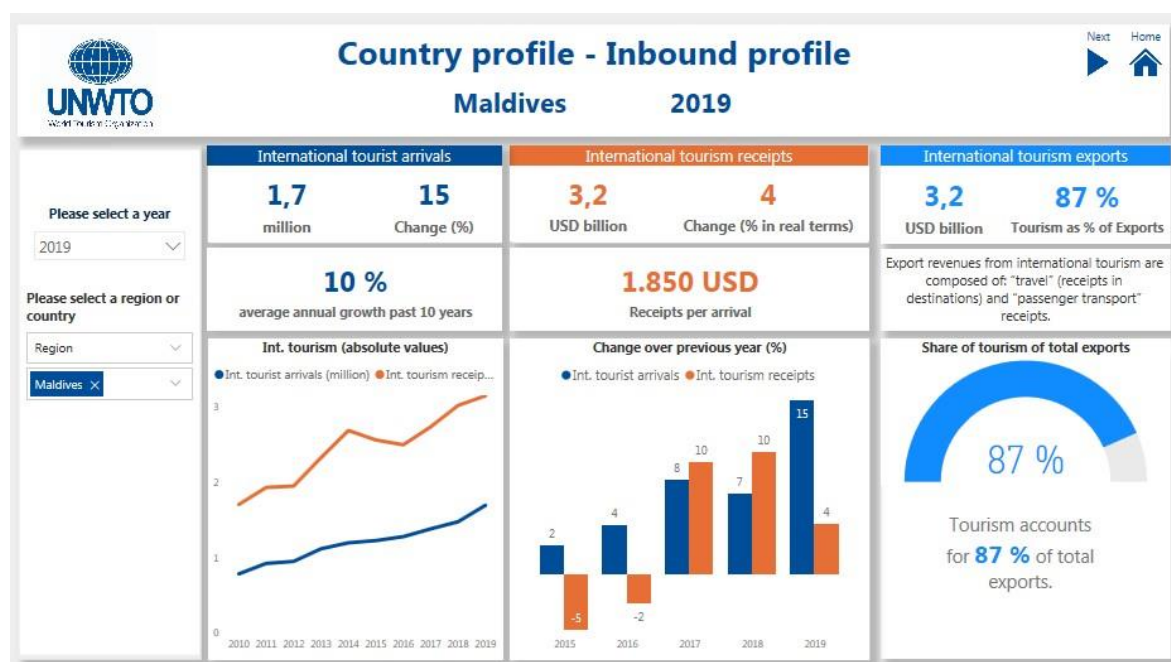
On June 25, 2020, the Asian Development Bank approved a \$25 million concessional loan and a \$25

million grant to help the Government of Maldives fund its response to the coronavirus disease (COVID-19) pandemic. The funds will be used to support the government in carrying out its social protection program, which includes unemployment allowances to salaried employees and self-employed workers whose incomes are affected by job or work loss, and other social assistance to the vulnerable population. It will also help the government in providing economic assistance to the self-employed and businesses with subsidized and collateral-free working capital loans during the crisis period.

To control the spread of COVID-19 in the Maldives, the Government successfully launched a vaccination campaign. By the end of March 2021, 237,716 persons out of a total population of 568,362 of the Maldives had already been vaccinated.

The JICA-UNWTO project will further assess the initiatives taken and support provided by the Maldives Government and development partners to mitigate the socio-economic impact of the COVID-19 pandemic, and assess how the actions have helped and/or could contribute to mitigating the impact on the tourism sector and accelerating tourism recovery.

TOURISM IN THE MALDIVES¹



The Maldives is known as an exclusive tropical island destination, and considered a paradise for divers, honeymooners, and other holiday makers. The Maldives consists of a chain of 1192 small coral islands and sandbanks, which are spread over 26 geographic atolls, out of which 202 islands are inhabited. A total number of 159 tourist resorts are located on different small islands of the Maldives.

Over the past decade, international tourist arrivals to the Maldives have gradually increased from 0.8 million in 2010 to 1.7 million in 2019. Likewise, international tourism receipts grew from 1.7 US billion to 3.2 US\$ billion over the same period. In January 2020, international visitor arrivals amounted to 173,347, which was a 14% increase compared to January 2019. As a result of the COVID-19 pandemic, arrival figures sharply declined to 149,785 in February 2020 and 59,630 in March 2020.

Following the first confirmed COVID-19 cases in the Maldives in tourist resorts in early March 2020, the Government of Maldives introduced strict containment measures which eventually resulted in the suspension of arrival visa for visitors at the end of April 2020. This meant that the Maldives tourism industry would completely close for almost three months until mid-July 2020. The re-opening of the tourism sector of the Maldives gradually started from 15 July 2020. Since that date, all tourists are granted 30 days free visa on-arrival and visa can be extended for any long-stay holiday makers. Resorts, and hotels located at uninhabited islands are open for tourists from July 15, 2020, and guest houses and hotels located at inhabited islands from August 1, 2020. Under the initial phase to re-open the tourism sector in July – August 2020, tourists were allowed to book their entire stay at one single tourist facility. Stay at multiple resorts and hotels were not allowed during this period. In September 2020, Maldives introduced the facilitation of “Split Stay” between resorts, which allowed

¹ Below figures taken from UNWTO’s dashboard: <https://www.unwto.org/country-profile-inbound-tourism>

tourists to experience more than one resort in the country and enabled them to stay longer in the country during their holidays. Maldives Tourism Ministry is an active member of the UNWTO Global Crisis Committee supporting countries to shape better policies for recovery. Further, in September 2020, the World Travel and Tourism Council (WTTC) awarded Maldives with the Safe Travels Stamp. The stamp was granted in recognition of the country's efforts to implement enhanced health and safety measures, in line with the WTTC global Safe Travels protocols. As soon as the vaccination campaign in the Maldives started, frontline workers in the tourism sector were among the priority groups to receive the vaccine in order to reduce the risk that they could contract or transmit the virus through their contacts with visitors. By the end of March 2021, a total of 17,516 tourism frontline workers had already been vaccinated.

Following the re-opening of the tourism sector, the Maldives recorded 1,769 international tourist arrivals in the second half of July 2020, 7,628 arrivals in August 2020 and 9,538 arrivals in September 2020. Between October and December 2020, the positive trend in arrival figures continued, with 21,515 arrivals in October, 35,759 in November, and 96,412 in December, bringing the total annual number of international tourist arrivals to the Maldives at 555,949. Overall, for the year 2020 the COVID-19 pandemic caused a decline in tourist arrivals to the Maldives of 67.4 percent² showing a slightly better performance than the 73% global decline of tourist arrivals in 2020. In the first quarter of 2021, the tourism sector of the Maldives showed further signs of recovery, with 92,103, 96,882 and 109,585 arrivals, respectively, for January, February and March 2021. The figure for January 2021 is still 46.9 % lower than the same month in 2020, but showing a much stronger recovery than the global international tourism market, which further weakened in January 2021 with a drop of 87%. Another positive trend is that the average length of stay of international visitors in the Maldives has increased to 8.9 days in the first quarter of 2021, compared to approximately 7 days in the pre-COVID-19 era.

SOCIO-ECONOMIC IMPACT OF COVID-19 ON TOURISM ENTERPRISES AND EMPLOYEES IN THE MALDIVES

With tourism being the leading economic sector for the Maldives, the COVID-19 pandemic and resultant slump in international tourism has undeniably had its impact on the Maldivian economy in general, and its tourism sector in particular. Two UNDP Rapid Livelihood Assessments of the Impact of COVID-19 on the Maldives³, published in June 2020 and August 2020, presented the following findings for the tourism sector as a result of the decline in tourist arrivals:

- A resort management survey indicated that 96 percent of the approximately 45,000 employees on payroll in the resorts were retained with partial pay for the initial period of closure of resorts (April-June period), while only 4 percent of employees were terminated. The speed at which operations normalize to pre- pandemic levels is an important factor that will determine longer term job security for employees of resorts and across the tourism value chain, job seekers and new entrants to the labour market.

² Source: Maldives Tourism Updates, Ministry of Tourism

³ Source: UNDP Rapid Livelihood Assessment Impact of the COVID-19 Crisis in the Maldives, June 2020 and August 2020

- Especially, a large number of the 1,186 people working for third-party service providers of the resorts are affected. A large proportion of these third-party employees of resorts are foreign migrant workers undertaking elementary work such as gardening, cleaning and maintenance.
- As a result of the temporary closure of resorts in the second quarter of 2020, resort employees earned no service charge between April and June 2020. Service charge income contributes to more than 40 percent of the monthly income earned for those resort workers below professional levels and managerial positions. The average monthly service charge income earned between April and June in 2019 was \$482, which resort employees lost over the same period in 2020, which is equivalent to \$32 million in losses for local employees in resorts during this period.
- The large scale and immediate impact of the crisis on employment in the tourism sector is evident from the JobCenter data of over 7,500 employment complaints. More than half of the cases (54 percent) relate to employees working directly in the tourism sector and 14 percent of the cases relate to those working in the transport sector, which is linked to tourism. According to the JobCenter data, the majority of those affected work in service areas, in lower-paying categories, or are self-employed.
- More than half of the employment complaints in the JobCenter relate to those under the age of 30. The JobCenter data shows that, across the tourism sector, redundancy and therefore loss of income impact was highest amongst young people between 15-20 years. Most people in this age group served in elementary and clerical level jobs.
- Services of freelancers, seasonal workers and local vendors providing goods and services to resorts have been temporarily stopped and majority work on mutual understanding basis, indicating a high prevalence of loss of work amongst informal sector catering the resorts. These include recreation/ entertainment providers to resorts, cleaning services provided to resorts which often involves women, reef fish providers, local boat (Dhoni) operators etc.

Short term employability and income opportunity within the tourism industry is uncertain for many including those in job transition. Those in job transition phase, have lost jobs, are on no pay, are unemployed and seeking for new jobs and are new entrants to the labour market are amongst those are unlikely to secure employment or incomes in the short term, from the tourism industry. Likewise, freelance service providers and community vendors of goods and services are undergoing multiple challenges with no formal recognition and loss of income affecting their livelihood and wellbeing during this period. The short-term income opportunities for freelance workers and some vendors look unpromising with low occupancy forecasts and slow growing demand in the tourism sector.

The JICA – UNWTO project will further assess the impact of the COVID-19 pandemic on employment and income generating opportunities in the tourism sector, analyse the effectiveness of mitigation measures taken for tourism employees, and make recommendations on how to mitigate the impact on tourism workers, especially the most vulnerable groups, including youth and women.

With the gradual return of international tourists to the Maldives from mid-July 2020 onwards, a reasonable number of tourism employees could continue working in the resorts, with improved possibilities to increase their income through service charges. As tourism recovery has primarily started

at resorts on uninhabited islands, it is pertinent to mention that especially the many tourism MSMEs on inhabited islands are still experiencing the most severe impact of the COVID-19 pandemic on the tourism sector. An early assessment carried out by the Guesthouse Association of Maldives (GAM) indicated that the guesthouse segment of the Maldives tourism industry, which includes 616 registered guesthouses on inhabited islands that generated US\$43 million in 2019, would incur an aggregate loss of US\$ 4,824,900 per month when operations ceased due to the COVID-19 pandemic, which would amount to US\$ 28.9 million over a 6 months period⁴. Other assessments carried out at the beginning of the pandemic, showed a requirement of \$3 million for the 125 registered safari boats in the Maldives to cover monthly expenses, and an expected revenue loss of US\$ 100 million over a 6 to 8 month period for the 135 active tour operators in the country⁵. To pay further attention to the impact of the COVID-19 pandemic on the tourism MSMEs on inhabited islands in the Maldives, the JICA- UNWTO project will further analyse the impact on these enterprises, and look into mitigating measures for the tourism MSMEs, as well as initiatives to help accelerate tourism recovery for this particular group.

MARKETING TO SUPPORT TOURISM RECOVERY

Competition in the tourism destination marketplace has further intensified in the framework of the COVID-19 pandemic, with countries re-opening for international tourism seeking to attract a reasonable share of the much lower number of international tourists that have the possibilities and confidence to travel. The challenge for destinations is to be able to stand out from the crowd and build confidence among potential tourists, especially showing that holidays in the destination can take place in a responsible manner during the COVID-19 pandemic, while showing that tourists can fully enjoy their stay and undertake many leisure activities. This entails marketing and development based on their unique features, maintaining an attractive and comprehensive product package, building capacities of tourism stakeholders from the public and private sector, and communicating their tourist product offer and COVID-19 protocol in place to the most appropriate markets and segments. A destination cannot realize an optimal recovery unless the range and quality of its tourism product offer and the COVID-19 protocol put in place meet the needs and expectations of tourists and cannot realize its optimal benefits from tourism without continuing to actively and creatively market its attractions.

To plan for a smooth re-opening of international tourism to the Maldives from July 2020 onwards, the Maldives started timely promoting the destination and sharing information on its COVID-19 protocol, titled “Guideline for Restarting Tourism in the Maldives”, and safety and hygiene measures taken. The communication and promotion have proven highly instrumental to achieve a steady increase of tourist arrivals in the second semester of 2020. To build on the successful re-opening of international tourism and to raise further interest to visit the country, in the beginning of 2021 Maldives launched several new promotional activities targeting its main source markets. Successful activities carried out include⁴:

- An eight-month campaign with the TripAdvisor platform, creating more destination awareness under the concept “Escape to Maldives: Calm Awaits”, targeting the US, Europe, and APAC region, the largest outbound source markets in the world.
- A four-month campaign with the Expedia Group to promote the Maldives as an exclusive, worry free, and one of the most accessible destinations during this unprecedented situation.

⁴ Source: Maldives Tourism Bulletin, Volume 03 – March 2021, and Volume 04 – April 2021

The campaign expects to reach over 23 million people, targeting especially some of the top source markets to the Maldives, including Russia, Middle East, China and India.

- A social and digital marketing campaign with Odigeo, a top Online Travel Agency (OTA) in France. This campaign targets a potential 1.6 million monthly visitors on their Opodo website and more than 450,000 of their social media followers, and specifically aims to boost arrivals to the Maldives during the low season.
- A joint three-month marketing campaign with India's leading travel services company, Thomas Cook India, aiming at increasing travellers' demand through focused marketing activities and utilization of the digital channels of Thomas Cook India.
- Another India-focused joint marketing campaign of three months with India's largest online travel agency, MakeMyTrip, targeting potential travellers from India with ongoing promotional offers and discounts, as well as various digital activities, aimed at the agency's customer-base of more than 42 million.
- Organizing familiarization trips for media teams and prominent freelance journalists and photographers from key source markets, starting with the United Arab Emirates market, the United Kingdom market, the German market, and the Russia & CIS market. Furthermore, the Croatian celebrity cellist Stjepan Hauser collaborated on a video shoot in the Maldives to showcase the natural beauty, safety and serenity of the country, and post stories on his social media channels with over 10 million followers.
- A joint three-month marketing campaign with India's leading travel services company, Thomas Cook India, aiming at increasing travellers' demand through focused marketing activities and utilization of the digital channels of Thomas Cook India.

The JICA-UNWTO project will further analyse recent market trends and scenarios, and review promotional activities undertaken in order to provide detailed guidance on scenario planning and targeted marketing in the COVID-19 tourism recovery phase.

UNWTO TECHNICAL ASSISTANCE TO MALDIVES

In the past two decades, UNWTO has fielded the following technical assistance missions to the Maldives:

- Legal framework to register weddings of foreign tourists (2003)
- Project formulation mission for a human resource development plan (2004)
- Classification and grading of resort properties and services (2004)
- Economic Impact of the Tsunami on the Tourism Industry in the Maldives (2005)
- Formulation of the Third Tourism Master Plan (2005)
- Tourism Marketing (2012)

In June 2020, the Ministry of Tourism of the Maldives shared with UNWTO the draft document on "Guideline for Restarting Tourism in the Maldives" for technical review. UNWTO analysed the document, and provided detailed feedback and inputs. The JICA- UNWTO project will further review the Guideline as well as other measure put in place for a safe and responsible re-opening of international tourism to the Maldives, and assess their effectiveness to facilitate smooth and responsible operations of tourism activities in the COVID-19 framework.

3. Approach, methodology and outputs

The technical assistance will be provided between February and October 2021 by a team of experts with expertise in various and complementary tourism related fields.

3.1 Approach

Scope

The project will be implemented in a phased approach and includes three main components, being:

Component 1. Measurement of the current situation of the tourism sector

For this component, at an initial stage the expert team will review the outcome of the COVID-19 impact assessment prepared by Ministry of Tourism and undertake a complete mapping of tourism data availability. Subsequently, the expert team will work with the Ministry of Tourism to review the national tourism statistics system and to introduce mechanisms to strengthen continued measurement and dissemination of the impact of the COVID-19 pandemic over the short and medium terms and for assessing the results achieved since the re-opening of the tourism sector after the lockdown. The team will also study the support provided by other donors to the tourism recovery process of the Maldives.

Component 1 will be implemented with the support of an Expert, Measurement (international) in collaboration with a Tourism Strategic Planner (international) and a national tourism expert.

Deliverable: report on the measurement of the current situation of the tourism sector

Component 2. Development of the draft of Country-specific Tourism Recovery Plan

The Country-specific Tourism Recovery Plan will build on the outcome of component 1, using the findings to develop tourism forecasts and scenario planning for the recovery of the tourism sector, which will serve as a basis to identify and propose support actions to facilitate tourism recovery in line with the forecasts and scenarios. To prepare the tourism recovery plan, the expert team will review the tourism recovery initiatives undertaken by the Ministry of Tourism and conduct a comparative analysis of regional/international benchmarking of tourism recovery measures. The expert team will pay specific attention to ICT readiness, e-marketing, incentives to stimulate travel, support mechanisms for tourism SMEs, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and opportunities to reorient the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain. Based on this review, the plan will present a detailed analysis of tourism recovery initiatives already taken by the Ministry of Tourism and other Government entities, and present detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID- 19 pandemic on the tourism sector and accelerate the recovery process.

Component 2 will be implemented with the support of a Tourism Strategic Planner (international) in collaboration with a Marketing, Incentives and Market Trends Expert (international), a Tourism HR and Quality Expert (international) and a national tourism expert.

Deliverable: Country-specific Tourism Recovery Plan.

Component 3. Recommendations to JICA

The detailed report to JICA with recommendations on the further support that JICA can provide to the Maldives in the tourism recovery process will assess for which of the actions presented in the Tourism Recovery Plan, donor assistance could in particular be relevant and feasible. Based on Japan's comparative advantage on providing development assistance in the South Asia region and JICA's priorities for Maldives, the report will make specific recommendation to JICA regarding selected tourism recovery projects that JICA could support in the Maldives, where possible in collaboration with UNWTO.

Component 3 will be implemented with the support of the Tourism Strategic Planner (international) in collaboration with the Expert Measurement (international), the Marketing, Incentives and Market Trends Expert (international), and the Tourism HR and Quality Expert (international).

Deliverable: detailed report to JICA with recommendations on the further support that JICA can provide to the Maldives in the tourism recovery process

Planning

The project will be implemented over a nine months period and involve an expert team with four international experts (Expert, Measurement; International Tourism Strategic Planner; International Marketing, Incentives and Market Trends Expert; International Tourism HR and Quality Expert) and one national expert that will closely collaborate with UNWTO officials and coordinate project activities with Government and local stakeholders. A Project Steering Committee (PSC) with representatives from JICA, the Ministry of Tourism of Maldives and UNWTO will be set up to supervise the project.

The indicative work plan for the three project components is as follows:

Component 1. Measurement of the current situation of the tourism sector

This component will be implemented with the support of 3 experts (International Expert, Measurement; International Tourism Strategic Planner, and a National Tourism Expert). The international experts will, in principle, provide most time inputs through remote technical assistance, with two missions by the International Expert, Measurement, to be planned to the Maldives in consultation with JICA and the Ministry of Tourism, probably around week 2 – 3 and week 5 - 6 of the assignment. The International Tourism Strategic Planner is also supposed to undertake two missions to Maldives included in the budget for project components 2 and 3. It is the intention that during these missions the expert can also exchange information and provide inputs for project component 1. Project component 1 will be implemented over an elapsed period of 3 months (preceded by 3 months of preliminary desk review and research) during which the International Expert, Measurement, will invest 40 days in the project component, the International Tourism Strategic Planner 15 days, and the National Tourism Expert 30 days.

The total time input is contemplated as follows:

Week 1 - 2: initial conference calls and webinars to hold discussions with relevant Government authorities on what data is collected both in terms of tourism demand and supply at national level, what processes are still in place or not due to COVID-19 and what lockdown measures were taken by the Government and any available data on the impact of COVID 19 on tourism as well as an overview of Measures to Support Tourism taken by the Maldives Government and donors working in tourism. In turn, Government

will submit to the expert all the latest tourism statistical information available. Conduct a review of the COVID-19 impact assessment reports prepared by the Ministry.

Week 3 - 4: mapping of data availability to determine needs for improvement in the tourism statistics system, as well as to update and strengthen any COVID-19 tourism impact assessment and future recovery scenarios. At the end of week 4, the experts will submit a : i) detailed activity plan identifying the time periods for data comparability, data gaps (if any) and how to address these needs; and ii) based on the available data, prepare guidelines on how to strengthen mechanisms for continued measurement and dissemination of the impact of the Covid-19 pandemic over the short and medium terms and for assessing the results achieved since the re-opening of the tourism sector after the lockdown.

Week 5-6: technical and capacity building sessions with technicians from the Government on various areas of data analysis, comparison and delivery of workshops/webinars to enhance skills amongst government officials on tourism statistics, impact analysis and market intelligence.

Week 7-8: formulation of a report on Measurement of the Current Situation of the Tourism Sector, including relevant information on demand, supply, employment, revenue, accommodation, mechanisms to strengthen the system of tourism statistics, and an overview of measures to support tourism taken by the Maldives Government and donors working in tourism, etc.. If possible, formal presentation of the report and delivery of any further capacity building sessions through a webinar.

Component 2. Development of the draft of Country-specific Tourism Recovery Plan

This component will be implemented with the support of 4 experts (International Tourism Strategic Planner, International Marketing, Incentives and Market Trends Expert, International Tourism HR and Quality Expert, and a National Tourism Expert). The international experts will, in principle, provide most time inputs through remote technical assistance, with one mission by each expert to be planned to the Maldives in consultation with JICA and the Ministry of Tourism, probably around week 3 - 7 of the assignment. The International Tourism Strategic Planner is also supposed to undertake a mission to Maldives included in the budget for project component 3. It is the intention that during this mission the expert can also exchange information and provide inputs for project component 2.

Project component 2 will be implemented over an elapsed period of 5 months (preceded by 3 months of preliminary desk review and research) during which the International Tourism Strategic Planner will invest 60 days in the project component, the International Marketing, Incentives and Market Trends Expert 45 days, the International Tourism HR and Quality Expert 35 days, and the National Tourism Expert 45 days.

The total time input is contemplated as follows:

Week 1 - 2: initial conference calls to hold discussions with JICA team and relevant Government Authorities on: a) the impact of COVID-19 on the tourism sector, and b) the tourism recovery initiatives undertaken by the Ministry of Tourism, other Government entities and donors, and c) tourism forecasts and scenario planning for the recovery of the tourism sector. JICA and the Ministry of Tourism will share with the expert team all available information on existing tourism recovery initiatives both from the Government and from donors, as well as latest available data regarding the impact of COVID-19 on the tourism sector, in particular figures on international tourist arrivals and revenue, and any existing/ updated forecasts on tourism growth.

Week 3 - 4: qualitative in-depth interviews and brainstorming sessions with the JICA team and senior representatives from the Government and Private Sector on various areas related to tourism recovery.

Assess which priority topics need to be addressed in the Maldives Tourism Recovery Plan and exchange further information on these, including: ICT readiness, e-marketing, incentives to stimulate travel, support mechanisms for tourism SMEs, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and reorienting the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain. Review and analysis of governance mechanisms for implementation of existing tourism recovery initiatives.

Week 5 - 6: Assess the current tourism value chain, from a perspective of local employment (HR), local economic development and sustainable consumption and production and formulate recommendations to strengthen sustainable tourism practices. Conduct a regional and international benchmarking of best practices in the formulation of tourism recovery plans and their implementation, paying ample attention to the priority topics to be included in the Maldives Tourism Recovery Plan.

Week 7 - 8: Analyze the findings and conclusions of component 1 to develop tourism forecasts and scenario planning for the recovery of the tourism sector, using these as a basis to start identifying and proposing support actions to facilitate tourism recovery in line with the forecasts and scenarios. Assess marketing activities carried out by Maldives prior and during the COVID-19 pandemic, paying specific attention to e-marketing; analyze travel patterns and possibilities of existing and potential source markets visiting the Maldives; and formulate recommendations for marketing activities, including possibilities for specific marketing activities for priority/high potential source markets.

Week 9 - 10: prepare a draft Maldives Tourism Recovery Plan, indicating how to further strengthen and build on the existing tourism recovery activities in the Maldives. Present the plan in a validation meeting with key project stakeholders.

Week 11 - 12: amend, where required, the draft Maldives Tourism Recovery Plan based on comments received from the Government/JICA, and present the Plan at a seminar/webinar with key tourism stakeholders.

Component 3. Recommendations to JICA

This component will be implemented with the support of 4 experts (International Tourism Strategic Planner, International Expert Measurement, International Marketing, Incentives and Market Trends Expert, and International Tourism HR and Quality Expert).

The international experts will, in principle, provide most time inputs through remote technical assistance, with one mission by the International Tourism Strategic Planner to be planned to the Maldives in consultation with JICA and the Ministry of Tourism, probably around week 2 - 5 of the assignment. The International Expert, Measurement, is also supposed to undertake two missions to Maldives included in the budget for project component 1. It is the intention that during the second mission for component 1, the International Expert, Measurement, can also exchange information and provide inputs for project component 3. Further, the International Marketing, Incentives and Market Trends Expert and the International Tourism HR and Quality Expert are supposed to undertake each one mission to Maldives included in the budget for component 2, and it is the intention that during these missions they can also exchange information and provide inputs for project component 3.

Project component 3 will be implemented over an elapsed period of 2 months during which the International Tourism Strategic Planner will invest 25 days in the project component and the International

Expert Measurement, the International Marketing, Incentives and Market Trends Expert, and the International Tourism HR and Quality Expert each 5 days

The total time input is contemplated as follows:

Week 1 - 2: conference calls and webinars to hold discussions with JICA officials and relevant Government authorities on the current support of JICA to the Maldives, in particular assessing JICA's support on tourism development, and exchange information on ideas and possibilities to plan and develop new JICA project activities for tourism recovery, based on the initial findings from project components 1 and 2.

Week 3 - 4: prepare a draft report on Recommendations to JICA, including detailed recommendations for the further support that JICA can provide to the recovery and sustainable development of tourism in Maldives, presenting several proposed pilot projects and making suggestions for activities that could be implemented in collaboration with UNWTO.

Week 5: amend, where required, the draft report on Recommendations to JICA, based on comments received from the JICA team/Government, and present the report at a seminar/webinar with key tourism stakeholders.

3.2 Methodology

The methodology will follow the Strategic Planning Process for Tourism. Thus, the project to prepare the Maldives Tourism Recovery Plan will comprise the following interrelated aspects:

- A comprehensive **Situation Analysis**, which will provide an overview of the sector and its performance prior and during the COVID-19 pandemic, identifying opportunities and challenges to be addressed, including mapping of data availability to determine needs and propose guidelines for improvement in the tourism statistics system. Component 1 on the Measurement of the Current Situation of the Tourism Sector will help provide valuable inputs for the Situation Analysis.
- a **Vision** of the tourism recovery process for the Maldives with **Goals** and **Objectives** agreed by all stakeholders, and placed in the context of the realization of the 2030 Agenda
- **Strategies** to achieve the vision, goals and objectives, taking into account existing mitigation measures and protocols
- A **Tourism Recovery Plan**, presenting forecasts and scenario planning for the recovery of the tourism sector and support actions to facilitate tourism recovery
- A detailed **report to JICA with recommendations** on the further support that JICA can provide to the Maldives in the tourism recovery process to help kick-start the implementation of the Tourism Recovery Plan
-

The situation analysis answers the question: **where are we now?** and the vision for tourism answers the question: **Where do we want to go?**

Based on the situation analysis, strategies will be formulated to provide focused direction for the recovery of the sector and to translate the vision for the tourism recovery process into actions, taking into account existing measures to help mitigate the impact of the COVID-19 pandemic on the tourism sector and protocols to manage tourism facilities and activities in the COVID-19 framework. Together these will form the *Tourism Recovery Strategy*. It is important that stakeholder desires and intentions for the tourism recovery process that they want to see developed for the Maldives are clearly stated in a tourism recovery

vision. This will provide the anchor for the strategy to ensure that it reflects the values and wishes of the stakeholders and provides guidelines to be abided by. The formulation of the strategy addresses the question: ***How do we get there?***

The final stage will be to lay out the Tourism Recovery Strategy into a Tourism Recovery Plan. This will offer a blueprint to implement the actions prescribed in the strategy and will indicate who or which organisation should be responsible for each action, when the activities will be carried out, over which time length, and will broadly identify the cost implicate

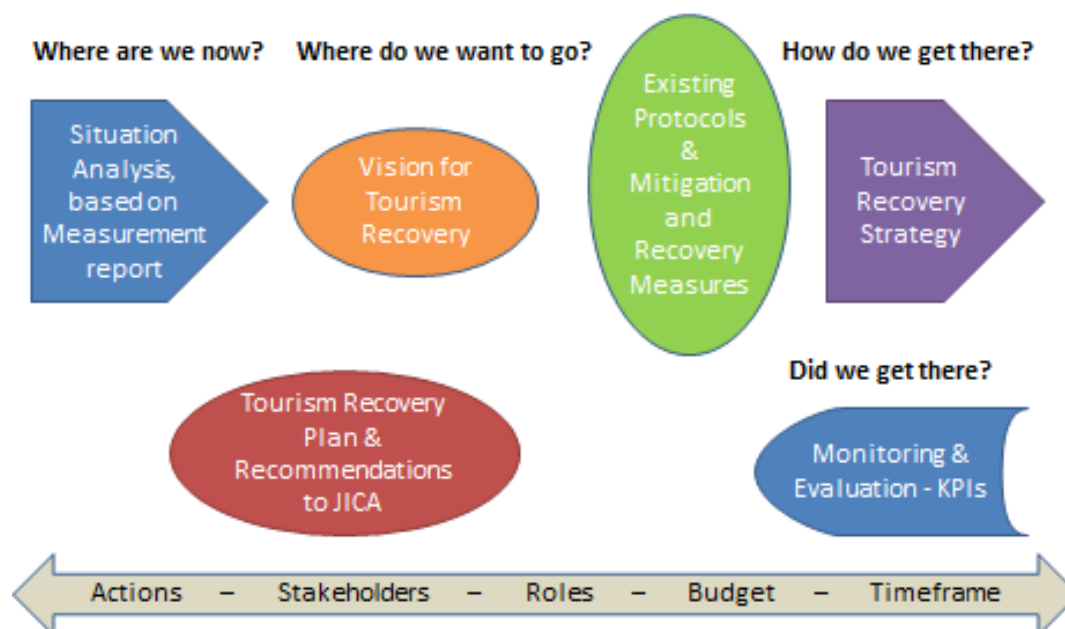
This stage will consider the following questions: Who does what? How much does it cost? What is the schedule? It will present the proposed actions, main stakeholders, their roles, the required budget and the planned timeframe.

Based on the Tourism Recovery Plan, a specific report will be prepared with Recommendations to JICA, indicating how JICA can provide further support to the Maldives in the tourism recovery process to help kick-start the implementation of the Tourism Recovery Plan.

Plans must be constantly monitored to ensure that they are being implemented as anticipated and are achieving the desired targets. If the actions are not having the required impact they must be adjusted or scrapped. Key Performance Indicators (KPI) must be set to measure the effectiveness of the plan. These will address the question: Did we get there? The process is graphically represented in Figure 1.

Figure 1: The Maldives Tourism Recovery Plan Strategic Process

Strategic process to formulate the Maldives Tourism Recovery Plan



The formulation of the plan and related reports will apply the following techniques and key activities:

- **Review of** documents and studies
- **Field trips** to selected tourism areas and those of tourism potential, if missions by the expert team will be possible with the developments of the COVID-19 Pandemic
- **Meetings** with key stakeholders, including with related sectors that will contribute to the tourism recovery process, both virtual meetings and meetings in the Maldives if the expert team can travel to the country
- An **inception meeting** at the beginning of the project to familiarise stakeholders with the objectives and approach of the three project components
- Delivery of **workshop/webinar** to enhance skills amongst government officials on tourism statistics, impact analysis and market intelligence during the first component of the project
- A **seminar/webinar** at the end of the project to present the main findings and recommendations and discuss the implementation of the recovery plan and recommendations to JICA with key-stakeholders

The Tourism Recovery Plan will be prepared with the active involvement of a wide range of stakeholders from the central government, provincial government/atolls/cities/islands, the private sector and NGOs and CBOs. It is the intention that the Plan will also be helpful for the tourism sector to prepare for future hazards. The development of the Plan will be based on the “Build Back Better” concept, defined by the United Nations Office for Disaster Risk Reduction (UNDRR) as “the use of the recovery, rehabilitation and reconstruction phases after a disaster to increase the resilience of nations and communities through integrating disaster risk reduction measures into the restoration of physical infrastructure and societal systems, and into the revitalization of livelihoods, the economy and the environment” (UNDRR, 2020).

3.3 Outputs

The outputs of the project will be a report on the measurement of the current situation of the tourism sector, a Tourism Recovery Plan for the Maldives, and a detailed report to JICA with recommendations on the further support that JICA can provide to the Maldives in the tourism recovery process. The documents will act as a blueprint for the Maldivian Government and other tourism and development stakeholders in the Maldives, in particular JICA, to take priority actions for COVID-19 tourism recovery.

The following outputs will be delivered by the project team during the project:

- An Activity Plan after two weeks of the start of each project component, confirming the study methodology, issues to investigate, data requirements, and proposed table of contents for the final report;
- A report on the measurement of the current situation of the tourism sector, based on inputs and feedback received from project stakeholder when presenting initial findings and recommendations on this project component;
- A Draft Tourism Recovery Plan for the Maldives, and a validation meeting with key project stakeholders in which the draft Tourism Recovery Plan is presented;
- Final Tourism Recovery Plan for the Maldives, incorporating feedback from the Maldivian Government and other key project stakeholders on the Draft Plan, and a presentation of the Plan at a seminar/webinar with key tourism stakeholders;
- A report with recommendations on the further support that JICA can provide to the Maldives in the tourism recovery process, based on the strategic actions included in the Tourism Recovery Plan, and the inputs and feedback received from project stakeholder when presenting the Plan, and a presentation of the report at a seminar/webinar with key tourism stakeholders.

All reports and supportive documentations will be provided in electronic format.

4. The project team

A team comprising 8 international experts and 1 national expert as well as counterpart support resource persons from JICA and the Ministry of Tourism of the Maldives will implement the project. Four of the international experts that will work on the project are UNWTO staff (i.e. the Project Leader, the Institutional Relations Expert; and two Research Assistants) whereas the other 4 international experts (i.e. a Tourism Strategic Planner, an Expert Measurement, a Marketing, Incentives and Market Trends Expert, and a Tourism HR and Quality Expert) and 1 national tourism expert will be recruited by UNWTO specifically for the tourism recovery project in the Maldives. The task descriptions for the 5 experts that will be recruited by UNWTO for the project are presented in Appendix A below.

APPENDIX A – Task descriptions

Tourism Strategic Planner (international)

The Tourism Strategic Planner is responsible for overall successful implementation of the project activities, including coordination of the activities of the members of the international expert team and their counterparts and ensuring that all technical outputs are of a high quality level. Equally important is the coordination of the project with the Project Steering Committee, the Project Coordinator, the National Government, and other involved stakeholders. The Tourism Strategic Planner will make presentations at the Project Steering Committee meetings and any other relevant meetings. A National Tourism Expert will be appointed to work closely with the Tourism Strategic Planner. In addition to administrative duties, this position is directly responsible for technical activities as follows:

- Actively liaise with the Ministry of Tourism, JICA contact persons, UNWTO and other team members to reach a joint understanding on the detailed planning of project activities for each project component and the scope of the topics to be addressed.
- In collaboration with the team, for each project component prepare an Activity Plan with an indicative Table of Contents for the final report of the component, and share these with UNWTO at the end of week 2 of each project component.
- Liaise with the International Expert, measurement, to prepare the report on the measurement of the current situation of the tourism sector.
- Formulate the Maldives Tourism Recovery Plan in collaboration with other team members.
- Prepare the report with recommendation to JICA with other team members.
- In collaboration with the team, in particular the marketing expert, use the findings of the measurement report to develop tourism forecasts and scenario planning for the recovery of the tourism sector, which will serve as a basis to identify and propose support actions to facilitate tourism recovery.
- Together with the expert team, review the tourism recovery initiatives undertaken by the Ministry of Tourism and conduct a comparative analysis of regional/international benchmarking of tourism recovery measures.
- In collaboration with the team, make a detailed analysis of the challenges and opportunities regarding topics addressed in the UNWTO Technical Assistance Package for COVID-19 Tourism Recovery, including pay specific attention to ICT readiness, e-marketing, incentives to stimulate travel, support mechanisms for tourism SMEs, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and opportunities to reorient the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain.
- Together with the expert team, review the tourism recovery initiatives already taken by the Ministry of Tourism and other Government entities, and present detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID-19 pandemic on the tourism sector and accelerate the recovery process.
- In collaboration with the National Tourism Expert organise a series of meetings and seminars and awareness building exercises with key tourism stakeholders to assess the impact of the COVID-19 pandemic on the tourism sector and to check their ideas and views and elicit their engagement in developing and operating viable tourism recovery initiatives.
- Evaluate the institutional factors in planning and managing the tourism recovery process, including tourism-related organisational structures, tourism data management, and laws and regulations.
- Prepare, participate and contribute to stakeholder meetings and workshops to be organized in the course of the project.

- Prepare PowerPoint slides and concise progress reports for the presentations to the Project Steering Committee meeting, in particular to present the progress achieved and the planning for the upcoming month.
- In collaboration with the HR Expert, undertake a rapid assessment of the training needs for the tourism sector and if necessary come up with recommendations to strengthen tourism training for the private sector and/or develop specific capacity building activities for public sector officials required in the context of COVID-19 Tourism Recovery.
- Make recommendations on changing, improving and/or strengthening institutional structures to tourism administration in the Maldives for supporting tourism recovery within the framework of government policies and organisational structures.
- At an initial stage, prepare the proposed outline of the measurement report and tourism recovery plan, indicating the inputs the various team members will make to different chapters. Upon completion of the draft tourism recovery plan, prepare the proposed outline of the report with recommendation to JICA, also indicating the inputs by other team members.
- Prepare the tourism recovery plan, including a strategic action plan, as well as the report with recommendations to JICA, both first in draft form and then in final form, including editing of the inputs of other team members.
- Guide and coordinate the participation of the international experts and national expert to ensure that expert outputs and deliverables are in line with project objectives.
- Provide expert input in all of the project topics, as required and act as general resource on the various project topics covered by the project experts.
- Prepare PowerPoint slides on the recommendations for the validation presentation and expand these for the final awareness raising seminar to present the recommendations of the project and their implementation.
- Convene team meetings and discussions regarding the various projects, as required.
- Coordinate project reports and formats and compile a final portfolio of project documents prepared by the team of international experts.
- Within the available timeframe, carry out any other tasks agreed upon in consultation with project stakeholders for the successful completion of the project.
- Abide by the report writing standards set by UNWTO (standards to be provided).

The Tourism Strategic Planner will be required to submit each of the above outputs by deadlines to be agreed with UNWTO, JICA and the Ministry of Tourism during the project period.

Qualifications

Highly qualified in tourism and specialized in tourism development programmes, substantial and broad experience is required for the preparation of the Maldives Tourism Recovery Plan, as well as previous involvement in more detailed levels of tourism development planning. Experience is also required in sustainable tourism planning and management of tourism planning projects, working effectively within a multi-disciplinary environment. Previous experience in leading the formulation of tourism plans and strategies is essential. Oral presentation and report writing skills are important. Prior working experience in the Maldives and/or other island/coastal destinations is an advantage. The expert will have at least 15 years' experience in an appropriate field. Fluency in English and report writing in English is essential.

Marketing, Incentives and Market Trends Expert (international)

Under the general direction of the Project Leader and the Tourism Strategic Planner, the Marketing, Incentives and Market Trends Expert is responsible for the inputs on tourism forecasts and scenario planning, marketing and promotion, including e-marketing, and incentives to stimulate travel, of the project components 2 and 3. The responsibilities of this position will be:

- Actively liaise with the Ministry of Tourism, JICA contact persons, UNWTO and other team members to reach a joint understanding on the detailed planning of project activities on tourism forecasts and scenario planning, marketing and promotion, including e-marketing, and incentives to stimulate travel for the project components 2 and 3, and the scope of the topics to be addressed.
- In collaboration with the team, provide inputs for the Activity Plan with an indicative Table of Contents for the final reports of components 2 and 3, that will be shared with UNWTO at the end of week 2 of each project component.
- Assess marketing activities carried out by Maldives prior and during the COVID-19 pandemic, paying specific attention to e-marketing; analyze travel patterns and possibilities of existing and potential source markets visiting the Maldives; and formulate recommendations for marketing activities, including possibilities for specific marketing activities for priority/high potential source markets.
- Provide necessary inputs on Marketing for the Maldives Tourism Recovery Plan and the report with recommendation to JICA.
- Together with the expert team, review the tourism recovery initiatives undertaken by the Ministry of Tourism in the field of Marketing and Incentives to Simulate Travel, and conduct a comparative analysis of regional/international benchmarking of tourism recovery measures.
- In collaboration with the Tourism Strategic Planner, assess and forecast current and future demand patterns in the tourism sector and advise on growth scenarios and priority markets (both geographic markets and thematic segments) to target in the recovery phase, and key marketing actions to use for these markets.
- Undertake a rapid assessment of the state of tourism in the COVID-19 aftermath, including a detailed review of the existing tourism marketing and product development plans and activities, and an assessment of the destination confidence and international competitiveness.
- Review the image of the Maldives in main source markets, including an identification of the strengths, weaknesses, opportunities and threats for tourism marketing and branding of the country in the light of the COVID-19 pandemic.
- Identify core, tactical, investment and watch list markets and products to provide guidance for the short- and medium.
- Provide recommendations and actions regarding priority market segments, their product development and packaging requirements, and promotional tools, both traditional and digital, to reach the segments, and advise on effective allocation of marketing resources per segment.
- Assess the current use of digital marketing tools for the promotion of tourism, and identify opportunities and provide recommendations to strengthen and elaborate the use of digital marketing tools within the framework of COVID-19 tourism recovery.
- Analyze travel patterns and marketing trends in the COVID-19 aftermath to identify opportunities to rapidly stimulate demand from selected markets through digital marketing.
- Assess feasibility to introduce competitive prices, special promotions and other possible tools to boost demand for travel to the Maldives.
- Identify opportunities to boost tourism demand through vouchers and benefit schemes offered by the public and private sector.
- Propose incentives to trigger demand that will facilitate travel to the Maldives and encourage increased length of stay.
- Provide inputs to the detailed analysis to be made by the expert team of the challenges and opportunities regarding topics addressed in the UNWTO Technical Assistance Package for COVID-19 Tourism Recovery, paying specific attention to marketing and promotion, including e-marketing tools, and incentives to stimulate travel.
- Together with other team members, review the tourism recovery initiatives already taken by the Ministry of Tourism and other Government entities, paying specific attention to initiatives related to marketing and promotion, including incentives to stimulate travel, and present detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID-19 pandemic on the tourism sector and accelerate the recovery process.
- In collaboration with the other international experts and the national expert organise and participate in a series of meetings and seminars and awareness building exercises with key tourism stakeholders to

assess the impact of the COVID-19 Pandemic on the tourism sector, and to check their ideas and views and elicit their engagement in developing and operating viable tourism recovery initiatives.

- Prepare, participate and contribute to stakeholder meetings and workshops specifically related to tourism marketing to be organized in the course of the project.
- Prepare inputs on marketing for the presentations to the Project Steering Committee meeting, in particular to present the progress achieved and the planning for the upcoming month.
- Prepare the inputs related to tourism forecasts and scenario planning, marketing and promotion, including e-marketing, and incentives to stimulate travel for the tourism recovery plan, including a strategic action plan, as well as for the report with recommendations to JICA, both first in draft form and then in final form, addressing possible feedback received.
- Prepare PowerPoint slides on the findings and recommendations related to tourism forecasts and scenario planning, marketing and promotion, including e-marketing, and incentives to stimulate travel for the validation presentation and expand these for the final awareness raising seminar to present the recommendations of the project and their implementation.
- Within the available timeframe, carry out any other tasks agreed upon in consultation with project stakeholders for the successful completion of the project.
- Abide by the report writing standards set by UNWTO (standards to be provided).

The Marketing, Incentives and Market Trends Expert will be required to deliver each of the above outputs by deadlines to be agreed with UNWTO, JICA and the Ministry of Tourism during the project period.

Qualifications

The Marketing, Incentives and Market Trends Expert will have at least 10 years experience in formulating tourism destination marketing, branding and promotion strategies including conducting market analyses and segmentation, assessing market trends, preparing tourism marketing studies at the national and destination level, including experience in preparing promotion strategies and programmes. Previous experience in participating in the formulation of tourism plans and strategies is essential. Oral presentation and report writing skills are important. Prior working experience in the Maldives and/or other coastal destinations is an advantage. Fluency in English and report writing in English is essential.

International Expert, measurement

Under the general direction of the Project Leader and the Tourism Strategic Planner, the International Expert, measurement, is responsible for the inputs on Economics, Statistics and related topics, such as mapping of data availability to determine needs for improvement in the tourism statistics system, as well as to update and strengthen any COVID-19 tourism impact assessment and future recovery scenarios, of the project components 1 and 3. The responsibilities of this position will be:

- Actively liaise with the Ministry of Tourism, JICA contact persons, UNWTO and other team members to reach a joint understanding on the detailed planning of project activities on Economics and Statistics for the project components 1 and 3, and the scope of the topics to be addressed.
- In collaboration with the team, provide inputs for the Activity Plan with an indicative Table of Contents for the final reports of components 1 and 3, that will be shared with UNWTO at the end of week 2 of each project component.
- Assess and evaluate the impact caused by the COVID-19 crisis to tourism operations and jobs (key industries, segments and destinations).
- Review existing plans and policy documents on the Tourism Statistics System in the Maldives, and any available studies regarding the Tourism Statistics System.
- Review the COVID-19 impact assessment reports prepared by the Ministry of Tourism and any available tourism statistical information both in terms of tourism demand and supply at national level.

- Together with the other team members, review the tourism recovery initiatives undertaken by the Ministry of Tourism and other Government entities, paying specific attention to initiatives to economics and statistics, and present detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID-19 pandemic on the tourism sector and accelerate the recovery process.
- Actively collaborate with the Ministry of Tourism to review the national tourism statistics system and to introduce mechanisms to strengthen continued measurement and dissemination of the impact of the Covid-19 pandemic over the short and medium terms and for assessing the results achieved since the re-opening of the tourism sector after the lockdown.
- Together with the team, study the support provided by other donors to the tourism recovery process of the Maldives.
- Map the data availability to determine needs for improvement in the tourism statistics system, as well as to update and strengthen any COVID-19 tourism impact assessment and future recovery scenarios and prepare a detailed activity plan identifying the time periods for data comparability, data gaps (if any) and how to address these needs.
- Assess priority topics for capacity building on various areas of data analysis, comparison and deliver workshops/webinars to enhance skills amongst government officials on tourism statistics, impact analysis and market intelligence to strengthen mechanisms for continued measurement and dissemination of the impact of the Covid-19 pandemic over the short and medium terms.
- In collaboration with the other international experts and the national expert organise and participate in a series of meetings and seminars and awareness building exercises with key tourism stakeholders to assess the impact of the COVID-19 pandemic on the tourism sector, and to check their ideas and views and elicit their engagement in developing and operating viable tourism recovery initiatives.
- Prepare, participate and contribute to stakeholder meetings and workshops specifically related to tourism statistics, impact analysis and market intelligence to be organized in the course of the project.
- Prepare inputs on tourism statistics, impact analysis and market intelligence for the presentations to the Project Steering Committee meeting, in particular to present the progress achieved and the planning for the upcoming month.
- Prepare the report on Measurement of the Current Situation of the Tourism Sector, including relevant information on demand, supply, employment, revenue, accommodation, mechanisms to strengthen the system of tourism statistics, as well as inputs for the report with recommendations to JICA, both first in draft form and then in final form, addressing possible feedback received.
- Prepare PowerPoint slides on the findings and recommendations related to data management and impact analysis for the validation presentation and expand these for the final awareness raising seminar to present the recommendations of the project and their implementation.
- Within the available timeframe, carry out any other tasks agreed upon in consultation with project stakeholders for the successful completion of the project.
- Abide by the report writing standards set by UNWTO (standards to be provided).

The International Expert, measurement, will be required to deliver each of the above outputs by deadlines to be agreed with UNWTO, JICA and the Ministry of Tourism during the project period.

Qualifications

The International Expert, measurement, will have at least 10 years experience on tourism statistics and in conducting economic analysis and impact assessment for the tourism sector. Previous experience in participating in strengthening systems of tourism statistics is an advantage. Oral presentation and report writing skills are important. Prior working experience in the Maldives and/or other island/coastal destinations is an advantage. Fluency in English and report writing in English is essential.

Tourism HR and Quality Expert (international)

Under the general direction of the Project Leader and the Tourism Strategic Planner, the Tourism HR and Quality Expert is responsible for the inputs on HR, Quality and related topics, such as ICT readiness, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and opportunities to reorient the tourism value chain towards sustainability, of the project components 2 and 3. The responsibilities of this position will be:

- Actively liaise with the Ministry of Tourism, JICA contact persons, UNWTO and other team members to reach a joint understanding on the detailed planning of project activities on HR and Quality for the project components 2 and 3, and the scope of the topics to be addressed.
- In collaboration with the team, provide inputs for the Activity Plan with an indicative Table of Contents for the final reports of components 2 and 3, that will be shared with UNWTO at the end of week 2 of each project component.
- Review existing plans and policy documents on Tourism HR and Quality, and any available studies regarding Tourism HR and Quality.
- Provide necessary inputs on HR and Quality for the Maldives Tourism Recovery Plan and the report with recommendation to JICA.
- Together with the expert team, review the tourism recovery initiatives undertaken by the Ministry of Tourism and other stakeholders in the field of HR and Quality, and conduct a comparative analysis of regional/international benchmarking of tourism recovery measures.
- Analyse the effectiveness of mitigation measures taken for tourism employees, and make recommendations on how to mitigate the impact on tourism workers, especially the most vulnerable groups, including youth and women.
- Assess priority topics for capacity building on tourism skills and business development that may be relevant to build resilience of tourism enterprises in different stages of the COVID-19 mitigation and recovery process. Topics may include: Tourist Safety and Security; Health and Hygiene for the Tourism Sector; Customer Care; Accessible Tourism for All; Language Skills; Business Model Adaptation; and, Management and Financing of Tourism Businesses.
- Carry out a rapid assessment of trends in supply and demand of the tourism labour market in the framework of the COVID-19 pandemic, identifying specific opportunities and needs for human resources development in the short, medium, and long term taking into account the forecast of tourist arrivals during the tourism recovery process.
- Evaluate capacity building needs of public and private stakeholders in terms of COVID-19 tourism recovery, levels of expertise and knowledge at national and local level.
- Undertake a review of existing hospitality and tourism management training programmes, assessing the role they can play in capacity building for COVID-19 tourism recovery.
- Provide inputs to the detailed analysis to be made by the expert team of the challenges and opportunities regarding topics addressed in the UNWTO Technical Assistance Package for COVID-19 Tourism Recovery, paying specific attention to ICT readiness, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and opportunities to reorient the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain.
- Together with other team members, review the tourism recovery initiatives already taken by the Ministry of Tourism and other Government entities, paying specific attention to initiatives related to HR and Quality, and present detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID-19 pandemic on the tourism sector and accelerate the recovery process.
- Review the Guideline for Restarting Tourism in the Maldives as well as other measure put in place for a safe and responsible re-opening of international tourism to the Maldives, and assess their effectiveness to facilitate smooth and responsible operations of tourism activities in the COVID-19 framework.
- In collaboration with the other international experts and the national expert organise and participate in a series of meetings and seminars and awareness building exercises with key tourism stakeholders to

assess the impact of the COVID-19 pandemic on the tourism sector, and to check their ideas and views and elicit their engagement in developing and operating viable tourism recovery initiatives.

- Prepare, participate and contribute to stakeholder meetings and workshops specifically related to tourism HR and Quality to be organized in the course of the project.
- Prepare inputs on HR and Quality for the presentations to the Project Steering Committee meeting, in particular to present the progress achieved and the planning for the upcoming month.
- In collaboration with the Tourism Strategic Planner, undertake a rapid assessment of the training needs for the tourism sector and if necessary come up with recommendations to strengthen tourism training for the private sector and/or develop specific capacity building activities for public sector officials required in the context of COVID-19 Tourism Recovery.
- Within the framework of the COVID-19 Tourism Recovery, assess ICT readiness of tourism staff and enterprises, identify job recuperation and retention actions and opportunities, and study existing protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence and options to strengthen/elaborate these. Related to this and as part of opportunities for quality enhancement in the tourism sector, identify opportunities to reorient the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain.
- Assess the current tourism value chain, from a perspective of local employment (HR), local economic development and sustainable consumption and production and formulate recommendations to strengthen sustainable tourism practices.
- Prepare the inputs related to Tourism HR and Quality for the tourism recovery plan, including a strategic action plan, as well as for the report with recommendations to JICA, both first in draft form and then in final form, addressing possible feedback received.
- Prepare PowerPoint slides on the findings and recommendations related to Tourism HR and Quality for the validation presentation and expand these for the final awareness raising seminar to present the recommendations of the project and their implementation.
- Within the available timeframe, carry out any other tasks agreed upon in consultation with project stakeholders for the successful completion of the project.
- Abide by the report writing standards set by UNWTO (standards to be provided).

The Tourism HR and Quality Expert will be required to deliver each of the above outputs by deadlines to be agreed with UNWTO, JICA and the Ministry of Tourism during the project period.

Qualifications

The HR and Quality Specialist will have at least 10 years experience in developing tourism human resources, training needs analysis, competency-based training and quality assurance systems. Experience of sustainable tourism planning and value chain analysis is an advantage. Previous experience in participating in the formulation of tourism plans and strategies is essential. Oral presentation and report writing skills are important. Prior working experience in the Maldives and/or other island/coastal destinations is an advantage. Fluency in English and report writing in English is essential.

National Tourism Expert

The National Tourism Expert will work closely with the Project Leader and the Tourism Strategic Planner in coordinating project schedules and stakeholder participation. The National Expert will ensure adequate logistical support for the project team and will advise the team regarding local protocols, requirements and priorities to be considered. He/she will also arrange stakeholder engagements and meetings as required, including virtual meetings and hybrid workshops. He/she will have close connections with high-level executives in the Ministry of Tourism, related Government Institutions, and key private sector stakeholders.

In addition to these administrative duties the position is responsible for providing:

- In collaboration with the expert team, organisation of a series of virtual meetings with management level executives in the tourism sector and related sectors to exchange information on the impact of the COVID-19 pandemic on the tourism sector in the Maldives and on (possible) initiatives for tourism recovery and to elicit their engagement in developing and implementing the tourism recovery plan.
- Provide information and guidance for the tourism recovery survey and the assessment of the recovery measures taken and proposed.
- Collaborate with the expert team to make a detailed analysis of the challenges and opportunities regarding topics addressed in the UNWTO Technical Assistance Package for COVID-19 Tourism Recovery, including paying specific attention to ICT readiness, (e-)marketing, incentives to stimulate travel, support mechanisms for tourism SMEs, HR and quality, job recuperation and retention, protocols for tourism facilities addressing tourism safety and security as well as other initiatives to build consumer confidence, and opportunities to reorient the tourism value chain towards sustainability, including innovative circular approaches to guide the transition towards economic recovery by strengthening linkages along the tourism value chain. Provide relevant inputs and feedback on these topics based on expertise and experiences of the local context.
- Provide information to the team of experts on the status of tourism recovery activities, with a specific focus on protocols developed in the COVID-19 framework, marketing activities and human resources development initiatives.
- Provide advice and information regarding the economic and socio-cultural impacts of tourism within the framework of COVID-19 pandemic.
- Inform the expert team regarding relevant tourism-related organisational structures, tourism data management, laws and regulations and policies/regulations related to travel incentives within the framework of the COVID-19 tourism recovery process.
- Together with other team members, review the tourism recovery initiatives already taken by the Ministry of Tourism and other Government entities, and help present detailed guidance and recommendations for complementary actions to help mitigate the impact of the COVID-19 pandemic on the tourism sector and accelerate the recovery process.
- In collaboration with other team members, organise and participate in a series of meetings and seminars and awareness building exercises with key tourism stakeholders to assess the impact of the COVID-19 Pandemic on the tourism sector, and to check their ideas and views and elicit their engagement in developing and operating viable tourism recovery initiatives.
- Input towards scoping and conceptualising priority tourism recovery initiatives and projects.
- Support and participate during team meetings and discussions regarding the various topics to be addressed and recommendations to be presented in the recovery plan.
- Support for the Strategic Planner and Team Leader in coordinating project reports and formats and compiling a final portfolio of project documents.
- Within the available timeframe, carry out any other tasks agreed upon in consultation with project stakeholders for the successful completion of the project.
- Abide by the report writing standards set by UNWTO (standards to be provided).

The National Expert will be required to deliver each of the above outputs by deadlines to be agreed with UNWTO, JICA and the Ministry of Tourism during the project period.

Qualifications

The National Tourism Expert will have hands-on experience on tourism development and planning in the Maldives, and a detailed overview of existing tourism plans, strategies, studies and available data. The expert will have key contacts at the highest level in the tourism sector as well as related economic sectors. Also, working experience in the context of risk management and governance would be preferable. The appropriate person will have at least 5 years of experience in the tourism sector in Maldives. Report writing skills are important. Fluency in English and Maldivian is essential.

Appendix 2: Project Work Plan

Phase	Task	Milestones / Deliverables	M1	M1	M1	M1	M2	M2	M2	M2	M3	M3	M3	M3	M4	M4	M4	M4	M5	M5	M5	M5	M6	M6	M6	M6	M7	M7
			1.-7.11.	8.-14.11.	15.-21.11.	22.-28.11.	29.11.-5.12.	6.-12.12.	13.-19.12.	20.-24.12.	3.-9.1.	10.-16.1.	17.-23.1.	24.-30.1.	31.1.-6.2.	7.-13.2.	14.-20.2.	21.-27.2.	28.2.-6.3.	7.-13.3.	14.-20.3.	21.-27.3.	28.3.-3.4.	4.-10.4.	18.-24.4.	25.-30.4.	1.-8.5.	9.-15.5.
COMPONENT 1. MEASUREMENT OF THE CURRENT SITUATION OF THE TOURISM SECTOR																												
1.1	Project coordination meeting, Nov. 4	M1																										
1.2	Conference call and brainstorming session with relevant Government Authorities, UNWTO and JICA																											
1.3	Mapping of tourism data availability																											
1.4	COVID-19 tourism impact assessment																											
1.5	Review of the national tourism statistics system																											
1.6	Guidelines on how to strengthen mechanisms for continued measurement	M2																										
1.7	Activity plan for data comparability, gaps and needs	M3																										
1.8	Capacity building sessions with technicians from the Government																											
Mission	Expert in Measurement																											
1.9	Elaboration of the report on Measurement of the Tourism Sector																											
1.10	Submission & formal presentation of the report and delivery of any further capacity building sessions through a webinar	D1																										
COMPONENT 2. Development of the draft of Country-specific Tourism Recovery Plan																												
2.1	Conference call and brainstorming session with relevant Government Authorities, UNWTO and JICA																											
2.2	Tourism recovery initiatives review																											
2.3	In-depth interviews with JICA, the Government and Private Sector																											
2.4	Review existing mechanisms for implementation of existing tourism recovery initiatives																											
2.5	International benchmarking of tourism recovery																											
Mission	Tourism Strategic Planner																											
Mission	HR & quality expert																											
Mission	Marketing expert																											
2.6	Drafting of initial recommendations																											
	Submission of draft recommendations and discussion with the client	M4																										
2.7	Elaboration of draft tourism recovery plan																											

Appendix 3: Proposal of workshops and the list of participants of workshops and presentation materials

A. Marketing, Incentives and Travel Trends capacity building proposals

1. Islands.mv

Rationale

The Ministry of Tourism is currently preparing and developing islands.mv: the first and only website designed to capture the details of all inhabited islands in the Maldives. Working with the island councils, this is a huge task and the project is due for completion in 2022. However, after the completion of the website its future is unclear, as the team itself is only contracted to the completion of the site. The project may be handed over to MMPRC, but the opportunity and potential of islands.mv is huge as it can become the de facto go-to site for all information on the local islands, from location and attractions to hotels, restaurants, shops and local transport. This workshop is designed to identify and unlock the true potential of islands.mv and demonstrate that the project must remain in the MoT.

The workshop should be carried out in Training of Trainers (TOTs) model, with a procedure manual for the TOTs to follow and train other audiences.

Workshop proposal

This workshop will build capacity on the effectiveness and efficiency of developing and maintaining such a huge mine of information for the Maldives for years to come. It will demonstrate and discuss how islands.mv can be the most important marketing tool for encouraging and growing local island tourism in the Maldives. We will set out a vision for the site, assess the current planned site and identify any possible gaps in the offering. Then discuss and agree possible process and structure to ensure that the site can be kept live and up to date as easily and efficiently as possible. Finally, participants will brainstorm about possible partners and even sponsors, in order that long term the site is a self-funding project.

Target group

- Ministry of Tourism senior managers / Deputy / Director General
- Ministry of Tourism Local Tourism, Diversity and Marketing Department (islands.mv)
- Possibly: Representative from the MMPRC and local island councils

Proposed agenda

- ½ - ¾ day (subject to final discussion).
- 30 minutes: Introduction and an outline of a possible vision for islands.mv.

- 30 minutes: Presentation of a likely journey for a traveller looking to stay on a local island today on e.g. booking.com; and an alternative journey using islands.mv to provide new, unique and better solutions.
- 30-60 minutes: Assess details and content of current site and identify any missing elements vs the vision / journey.
- 30-60 minutes: brainstorm the team needed at the MoT / Maldives to work on and develop the site and maintain and keep it up to date on an ongoing basis.
- 30-60 minutes: brainstorm how the island councils and local hotels, attractions and shops etc. can best work with and co-ordinate their news and updates to the site.
- 30 minutes: Brainstorm likely local and international partners who would be interested to sponsor or advertiser on the islands.mv.
- 15 minutes: summary and wrap-up.

2. Local Island Marketing

Rationale

The decentralization of the Maldives local island hospitality and tourism development means that the Maldives diversification from one island, one resort to include local island tourism is now in full swing.

Resorts have spent the last 50 years building relationships with travel agents and tour operators and have succeeded in building fearsome global reputations and awareness. However, the local islands, hotels and guesthouses don't have the advantage of large budgets and resources to promote themselves and also don't have the time to wait for word of mouth to spread. Therefore they have to think smarter and be more attuned to the needs and wants of their guest profiles, which differ from the resorts and use different booking channels.

The workshop should be carried out in TOTs model, with a procedure manual for the TOTs to follow and train other audiences.

Workshop proposal

This workshop will engage with representatives of local islands to find simple, easy and cost effective ways of promoting themselves and also identify opportunities to group together to maximize their impact. A written summary of the workshop will be circulated afterwards to attendees for their further reference and practical use.

Target group

- Ministry of Tourism Senior manager / Deputy / Director General
- Ministry of Tourism Local Tourism, Diversity and Marketing Department (islands.mv)
- Local Island councils
- Managers of or marketing personnel from hotels, guesthouses and homestays
- Possibly: Representatives from MMPRC

Proposed agenda

- ½ day
- 15 minutes: Introduction and setting out the task and objectives including analysis of current booking patterns and source markets for local island tourism and the importance of digital marketing.
- 15 – 30 minutes: Identification of the issues facing local islands tourism from a marketing point of view, with reference to current marketing from the MMPRC, using brainstorm techniques.
- 60 minutes: Best practice for digital marketing, including presentation of OTA marketing opportunities and how to extract the most out of listings, social media, facebook and your own website.
- 30 minutes: The User Journey to book local island accommodation and understanding the touch points that can influence choice of destination and accommodation.

- 30 minutes: Thinking smarter, a brainstorm by key stakeholders to see what opportunities there are with any free or available routes to market that can be exploited by; local island councils, hotels and guesthouses.
- 15 minutes: What more can be done to promote local island tourism on a National / MMPRC level?
- 15 minutes: The Way Forward. Summary and wrap up.

B. Tourism data & statistics

3. Exit survey methodology

Rationale

The MOT carries out a biannual exit survey with visitors at Velana International Airport. The survey is comprehensive and exhaustive, with a sample size of at least 1,500 respondents. Topics covered are sociodemographic data, travel behavior (places of stay, etc.), motivation and satisfaction. However, questions related to visitor expenditures are limited, and could be improved in terms of wording and methodology. E.g., visitors are asked for total expenditures, which is difficult to estimate for most visitors. Furthermore, expenditure categories are not fully in line with national accounting economic sectors (such as ISIC), which makes further usage of exit survey data for economic impact assessment difficult, including for the newly-developed Tourism Satellite Account.

Workshop proposal

It is proposed to build capacities on assessing strengths and weaknesses of the current exit survey methodology in a participatory manner, specifically with regard to monitoring of tourist expenditures, and to jointly develop come up with improvements.

Target group

- MOT statistics division
- Maldives Bureau of Statistics
- Possibly: Central Bank/Ministry of Finance, private consulting companies (e.g., CDE Consulting), Maldives Inland Revenue Authority and possible other government entities)

Proposed agenda

- ½ day
- 45 minutes: demand side surveys in tourism – success factors, challenges & best practices
- 45 minutes: assessment of current methodology
- 90 minutes: joint elaboration of methodology for future visitor surveys

4. Regional economic impact assessment

Rationale

Decentralization is a political priority of the Maldives. Whereas the traditional resorts-based business model is somewhat independent of local structures, the growing guesthouse, hotel and, since 2022, homestay markets are (and should be) much more interlinked with local economies and communities. Hence, it is necessary to strengthen regional statistics and tourism monitoring.

Workshop proposal

We propose a capacity building workshop on regional economic impact assessment for tourism, which relies on an internationally established and proven, yet relatively easy to implement methodology based on regional input-output modeling. In the workshop, the foundations of input-output modeling, methods for regionalization of national input-output tables, and approaches for primary demand-side data collection will be presented and jointly discussed.

Target group

- MOT statistics division
- Maldives Bureau of Statistics
- Possibly: regional stakeholders for pilot region(s) (councils), and possible other government entities

Proposed agenda

- ½ day
- 60 minutes: input-output modeling & regionalization of IO tables
- 60 minutes: hands-on training on regional input-output modeling with standard software (MS Excel)
- 60 minutes: Q&A, discussion on possibilities for regional economic impact assessment and monitoring for tourism in the Maldives

List of participants:

1- List of participants for Workshop 'Developing Successful Marketing for islands.mv' (22nd May 2022)

Representative Body	Name	Position
Ministry of Tourism	1. Aishath Ali	Director General
	2. Ali Shinan	Deputy Director General
	3. Fathimath Naziya	Director
	4. Aminath Nuzla Hameed	Director
	5. Najumullah Shareef	Project Officer - Marketing
	6. Mohamed Hammad	Project Officer – Quality Auditor
	7. Zafarullah Shakeel	Project Officer
	8. Mariyam Maya	Project Officer – Stakeholder Relations
	9. Ahmed Unais	Assistant Quality Auditor
	10. Fathimath Thumauneena	Administrative Officer
	11. Sana Abdul Muhsin	Administrative Officer
	12. Fathimath Mafaashil	Project Officer
	13. Fathimath Zaina Shareef	Compliance Officer
	14. Fathmath Nasma	Senior Administrative Officer
	15. Salma Ali	Senior Administrative Officer

2. List of Participants for Workshop ‘Increasing Tourism through Effective Marketing of Local Inhabited Islands’ (25th May 2022)

Note: The Atoll and Island Council members listed are those who confirmed their participation with us via the online form we provided. However, the online participation numbers showed 15 from MoT’s zoom account during the session. Since most of the members were logged in on their personal phones and devices, we were unable to determine the exact councils who took part.

Representative Body	Name	Position
Ministry of Tourism	1. Dr. Naushad Mohamed	Deputy Minister
	2. Ibrahim Rasheed Aboobakuru	State Minister
	3. Asad Riza	Deputy Minister
	4. Ibrahim Farhad	Senior Policy Director
	5. Aishath Ali	Director General
	6. Ali Shinan	Deputy Director General
	7. Fathimath Naziya	Director
	8. Aminath Nuzla Hameed	Director
	9. Najumullah Shareef	Project Officer - Marketing
	10. Mohamed Hammad	Project Officer – Quality Auditor
	11. Zafarullah Shakeel	Project Officer
	12. Mariyam Maya	Project Officer – Stakeholder Relations
	13. Ahmed Unais	Assistant Quality Auditor
	14. Fathimath Thumauneena	Administrative Officer
	15. Sana Abdul Muhsin	Administrative Officer
	16. Fathimath Mafaashil	Project Officer
	17. Fathimath Zaina Shareef	Compliance Officer
	18. Fathmath Nasma	Senior Administrative Officer
	19. Salma Ali	Senior Administrative Officer
	20. Fathimath Shifa	Assistant Director
	21. Mariyam Lubna Ahmed	International Relations Officer
	22. Ibrahim Fikree	Director
	23. Malaka Abdul Hameed	Director
	24. Aminath Manaal Musthafa	Research Officer
	25. Hasaana Hassan	Statistical Officer
	26. Fathimath Maishan	Planning Officer
	27. Abdulla Iyaz	Planning Officer
Maldives Marketing and Public Relations Corporation	28. Thayyib Mohamed	Managing Director
	29. Neesha Shahid	Deputy Managing Director
	30. Fathimath Afra	Chief Marketing Officer
	31. Reesha Rasheed	Senior Marketing Coordinator
	32. Suhaa Faheem	Assistant Marketing Officer
Ministry of Arts, Culture and Heritage	33. Nihama Ibrahim	Director
	34. Zaha Ahmed	Assistant Architect
	35. Hassan Amroo	Creative Director
Business Center Corporation	36. Mariyam Sana Salih	Project Coordinator
Secretariat of Madaveli Council	37. Ilham Mohamed	Assistant Council Executive
Secretariat of South Huvadho Atholl Fiyoaree Council	38. Ahmed Zihan	Council Member
	39. Mushrif Ali	Council Executive
	40. Athif Saeed	Assistant Council
F. Magoodhoo Council	41. Ibrahim Mohamed	Secretary General
	42. Moosa Fathuhy	Council Officer

	43. Moosa Misbah	Council Officer
	44. Ahmed Fazeel Hassan	Finance Officer
Vaikaradhoo Council	45. Aishath Fasaana	Secretary General
	46. Jadhulla Mohamed	Assistant Council Executive
	47. Ahmed Zahir	Senior Council Officer
F. Atoll Council	48. Ibrahim Shifaah Abdul Rahman	Senior Council Executive
	49. Ibrahim Moosa	Assistant Council Executive
	50. Fareeda Ibrahim	Assistant Council Executive
L.Kalaidhoo Council	51. Ahmed Shiyam	Council President
	52. Ibrahim Majidh	Council Vice President
	53. Mohamed Saaidh	Council Member
	54. Shiyama Hussain	Council Member
	55. Rugiyya Ahmed	Council Member
	56. Mohamed Ibrahim	Council Executive
	57. Mariyam Suzanaa	Council Executive
	58. Ibrahim Shaafiu	Council Officer
Dh.Rinbudhoo Council	59. Navaaz Shareef	Council Member
Secretariat of the South Ari Atoll Dhangethi Council	60. Mohamed Musthausim Billah	Secretary General
	61. Isam Adam	Assistant Council Executive
The Secretariat of the Hulhudheli Council	62. Ahmed Nasru	Council Officer
L.Maabaidhoo Council	63. Ibrahim Wisam	Council Member
	64. Ahmed Aslam	Council Member
	65. Mohamed Ajuwad	Council Member
ADh. Atoll Council	66. Mariyam Humaisha	Council Officer
	67. Aminath Saadha	Assistant Council Officer
Veyvah Council	68. Mamdhoo Waheed	Council President
	69. Ahushan Naeem	Vice President
	70. Ahmed Haleem	Acting Secretary
Bilehdhoo Council	71. Samih Abdul Mannan	Senior Council Officer
Secretariat of the Addu City Council	72. Aishath Asna	Associate Council Officer
	73. Hussain Zareer	Councillor
Secretariat of Filladhoo Council	74. Mohamed Razeef	Council Vice President
Secretariat of Hinnavaru Council	75. Abdulla Shafiu	Council Member
V.Rakeedhoo Council	76. Abdulla Rasheed	Council President
	77. Aminath Sheeza	Council Member
	78. Hussain Rasheed	Council Member
	79. Hussain Muaz	Assistant Director
Noonu Atoll Council	80. Mohamed Basheer	President
	81. Faariha Adnan	Assistant Council Officer
Gemanafushi Council	82. Abdulla Shiyam	Assistant Council Officer
Noonu Velidhoo Council	83. Fathimath Asfa	Council Executive
	84. Athif Hussain	Council President
Fuvahmulah City Council	85. Ali Maseeh	Council Executive
	86. Sheemath Ibrahim	Tourism Officer
B.Goidhoo Council	87. Athira Ibrahim	Council Member
	88. Ilyas Ibrahim	Council Member
Keyodhoo Council	89. Aishath Shaiga Adam	Council Officer
	90. Ashraf Mohamed	Council Officer
Secretariat of the Maafushi Council	91. Fathimath Nashaha	Council Member
	92. Mariyam Najfa	Assistant Council Officer
	93. Aminath Afsana Ahmed Sodhig	Assistant Council Officer
Muli Council	94. Ahmed Sirraaj	Council Officer

Baa Maalhos Island Council	95. Abdulla Shujau	Council President
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3. List of Participants for Workshop 'Exit Survey Methodology' (24th May 2022)

Representative Body	Name	Position
Ministry of Tourism	1. Aishath Ali	Director General
	2. Fathimath Zaina Shareef	Compliance Officer
	3. Mohamed Hammadh	Quality Auditor
	4. Salma Ali	Senior Administrative Officer
	5. Ahmed Unais	Assistant Quality Auditor
	6. Mariyam Maaya	Project Officer
	7. Fathimath Mafaashil	Project Officer
	8. Sana Abdul Muhsin	Administrative Officer
	9. Fathmath Shifa	Assistant Director
	10. Ibrahim Fikree	Director
	11. Fathimath Nasma	Senior Administrative Officer
	12. Fathimath Thumauneena	Project Administrative Officer
	13. Fathimath Naziya	Director
	14. Hasaana Hassan	Statistical Officer
	15. Aminath Manaal Musthafa	Tourism Research Officer
Maldives Bureau of Statistics	16. Sajidha Ahmed	Statistician
	17. Mariyam Shadeena	Deputy Statistician
SME Development Finance Corporation	18. Aminath Muha	Senior Credit Analyst

4. List of Participants for Workshop ‘‘Regional Economic Impact Assessment’’
(26th May 2022)

Representative Body	Name	Position
Ministry of Tourism	1. Aishath Ali	Director General
	2. Fathimath Mafaashil	Project Officer
	3. Fathimath Thumauneena	Project Administrative Officer
	4. Mariyam Maaya	Project Officer
	5. Aminath Manal	Tourism Research Officer
	6. Malaka Abdul Hameed	Director
	7. Sana Abdul Muhsin	Administrative Officer
	8. Zafarullah Shakeel	Project Officer - Planning
	9. Abdulla Iyaz	Planning Officer
	10. Ahmed Unais	Assistant Quality Auditor
	11. Hasaana Hassan	Statistical Officer
	12. Fathimath Naziya	Director
	13. Fathimath Zaina Shareef	Compliance Officer
	14. Fathimath Nasma	Senior Administrative Officer
	15. Ali Shinan	Deputy Director General
	16. Fathmath Shaiha	Project Officer
	17. Aminath Irene	Project Officer
	18. Mohamed Sinan	Environment Officer
	19. Ibrahim Farhad	Senior Policy Director
	20. Ibrahim Fikree	Director
Maldives Bureau of Statistics	21. Sajidha Ahmed	Statistician
	22. Mariyam Shadheena	Deputy Statistician
	23. Aishath Sobaha	Assistant Statistician
Maldives Inland Revenue Authority	24. Nathiu Ali	Deputy Tax Officer
	25. Ghalib Rasheed	Manager
	26. Ismail Zihan Zuhair	Assistant Tax Officer
	27. Fathmath Raudha	Principal Officer
	28. Mariyam Saneeha	Senior Tax Officer
	29. Aishath Shahudha	Senior Tax Officer
	30. Mariyam Idham Adnan	Senior Tax officer
	31. Mariyam Jaidha	Deputy Manager
	32. Zayaan Hussain	Assistant Tax Officer
	SME Development Finance Corporation	33. Aminath Muha
34. Mariyam Mahin		Business Support Specialist
35. Mariyam Shazna		Deputy Manager

Presentation materials used for Workshop

1. Presentation materials for Workshop 'Developing Successful Marketing for islands.mv' (22nd May 2022)



1

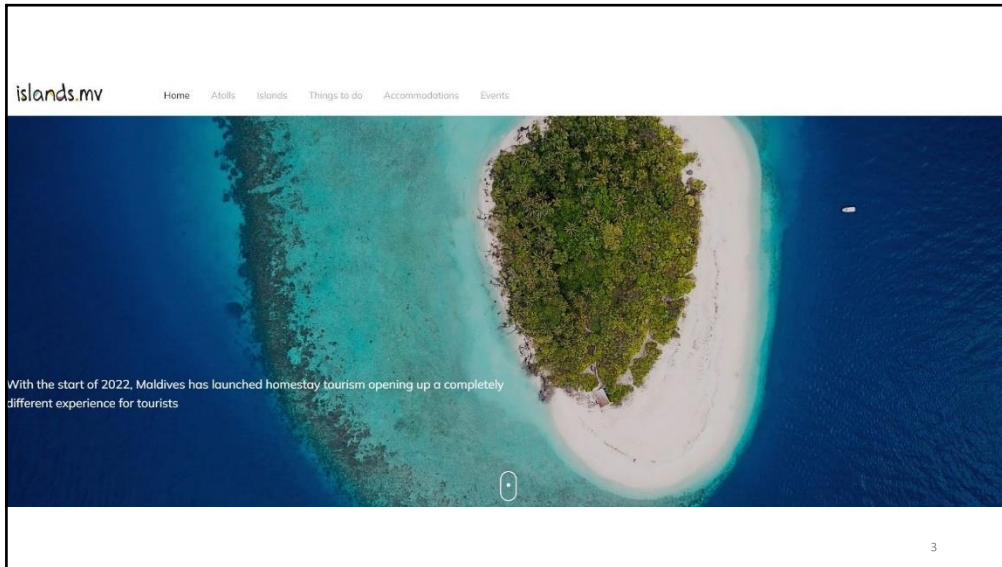
Workshop Schedule

2–4pm

- | | |
|---|---------|
| 1. Intro and Background | 20 |
| 2. The Customer Journey | minutes |
| 3. A vision for islands.mv | 15 |
| 4. The Site | minutes |
| 5. The Process to keep it up to date | 20 |
| 6. Where and how to promote it in the Maldives | minutes |
| 7. Potential local and international partners / | 15 |
| | minutes |

2

2



3

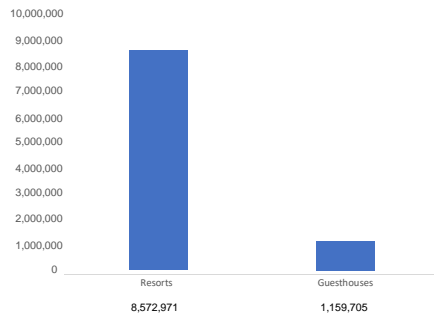
1. Background and Strategy

Why do we need islands.mv?

4

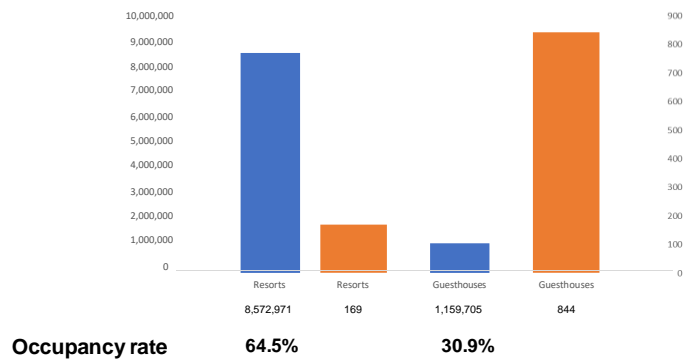
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Room Nights 2021



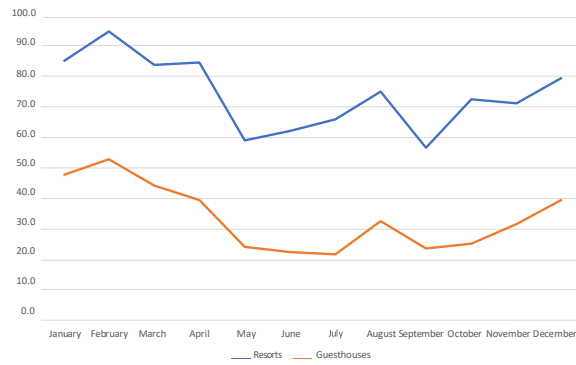
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Room Nights 2021 vs No. of Establishments



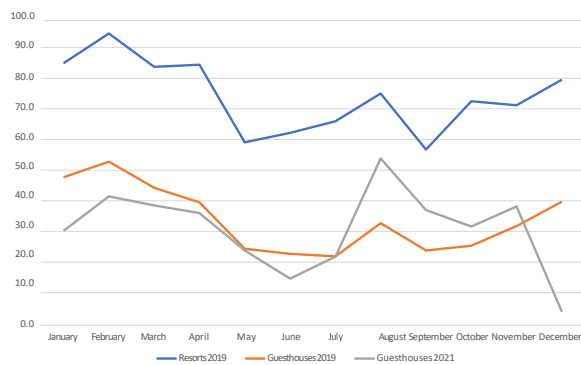
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Seasonality: Occupancy Rates 2019



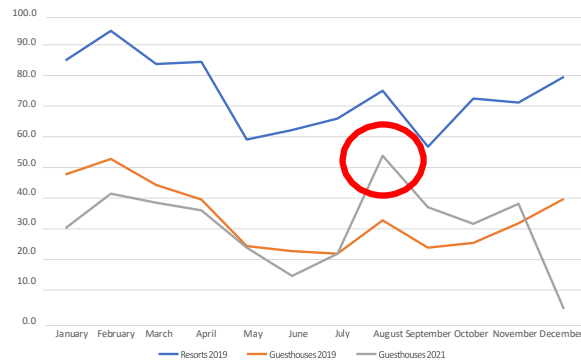
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Seasonality: Occupancy Rates 2019 and 2021



8

Seasonality: Occupancy Rates 2019 and 2021



9

If guesthouse occupancy = resort occupancy

- Double occupancy: 30.9% → 64.5% (2021 average figures).
- Double bed nights to 2.3 million (2021 figures).
- An extra 267,000 visitors to the Maldives (based on 2pax per room night and an average length of stay of 8.7 nights).
- At an average of \$70 per night = \$80 million extra revenue.
- Plus: taxes + food and drink + ferries / air fares + water sportsetc.

10

Source Markets

The 2019 Top 10 visitors:

China
India
Italy
Germany
UK
Russia
France
USA
Japan
Australia

11

11

% staying at Guesthouses

The 2019 Top 10 visitors:

China	16%
India	19%
Italy	26%
Germany	9%
UK	3%
Russia	17%
France	15%
USA	7%
Japan	13%
Australia	14%

Total average: 16%

Source: 2019 Exit survey 15c % staying at a guesthouse.¹

12

12

% staying at Guesthouses

The 2019 Top 10 visitors:

China	16%
India	19%
Italy	26%
Germany	9%
UK	3%
Russia	17%
France	15%
USA	7%
Japan	13%
Australia	14%

Total average: 16%

Top % staying in a guesthouse:

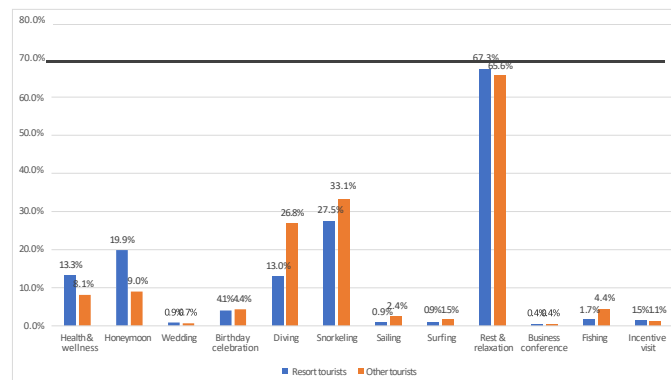
Slovenia	80%
Israel	60%
Malaysia	46%
Indonesia	46%
Poland	39%
Croatia	33%
Kuwait	33%
Pakistan	33%
Czech Republic	29%
Spain	29%
Kazakhstan	27%
Canada	22%
Portugal	20%
Finland	19%
Denmark	17%

Source: 2019 Exit survey 15c: '% staying at a guesthouse.'

13

13

Main purpose of visit

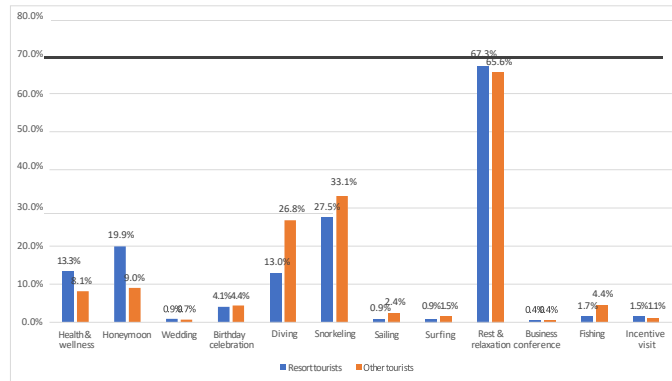


Source: 2019 Exit Survey

14

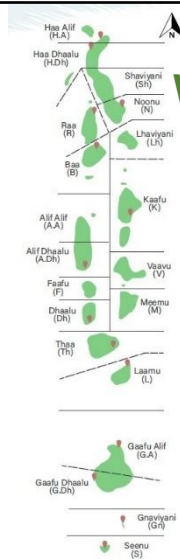
Non-resort guests are more 'active'

Diving, snorkelling, sailing, fishing, surfing. Not honeymooners or health.

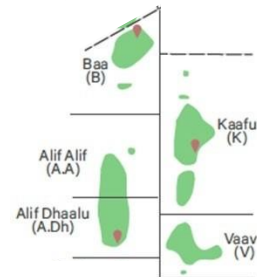


15

Where will future growth be?

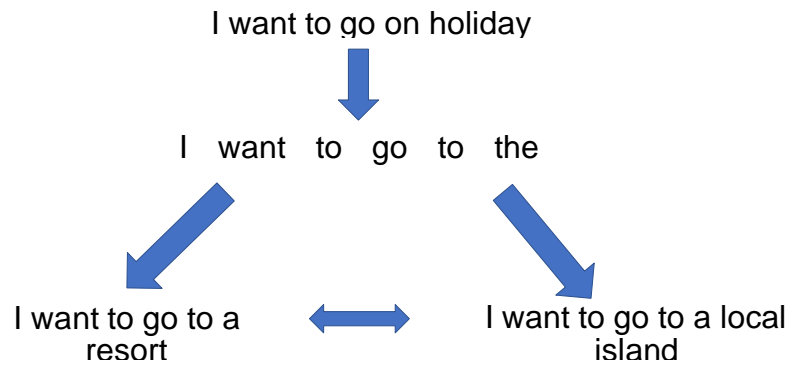


Atoll	No of guesthouses/ beds
1. Kaafu	250 / 5884
2. Alifu Alifu	124 / 1604
3. Alifu Dhaalu	74 / 1030
4. Vaavu	50 / 596
5. Baa	40 / 692
Total	538 / 98906
As % of total	83% / 87%



16

2. Customer Journey



17

3. The Vision

We need a central objective to target and aim for: a vision.

This will provide clarity on everything on the site from content to management to promotion to usage and awareness.

It will be the 'North Star' that will guide most if not all decisions on the site.

18

The Vision for islands.mv

Who are we targeting?
What do we want them to do? How are we going to tell them? Where will they see the site?
Why are we doing this?

19

The Vision for islands.mv

?

20

20

The Vision for islands.mv

The 'go-to' local island website for visitors to the Maldives

21

21

The Vision for islands.mv

Who are we targeting?
What do we want them to do? How are we going to tell them?

Where will they see the site? Why are we doing this?

Visitors to the Maldives
Stay on the local islands
By keeping islands.mv comprehensive and up to date
By promoting islands.mv across the Maldives and current visitors
Because there is nowhere to find out about local islands and we can keep revenue in the Maldives

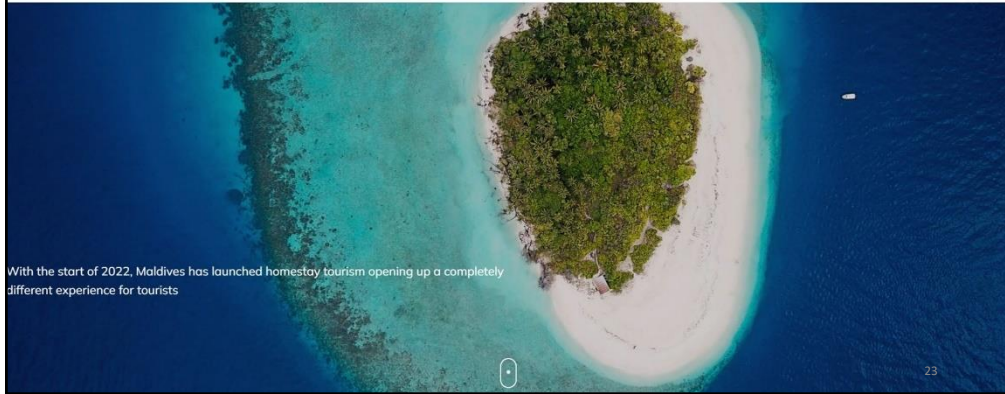
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4. The Site

islands.mv

Home Atolls Islands Things to do Accommodations Events



With the start of 2022, Maldives has launched homestay tourism opening up a completely different experience for tourists



23

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4. The Site

islands.mv

Home Atolls Islands Things to do Accommodations Events



24

24

5. The Process

Information from the local islands needs to get to the site.

How?

25

25

6. Where and how to promote

Who will see this?
Where will they see
it?

26

7. Partners and Sponsors

What sort of information will be on the site?
Who will be interested in our audience?

27

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7. Advertisers

An idea:
To incentivize updates, we can offer free ads to anyone who updates that week.

28

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8. Summary and wrap up

The Vision
The Site
The Process
Where to promote it
The Sponsors and advertisers

2. Workshop 'Increasing Tourism through Effective Marketing of Local Inhabited Islands'
(25th May 2022)



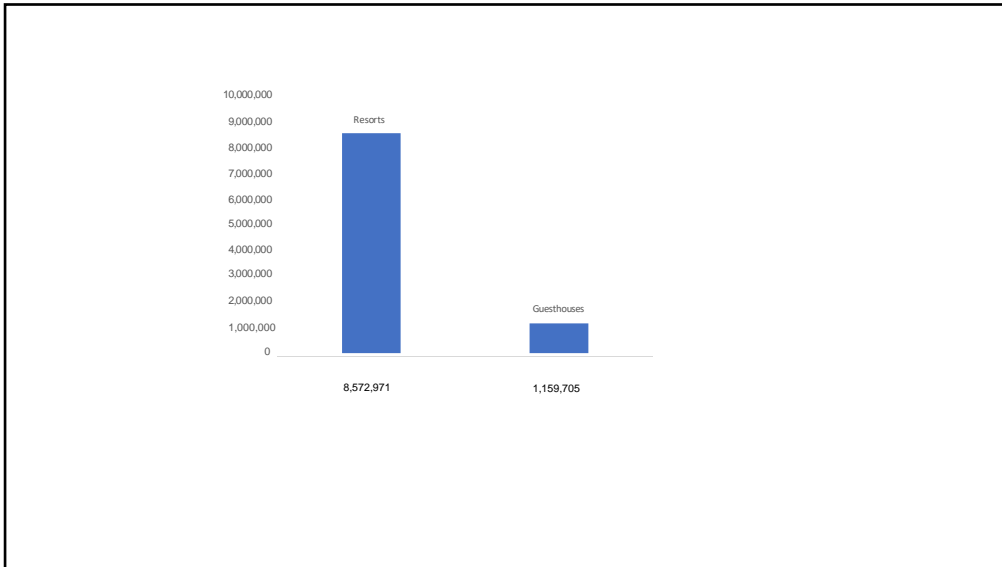
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Workshop Schedule

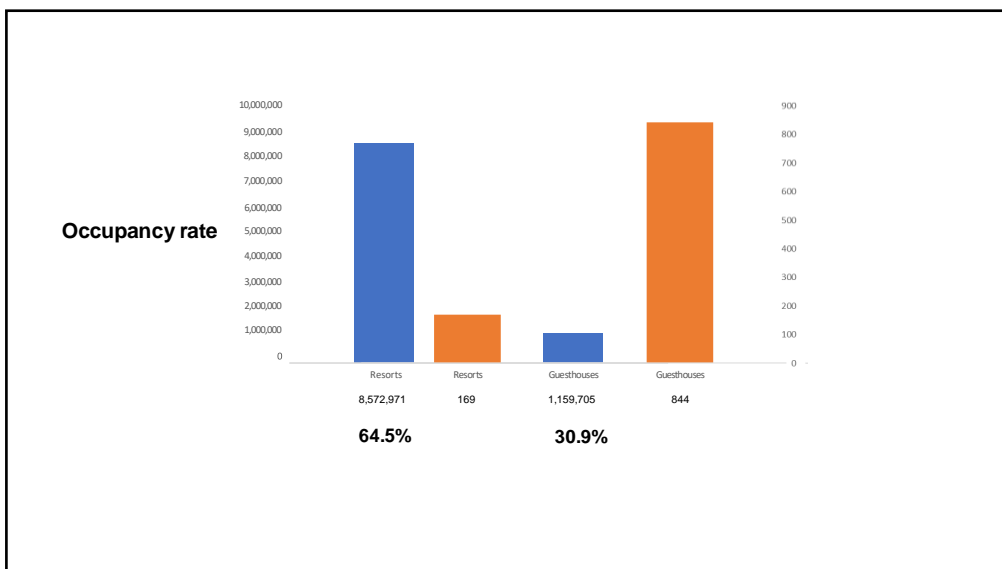
9–11am

1. Intro and background	25minutes
2. Issues to be addressed through marketing	20minutes
3. Best practice digi marketing	30minutes
4. Thinking Smarter Locally	10minutes
5. Going International	20minutes
6. Summary and wrap-up	10minutes

2

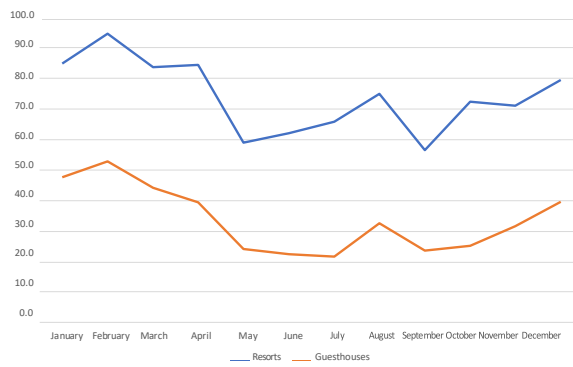


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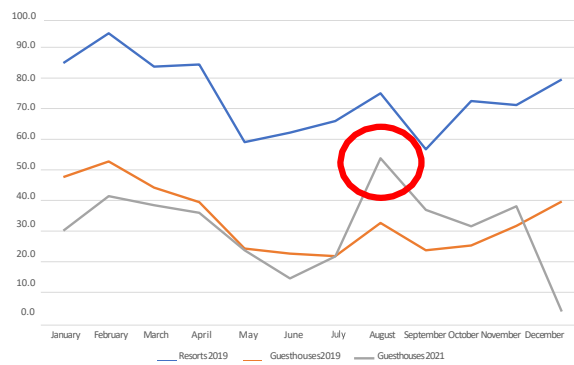
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Seasonality: Occupancy Rates 2019



5

Seasonality: Occupancy Rates 2019 and 2021



6

If guesthouse occupancy = resort occupancy

- Double occupancy: 30.9% → 64.5% (2021 average figures).
- Double bed nights to 2.3 million (2021 figures).
- An extra 267,000 visitors to the Maldives (based on 2pax per room night and an average length of stay of 8.7 nights).
- At an average of \$70 per night = \$80 million extra revenue.
- Plus: taxes + food and drink + ferries / air fares + water sports etc.

7

Source Markets

The 2019 Top 10 visitors:

China
India
Italy
Germany
UK
Russia
France
USA
Japan
Australia

8

8

% staying at Guest houses

The 2019 Top 10 visitors:

China	17%
India	19%
Italy	26%
Germany	9%
UK	3%
Russia	17%
France	15%
USA	7%
Japan	13%
Australia	14%

Total average: 16%

Source: 2019 Exits survey 15c '% staying at a guesthouse.'

9

9

% staying at Guesthouses

The 2019 Top 10 visitors:

China	17%
India	19%
Italy	26%
Germany	9%
UK	3%
Russia	17%
France	15%
USA	7%
Japan	13%
Australia	14%

Total average: 16%

Top % staying in a guesthouse:

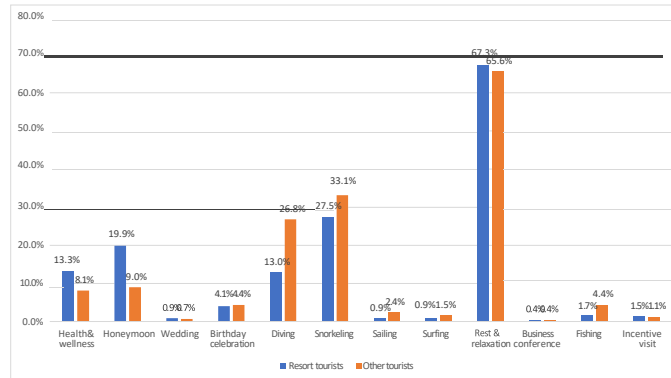
Slovenia	80%
Israel	60%
Malaysia	46%
Indonesia	46%
Poland	39%
Norway	37%
Croatia	33%
Kuwait	33%
Pakistan	33%
Czech Republic	29%
Spain	29%
Kazakhstan	27%
Netherlands	24%
Canada	22%
Portugal	20%
Finland	19%
Denmark	17%

Source: 2019 Exits survey 15c '% staying at a guesthouse.'

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Main purpose of visit

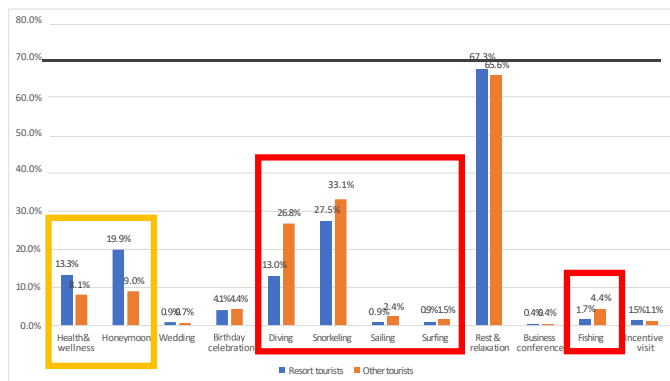


Source: 2019 Exit Survey

11

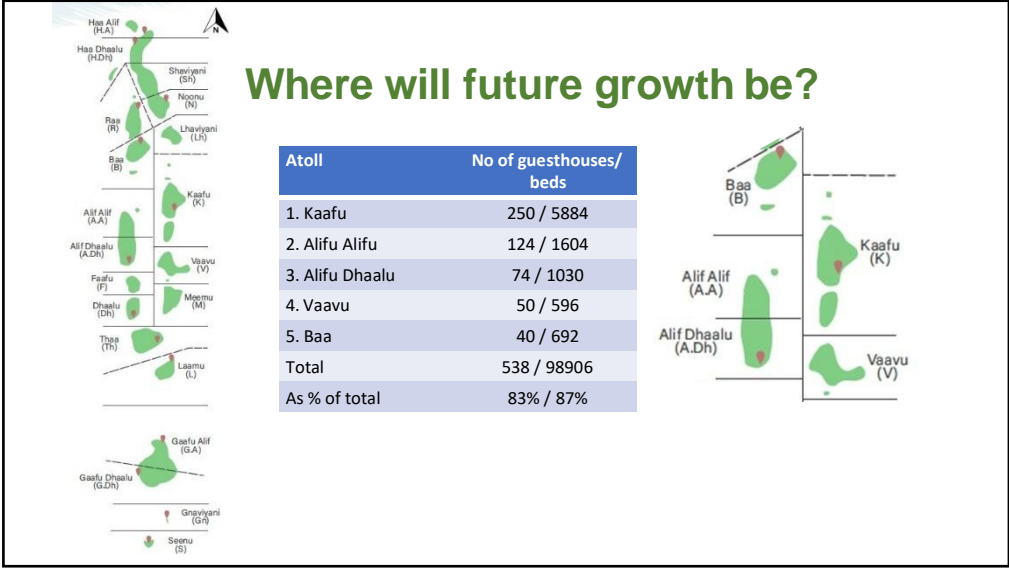
Non-resort guests are more 'active'

Diving, snorkeling, sailing, fishing, surfing. Not honeymooners or health.

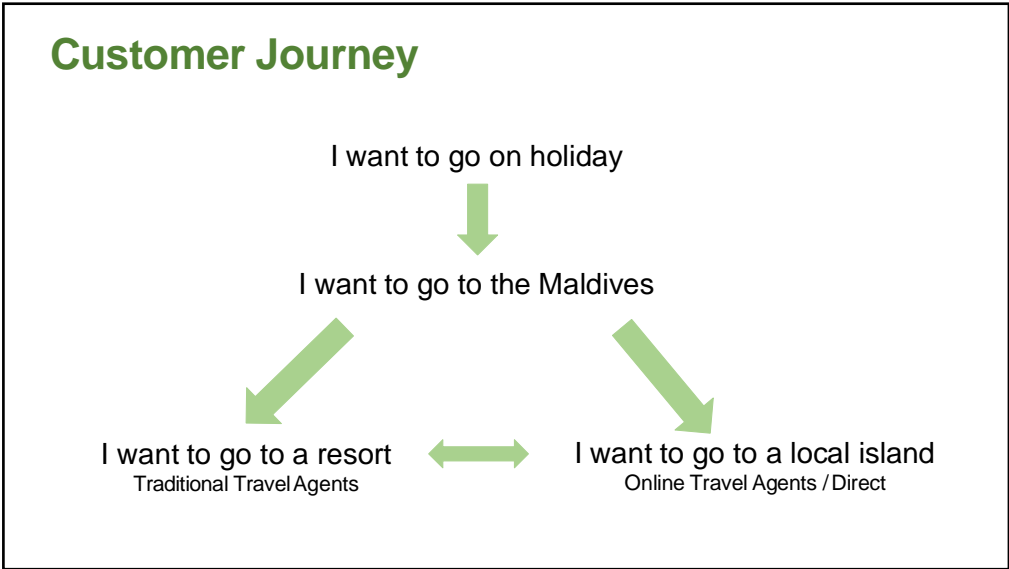


Source: 2019 Exit Survey

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Booking Channels

Resorts

	(Approx)
Traditional travel agents / DMCs	70%
Direct	10%-20%
OTAs	10%-20%

Guesthouses & hotels

	(Approx)
Traditional Travel agents / DMCs	25%
Direct	25%
OTAs	50%

15

How and where to influence?



16

2. Issues to be addressed through marketing

Atolls and Islands

- Probably have never heard of you before
- Where are you?
- What can I do there?
- Where can I stay?
- How do I get to you?

Guesthouses and hotels

- Price is a 'hygiene factor'
- Photo and video-based decision making
- Traveler Reviews are vital
- Up to 40 separate online search occasions are used to make a decision
- How to migrate from 'booking.com' to direct?

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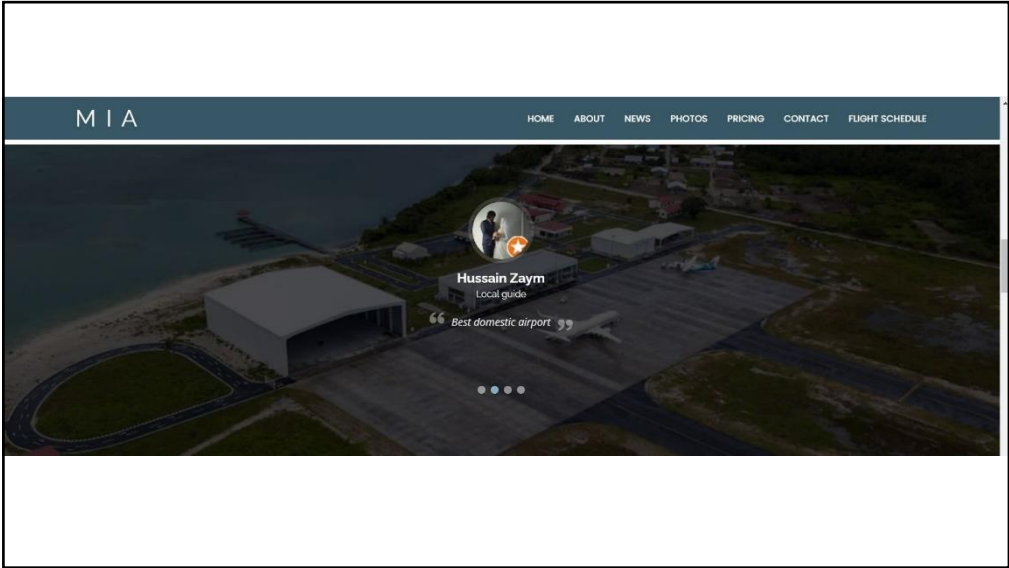
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3. Best Practice digital marketing

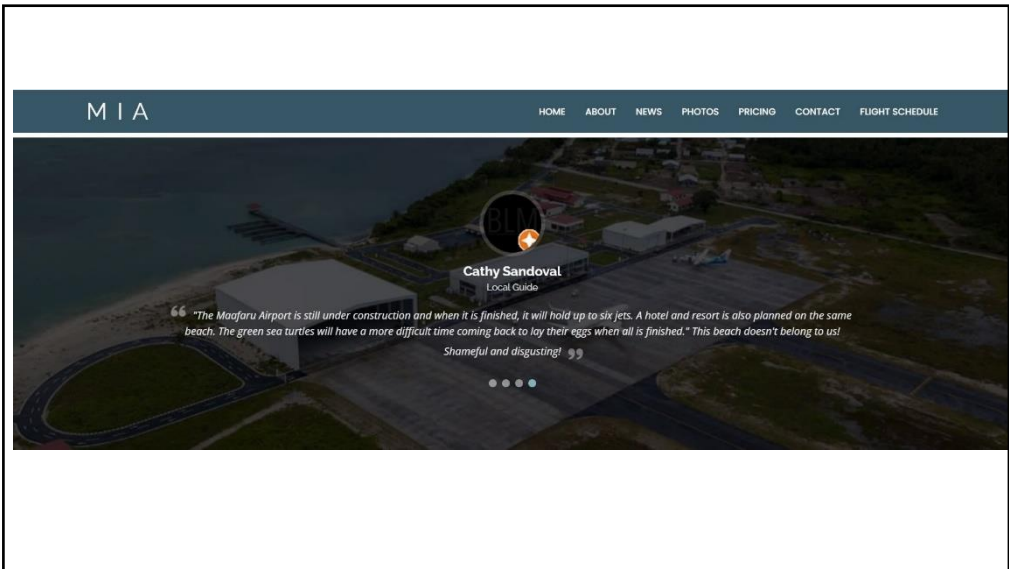
1. Content is king.
2. Stories. Visuals. Images. Videos.
3. Reviews and comments are hugely important.

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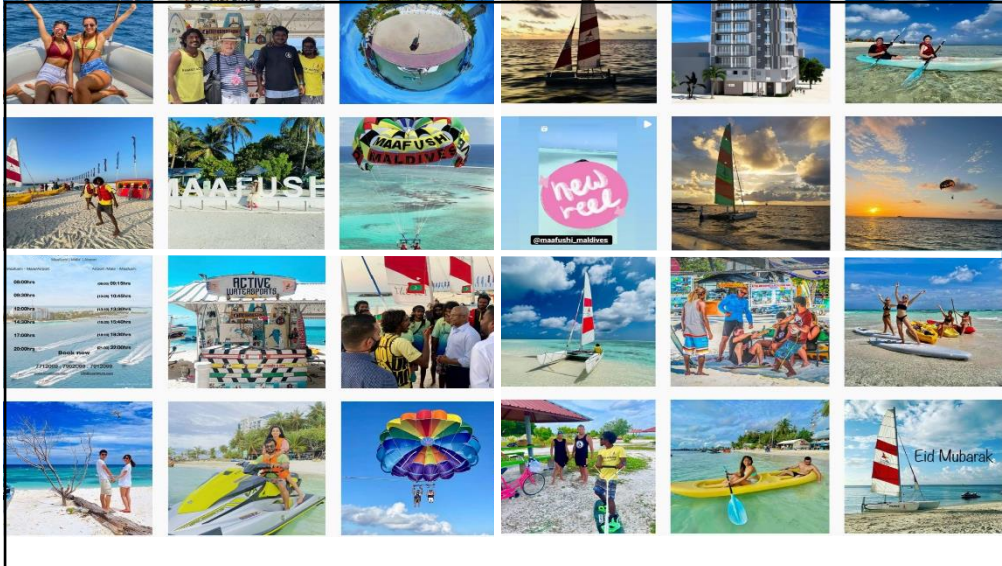
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3. Best Practice digital marketing

9. But whatever you use WILL BE your image! So don't post unless:

- You are clear that it fits the image you want to portray
- It communicates the message you want the target audience to see
- You own the content or have permission to post it

24

Strategy is the most important thing in Marketing

1. Set an objective, target or goal.
2. Be honest. Define what makes your atoll/island/guesthouse/hotel/liveaboard/truly unique or different.
3. Define your target audience, as precisely as possible.
4. Understand exactly what they want.
5. Be truthful. Is what makes you different(2)'relevant

25

Sell not Tell

Physical features and practical things are important e.g., you should tell people you have a coral reef.

But it's the feeling and emotion of the holiday experience that sells e.g.:

i) We have a coral reef close to shore. Or:

i) Wake up every morning and swim with the fishes, in our stunning, off-the-beach coral reef.

Lists of 'stuff' are needed.

But if you inspire people how to use them and tell stories about what to do... you will sell more.

26

Celebrate with your guests

- Don't just use theme or forget about them.
- Your guests have posted many many images of their holiday on social media.
- Public is your hashtag to them. Run a competition. Offer a prize.
- Many people use maps to find places to stay.
- Make sure you are geolocated on google and apple maps.
- Make sure you own the business and regularly update it.
- Make sure they fill in surveys and reviews, before during and after they stay.
- Again, incentivize them to do so.

27

From OTAs to direct booking

OTAs are currently a necessary evil, giving access to global markets, but take a lot of commission Migrating to direct takes time and effort, but starts with your guests.

A 20 room guesthouse needs 644 bookings a year to be 75% full (at an average of c.8 nights per booking).

That's 12 bookings a week.

You can't price discount vs your price on booking.com but you can give away extras e.g. collection from ferry or airport; breakfast included; a free watersport excursion etc.

28

4. Thinking Smarter Locally

What more can be done locally?

Pool resource together?

Think on an island level

Then atoll level

Ports of entry – consumer touchpoints around the Maldives

29

5. Going International

Go it your own

Visit Maldives

A sub-brand

islands.mv

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6. Summary and wrap up

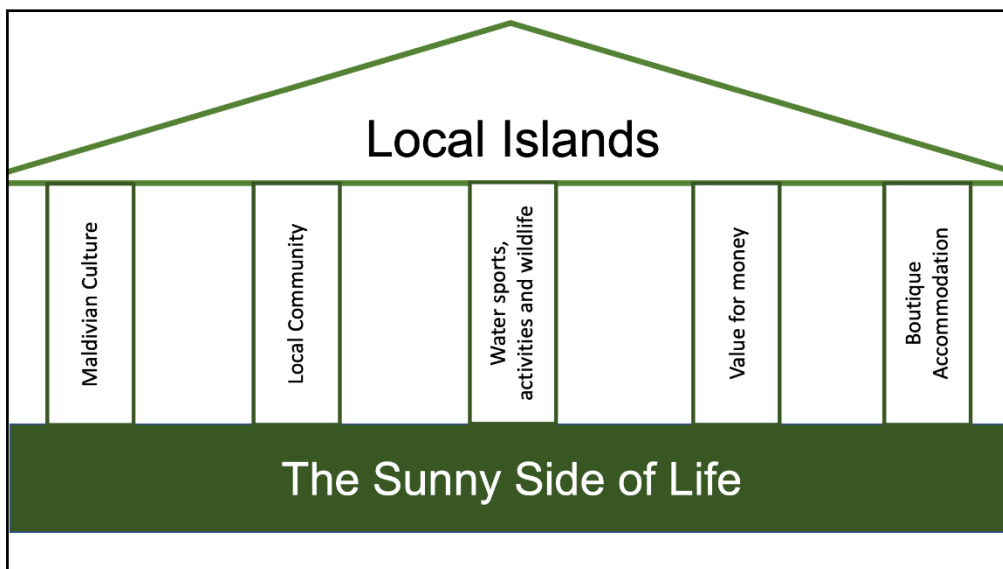
Marketing needs a strategy

Digital needs time and content

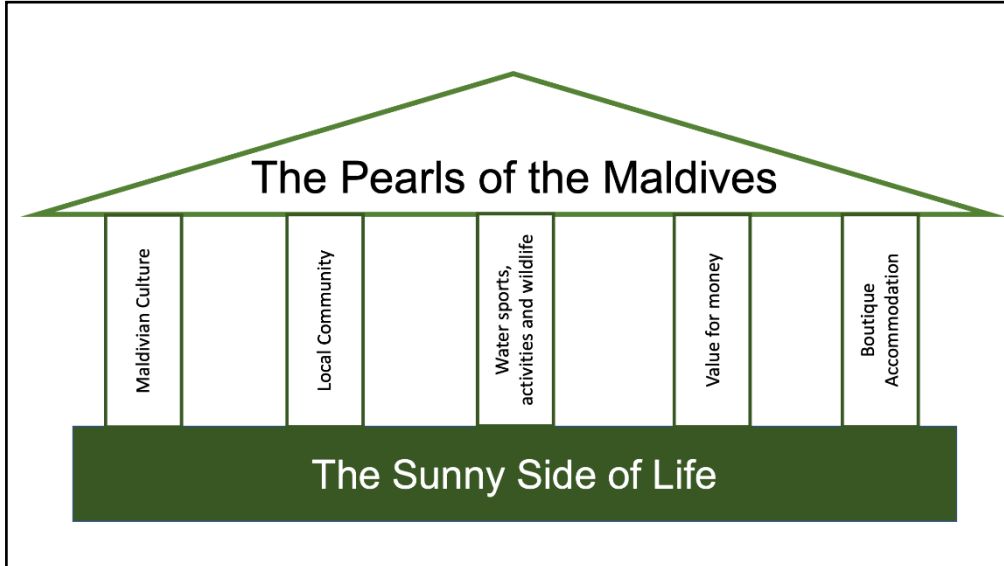
Content can be as fun as you want

Local islands should be about the culture and community

31



32



33

3. Presentation material used for Workshop 'Exit Survey Methodology'
(24th May 2022)



1



2

Workshop objectives

Understand key issues for quantitative visitor (exit) surveys

Develop ideas for strengthening the Maldives exit survey methodology & instrument

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Workshop agenda

Introduction: demand side surveys in tourism – challenges & success factors

Joint assessment of Maldives exit survey methodology

Way forward: strengthening the exit survey methodology & instrument

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Demand side surveys in tourism - agenda

Introduction: quantitative research methods

Survey approaches

Questionnaire design

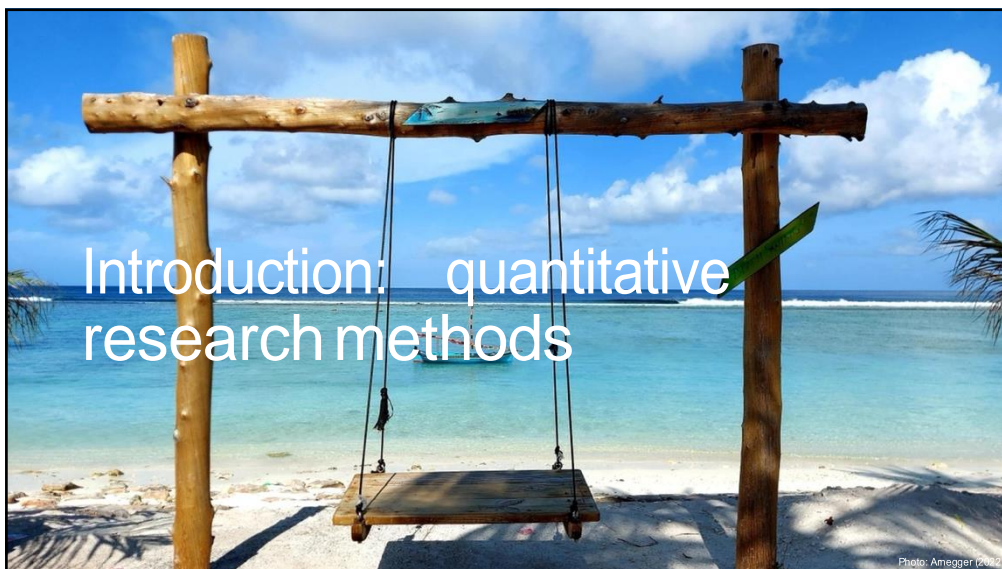
Exit surveys in tourism

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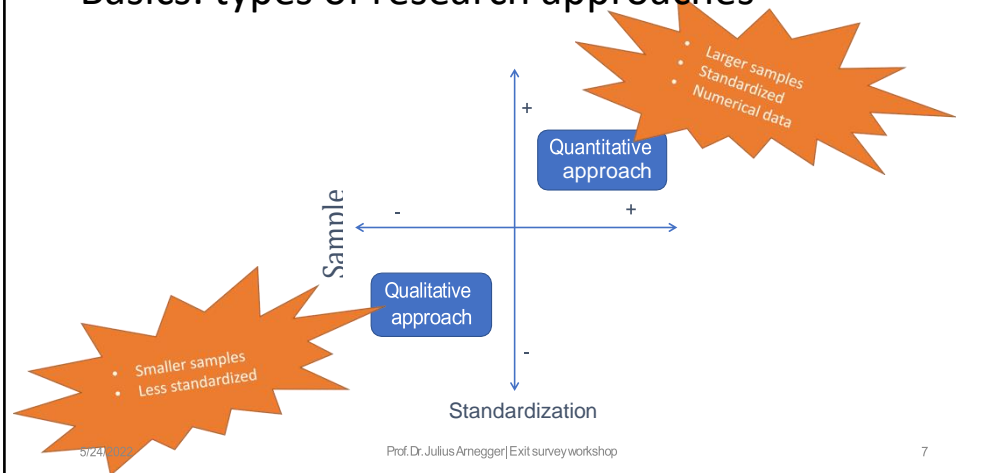
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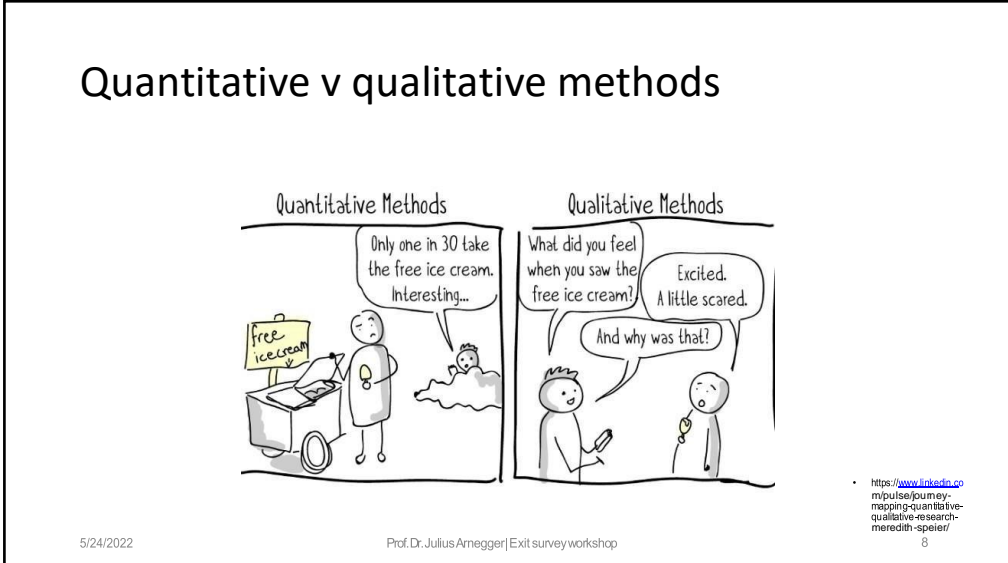
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Basics: types of research approaches



7

Quantitative v qualitative methods



8

Qualitative data

- Describes qualities or characteristics
- Is collected using questionnaires, interviews, or observation, and frequently appears in narrative form (i.e. words)
- For example:
 - It could be notes taken during a focus group on the quality of the food at resort xy,
 - or responses from an open-ended questionnaire.
- Qualitative data may be difficult to precisely measure and analyze
- The data may be in the form of descriptive words that can be examined for patterns or meaning, sometimes through the use of coding
- Coding allows the researcher to categorize qualitative data to identify themes that correspond with the research questions and to perform quantitative analysis.

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Quantitative data

- Are used when a researcher is trying to quantify a problem, or address the "what" or "how many" aspects of a research question.
- Is data that can either be counted or compared on a numeric scale
- For example:
 - it could be the annual number of visitors to a given destination
 - or the ratings on a scale of 1-5 of the quality of food resort xy.
- This data are usually gathered using instruments, such as a questionnaire which includes a ratings scale or a thermometer to collect weather data.
- Statistical analysis software, such as SPSS, is often used to analyze quantitative data.

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Quantitative or qualitative methods?

- Research topics may be approached using either quantitative or qualitative methods
- Choosing one method or the other depends on what you believe would provide the best evidence for your research objectives
- Researchers sometimes choose to incorporate both qualitative and quantitative data in their research since these methods provide different perspectives on the topic

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Quantitative and qualitative approaches: common methods

Quantitative approach

Structured interview

Survey

...

Qualitative approach

Semi-structured interview

Unstructured interview

...

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Quantitative approaches

- Attempts to explain phenomena by collecting and analyzing **numerical data**
- Tells you if there is a “**difference**” or a “**pattern**” but not necessarily why
- Data collected are always numerical and analyzed using **statistical methods**
- **Variables are controlled** as much as possible so we can **eliminate interference** and measure the effect of any change
- **Randomization** to reduce subjective bias
- **If there are no numbers involved, its not quantitative**

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Analyzing quantitative data

- Always good to group and/or visualize the data initially to **identify outliers/cleaning data**
- What **average** are you looking for? Mean, median or mode?
- Spread of data:
 - skewness/distribution
 - range, variance and standard deviation
- Try to find the **signal from the noise**
- Generally, either a **difference** (between/within groups) or a **correlation**
- Choosing the right test to use: parametric v. non-parametric (depends what sort of data you have—interval/ratio v. nominal/ordinal and how it is distributed)
- **Correlation does not imply causation!**

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Why do we need to conduct surveys?



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Communication in surveys

- Face-to-face survey
 - Self-administered questionnaire survey
- } On-site
- Phone survey
 - Mail survey
 - Online survey
 - ...

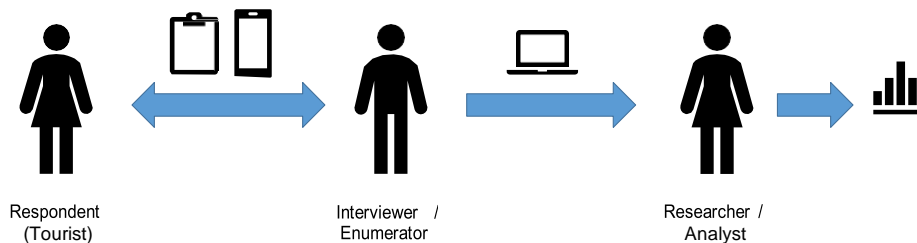
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Information flow



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On-site survey approaches

Self-administered questionnaire

- Pen & paper

Face-to-face interviews

- Pen & paper
- CAPI (computer-assisted personal interviews)

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19

On-site survey approaches: comparison

	Face-to-face survey	Self-administered questionnaire
Costs	Higher	Lower
Staff resources	More	Less
Sample size	Smaller	Larger
Complexity of questions	Higher	Simpler
Dropout rate	Lower	Higher
Data quality*	Higher	Lower

*E.g., errors due to misunderstandings, such as selecting multiple answer categories instead of just one.

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20

Face-to-face surveys: pen & paper v tablet survey

	Pen & paper	CAPI (tablet survey)
Equipment costs	Lower	Higher (but tablets can be used for future surveys)
Printing costs	Higher	n/a
Costs for data entry (staff costs)	Higher	n/a
Data entry errors	Possible	n/a
Time requirements	Higher (for data entry)	Lower

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22

Variables

- Each person/ thing we collect data on is called an **Observation**
- In social sciences these are usually people (often called *respondents* or *participants*)
- Participants possess a variety of **characteristics**

In research we don't get excited about constants (since everyone is the same on that characteristic); we're more interested in **variables**.

Constant

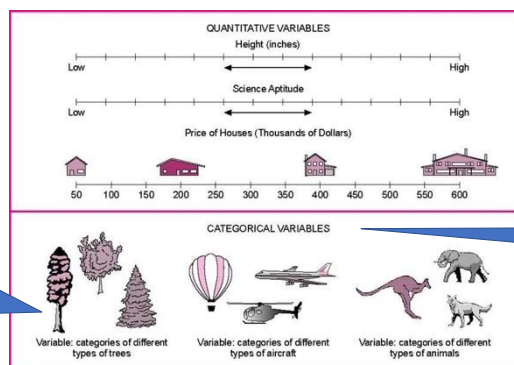
A characteristic of an observation (participant) is the same for every member of a group.

Variable

A characteristic differs for group members.

23

Types of quantitative variables



• Categorical variables can also be expressed with numbers

Also called nominal variables

24

Variables: 4 levels of measurement

THE FOUR LEVELS OF MEASUREMENT:

	Nominal	Ordinal	Interval	Ratio
Categorizes and labels variables	✓	✓	✓	✓
Ranks categories in order		✓	✓	✓
Has known, equal intervals			✓	✓
Has a true or meaningful zero				✓

<https://careerfoundry.com/en/blog/data-analytics/data-levels-of-measurement/>

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25

Nominal variables

- Nominal variables are also called categorical variables
- Categorical variables do not vary in degree, amount or quantity, but are qualitatively different
- Examples:
 - Gender
 - Religion
 - Political party affiliation
 - Etc.
- When numbers are used they serve as labels rather than numeric values (e.g., 1= male; 2=female)
- Can be used for determining the mode*, the percentage values, or the chi square.

**The mode is the value that appears most often in a set of data values.*

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Ordinal scale

- An ordinal scale is one where the order matters but not the difference between values.
- Examples:
 - Socio economic status ("low income", "middle income", "high income")
 - Education level ("high school", "BS", "MS", "PhD")
 - Income level ("less than 50K", "50K-100K", "over 100K")
- Differences between adjacent categories do not necessarily have the same meaning.
- For example, the difference between the two income levels "less than 50K" and "50K-100K" does not have the same meaning as the difference between the two income levels "50K-100K" and "over 100K".
- Can be used for determining the mode, percentage, chi square, median, percentile rank, or rank correlation.

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Interval scale

- A scale that measures in terms of equal intervals or degrees of difference
- The zero point, or point of beginning is arbitrarily established
- Examples:
 - Temperature (e.g. Fahrenheit, Celsius)
 - Years (e.g. year of birth, death)
 - IQ
- Can be used for determining the mode, the mean, the standard deviation, the *t* test, the *F* test, and the product moment correlation (Pearson's correlation)
- It is possible to calculate differences between two values but multiplication does not make sense.

One cannot say "today it is twice as warm as yesterday"

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Ratio scale

- A scale that measures in terms of equal intervals and has an absolute zero point of origin
- Examples:
 - Height (1.75 m...)
 - Money
 - Weight
 - Age
 - Etc.
- Can be used for determining the geometric mean, the harmonic mean, the percent variation and all other statistical determinations.

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Levels of measurement: implications for survey design

- The higher the level of measurement, the more options we have for data analyses
- If possible, choose the highest possible level of measurement in the questionnaire design
- We can always scale down (e.g. by building categories out of ratio-scale data), but never scale up

Example: length of stay

E.g., it is not possible to calculate the mean value (average) from these categories.

A4a. How many nights did you stay in the Maldives during this visit? (Please tick (✓) one box)

- a. 3 - 4 nights b. 5 - 7 nights c. 8 - 10 nights d. 11 - 14 nights
e. 15 - 29 nights f. 30 nights or more

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Levels of measurement: issues

Providing categories rather than asking for exact numbers may be considered for sensitive questions.

Q34. Which of the following categories describes your total annual household income?

Under \$20,000	<input type="checkbox"/> 1
\$20,000 - \$39,999	<input type="checkbox"/> 2
\$40,000 - \$59,999	<input type="checkbox"/> 3
\$60,000 - \$79,000	<input type="checkbox"/> 4
\$80,000 - \$99,000	<input type="checkbox"/> 5
\$100,000 - \$119,000	<input type="checkbox"/> 6
\$120,000 - \$149,000	<input type="checkbox"/> 7
\$150,000 or more	<input type="checkbox"/> 8
Refused	<input type="checkbox"/> 9

"More than" category can be helpful if respondents may not remember.

A5. How many times have you visited the Maldives? (Please tick (✓) one box)

- a. First Time b. 2-5 times c. 6-10 times d. more than 10 times

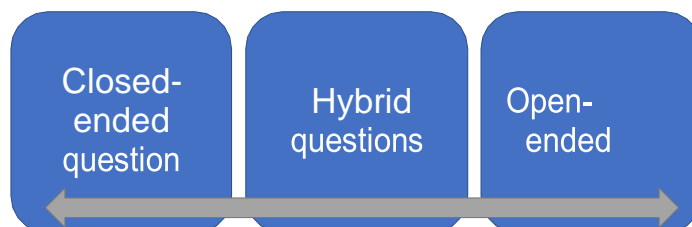
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Types of survey questions



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Closed-ended / open-ended questions

A4a. How many nights did you stay in the Maldives during this visit? *(Please tick (✓) one box)*

- a. 3 - 4 nights b. 5 - 7 nights c. 8 - 10 nights d. 11- 14 nights
e. 15- 29 nights f. 30 nights or more

Closed-ended
question

A7. How many people are in your travel group, including yourself?

- a. Adults b. Children (below 18 years)

Open-ended
question

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Hybrid question

A9. Did you use any of the following to plan/organise your trip to the Maldives? *(Please tick (✓) all relevant boxes)*

- a. Trip Advisor b. LonelyPlanet c. Trivago d. Facebook
e. Instagram f. Pinterest g. Weibo h. Skyscanner
i. Wechat j. Kayak k. Online Travel Blogs l. Other, specify

Hybrid
question

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34

Questions: basic rules

- Stick to **short, comprehensible, concise questions**
- Answer categories for close-ended questions must be:
 - disjointed
 - exhaustive
 - precise
- Questions focusing on **frequencies, time and other numerical values** should be **open-ended** (or categorized in a systematic way)



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Answer categories

- **Should be exhaustive:** the most important possible answers need to be anticipated (this can be tricky, hence the importance of pre-tests!)
- **Should be**

Answers differ substantially between open-ended and closed-ended questions



In this example there are two possible answers for people earning exactly EUR 1,000 or EUR

Please indicate your gross monthly household income:

EUR 0 –	EUR 1,000 –	EUR 2,000 –	More than EUR
EUR 1,000	EUR 2,000	EUR 3,000	3,000
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fewer People Mention Economy in Open-Ended Version

What one issue mattered most to you in deciding how you voted for president?

	Open-ended ¹	Closed-ended ²
The economy	35%	58%
The war in Iraq	5	10
Health care	4	8
Terrorism	6	8
Energy policy	4	6
Other	43	8
Candidate mentions	9	-
Moral values/social issues	7	-
Taxes/disp. of income	7	-
Other issues	5	-
Other political mentions	3	-
Change	3	-
Other	9	-
Don't know	7	2
	100	100

Data from Pew Research November 2008 post-election survey.
¹ Unprompted first response to open-ended question.
² First choice from five options read to respondents.

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36

Questions: basic rules II

- **No suggestive questions** (“*Don’t you think that...*”)
- Do not use untested indirect questions
- Do **not overwhelm** the respondents (e.g. by asking them to perform mathematical operations)
- Ask for **sociodemographic data** at the **end of the questionnaire**

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Questions: basic rules III

- Use **bipolar Likert scales** (e.g. ranging from “*bad*” to “*good*”, not from “*good*” to “*very good*”)
- Use **consistent Likert scales** (e.g., always 5-point scales)
- Ideally, use always the same wording for Likert scales
- Likert scale type questions (ratings) are best asked as item batteries (tables) → easier for the respondents to understand the meaning of ratings

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Likert scale questions

Item batteries are easy to understand and answer.

5-point scales are a good choice for most surveys.

19. How would you rate the following activities? (Please tick (✓) one box)

	Excellent	Very Good	Average	Poor	Very poor	Not Applicable
a. Sight-seeing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Spa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Picnic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Local island visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

C1. How much were you exposed to local experience, culture, history, and food during your visit? (Please tick (✓) one box)

a. Well exposed b. Exposed c. Somewhat exposed

d. Not exposed e. Not at all exposed

Writing answer categories over different lines makes it more difficult to understand the scale/order.

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Likert scale questions II

Recommendable to use consistent scales (e.g., always 5-point scales)...

ii) Compared to that destination, how would you rate the Maldives? (Please tick (✓) one box)

	Lower	Same	Higher		Lower	Same	Higher
a. Resorts and hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	e. Underwater beauty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Friendliness of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	f. Safety/security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Quality of the food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	g. Value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Beach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	h. Privacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Likert scale questions III

...and to use precise wording.

17. In general, how did you find the prices charged for the following?

	<i>Expensive</i>	<i>Value for Money</i>	<i>Cheap</i>	<i>Not applicable</i>
a. Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Soft drinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Alcoholic beverages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

E.g., the difference between "value for money" and "cheap" may not be clear to every respondent.

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Exit surveys in tourism - considerations

Photo: Arnegger (2022)

42

Exit surveys - considerations

- Demand side surveys in tourism often have advantages over supply side studies
- Tourism is a demand-driven industry!
- Individual tourists know best which places they visited, what they spent, where they are from, how they rate certain services, etc. – businesses often cannot answer these questions precisely
- Specifically with regard to expenditures, businesses (e.g., restaurants, transport providers, etc.) often don't know which share of their sales can be attributed to tourism
- Exit surveys are a useful tool to assess all kinds of visitor behavior patterns (including expenditures) due to their retrospective character

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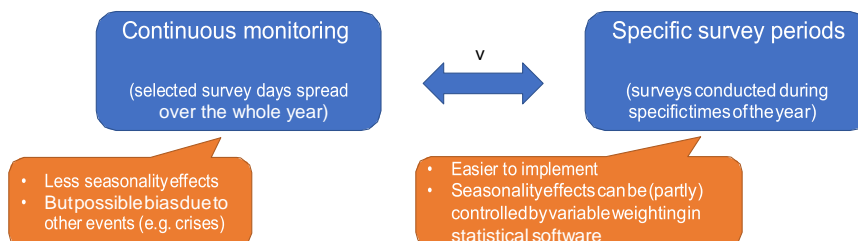
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Exit surveys – considerations II

- Exit surveys are particularly suitable for island destinations
- Airport exit surveys are best implemented in the departure hall (after security & passport checks)



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44

Data weighting

- Statistical adjustments that are made to survey data after they have been collected in order to improve the accuracy of the survey estimates.
- Two basic reasons
 - Correct for unequal probabilities of selection during sampling
 - Try to help compensate for survey nonresponse
- Weights are often calculated based on demographic characteristics (e.g., country of origin, age, gender...)

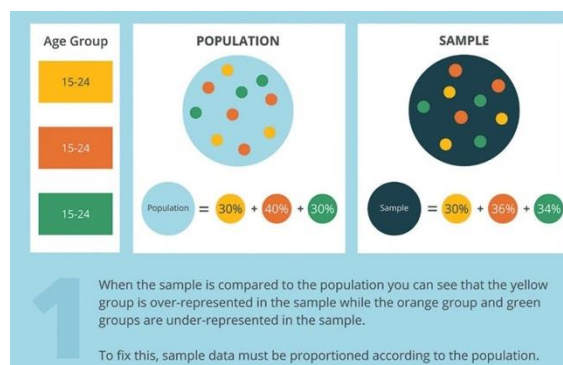
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Weight calculation



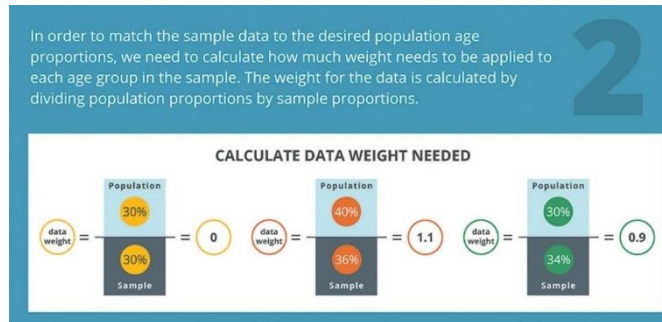
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Weight calculation II



https://www.geopoll.com/wp-content/uploads/2020/09/data-weighting_infographic_small-1.jpg

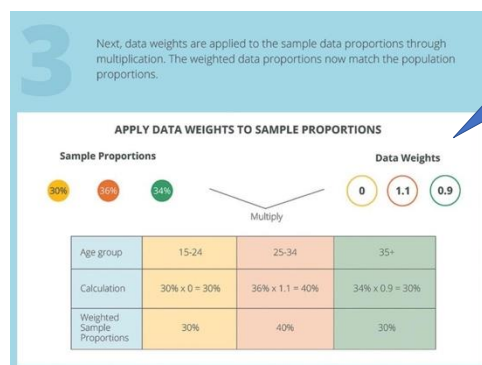
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Weight calculation III



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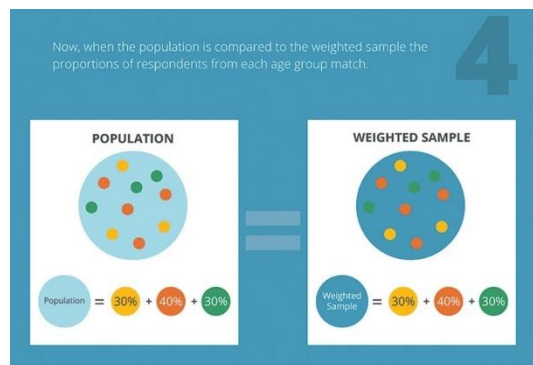
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Weight calculation IV



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49

Assessing tourist expenditures in exit surveys

- Assessing tourist expenditures of different target group is crucial for marketing, tourism planning and strategy development
- Tourist expenditure data can also be used for further analysis, e.g. economic impact assessments or TSA
- Tourists should technically know how much they have spent at the end of a trip...

...but there are some challenges.

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Demand-side assessment of expenditures: challenges

- Tourists on vacation may not want to think about expenditures
- Asking for aggregated expenditures (“how much did you spend in total during your stay...”) may lead to underestimations, especially after longer stays
- Asking for expenditures by categories is often easier to answer for tourists

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Expenditure categories

- Expenditure categories should be (as good as possible) in line with the national system of accounting (use for further analyses)



- E.g., Maldives Input-Output tables: 34 sectors/industries
- Data in exit survey may be more detailed (it is always possible to group data together, but not to disaggregate)

- Important to include all relevant categories (e.g., tips are often forgotten, but can make up a significant amount in some countries and by certain groups)
- Sometimes it is easier to give estimates on expenditures per person per day, rather than in total (e.g., for recurring expenditures, such as meals in restaurants)

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Demand-side assessment of expenditures: challenges II

- Package tours pose a specific challenge

- Additional supply side surveys required to fully understand expenditure/cost structures.
- Workaround: use assumptions based on secondary sources & educated

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53

Expenditure question: example

May be challenging to answer.

Answer categories have very different meaning for different currencies.

Answer categories have very different meaning for different currencies.

29. a) What is the **TOTAL** spend/expenditure of your holiday to the Maldives?

a) Currency

i. <input type="checkbox"/> USD	ii. <input type="checkbox"/> GBP	iii. <input type="checkbox"/> EUR	iv. <input type="checkbox"/> RMB	v. <input type="checkbox"/> INR
vi. <input type="checkbox"/> RUB	vii. <input type="checkbox"/> JPY	viii. <input type="checkbox"/> KRW	ix. <input type="checkbox"/> AUD	x. <input type="checkbox"/> CHF
xi. <input type="checkbox"/> SAR	xxii. <input type="checkbox"/> Other (Please specify).....			

b) Amount (Please tick (✓) one box)

i. <input type="checkbox"/> < 1,000	ii. <input type="checkbox"/> 1,000 - 5,000	iii. <input type="checkbox"/> 5,001 - 10,000
iv. <input type="checkbox"/> 10,001 - 20,000	v. <input type="checkbox"/> 20,001 - 30,000	vi. <input type="checkbox"/> 30,001 - 40,000
vii. <input type="checkbox"/> 40,001 - 50,000	viii. <input type="checkbox"/> 50,001 - 60,000	ix. <input type="checkbox"/> 60,001 - 70,000
x. <input type="checkbox"/> 70,001 - 80,000	xi. <input type="checkbox"/> 80,001 - 90,000	xii. <input type="checkbox"/> 90,001 - 100,000
xiii. <input type="checkbox"/> > 100,000		

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54

Expenditure question: example

May be challenging to answer.

Answer categories have very different meaning for different currencies.

Answer categories have very different meaning for different currencies.

29. a) What is the TOTAL spend/expenditure of your trip?

a) Currency

i. USD ii. GBP **iii. EUR** iv. RMB **v. INR**
 vi. RUB vii. JPY viii. KRW ix. AUD x. CHF
 xi. SAR xii. Other (Please specify).....

b) Amount (Please tick (✓) one box)

i. < 1,000 **ii. 1,000 - 5,000** iii. 5,001 - 10,000
 iv. 10,001 - 20,000 v. 20,001 - 30,000 vi. 30,001 - 40,000
 vii. 40,001 - 50,000 viii. 50,001 - 60,000 ix. 60,001 - 70,000
 x. 70,001 - 80,000 **xi. 80,001 - 90,000** xii. 90,001 - 100,000
 xiii. > 100,000

• E.g., EUR 1,000 = INR 82,200
 • Different categories → challenge for further analyses!

55

Expenditure question: example II

G1. How much do you spend for you and your fellow travelers?						
Subjects	Nothing	Average expenses per person per day	Total	Number of days	Number of persons	No answer
a. Organized tour/guide	[0]	_____ GEL	_____	_____	_____	[]
b. Accommodation	[0]	_____ GEL	_____	_____	_____	[]
c. Restaurants	[0]	_____ GEL	_____	_____	_____	[]
d. Shopping (grocery)	[0]	_____ GEL	_____	_____	_____	[]
e. Souvenirs	[0]	_____ GEL	_____	_____	_____	[]
f. Entrance fees	[0]	_____ GEL	_____	_____	_____	[]
g. Public transport	[0]	_____ GEL	_____	_____	_____	[]
h. Rental car	[0]	_____ GEL	_____	_____	_____	[]
i. Tip	[0]	_____ GEL	_____	_____	_____	[]
j. Other: _____	[0]	_____ GEL	_____	_____	_____	[]

56

Expenditure question: example II

Expenditure categories

Main answer: expenditures per person/day

Fields to help calculate expenditures per person/day

G1. How much do you spend for you and your fellow travelers?

Subjects	Nothing	Average expenses per person per day	Total	Number of days	Number of persons	No answer
a. Organized tour/guide	[0]	_____ GEL	_____	_____	_____	[]
b. Accommodation	[0]	_____ GEL	_____	_____	_____	[]
c. Restaurants	[0]	_____ GEL	_____	_____	_____	[]
d. Shopping (grocery)	[0]	_____ GEL	_____	_____	_____	[]
e. Souvenirs	[0]	_____ GEL	_____	_____	_____	[]
f. Entrance fees	[0]	_____ GEL	_____	_____	_____	[]
g. Public transport	[0]	_____ GEL	_____	_____	_____	[]
h. Rental car	[0]	_____ GEL	_____	_____	_____	[]
i. Tip	[0]	_____ GEL	_____	_____	_____	[]
j. Other: _____	[0]	_____ GEL	_____	_____	_____	[]

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Expenditure question: example III

Please give a breakdown of your expenditure in Tanzania on the following:

Items	Currency code	Amount
Hotel		_____
Others (Lodges, Motels, Campsites etc.)		_____
Food and drinks		_____
Internal transportation while in Tanzania		_____
By Air		_____
By Road		_____
By Water		_____
by Railway		_____
Rentals (Car hires, Charters, Boats, etc.)		_____
Cultural services (Museums, Historical sites, etc.)		_____
Sports and recreational		_____
Diving, Snorkelling and water games		_____
Sight seeing and excursion		_____
Mountain climbing		_____
Hunting		_____
Access/entry/gate fees		_____
Visa fees and taxes		_____
Fuel (International Transit vehicles)		_____
Charges related to international vehicle pick up		_____
Souvenirs (gifts), precious metals, crafts, etc.		_____
Tips		_____
Donations		_____
Shopping		_____
Other (please specify)		_____

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59

Joint brainstorming

Who will use exit survey data...?

...and for which purposes?

Goals & objectives?

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Questionnaire assessment

Existing questions

- Purpose?
- Required?
- Scope for improvement?

Missing questions?

- Why to include?
- How to formulate?

Expenditure questions

- Purpose?
- Scope for improvement?

Survey procedures

- Timing
- Face-to-face vs. self-administered?
- ...

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61

61

Contact



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West Coast University of Applied Sciences | Germany

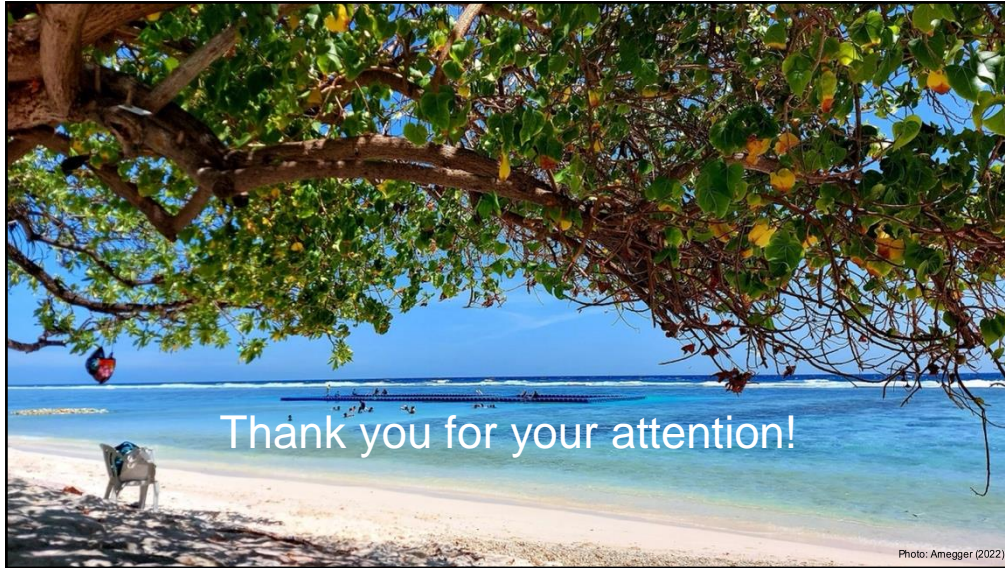
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62



63

4. Presentation material used for Workshop “Regional Economic Impact Assessment’ (26th May 2022)

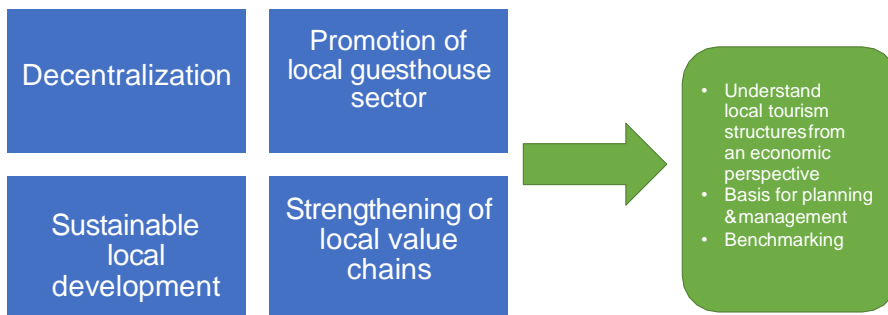


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Parameters of future tourism development in the Maldives



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Regional economic impact assessment

- What is the contribution of tourism to the local economy?
- Which sectors benefit (directly & indirectly)?
- What degree of leakage exists?
- Which target groups are most attractive in economic terms?

In-depth economic analysis of local tourism

For individual administrative units (e.g., atolls, islands), specific geographic contexts (e.g., protected areas) or periods (e.g., special events)

Basis for planning, management & marketing of local tourism

Fills existing data

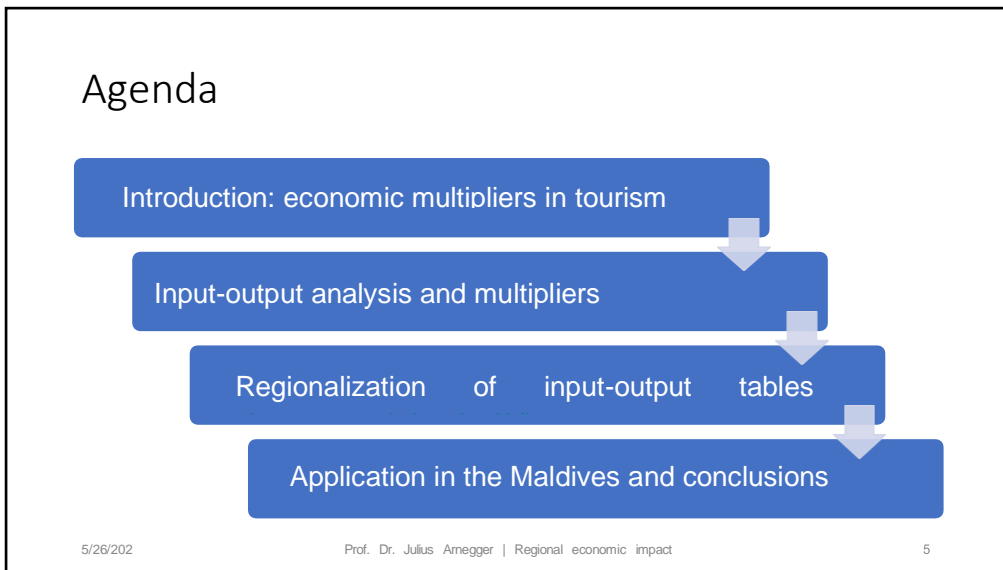
Basis for benchmarking (baseline) to assess future

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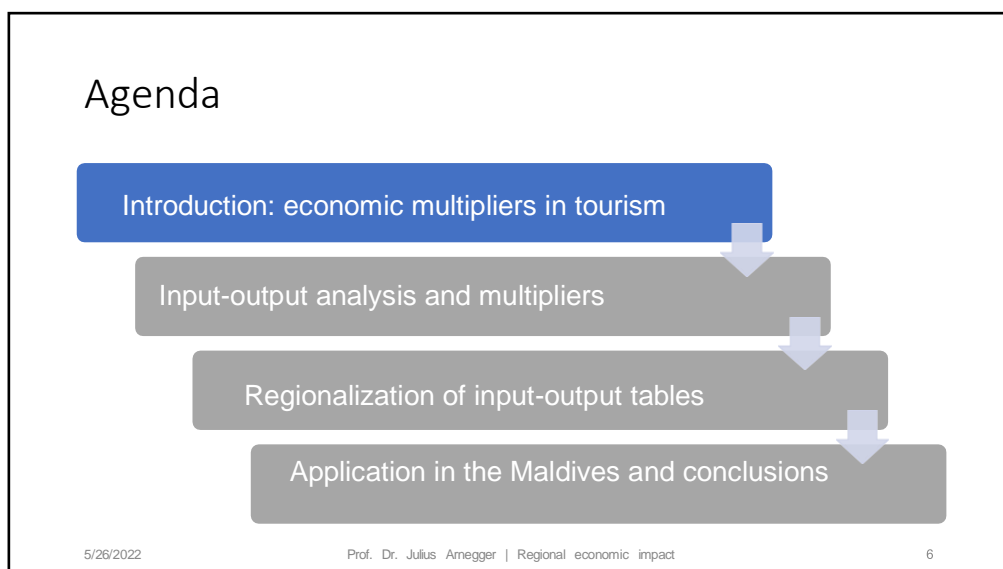
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6

Economic multipliers in tourism

"A tourism multiplier is a measurement of the additional activity created by an additional unit of tourist expenditure or, in the case of a reduction in expenditure, the incremental fall in economic activity created by an incremental fall in tourist expenditure."

Archer & Fletcher, 1990:

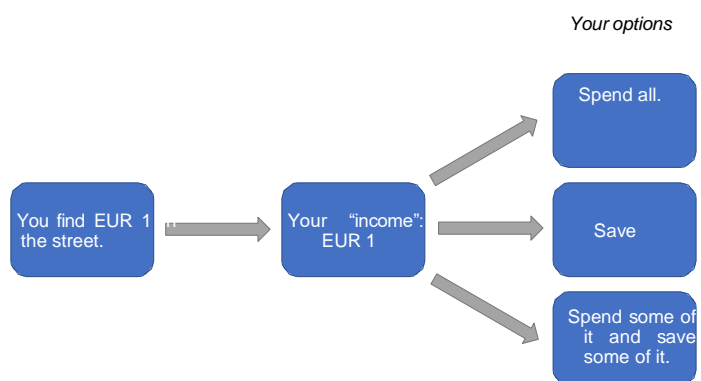
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Multiplier effect: example

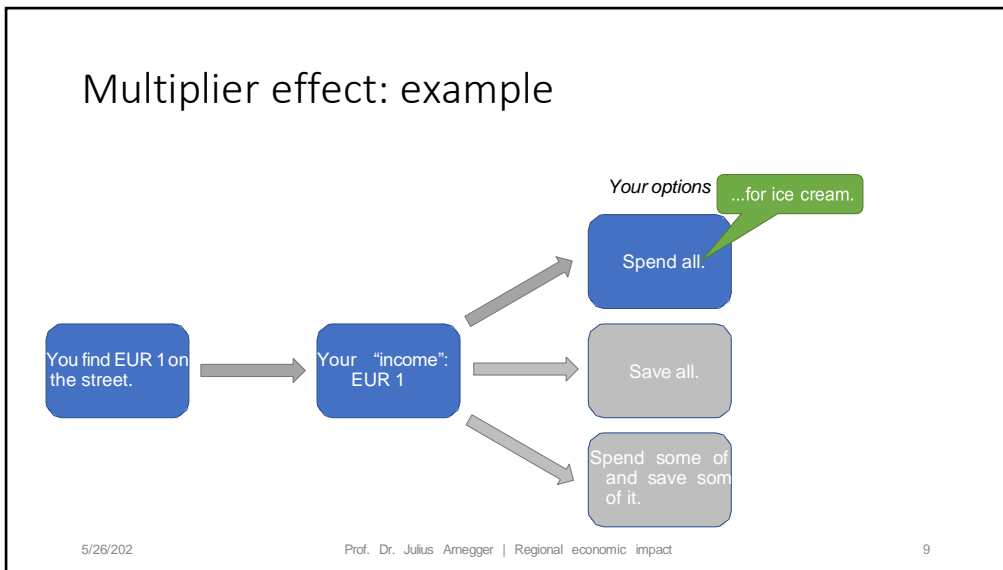


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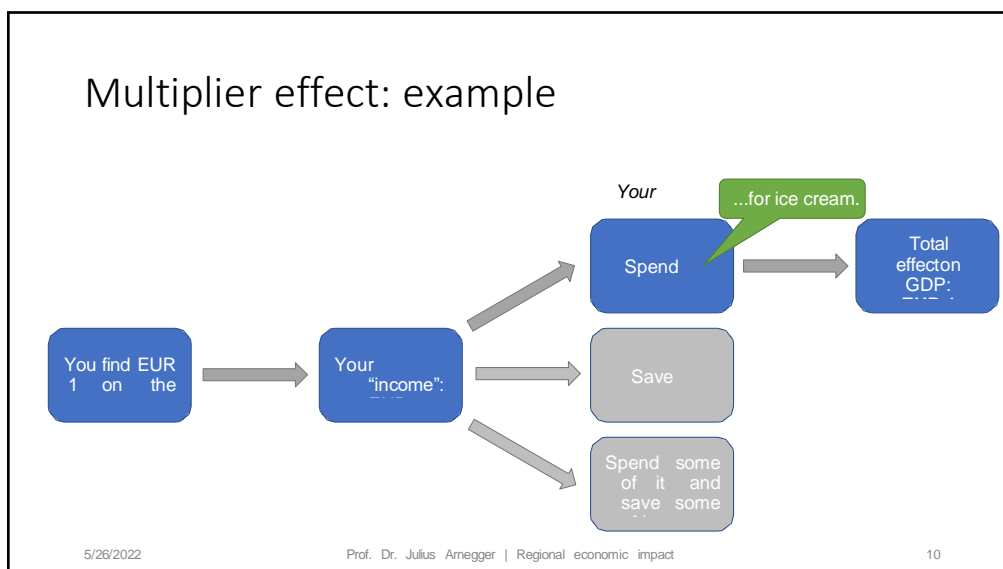
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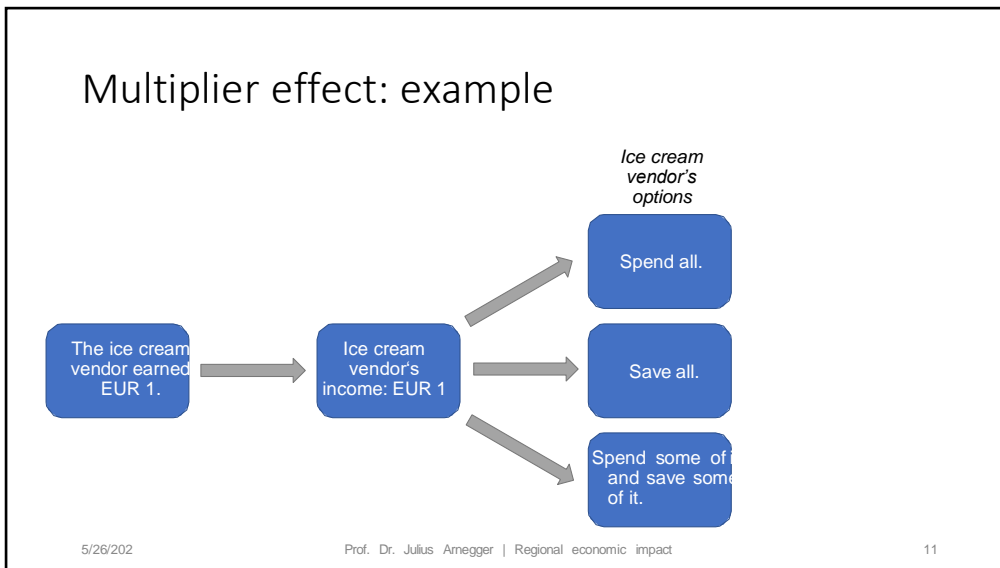
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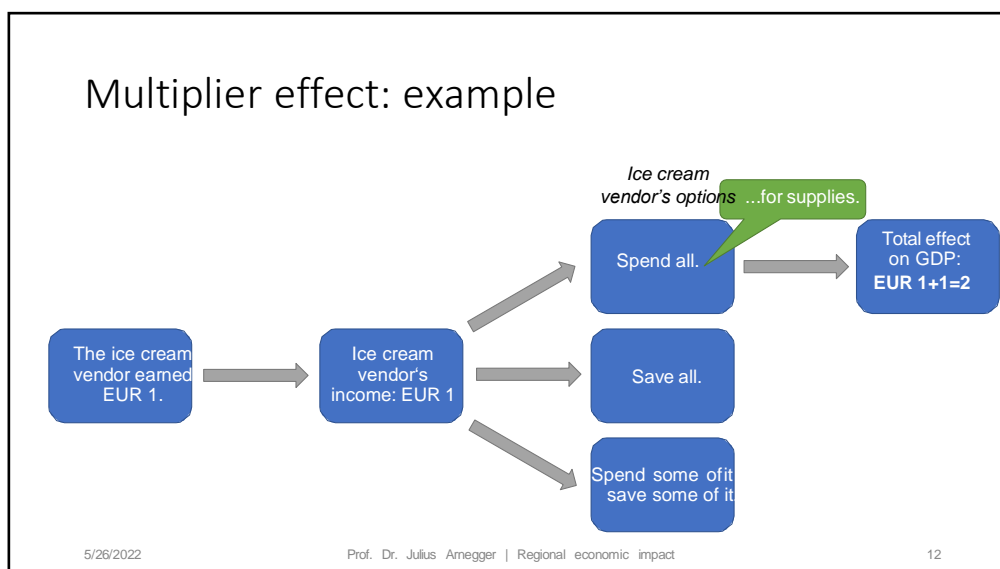
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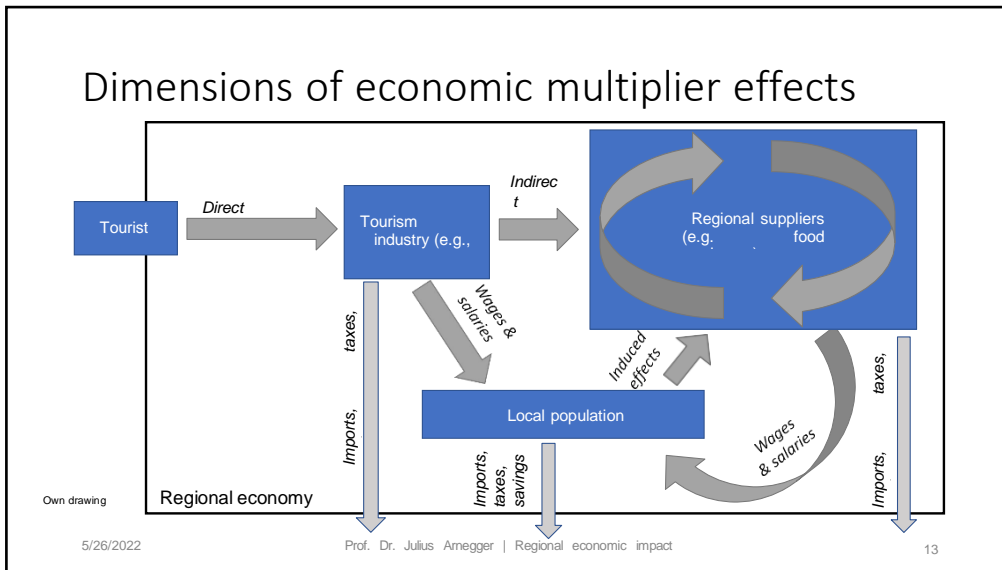
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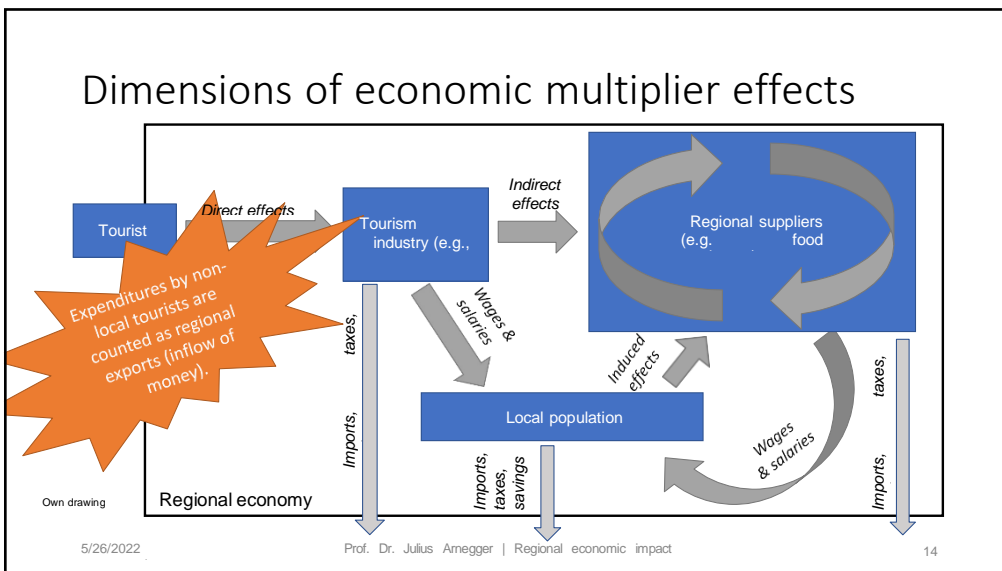
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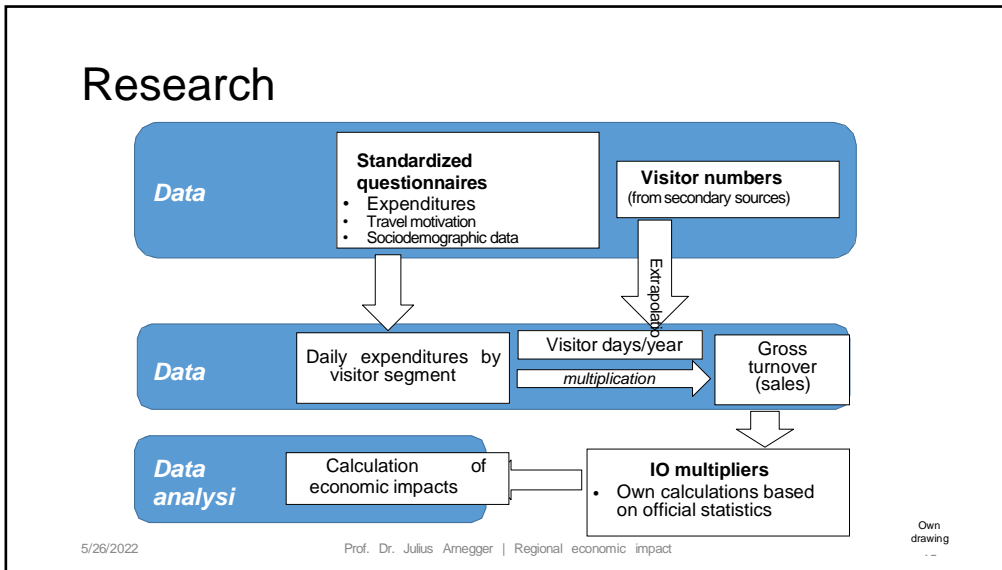
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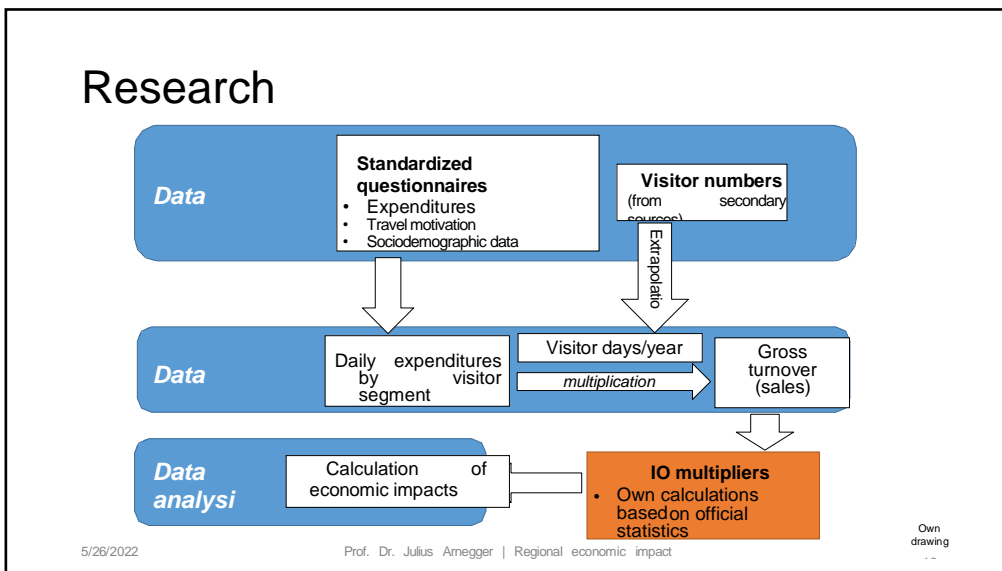
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14



15



16

Regional multipliers: parameters

Size of the region

- Larger regions tend to be less dependent on imports (lower leakage rates)

Important for definition of study area.

Degree of regional integration

- The stronger the intraregional economic linkages, the lower the need for imports

Structure of tourist expenditures

- Multipliers vary between different industries (and individual businesses)

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Based on Archer & Fletcher (1990); Wall (1997)

17

Multipliers: degree of aggregation

- Economic multipliers are often highly aggregated...
- ...detailed insights into economic impacts of specific industries are not always possible.

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18

Agenda

Introduction: economic multipliers in tourism

Input-output analysis and multipliers

Regionalization of input-output tables

Application in the Maldives and conclusions

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19

Agenda

Introduction: economic multipliers in tourism

Input-output analysis and multipliers

Regionalization of input-output tables

Application in the Maldives and conclusions

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20

Input-output analysis

- Shows flows of expenditure within a (national) economy during a given time period (usually one year) between industries and final demand sectors
- Part of the system of national accounting
- Basic component: transaction table in the form of a matrix
- Use, e.g.:
 - Structural studies of national economies
 - Analyses of direct and indirect impacts of changes in final demand, prices, salaries, etc., on the total economy and different industries
 - Basis for modeling or simulations and forecasts

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21

Symmetrical input-output table: basis of IO analysis

Sales of (USD '000)	Inputs (USD '000) by purchased				Total output
	Industry X	Industry Y	Local household expenditure	Exports	
Industry X	100	320	200	380	1,000
Industry Y	300	640	300	360	1,600
Local households	200	160	100	540	1,000
Regional imports	400	480	400	-	1,280
Total inputs	1,000	1,600	1,000	1,280	4,880

Source: Archer (1977): 6

- Total input = total output (SIOT: symmetrical IO table)
- Assumption: fixed-coefficient linear production function (Leontief function)
- For each unit of output produced by a given industry, a fixed amount of input is required
 - E.g., industry X receives 30% of its total inputs from industry Y

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22

Symmetrical input-output table: basis of IO analysis

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Industry X	100	320	200	380	1,000
Industry Y	300	640	300	360	1,600
Local households	200	160	100	540	1,000
Regional imports	400	480	400	–	1,280
Total inputs	1,000	1,600	1,000	1,280	4,880

Assumption: increase of industry X's output by USD 100,000

- Total input = total output (SIOT: symmetrical IO table)
- Assumption: fixed-coefficient linear production function (Leontief function)
- For each unit of output produced by a given industry, a fixed amount of input is required
 - E.g., industry X receives 30% of its total inputs from industry Y

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23

Technical coefficients

	Purchase coefficients of:			
	Industry X	Industry Y	Local household expenditure	Exports
Industry X	0.1	0.2	0.2	0.30
Industry Y	0.3	0.4	0.3	0.28
Local households	0.2	0.1	0.1	0.42
Regional imports	0.4	0.3	0.4	–
Total inputs	1.0	1.0	1.0	1.0

- Calculation of effects caused by changes in demand
- Assumption: no production capacity constraints
- Example: demand increase for products of industry X by USD 100,000
 - $0.1 \times \text{USD } 100,000 = \text{USD } 10,000$ additional output of industry X
 - $0.3 \times \text{USD } 100,000 = \text{USD } 30,000$ additional input by industry Y
 - $0.2 \times \text{USD } 100,000 = \text{USD } 20,000$ additional inputs from local households (wages & salaries)
 - $0.4 \times \text{USD } 100,000 = \text{USD } 40,000$ additional imports

This is only the first round of effects!
Additional outputs in every sector imply effects on other sectors.

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24

Calculation of economic impacts I

$$(1) \quad A = \begin{bmatrix} a_{11} & a_{12} \\ a_{21} & a_{22} \end{bmatrix}$$

$$(2) \quad x_1 = a_{11}x_1 + a_{12}x_2 + d_1.$$

$$(3) \quad (1 - a_{11})x_1 - a_{12}x_2 = d_1.$$

$$(4) \quad \begin{bmatrix} 1 - a_{11} & -a_{12} \\ -a_{21} & 1 - a_{22} \end{bmatrix} \begin{bmatrix} x_1 \\ x_2 \end{bmatrix} = \begin{bmatrix} d_1 \\ d_2 \end{bmatrix}$$

$$(5) \quad \begin{bmatrix} 1 & 0 \\ 0 & 1 \end{bmatrix} - \begin{bmatrix} a_{11} & a_{12} \\ a_{21} & a_{22} \end{bmatrix}$$

- Region with industries 1 and 2
- Coefficient a_{ij} : required input i to produce one unit of output j

- x_i : total output of industry i
- a_{ij} : input demand for industry j
- d_i : final demand (external sector) for output of industry i

- Equation (2) rearranged

- Same process repeated for all industries
- Left matrix: input coefficients
- Vectors on left and right of the equal sign: outputs of the respective sectors that are purchased as inputs by other industries and final external demand

- Matrix on the left: sum of the identity matrix I and the matrix $-A$

Adapted from McCann

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Calculation of economic impacts II

$$(6) \quad (I - A)x =$$

- Alternative way of expressing (5)
- x : variable vector

$$(7) \quad T = (I -$$

- $(I - A)$: "technology matrix"

$$(8) \quad Tx =$$

- Substitution

$$(9) \quad x = T^{-1}$$

- T^{-1} : inverse of

Thus, the input demand requirements through the different rounds of the input-output expenditure flows for the different economic sectors can be calculated for any given level of external output demand.

Adapted from McCann (2002)

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Example: IO multipliers (T^{-1})

	Industry X	Industry Y
Industry X	1.25	0.42
Industry Y	0.62	1.87
Sectoral output multiplier	1.88	2.29

Different types of multipliers, e.g.:

- Output multipliers
- Income multipliers
- Employment multipliers

Derived from Armstrong & Taylor (2000) and Archer

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27

Example: + USD 100,000 output for industry X

Inputs (USD '000) purchased by					
Sales of (USD '000)	Industry X	Industry Y	Local household expenditure	Exports	Total output
Industry X	13	13	-	100	125
Industry Y	38	25	-	-	63
Local households	25	6	-	-	31
Regional imports	50	19	-	-	69
Total inputs	125	63	-	100	288

Type I multiplier: local households are treated as exogeneous (part of final demand)

Type II multiplier: local households are treated as endogeneous (part of the transaction)

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28

Example: + USD 100,000 output for industry X

Sales of (USD '000)	Inputs (USD '000) purchased by				
	Industry X	Industry Y	Local household expenditure	Exports	Total output
Industry X	13	13	–	100	125
Industry Y			–	–	63
Local households			–	–	31
Regional imports			–	–	69
Total inputs			–	100	288

Conservative approach:
increase of household
incomes does not lead to
more consumption.

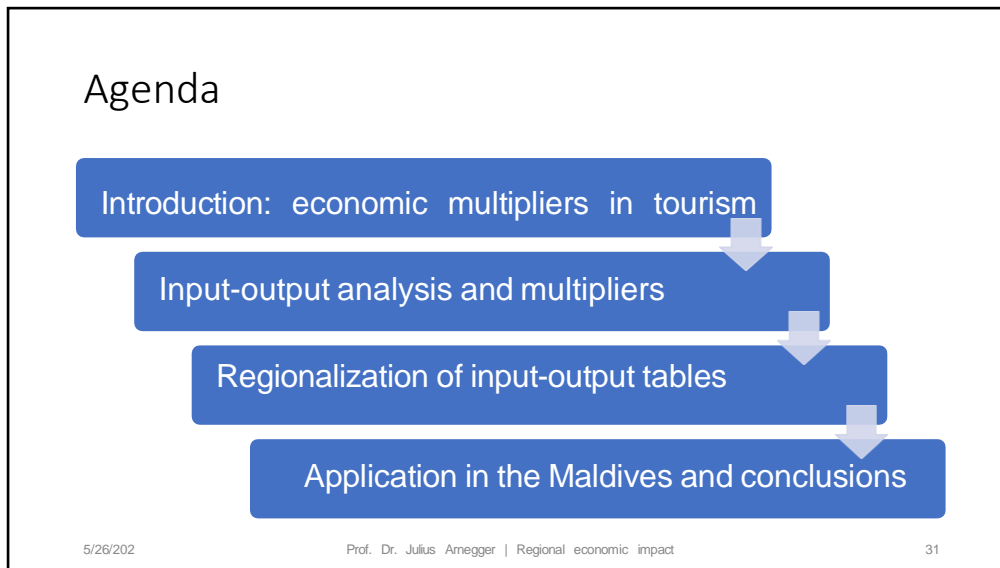
Type I multiplier: local households are treated as exogeneous (part of final demand)

Type II multiplier: local households are treated as endogeneous (part of the transaction matrix)

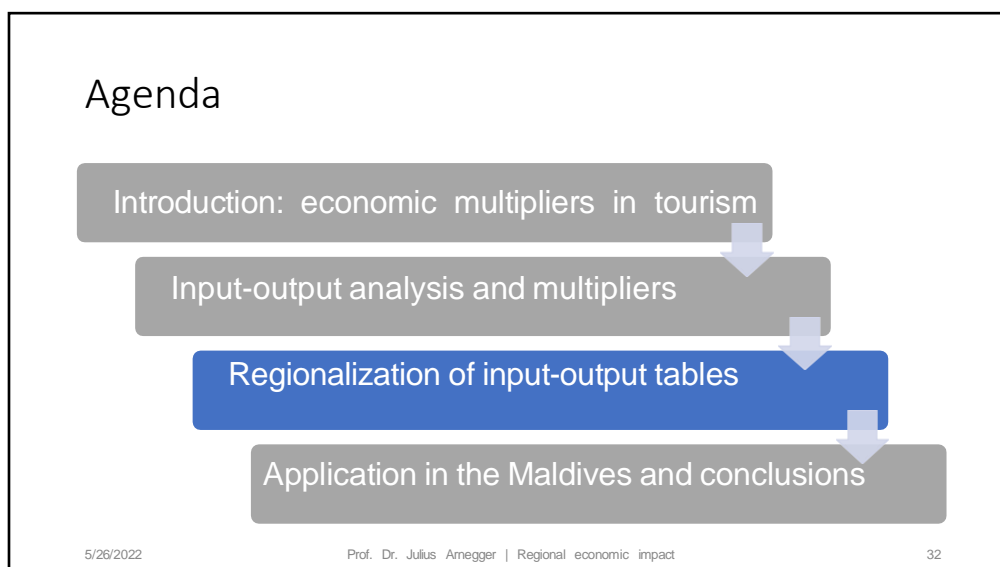
Households are treated as a producing sector:
additional income is spent for consumption.

IO tables: remarks

- IO tables can be presented either on the basis of industries (*industry-by-industry tables*) or products (*product-by-product tables*)
- Some authors claim that industry-by-industry tables are less meaningful in an economic sense (e.g., Almon, 2000)
- However, industry-by-industry tables are more in line with official statistics and thus often of more practical use (Thage, 2005; Eurostat, 2008; OECD, 2021)
- SIOTs are available for many countries, including the Maldives



31



32

IO analyses on regional levels

- Non-availability of subnational/regional IO tables poses a challenge for regional economic impact studies
- Approaches for regionalization of national IO models:

Survey method

- Own representative empirical studies on regional economic linkages
- Most accurate (if done correctly), but also most costly and time consuming

Hybrid method

- Own empirical studies complemented by secondary data
- Cost, work inputs and quality of results can vary substantially

Non-survey method

- Regionalization of national IO tables with location quotients
- Still often applied in projects due to timely and financial restrictions

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33

33

Regionalization of IO tables: SLQ

$$(10) \quad SLQ_{ir} = \frac{o_{ir}}{o_r} / \frac{o_{in}}{o_n} \quad \text{Simple location quotients}$$

- Output O (or employment) of a specific regional industry i in relation to the national output (employment) n in the same industry
- Input coefficients of underrepresented industries ($SLQ < 1$) are reduced, import coefficients increased
- Assumption: underrepresented industries cannot meet increases in demand and are required to rely on imports
- No adjustment for industries with $SLQ \geq 1$
- Criticism: SLQ does not consider to which industries a given industry is selling its output

One and the same value for SLQ is applied to all coefficients in one row in the IO table.

Flegg et al. (1995); McCann (2002)

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34

34

Regionalization of IO tables: CILQ

$$(11) \quad CILQ_{ij} = \frac{\frac{O_{ix}}{O_{in}}}{\frac{O_{jx}}{O_{jn}}} \quad \text{Cross-industry} \quad \text{location}$$

Regionalization of IO tables with CILQ

- Proportion of national output (or employment) of a regional selling industry i to that for buying industry j
 - O_{ix}/O_{in} : regional/national output in the supplying industry i ,
 - O_{jx}/O_{jn} : regional/national output in the purchasing sector J
- $CILQ = 1$ when $i = j$

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35

35

Comparison: SLQ / CILQ

- Three dimensions of localization quotients:
 - 1) Relative size of the supplying sector
 - 2) Relative size of the purchasing sector

SLQ

- Considers dimensions (1) & (3)

CILQ

- Considers dimensions (1) & (2)

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36

36

Regionalization of IO tables: FLQ

$$FLQ_{ij} = CILQ_{ij} \times \lambda_r^j$$

$$\text{with } \lambda_r = (O_r / O_n) / [\log_2(1 + O/O_n)], \beta \geq 1$$

- Significantly better results (primary data as benchmark) than approaches with other types of localization quotients (Tohmo, 2004)
- Methods & critical discussion: cf. Flegg et al. (1995), Brand (1997), Flegg & Webber (1997)
- Tends to an upper limit of unity as the region approaches national dimensions and to a nonzero lower limit as the region becomes increasingly smaller (also dependent on β)

Flegg et al.

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37

37

IO calculations in MS Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	SIC2, Albany, 2015	million \$													
2	Agriculture, Forestry and Fishing														
3	Mining and Quarrying, Manufacturing, Electricity and water supply														
4	Wholesale, Retail Trade, Transportation, Information and communication activities														
5	Financial activities, Insurance														
6	Real Estate Activities														
7	Professional, Scientific and Technical Activities														
8	Public Administration, Education, Health and Welfare Activities														
9	Other services and activities of households														
10	Total														
11	Value added at basic prices														
12	Output at basic prices														
13	Imports CE														
14	Exports at basic prices														

Single location quotients & Cross-industry location quotients	Agriculture, Forestry and Fishing	Wholesale, Retail Trade, Information and communication activities	Financial activities, Insurance	Real Estate Activities	Professional, Scientific and Technical Activities	Public Administration, Education, Health and Welfare Activities	Other services and activities of households
Agriculture, Forestry and Fishing	0.0000	2.7154	3.4633	3.2451	3.1655	1.6465	3.5656
Mining and Quarrying, Manufacturing, Electricity and Water Supply	0.3055	0.9011	0.7487	1.1537	0.7173	0.8737	0.4633
Wholesale, Retail Trade, Transportation	0.4001	1.1005	0.8368	0.8180	1.2406	0.7936	0.7783
Information and communication	0.1156	0.8635	0.7714	0.6443	0.8386	0.6133	0.7549
Financial activities, Insurance	0.5124	1.4035	1.3628	1.0565	1.5700	0.8766	1.2571
Real Estate Activities	0.4382	1.3440	1.0300	0.8701	1.3375	0.8185	0.8988
Professional, Scientific and Technical Activities	0.5183	0.6093	0.3653	0.3202	0.4705	0.2812	0.2140
Public Administration, Education, Health and Welfare	0.5238	1.4262	1.2834	1.0470	1.4520	1.0162	1.2468
Other services and activities of households	0.2702	0.9023	1.4053	1.0906	1.4683	1.1136	1.2400
Total	1.0000	1.0000	1.0000	1.0000	1.0000	1.0000	1.0000

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38

38

IO calculations in MS Excel

	Agriculture, forestry and fishing	Mining and quarrying, manufacturing, electricity and water supply	Construction	Wholesale, retail trade, and information and communication activities	Financial and insurance activities	Real estate activities	Professional, scientific and technical activities	Public Administration; Education; Health and Social Work Activities	Arts, entertainment and recreation	Other services and activities of households
Regional Leontief Inverse										
Agriculture, Forestry and Fishing	1.23930	0.28778	0.01622	0.00530	0.00328	0.00076	0.00087	0.00640	0.00732	0.00026
Mining and Quarrying, Manufacturing, Electricity and Water Supply	0.00275	1.09985	0.12782	0.00176	0.00750	0.00099	0.00271	0.00811	0.01281	0.00277
Construction	0.00212	0.04640	1.16968	0.01565	0.00465	0.01204	0.01111	0.01795	0.03462	0.00246
Wholesale, Retail Trade, Transportation	0.00368	0.02886	0.02210	1.05282	0.01578	0.00297	0.00343	0.03490	0.01320	0.00188
Information and communication	0.00008	0.01255	0.03335	0.01877	1.00796	0.01311	0.00212	0.01473	0.01128	0.00134
Financial activities; insurance activities	0.00077	0.115878	0.11322	0.18996	0.00190	1.04109	0.02642	0.01289	0.02493	0.00846
Real estate Activities	0.00064	0.012257	0.017648	0.01144	0.01018	0.00843	1.00888	0.02266	0.00751	0.00464
Professional, Scientific and Technical Activities	0.00200	0.01557	0.05840	0.04510	0.00784	0.00818	0.00205	1.00489	0.00391	0.00151
Public Administration; Education; Health and Social Work Activities	0.00007	0.00187	0.00324	0.00307	0.00174	0.00140	0.00016	0.00406	1.00874	0.00076
Arts, entertainment and recreation	0.00001	0.00043	0.00076	0.00067	0.00068	0.00064	0.00064	0.00060	0.00011	1.00028
Other services and activities of households	0.00014	0.00410	0.00110	0.01411	0.00994	0.00108	0.00474	0.00427	0.00199	0.00017
Insert turnover here										
Wholesale, Retail Trade, Transportation				147,837,242						
Professional, Scientific and Technical Activities				74,474,609						
Public Administration; Education; Health and Social Work Activities				31,250,578						
Arts, entertainment and recreation				58,768,221						
Other services and activities of households				315,484,441						
Read output effects here										
Wholesale, Retail Trade, Transportation									213,875,395	
Professional, Scientific and Technical Activities									92,437,209	
Public Administration; Education; Health and Social Work Activities									34,992,737	
Arts, entertainment and recreation									59,308,560	
Other services and activities of households									3,501,730	
										404,716,032
Output multiplier										1.28
Employment multiplier										0.000001117
Employment equivalent										452

5/26/2022

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39

39

Agenda

Introduction: economic multipliers in tourism

Input-output analysis and multipliers

Regionalization of input-output tables

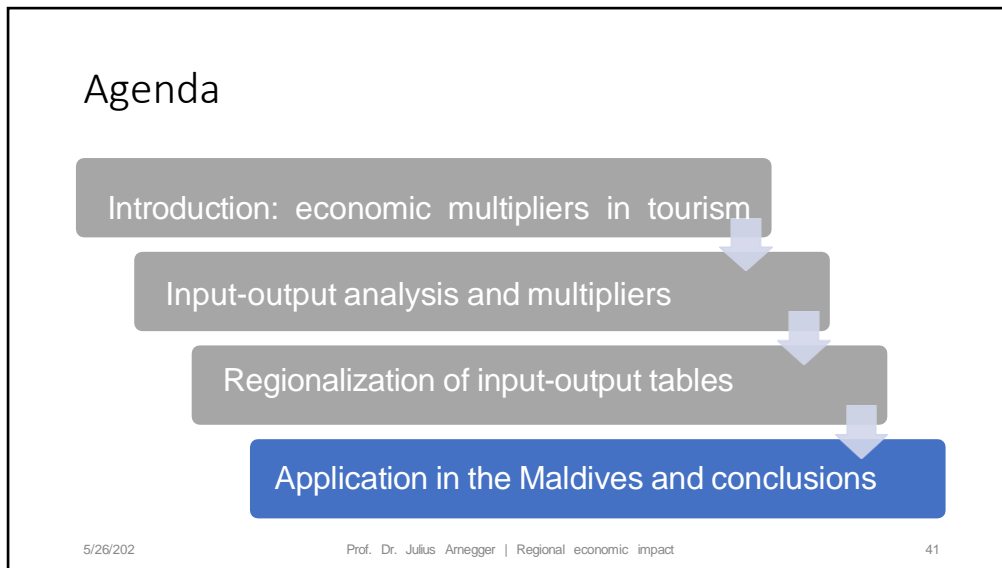
Application in the Maldives and conclusions

5/26/2022

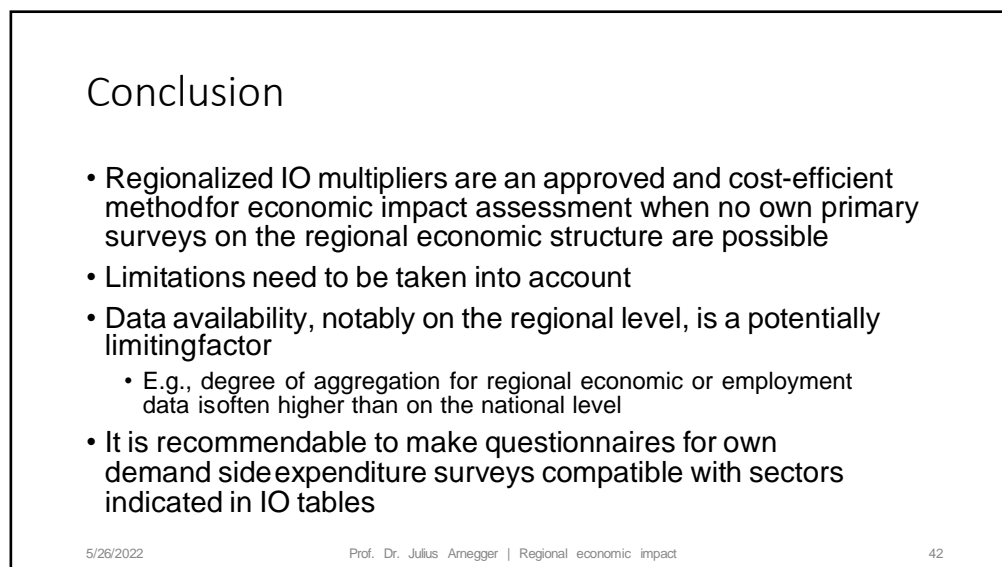
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40

40



41



42

Way forward?

Conduct in-depth economic impact assessment in pilot region

Combination with other regional assessments (e.g., socio-ecological carrying capacity)

Contributes to strategic sustainable tourism development planning

Provides benchmark for future assessments

Upscaling to other regions


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43

Detailed methodology



Free



<https://opus.bibliothek.uni-wuerzburg.de/frontdoor/index/index/docId/10092>

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44

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5/26/2022

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45

45

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5/26/2022

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46

46



Appendix 4: Meeting Agenda of the first Steering Committee Meeting

Data Collection Survey on Recovery of Tourism affected by COVID-19

Steering Committee Meeting

2nd February 2022, 10am
Venue: Ministry of Tourism
with option to participate online

Agenda

- 5 min. Opening Remarks (Maldivian government)
- 5 min. Introductory Remarks (UNWTO)
- 15 min. Self-introduction participants from Maldivian Government, JICA, UNWTO and Reformatics (All)
- 30 min. Project activities carried out so far, and planning of project activities (Reformatics)
- 15 min. Practical arrangements for project implementation - presentation (Reformatics and UNWTO)
- 15 min. Open discussion (Steering Committee members)
- 5 min. Closing

Address:

Ministry of Tourism - 5th Floor, H. Velaanaage, Ameeru Ahmed Magu, Male' 20096, Maldives)

Virtual participation:

Zoom: <https://us02web.zoom.us/j/83642667102?pwd=Vkl6QkNhaTYwMzJMbElwVDVPb0x1UT09>

Meeting ID: 836 4266 7102

Passcode: 986013

Final List of Participants

Name	Title	Partner	Contact
In Male			
Mr. Ali Shinan	Deputy Director General, , Policy and Development	Ministry of Tourism	ali.shinan@tourism.gov.mv
Ms. Fathmath Shifa	Assistant Director, Industry Human Resources & International Relations	Ministry of Tourism	fathmath.shifa@tourism.gov.mv
Mr. Marcel Leijzer	Department Manager /TCSR	UNWTO	mleijzer@unwto.org
Mr. Chenxu Wang	Project Specialist /TCSR	UNWTO	cwang@unwto.org
Mr. Noboru Zama	Project Formulation Advisor	JICA Maldives	Zama.Noboru@jica.go.jp
Dr. Bernhard Bauer	Tourism Strategy Planner and Team Leader	Reformatics/experts	dr.bernhard.bauer@gmail.com
Prof. Dr. Julius Arnegger	Measurement Expert	Reformatics/experts	julius@arnegger.net
Dr. Stefan Thelen	Tourism HR and Quality Expert	Reformatics/experts	icek@gmx.at
Virtual Participation			
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Ms. Aishath Ali	Director General	Ministry of Tourism	Aishath.ali@tourism.gov.mv
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Ms. Tamara Kovziridze	Senior Director and Partner	Reformatics	t.kovziridze@reformatics.com
Ms. Aishath Nayasheen Ahmed	National Expert	Reformatics Expert	aishath.nayasheen@tourism.gov.mv

Appendix 5: Meeting notes of the first Steering Committee Meeting

Data Collection Survey on Recovery of Tourism affected by COVID-19

Steering Committee Meeting

2nd February 2022, 10 am
Venue: Ministry of Tourism (hybrid)

Report

Opening remarks by H.E. Dr. Abdulla Mausoom, Minister of Tourism of the Maldives:

- Welcomed and acknowledged the presence of JICA and UNWTO officials, Mr. Zama Noboru, JICA Project Formulation Advisor, Mr. Marcel Leijzer, Manager, UNWTO Technical Cooperation and Silk Road Department, Mr. Chenxu Wang, Project Specialist, UNWTO Technical Cooperation and Silk Road Department, and the expert team of Reformatics, as well as other online participants.
- Acknowledged the joint support by UNWTO and JICA to assist the Maldives with the tourism recovery.
- Expressed the need to look at the scenario to have a more resilient tourism industry in the future.

Remarks by Naushad Mohamed, Deputy Minister of Tourism of the Maldives:

- Welcomed and acknowledged the team for coming to the Maldives.
- Proposed a casual meeting in person once his quarantine is over.
- Acknowledged JICA for taking the initiative to conduct this project.
- Emphasized the success of the Maldives is not the work of the Maldives alone.
- Appreciated the aid from international organizations in a timely and supportive manner.
- Provided an update of the current situation of the Maldives, the international arrivals are growing.
- Expressed the need to gain insights to
 - build the Maldives tourism industry stronger and more resilient to ensure a stronger future and sustainable growth,
 - look at the impact of covid by meeting stakeholders.
- The Ministry will make arrangements for the expert team to help them understand the industry profile.
- Apologized that the team could not visit the resorts due to the travel restrictions within the country.
- Stressed the importance to understand the activities implemented by the Government to mitigate the impact of the COVID-19 pandemic, e.g., the Government provided financial support to guesthouse operators and employees working in the tourism sector.
- Also stressed the importance to know where to get grants or support for the tourism sector and how it can be best realized to build a more resilient tourism sector.
- Recommended to have a casual meeting by the end of the mission

Remarks by Marcel Leijzer, Programme Manager, UNWTO:

- Appreciated JICA for the overall support and for making this project available to support the Maldives. UNWTO is implementing a portfolio of tourism recovery projects around the World. JICA is turning into a lead partner of UNWTO to help destinations overcome the challenges of

the COVID-19 pandemic, which is highly appreciated. UNWTO and JICA are implementing another project together in the Dominican Republic.

- Appreciated the arrangements made by the Ministry to undertake this mission to the Maldives during this challenging period.
- Thanked Reformatics for the joint implementation of the project and introduced the expert team.
- Introduced the main components of the project:
 - Component 1, measurement of the impact of the covid 19 pandemic on the tourism sector. The component will assess the measurement tools, the system of tourism statistics, how the Maldives managed to mitigate the impact, how and if the Maldives already managed to start the recovery process,
 - Component 2, formulation of a tourism recovery plan. It's important to know: What the Maldives has already achieved, what further actions can be taken to help recover the tourism sector looking at topics like quality, human resource development, sustainability, and marketing.
 - Component 3, Recommendations on the follow-up actions that UNWTO and JICA can undertake jointly to lay the basis for future collaboration and projects to complete the whole recovery process of the Maldives and build up a competitive and sustainable tourism sector for the future.
- Complimented the recovering process of the Maldives. This project will help the Maldives get further guidance on additional steps to take in the recovery process to achieve a full recovery and on the way forward to develop tourism sustainably in the future.
- Today's meeting aims to focus on where the project stands.
- Appreciated the excellent work of the national expert to prepare the mission calendar.
- Explained that UNWTO has been working with experts to discuss technical aspects of the project and provide inputs and information whenever there are gaps.
- Proposed to have a debriefing meeting towards the end of the mission.

Bernhard Bauer, Tourism Strategy Planner and Team Leader:

- Updated the current progress of the project:
 - Component I, a brainstorming meeting with the Ministry was held in December 2021, and various topics were discussed during the meeting. A list of questions and data requirements was submitted to the Ministry, and the experts have received parts of the requested data. Many desk research and data collection have been done, and many individual stakeholder meetings have been held. Within the team, weekly meetings were held to update the progress. A draft table of contents of the component one report was submitted to UNWTO, and feedback has been received. The expert team will update the ToC and UNWTO will share it with the Ministry for comments. As of 29th January, the team started with the assessment phase in the Maldives for component I, which is mainly elaborated by the measurement expert.
 - Component II, both components I and II have been launched simultaneously, and desk research has been carried out for HR, Quality, and Marketing. Further individual meetings with local stakeholders are being arranged. A draft table of contents for component two has been shared with UNWTO, and feedback has been received.
- Acknowledged the Ministry, UNWTO, UNDP, JICA, and local expert for their excellent support.
- Presented the challenges so far:
 - Logistics and travel:
 1. His mission was postponed because he had tested positive on COVID-19.

2. Local travel restrictions: Some activities and outputs in the work plan are postponed due to the travel restrictions within the country, especially for the quality assessment process. Hope to get access to resorts during the second mission.
 - Data collection:
 1. Interviewees, mainly from business associations, hesitate to share business data with the expert team as it is sensitive.
- Complimented the performance of the tourism sector of the Maldives before the COVID-19 and expressed the willingness to help the Maldives get back to the same level through this project.
 - Due to the limited time for the first mission, the expert team will keep organizing online meetings after the first mission to access more stakeholders.
 - Indicated the need to discuss the dates of the second mission, planned to submit the draft reports of Component I and Component II before the second mission.
 - Presented the mission calendar and the meetings that have been held so far. Travels to inhabited islands have been planned to access guesthouses and homestay.
 - Appreciated the excellent support from the national expert for arranging meetings.

Stefan Thelen, Tourism HR and Quality Expert:

- Acknowledged the excellent support.
- Met the UNDP expert and discussed the topic of homestay and guesthouse.
- The expert team is working on component I and component II and will see what could be suitable for component III.
- Explained that certain tasks are postponed due to the COVID-19 situation.
- Appreciated the information and materials provided by the Ministry. Will let the Ministry know if more materials will be needed.
- Due to the travel restrictions within the country, it's impossible to visit the resorts for quality assessments. Will have virtual meetings with the resorts.

Julius Arnegger, Measurement Expert:

- Acknowledged the Ministry for the support and making data available.
- Updated the desk research progress and limits.
- To propose how to support the country to strengthen the availability of relevant data.
- Emphasized the importance of data to serve as the basis to elaborate strategies, and the recently established tourism satellite account is a crucial step.
- Appreciated the support from the Ministry. The challenges are fully understood.

Zama Noboru, Project Formulation Advisor, JICA Maldives:

- Requested the draft mission calendar.
- Recommend to have a meeting with the Guesthouse Association of the Maldives.

Aishath Ali, Director General, Ministry of Tourism of the Maldives:

- Explained the challenges of the mission. The Ministry is arranging field trips for experts to the islands that are not under monitoring. Most of resorts accept only tourists that come directly from the airport. Local transportation is another challenge.

Risa Ichishi, Project Formulation Advisor, JICA Maldives:

- Appreciated the detailed presentation
- Emphasized the influence of tourism in the inhabited islands to contribute to tourism products in the Maldives and the economic recovery in the Maldives.

Ali Shinan, Director, Planning Section, Ministry of Tourism of the Maldives:

- Acknowledged participants for participating virtually and physically in the first steering committee meeting. Looking forward to a successful mission in the Maldives.

Appendix 6: Meeting Agenda of the Second Steering Committee Meeting

Data Collection Survey on Recovery of Tourism affected by COVID-19

2nd Steering Committee Meeting

22nd May 2022, 11am

Venue: Ministry of Tourism, with option to participate online

Agenda

- 5 min. Opening Remarks (Maldivian government)
- 5 min. Introductory Remarks (UNWTO)
- 5 min. Self-introduction participants from Maldivian Government, JICA, UNWTO and Reformatics (All)
- 20 min. Project status and planning: activities carried out so far and status of deliverables for components 1 and 2; planning of activities for component 3 (Reformatics)
- 10 min. Practical arrangements for the presentation of the tourism recovery plan and the capacity building workshops
- 10 min. Open discussion (Steering Committee members)

Participants (TBC)

The Ministry of Tourism (TBC)			
H.E. Dr. Abdulla Mausoom	Minister	Ministry of Tourism	
Dr. Naushad Mohamed	Deputy Minister	Ministry of Tourism	
Mr. Ali Shinan	Deputy Director-General, Planning Section	Ministry of Tourism	ali.shinan@tourism.gov.mv
Ms. Fathmath Shifa	Assistant Director, International Relations	Ministry of Tourism	fathmath.shifa@tourism.gov.mv
UNWTO			
Mr. Marcel Leijzer	Department Manager /TCSR	UNWTO	mleijzer@unwto.org
Ms. Cláudia Lisboa	Technical Coordinator /IRP	UNWTO	clisboa@unwto.org
Ms. Rosanne Watson (Virtually)	Senior Project Specialist /IRP	UNWTO	rwatson@unwto.org
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Mr. Julius Arnegger	Measurement Expert	Reformatics/experts	julius@arnegger.net
Mr. Aneil Bedi	Marketing Expert	Reformatics/experts	aneilbedi@gmail.com
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Ms. Naya Nayasheen	National Expert	Reformatics/experts	nayashyyyn@gmail.com

Appendix 7: Indicative Summary of Component 2

Report Component 2: Tourism Recovery Plan – Indicative Summary

Team composition:

Julius Arnegger, Bernhard Bauer, Aneil Bedi, Stefan Thelen (alphabetical order)

1. Background and Introduction

The report about the tourism recovery plan for the Maldives is the second out of three reports within the framework of the project titled “Technical assistance to promote recovery of the tourism activity in the aftermath of the lockdown, regaining consumer confidence and building resilience in the tourism sector in the Republic of Maldives” implemented with the support of JICA and UNWTO.

The global tourism industry is undergoing a massive transformation, in particular since the beginning of the pandemic in 2020. New protocols for travel and tourism have been introduced to address hygiene and safety aspects during the Covid-19 pandemic. Established source markets have changed significantly for many destinations (especially the Chinese and US-American markets) as travel restrictions are continuously revised, resulting in an alteration of travel behaviour. Various tourism destinations around the world are working on strategies for repositioning and innovative marketing concepts, most often combined with a significant upgrade of the digitalization of statistics, services and booking facilities. Many small island development states (SIDS) in the Caribbean and Indian Ocean had to acknowledge their dependency on international tourism facing severe difficulties, especially in 2020.

The Maldives was one of the first countries worldwide introducing successful measures for opening borders implementing strict Covid-19 protocols. This competitive advantage has helped the island state to recover well in terms of arrival numbers in 2020 and 2021 in comparison to other destinations. However, the pandemic has also revealed challenges the country’s tourism industry is facing.

The Tourism Recovery Plan presents i) the results of an in-depth assessment of key priority topics (such as HR and employment, marketing, sustainability, ICT readiness, and support to the tourism sector businesses, among others) and ii) recommendations of how to overcome related challenges and issues supporting the sustainable recovery of the industry.

The analysis is backed with a detailed review of the past and present performance of the national tourism industry with a focus of the Covid-19 impact on businesses and employees. Tourism recovery measures that were taken by the Ministry of Tourism as well as other key stakeholders are presented in detail. With a benchmarking analysis the countries of Seychelles, Dominican Republic and Italy were compared.

Twelve key recovery strategic recommendations have been identified (built around a strategic logic as depicted in the chart below) with the objective of improving the Maldives tourism sector competitiveness. For each of the three pillars four key recommendations have been elaborated. At the end of each key

recommendation a table with key actions to implement (including leading implementation partner and a timeframe) is presented.

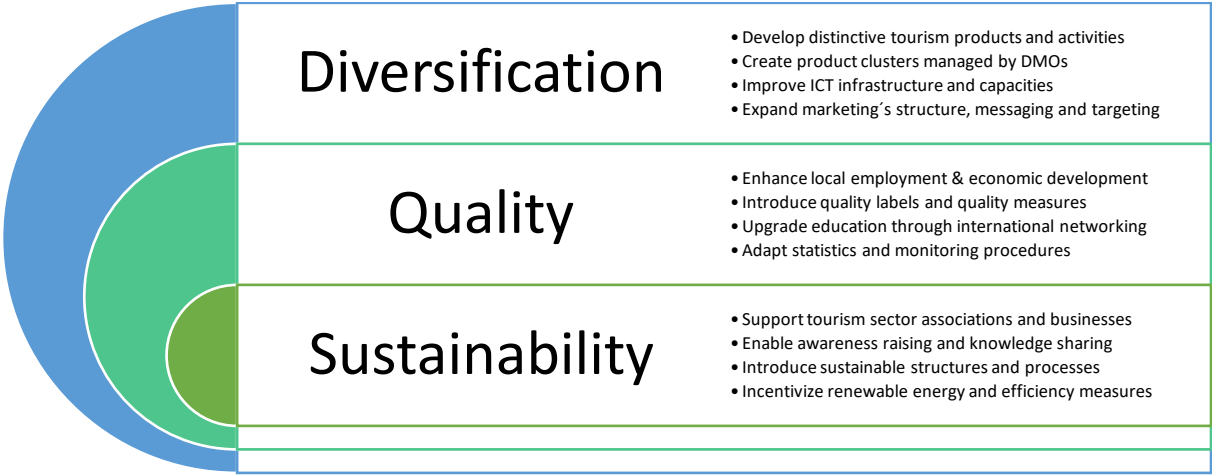


Figure 1 Key recovery strategic recommendations

Source: elaboration by the consultant

2. Objectives and Methodology

The main objectives of the report are to i) give a detailed overview about the Covid-19 impact on the tourism sector, ii) analyse how the Ministry of Tourism and other key stakeholders reacted with recovery measures, iii) provide an assessment of the priority topics such as marketing, employment and HR, ICT readiness and sustainability, iv) and formulate recommendations on how the sector can recover best keeping the destination Maldives highly competitive.

The methodology of the study is based on the following activities:

- exchange of data and information with the Ministry of Tourism;
- around 20 online qualitative interviews with public and private key stakeholders;
- around 35 personal qualitative interviews with public and private key stakeholders;
- desk research and qualitative analysis of the conducted interviews;
- quantitative analysis of collected data;
- on-site assessment during the first mission of the consultants to the Maldives between January 29th and February 17th 2022.

The report will be validated and presented during a second mission of the expert team to the Maldives between May 22nd and May 26th 2022, with relevant adjustments and additions to be made if necessary.

3 Structure of the report

The main report starts with an introductory chapter, outlining the background and structure of the report (**Chapter one**). **Chapter two** gives an overview about the past, present, recovery phase and future of tourism in the Maldives. Since the natural catastrophe of the Tsunami in Indonesia which also reached the Maldives at the end of 2004, a steady and ultimately steep increase of tourist arrivals has been observed until 2019. The Covid-19 pandemic heavily impacted the national tourism industry in 2020, especially between the months of March and July when almost all flights were cancelled. The overall decrease of arrival numbers in 2020 was -67.4% with respect to 2019. A detailed analysis about the impacts on the supply side and on employees is further described. Due to the many interventions from the Ministry of tourism the decrease of arrival numbers in 2021 was reduced to -22%.

An analysis of new plans and developments shows that the tourism supply will be steadily growing in the short to medium term. By 2025, the total bed capacity shall reach a number of 50.000 in 207 island resorts. With regards to tourism on inhabited islands, a total of around 17.000 beds shall be offered by 1.000 hotel and guesthouse businesses.

Chapter three provides a consolidated review of all Covid-19 related recovery measures taken by the Ministry of Tourism, other national Ministries as well as international donor agencies. The Maldivian government undertook various administrative and policy support measures to tourism industry recovery. This included the close collaboration of the Ministry of Tourism with private insurance companies offering comprehensive insurance packages to international arrivals, as well as a successful marketing campaign managed by the MMPRC. Efforts to provide safe travel conditions and the focus on the early vaccination of tourism employees also contributed to the positive results. 32% of all financial support funding from the government was dedicated to the tourism industry's most important elements such as accommodation facilities and food services. Additional support programs were funded by international donors such as the World Bank, UNDP, the European Union, as well as UNWTO with funding from JICA.

Chapter four presents a benchmark study for tourism recovery measures. The benchmarked countries (Seychelles, the Dominican Republic and Italy) were selected upon six distinctive criteria. The Maldives show very good results with respect to the high vaccination rate among tourism sector employees and measures taken for travel stimulation. The government's decision to participate in the Covid-free corridors has allowed the Maldives to keep up with and even outperform their main competitors.

Chapter five contains the assessment of priority topics of the study. Presently existing tourism products and activities are assessed with respect to those offered by island resorts and those available at inhabited islands. This is done because the main purpose of visit among resort tourists and other visitors differs substantially. A lack of activities for non-resort visitors, travelling around inhabited islands was detected. This also concerns the assessment of product clusters and missing destination management organisations which are usually managing tourism products in certain areas.

An assessment about the ICT readiness of the national tourism industry demonstrates the fact that there is low use of technology and a low rate of digitalisation among tourism businesses with regards to their skills and capacities, data collection, online booking facilities, applications and payment solutions.

A detailed assessment of marketing activities covers digital marketing and its difference among resort tourism and tourism on inhabited islands. Moreover, the travel patterns and possibility of existing and potential source markets visiting the Maldives is analysed. This is followed by an assessment of the national media plan for making the work in tourism more attractive. Furthermore, the analysis covers the identification of most suitable source markets and core messages to motivate bookings.

The tourism value chain is assessed from a perspective of employment and quality looking at the topic of local employment and local economic development potential along the value chain. A gap analysis between the local and the international workforce is presented with a focus on gaps in education, salaries, motivation and stability. Incentives to work in tourism for the local workforce are further assessed. Educational institutions and their networks, which are regarded as an important asset for quality in tourism, are analysed. This service quality in resorts and in guesthouses is subject of the following assessment.

In the framework of the present project, the structure, processes and institutional landscape of tourism statistics and data provision in the Maldives have been assessed.

Overall, the system of tourism statistics is solid and extensive, and key indicators are collected regularly/continuously and made publicly available. A detailed assessment about statistics has been carried out in the component 1 report titled “Measurement of the current situation of the tourism sector”. The present report refers to the results of component 1.

The support mechanisms for tourism SMEs are considered a priority topic and are assessed in the following, focussing on guesthouses, diving centers, tour operators and travel agencies, as well as on sub-sectors in the supply chain such as artisans and handicraft workshops. Agriculture and fisheries, considered as indirect tourism sector businesses are also assessed. Incentives to stimulate travel such

as the covid-19 corridor, priority vaccination among tourism employees, and price policy are analysed.

With regards to the assessment of sustainability measures the analysis focuses on opportunities to reorient the tourism value chain towards sustainability. The analysis about sustainable consumption and production shows the potential social and economic conflicts of interest about fresh water supply, availability of land and fish. These potential conflicts are carried out among the population of inhabited islands and local tourism businesses.

The assessment chapter includes an analysis about the current use of renewable energy facilities and energy efficient tools. The environmental impact of tourism is further assessed primarily concerning issues with residual waste and waste water management on inhabited islands. A SWOT analysis summarizes the assessment chapter is added in the annex “SWOT analysis”.

Chapter six contains the detailed recommendations for the recovery strategy of the Maldives following the same structure as chapter five. In this way, the reader can easily refer from the assessment to the recommendations and vice-versa.

Twelve key recommendations have been elaborated. At the end of each key recommendation a table with key actions to implement (including leading implementation partner and a timeframe) is presented. These key actions can be interpreted as a guideline for how to implement the respective recommendation. The given timeframe for the recommendations concerns the necessary time of implementation with regards to short, medium, and long-term.

4. The tourism recovery plan

The proposed tourism recovery approach for the Maldives is directed towards strengthening the tourism competitiveness. Although the country has achieved excellent recovery figures (tourist arrivals) in 2020 and 2021 (due to a strong competitive advantage based on the Covid-19 travel measures introduced by the government) there are many elements along the tourism value chain which could be implemented to remain globally competitive. As other countries, in particular in Asia, are slowly opening their borders and easing travel restrictions again (e.g., Thailand), the Maldives will envisage strong competition on the short term. This is taken into consideration for all the recommendations that have been elaborated within the strategic logic.

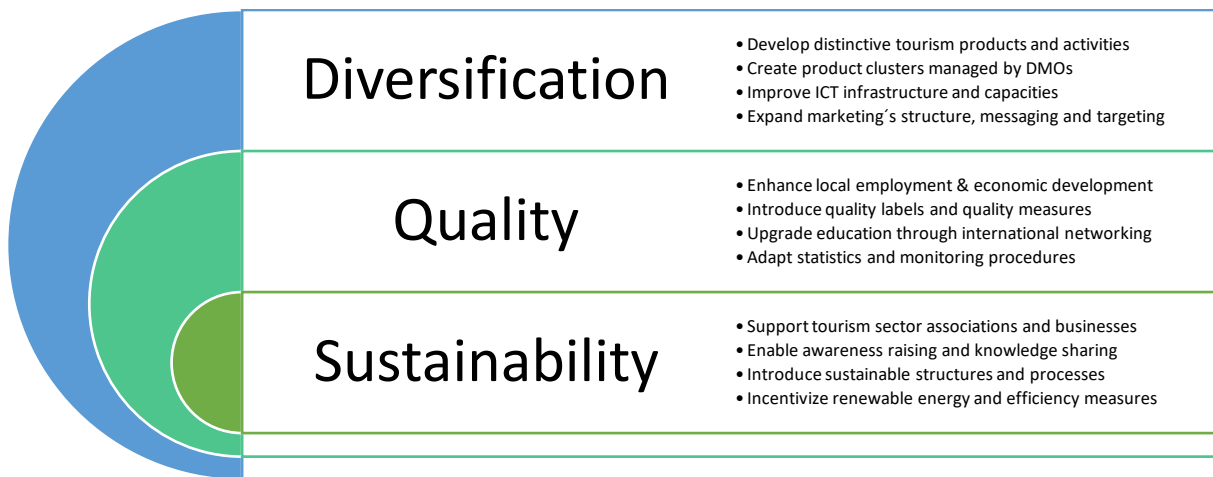


Figure 2 Pillars for strengthening competitiveness in the Maldives

Source: elaboration by the consultant

Pillar 1: Diversification

At present, the tourism market of the Maldives, especially with regards to source markets, products and activities is hardly diversified. The country depends very much on a small number of source markets with visitors interested in resort tourism. Moreover, the resort tourism product is over represented. The tourism industry is very much dependent on the resort product and its visitors. The chart below shows the sales volume of resorts and guesthouses for the years 2016 to 2021. While the resorts had record sales for a total of US\$ 3.74 billion, the guesthouses had US\$ 39 million in 2021, representing a share of 1%. Moreover, the resort sales showed an increase of 10% with respect to 2019 while the guesthouse sector had a loss of -50% of sales within the same period.

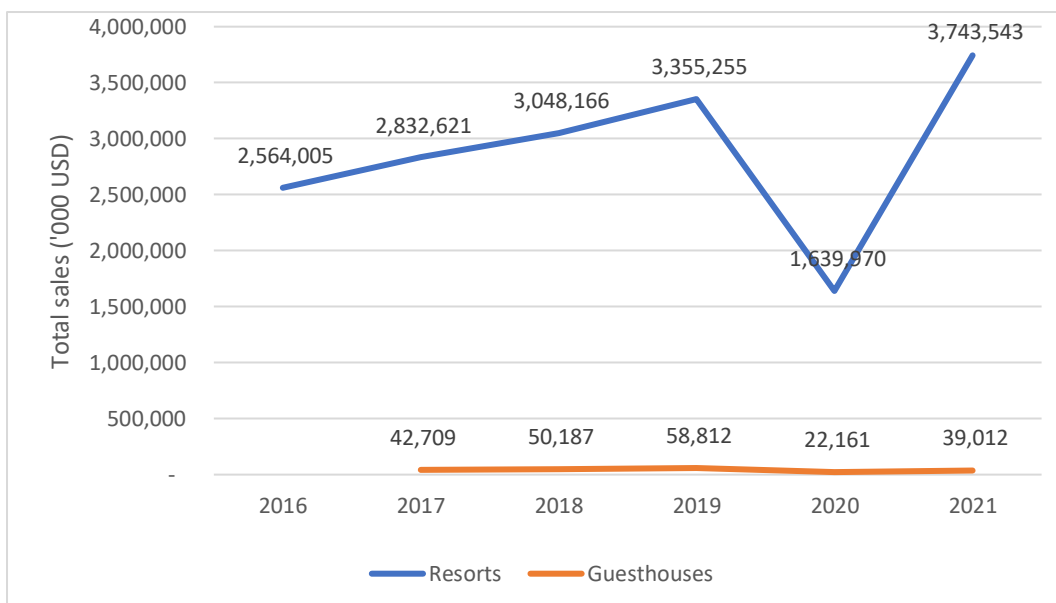


Figure 3 Sales volume of resorts and guesthouses 2016-2021

Source: elaboration based on data from MoT.

Based on the above it is recommended that **new tourism products enabling cultural, culinary, and eco-tourism activities** are introduced, in particular at inhabited islands. This shall lead to the creation of **product clusters** that are managed by regional **destination management organisations** for certain atolls.

The diversification of products around different geographical areas will attract a varied mix of visitors, in particular non-resort tourists, typically travelling to inhabited islands. Resorts will also benefit from the development of new products as their visitors will be able to undertake day-trips to experience certain attractions at nearby populated islands.

Individual travellers, in particular non-resort tourists, are very demanding all along the customer journey. This includes the pre-booking steps, online booking facilities, updated travel information and digital/cashless payment. Therefore, it is recommended to **improve ICT infrastructure and capacities** to cope i) with the travel behaviour of this group of tourists and ii) to keep up with the global technological transformation of the tourism industry. On the demand side, it empowers visitors to identify, customize, and purchase tourism products and services. On the supply side, it plays a critical role for the competitiveness of tourism organizations and destinations, providing tools for developing, managing, and distributing tourism products.

Marketing activities have a decisive role when it comes to promoting tourism to inhabited islands. A **strategic collaboration between the MMPRC and the Ministry of Tourism, including the hotel and guesthouse sector, is recommended** to ensure the successful integration of tourism to inhabited islands into the overall outstanding resort tourism concept of the Maldives. Moreover, it is recommended to **expand and continue the islands.mv project** within the Ministry of Tourism to create the leading, go-to website that gives up to date, local island information and details for all travellers to the Maldives.

Pillar 2: Quality

The Maldives is a tourism destination with established high tourism quality. Due to the envisaged goal of further growth of travellers, the country is in need of enhancing the actions to achieve substantial numbers of trained personnel for the future economic prosperity and the wellbeing of its guests.

It is recommended to **enhance local employment and economic development** through the improvement of statistical data on HR, awareness raising about employment opportunities and bridging gaps between the local and international workforce.

Further **recommendations related to quality** are the introduction of a comprehensive **complaints**

management system, the introduction of internationally recognized **quality labels** and the initiation of **support programs for women and the youth** enabling inclusive growth (social sustainability and benefits for the local population) as well as environmental sustainability. The valorization of the Maldivian tourism related **educational institutions and its international networks** plays a critical role with regard to the quality upgrade.

The improvement of statistics and monitoring can significantly contribute to the overall upgrade of quality in the Maldives. A good **coordination between different actors is key** to coherent and efficient dissemination of data. Specific regular survey instruments, such as the biannual exit survey for international tourists, could be strengthened to overcome identified gaps and shortcomings. Data on the fast-growing guesthouse market, a priority of the government and a potential instrument for local development in more peripheral regions and a broader participation of the population in tourism benefits, is not of the same quality as data on the longer established resort sector. In a similar sense, regionally disaggregated data (on tourism, but also on other topics) is also scarce, and should be strengthened in light of the ongoing political and administrative decentralization process.

Moreover, measures are being proposed to overcome these shortcomings with the aim of **providing better and more information to support policy-makers and managers in post-COVID-19 recovery**, and to elaborate sustainable tourism development strategies for long-term success of the industry.

Pillar 3: Sustainability

Social, economic and environmental sustainability is a key indicator for successful tourism destinations. In order to ensure social sustainability in the Maldives, it is recommended that **potential conflicts of interest** between the local population and tourism businesses about fresh water, fishing and the availability of land are managed with care before it leads to severe issues. Recommended actions related to economic sustainability include the **active support to businesses and sector associations**. Various associations have not been active since early 2020 and lack in proper management, finance, and access to other key stakeholder groups within the industry. It is recommended that the MoT reaches out actively to the various associations, establishing **communication channels and information exchange platforms**, as well as **creating a position for a specific sector representative officer** in the MoT with the main role to liaise actively with the associations. The MoT needs the businesses associations for the implementation of their plans in product development, sector diversification, marketing and positioning, as well as with regards to actions taken for the protection of the environment. The **introduction of**

awareness raising and knowledge sharing strategies and measures will help in overcoming the present difficulties.

Tourism in the Maldives is very much dependent on the magnificent and sensitive natural environment. **Eco-friendly business policies and practices** shall not only be introduced but more importantly monitored, eventually with paying attention to the Measurement of Sustainable Tourism (MST) in the national tourism statistics and/or the installation of an **UNWTO-INSTO** (International Network of Sustainable Tourism Observatories) office.

The Maldivian tourism industry is heavily dependent on fossil energy resources. Each resort island uses fossil fuels for satisfying its electricity household. The same applies to local islands where hotels and guesthouses are operating. Fossil fuel prices are volatile and need to be imported and paid in foreign currencies. It is recommended that this dependency is reduced through the **introduction of the many innovative renewable energy opportunities**. In order to incentivize the operators to invest in the sustainable energy supply it is recommended that **taxes such as VAT and import taxes are reduced** if not totally cut on the hardware infrastructure, installation and maintenance services. The same **recommendations apply to all equipment that ensures energy efficiency** for reducing the consumption of water and electricity. Further actions for the thermal insulation of buildings, irrigation systems, and the incentivized use of e-mobility vehicles (powered with renewable energy sources) shall be realized.

ANNEX

Table of contents Main Report

Acronyms	1
Executive summary	2
1 Introduction	8
1.1 Structure of this report	9
2 Tourism performance, vision, and scenarios in the Maldives	12
3 Review of the tourism recovery initiatives undertaken by the MOT and other key stakeholders	23
4 Assessment of priority topics for the tourism recovery plan	27
4.1. Assessment of tourism products, ICT readiness and marketing	27
4.1.1. Currently existing tourism products and activities	27
4.1.2 Assessment of tourism product clusters and destination management organisations	30
4.1.3 Assessment of ICT readiness of the tourism industry	30
4.1.4 Assessment of marketing activities	33
4.2 Assessment of the tourism value chain from a perspective of employment and quality	55
4.2.1 Local employment and economic development	55
4.2.2. (Service) Quality assessment	70
4.2.3 Assessment of educational institutions and its networks	73
4.2.4 Assessment of statistics	74

4.3. Assessment of tourism sustainability measures	75
4.3.1 Assessment of support mechanisms for tourism SMEs	75
4.3.2 Knowledge sharing	82
4.3.3 Sustainable structures and processes	82
4.3.4 Environment and energy	86
5 12 key recommendations for tourism recovery in the Maldives	88
5.1 Pillar 1: Diversification	93
5.1.1. Develop distinctive tourism products and activities	93
5.1.2 Create product clusters managed by DMOs	106
5.1.3 Improve ICT infrastructure and capacities	108
5.1.4 Expand marketing's structure, messaging and targeting	114
5.2. Pillar 2: Quality	125
5.2.1 Enhancing local employment - HR and local economic development	125
5.2.2. Introducing quality labels and quality measures	137
5.2.3 Upgrade of educational institutions and its international networks	143
5.2.4 Adapt statistics and monitoring procedures	145
5.3 Pillar 3: Sustainability	153
5.3.1 Support tourism sector associations and businesses	153
5.3.2 Enable awareness raising and knowledge sharing	167
5.3.3 Introduce sustainable structures and processes:	170
5.3.4 Incentivize renewable energy and efficiency	175
6 Road Map	178

Table of Figures

Figure 1: Pillars for enhancing resilience and strengthening competitiveness in the Maldives	3
Figure 2: Sales of resorts and guesthouses 2016-2021	4
Figure 3 International tourist arrivals to the Maldives 2000-2021	12
Figure 4 Tourist accommodation growth and capacity	12
Figure 5: Number of resorts in operation 2019-2020	13
Figure 6 Total sales in the resorts sector 2016-2021	14
Figure 7 Total sales in the guesthouse sector 2017-2021	14
Figure 8 Revenue/bed night in resorts vs. guesthouses 2016-2021	15
Figure 9 Workers affected by COVID-19 per tourism sectors	16
Figure 10 Employees in tourist resorts, beginning and end of 2020	16
Figure 11 Age distribution of recipients of Income Support Allowance	17
Figure 12 International tourist arrivals 2020, 2021 and projections for 2022	19
Figure 13 Registered resorts and bed capacity 2010-2021, planned facilities 2022-2025	20
Figure 14 Registered guesthouses and bed capacity 2010-2020, linear trend 2021-2025	20
Figure 15 Development of guesthouses and resorts 2010-2021, forecast until 2025	21
Figure 16 Information for travelers regarding COVID-19 regulations on MOT website	23
Figure 17 Composition of ISA beneficiaries by broad industry level	25
Figure 18 Main Purpose of Visit to the Maldives	28
Figure 19 Tourist establishments in operation 2019-2022	35
Figure 20 Tourist bed nights 2019 vs 2021	36
Figure 21 Russian share of visitors to the Maldives 2017-2021	51
Figure 22 Russian actual number of visitors to the Maldives 2017-2021	51
Figure 23 Unemployment rate illustration	55
Figure 24 Vaccination campaign illustration	80
Figure 25 Stages of a tourism customer journey	110
Figure 26 Screen capture from island.mv, May 11th, 2022	117
Figure 27 Quality pillar	125
Figure 28 Sustainability Pillar	153

List of Tables

Table 1 Rate of tourism recovery in the Maldives vs. the world 2021,2022	18
Table 2 Data on new resort openings planned until 2025	21
Table 3 Data on new hotels and guesthouses until 2023	22
Table 4 Present tourism products and activities in the Maldives	29
Table 5 Occupancy rates in tourist accommodation 2021 vs 2019	38
Table 6 Visit Maldives Social Media following as of May 2022	41
Table 7 Impact of the Russian Invasion on Russian and Ukraine visitor numbers to the Maldives	50
Table 8 Number of Indian visitors to the Maldives 2022 vs. 2021	52
Table 9 Tourism value chain elements	55
Table 10 Resort beds under developments 2022 - 2024	58
Table 11 Employment demand projections 2022-2024for resorts under development	58
Table 12: Projection of manpower in tourism sector by MEERY Maldives	59
Table 13 Local vs. foreign employment data in resorts	65
Table 14 Tourism quality service chain elements	70
Table 15 Registered tourism businesses	75
Table 16 Registered tourism accommodation facilities	75
Table 17 Data on upcoming resort developments	83
Table 18 Data on upcoming hotels and guesthouses	84
Table 19 Key recommendations for tourism product development and diversification	93
Table 20 Key action table: Pillar 1, Recommendation 1	102
Table 21 Key action table: Pillar 1, Recommendation 2	107
Table 22 Key action table: Pillar 1, Recommendation 3	111
Table 23 Key action table: Pillar 1, Recommendation 4	123
Table 24 Key action table: Pillar 2, Recommendation 1	133
Table 25 Key action table: Pillar 2, Recommendation 2	141
Table 26 Key action table: Pillar 2, Recommendation 3	144
Table 27 Key action table: Pillar 2, Recommendation 4	150
Table 28 Sector representative roles	155
Table 29 Proposed baseline study for souvenir market upgrade	160
Table 30 Key action table: Pillar 3, Recommendation 1	164
Table 31 Key action table: Pillar 3, Recommendation 2	169
Table 32 Key action table: Pillar 3, Recommendation 3	173
Table 33 Key action table: Pillar 3, Recommendation 4	176

Attachment 1: Recommendations to JICA for tourism recovery projects in the Maldives



Attachment to Project Completion Report

Recommendations to JICA for tourism recovery projects in the Maldives

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Table of Contents

Acronyms	3
Introduction	4
Proposed Projects Titles	9
1. Policy and strategy level project proposals	10
2. Operational level project proposals	30
Conclusions	50

List of Tables

Table 1 JICA Project Proposal Template	8
Table 2 Project Proposals Titles Summary	9

Table of Figures

Figure 1: Pillars for Enhancing resilience and strengthening competitiveness Maldives.	5
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Acronyms

BML	Bank of Maldives
EWT	Employee Withholding Tax
FAO	Food and Agriculture Organization
IFC	International Finance Corporation
IPT	Personal Income Tax
ISA	Income Support Allowance
JICA	Japan International Cooperation Agency
MBS	Maldives Bureau of Statistics
MCAA	Maldives Civil Aviation Authority
MCS	Maldives Customs Services
MED	Ministry of Economic Development
MOF	Ministry of Finance
MIRA	Maldives Inland Revenue Authority
MMA	Maldives Monetary Authority
MMPRC	Maldives Marketing & PR Corporation
MNPI	Ministry of National Planning, Housing and Infrastructure
MOE	Ministry of Environment, Climate Change and Technology
MOT	Ministry of Tourism
NBS	National Bureau of Statistics of the Maldives
NCIT	National Center for Information Technology
SDFC	SME Development Finance Corporation
SME	Small and Medium Enterprises
SRM	Statistics Regulation of the Maldives
TIMS	Tourism Information Management System
TSA	Tourism Satellite Account
TSAM	Tourism Satellite Account of the Maldives
UN	United Nations
UNDESA	United Nations Department of Economic and Social Affairs
UNDP	United Nations Development Programme
UNESCAP	United Nations Economic and Social Commission for Asia and the Pacific
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNWTO	United Nations World Tourism Organization
WTTC	World Travel & Tourism Council

Introduction

This present report on recommendations to JICA for tourism recovery projects in the Maldives is the third out of three reports within the framework of the project titled “Technical assistance to promote recovery of the tourism activity in the aftermath of the lockdown, regaining consumer confidence and building resilience in the tourism sector in the Republic of Maldives” implemented with the support of Japan International Cooperation Agency (JICA) and the World Tourism Organization (UNWTO).

The objective of this report is to provide recommendations on further support that JICA can provide to the Maldives in the tourism recovery process. The recommendations are based on the strategic actions included in the tourism recovery plan, and the inputs and feedback received from project stakeholders. Moreover, this report aims to assess which of the strategic actions through donor assistance could in particular be relevant and feasible for JICA.

The project recommendations are largely derived from the reports of Component 1 (Measurement of the current situation of the tourism sector) and Component 2 (Tourism recovery plan). The tourism recovery plan for the Maldives is directed towards enhancing resilience and strengthening the tourism competitiveness. Twelve key recovery recommendations have been identified (built around a strategic logic as depicted in the chart below). For each of the three pillars, four key recommendations have been elaborated (see Figure 1 below).

Although the Maldives has achieved excellent recovery figures in terms of tourist arrivals in 2020 and 2021, partly due to a strong competitive advantage based on the COVID-19 travel measures introduced by the government, there are many elements along the tourism value chain which could be implemented to ensure the country remains globally competitive. With countries opening their borders and easing travel restrictions again, particularly in Asia (e.g., Thailand), the Maldives will expect strong competition in the short term. This fact has been taken into consideration for all the recommendations elaborated within the Maldives Tourism Recovery Plan’s logic.

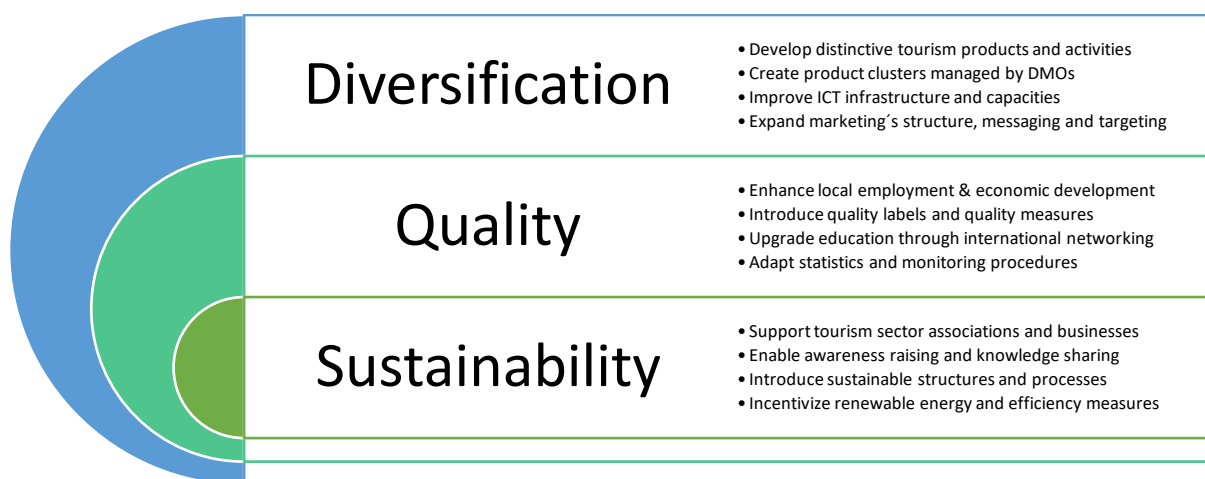


Figure 1: Pillars for Enhancing resilience and strengthening competitiveness Maldives

Source: Elaboration by the Consultant

The recommendations in the present report are presented using project data sheet templates, which has been prepared in consultation with JICA and includes relevant information for project planning and implementation. Two types of intervention have been selected: projects that regard interventions (1) on the policy and strategy level and (2) on the operational level.

The projects that represent the policy and strategy level are independent from specific locations as they are designed to be applied to the whole territory of the Maldives. The recommended projects include various thematic areas, such as tourism statistics, tourism institutional framework, regional tourism management models, marketing, introduction of tourism service quality labels, upgrade of technology and digitalization among public tourism authorities, as well as climate change adaptation and mitigation measures.

The proposed projects for the policy and strategy level derive from the pillars illustrated in Figure 1 above and from the recommendations for enhancing resilience and strengthening competitiveness in the Maldives. The proposed development and management of tourism products and destinations must be based on a national legal framework, hence, the identification of a specific management model for regional tourism authorities, responsible for marketing and management, is needed (project 1.1). The newly developed tourism products and an introduction of a management system will create more relevant data. It is for this reason, interventions regarding the digitalization and data management (project 1.2) as well as the monitoring of the tourism system's sustainability (project 1.4) are recommended.

In order to enhance the country's destination quality and visitor experience towards environmentally friendly environments, a specific project for the introduction of quality labels is recommended (project 1.3).

The Maldives is very much affected by climate change. Therefore, it is recommended that the Government introduces certain national policies and incentives, in particular to private businesses to implement mitigation and adaptation measures on their own initiative (project 1.5).

With regards to marketing and communication there are two important policy related actions to be taken. The Maldives has successfully managed the COVID-19 crisis, specifically in terms of communicating governmental policies and steps for the re-opening of borders, airports and hospitality businesses. However, the country and in particular the tourism industry needs to be prepared for other possible crises (related and not limited to health, nature, energy, terror, deadly accident, etc.). Therefore, the preparation of a crisis management communication plan is recommended in project 1.6. Moreover, in order to strengthen the inhabited islands' competitiveness, the elaboration of a distinct tourism marketing plan for "holiday on local islands" is recommended (project 1.7).

The tourism industry in the Maldives is dominated by a few enterprises, mainly joint ventures and international companies. In order to increase the number of locally owned tourism businesses, to reduce bureaucratic hurdles, and to make the tourism industry more attractive for the local population, a project covering the tourism regulatory environment and SME development is recommended (project 1.8).

The operational level project recommendations are directed to the local island tourism SMEs. For most of these recommendations, certain pilot project areas could be selected for implementation. The recommended projects for the operational level address a wide range of thematic areas, including tourism product development, handicraft and souvenir upgrade, environment and biodiversity awareness raising campaigns, a local tourism economy, B2B linking programme and local tourism education facilities.

Taking into consideration pillar 1 / recommendation 1 from the Pillars chart in Figure 1, "develop distinctive tourism products and activities", as well as the proposed project 1.1., it is recommended to implement two projects that foresee the identification, development and piloting of culinary (project 2.1), and eco-, and cultural products (project 2.2.) to diversify the tourist activity landscape. The Maldives' unique biodiversity and natural heritage is currently

facing challenges due to environmental pollution and stress, partly related to the country's tourism industry. In order to increase the protection of the environment it is recommended to implement awareness raising campaigns for local businesses and the population (project 2.3). Product diversification and new business management models need to be strengthened around the Maldives to remain competitive. Hence, the elaboration of local tourism island plans is recommended (project 2.4).

As the tourism industry and arrival numbers in the Maldives are predicted to grow over the next years (due to investment in infrastructure, new resorts and guesthouses, among others) the availability of skilled local workforce is a critical topic. Based on this assumption, two projects related to education and capacity building are recommended (projects 2.5 and 2.6).

To enhance the local economic impact from tourism it is further recommended to extend the tourism value-chain to businesses that benefit indirectly from tourism such as artists, handicraft, agriculture, among others. In order to increase the sales of handicraft products a specific souvenir design upgrade project (project 2.7) is recommended. Project 2.8 addresses the implementation of a local economy linkages programme, which is focused on interconnecting the local businesses with a business match-making platform.

In consultation with JICA, the following project proposal template has been designed to present the projects:

Component 3 – Project Proposal Template

Project title	Clear and easy understandable project title
Objectives and necessity	<ul style="list-style-type: none"> - Key objective - Specific objectives - Project background/rationale explaining why this project is necessary
Contents (main activities)	<ul style="list-style-type: none"> - Project activities
Locations	<ul style="list-style-type: none"> - If applicable
Project implementation period	<ul style="list-style-type: none"> - Up to 1 years - Between 1 and 2 years - More than 2 years
Scheme	<p>Main options of JICA support schemes include:</p> <ul style="list-style-type: none"> - Technical Cooperation Scheme - Grants Aid Scheme <p>Further JICA has two programmes that could be useful for some of the proposed projects:</p> <ul style="list-style-type: none"> - Dispatching volunteers: JICA can dispatch either short term volunteers for less than a year (normally 3 – 6 months) or long-term volunteers for more than a year (normally two years). - Collaboration with Japanese companies to make investments in the Maldives.
Inputs	<ul style="list-style-type: none"> - Support side: individual expert (long-term; short-term); any portable equipment, etc. - Maldives side: counterparts, existing equipment, office space, transportation, etc.
Implementation structure	Who will be assigned as the leading stakeholder of the project (Maldivian side) and who are the main partners
Pre-conditions / external conditions and public relations activities	<ul style="list-style-type: none"> - Any connection to policies, projects, networks, partnerships etc. that are prerequisites for the implementation of the project
Remarks for implementation	Any remarks if it is necessary to transport any physical items (equipment, personnel, etc.) for the implementation of the project
Minimum budget	<ul style="list-style-type: none"> - Up to USD 200.000: small budget - Up to USD 1.000.000: medium budget - More than USD 1.000.000: big budget
Others	<ul style="list-style-type: none"> - Any other relevant comments

Table 1 JICA Project Proposal Template

Proposed Projects Titles

The proposed projects have been divided into 1) Policy and Strategy level projects, and 2) Operational level projects, as can be seen in the table below:

Project Title	
1. Policy and strategy level	
1.1	Development of a DMO model and destination development plans
1.2	Digitalization and data management of the national tourism authorities
1.3	Introduction of tourism quality labels: blue flag and green key
1.4	Measuring of sustainability of tourism
1.5	Tourism and climate change adaptation and mitigation
1.6	Tourism crisis communication plan
1.7	Improving and developing the marketing of the local islands
1.8	Tourism regulatory environment and SME development
2. Operational level	
2.1	Development of culinary tourism products
2.2	Development of eco- and cultural tourism products
2.3	Conservation of biodiversity and awareness raising campaign for the protection of the environment
2.4	Local Island Master Plan
2.5	Setup of an international tourism hotel training and boarding school
2.6	Tourism competence promotion boat/mobile training force and capacity building programme for guesthouse businesses
2.7	Handicraft and souvenir design upgrade
2.8	Local economy linkages programme

Table 2: Project Proposals Titles Summary

The following chapter 1 and chapter 2 will present all suggested projects above using the project proposal template shown in Table 1.

1. Policy and strategy level project proposals

Chapter 1 presents the projects that focus on the policy and strategic level

Project Title	1.1 Development of a DMO model and destination development plans
Objectives and necessity	<p>Key objective:</p> <p>The objective is to establish a model for a destination management organisation (DMO) to enhance the diversification and distinctiveness of the atolls and island groups.</p> <p>Project background and rationale:</p> <p>At the moment, tourism at destination level is mainly managed by the regional and local island councils only, without any proper plan for development and marketing, and low budget possibilities. Once the DMO model (based on principles of Public Private Partnership) has been developed for one destination, it can ideally be replicated at various atolls around the country. Specific destination management plan shall be elaborated for the selected DMO destination.</p> <p>The key responsibility of the DMO is to co-ordinate the management of all the elements that make up a destination and its tourism product (attractions, amenities, access, marketing and pricing). This will result in enhanced opportunities for tourists to travel more within the Maldives, creating more economic possibilities for the local islands.</p>
Contents (main activities)	<p>The development of a specific decentralized model for the DMO includes the elaboration of its governance structure, data management, responsibilities, funding models, and an action plan for the priority activities. There needs to be a strong focus on multi-stakeholder engagement and the establishment of an Advisory Committee.</p> <p>Furthermore, for each DMO, a proper Destination Management Plan is developed which sets out the objectives and targets of the tourism industry on the selected atoll for the next 5 years in terms of strategic and spatial planning, environmental protection, marketing, among others.</p>
Locations	<p>Local context: A possible location for this pilot project could be Addu Atoll, where good possibilities exist for product diversification and enhancing the local economic impact from tourism. The Addu City Council is responsible for tourism planning on the atoll but has limited capacities and human resources. A DMO is needed to take over specific tourism related activities such as stakeholder management, regional marketing, business matchmaking, and product development, among others.</p> <p>Ideally, such a DMO is based on a PPP model which is distributing the responsibility, funding, and overall interests on the private and public sector likewise. With such a DMO model in place a specific Tourism Destination Management Plan can be elaborated.</p>

Project implementation period	- Within 2 years
Scheme	Technical cooperation
Inputs	The following support would be required to implement the project: <ul style="list-style-type: none"> - international experts on Tourism Destination Management, tourism strategy, marketing quality assurance, data management, and multi stakeholder collaboration - national expert on tourism law, institutional policy, HR - Maldives side: office space, transportation
Implementation structure	From the Maldivian side, the following entities would be responsible for the successful implementation of the project: <ul style="list-style-type: none"> - For the DMO model development: MOT - For the implementation of the first DMO destination: MOT and regional island council - For the destination management plan: MOT and regional island council
Pre-conditions / external conditions and public relations activities	The decentralization strategy of the Government is an excellent basis for the introduction of DMOs. However, the definition of a proper policy and regulatory framework for the installation of regional offices based on principles of public-private partnership is a precondition.
Remarks for implementation	The project focus should be on the development of the DMO model; on its implementation in one destination; on the destination plan. The model shall then be applied to various destinations in a second step.
Minimum budget	- Up to USD 1.000.000: medium budget
Others	The project budget shall include the development and management of the DMO for the first two years, with the intention that the organization will be able to cover its own costs afterwards.

Project title	1.2 Digitalisation and data management of the national tourism authorities
Objectives and necessity	<p>Key objective</p> <p>This project aims at enhancing the digitalization of the tourism sector, including the collection and analysis of big data and the sharing of knowledge on a specific platform (dashboard). The activities focus primarily on the upgrade of digitalization and technology for the Ministry of tourism and possible DMOs with a specific cloud-based system for data storage and collaboration.</p> <p>Project background and rationale:</p> <p>All licensed tourism businesses are required to submit monthly reports on guest numbers and occupancy rates to the MOT. Reportedly, the level of compliance with this obligation varies substantially between different types of establishments. E.g., while resorts appear to generally have a high level of compliance, it is much lower in the guesthouse sector. Reasons include a lack of understanding of the importance of accurate statistical data among smaller, privately-run businesses, lack of resources, and less structured operative work routines in SMEs. The new Tourism Information Management System (TIMS) is a step toward facilitation of monthly data submission but is not yet fully adopted by the guesthouse sector.</p> <p>Under the proposed project, a mobile application will be developed that can be integrated in TIMS and the broader eFaas, e-government system and will facilitate data submission (e.g., by sending monthly reminders) in line with privacy and data security requirements.</p>
Contents (main activities)	<ul style="list-style-type: none"> - Elaboration of a strategy for a “big data” data center and analysis, linked to the identification and installation of an interactive knowledge sharing platform (dashboard) with an open data source; - Training and capacity building for MOT and DMO officials who shall be responsible for leading the implementation of the action plan; - Development of a mobile application for the submission of relevant tourist arrival data.
Locations	N/A
Project implementation period	<ul style="list-style-type: none"> - Within 2 years
Scheme	Technical cooperation
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - international experts on data management, tourism statistics, programmer and data storage, designer, data strategy

	<ul style="list-style-type: none"> - national experts on data protection and data privacy act, institutional policy, legislative drafting - Maldives side: office space, transportation
Implementation structure	<p>From the Maldivian side, the following entities would be responsible for the successful implementation of the project:</p> <ul style="list-style-type: none"> - for the big data strategy and the implementation of the action plan: national bureau of statistics and MOT - For the mobile app and data transfer: national bureau of statistics
Pre-conditions / external conditions and public relations activities	<p>An open data policy that is introduced and managed by the Government, its Ministries and other public authorities is needed.</p>
Remarks for implementation	<p>The Government, in particular the MOT, must play an active role in boosting technology adoption, in particular with the adoption of advanced digital technologies within the MOT for its own activities, services, workflow, publications and communications. Digital adoption can increase the effectiveness and efficiency of private enterprises not only for improving their daily operations but also for creating unique experiences for tourists.</p>
Minimum budget	<ul style="list-style-type: none"> - Up to USD 1.000.000: medium budget
Others	<p>The project budget shall cover the strengthening of digitalization and the development of an interactive knowledge sharing platform (dashboard) for the first two years, with the intention that the national stakeholders will be able to manage the platform and cover its costs afterwards.</p>

Project Title	1.3 Introduction of tourism quality labels: Blue Flag and Green Key
Objectives and necessity	<p>Key objective: The key objective is to stimulate ecological awareness of enterprises as well as inhabitants throughout the Maldives and to attract more ecologically aware tourists. The inhabited islands of the Maldives often do not match the expectations of international ecological standards. Hence, the standards need to be improved with the aim to qualify for internationally known quality labels.</p> <p>Project background and rationale: BLUE FLAG: A world-renowned award for safe and clean beaches is trusted by millions around the globe, the Blue Flag programme is run by the Foundation for Environmental Education and is headquartered in Copenhagen, Denmark.⁵</p> <p>In order to qualify for this prestigious award, a series of stringent environmental, educational, safety-related and access-related criteria must be met and maintained for the beaches and tourism enterprises. The iconic Blue Flag is one of the world’s most recognized voluntary awards for beaches, marinas, and sustainable boating tourism operators. Encouraging especially Island City Councils (and possibly future DMOs) to implement it would be a successful step for enhancing ecological awareness on the inhabited islands plus a strong encouragement for FIT (Fully Independent Tourists) to come for a visit.</p> <p>The GREEN KEY: is a voluntary eco-label awarded to more than 3,200 hotels and other establishments in 65 countries. The Green Key award is the leading standard for excellence in the field of environmental responsibility and sustainable operation within the tourism industry. This prestigious eco-label represents a commitment by businesses that their premises adhere to the strict criteria set by the Foundation for Environmental Education. A Green Key stands for the promise to its guests that by opting to stay with the Green Key establishment, they are helping to make a difference on an environmental level.⁶</p> <p>In the focus of the Green Key project stands a grant system, offering financial support to private Island Guest Houses in order to upgrade their businesses to international ecological and environmentally sustainable standards.</p>

⁵ More information: <https://www.blueflag.global>

⁶ More information: <https://www.greenkey.global/>

Contents (main activities)	<ul style="list-style-type: none"> - Elaboration of a grants scheme key and selection criteria for accommodation providers on inhabited islands to qualify for the Green Key label - Awareness raising program among accommodation providers on inhabited islands to participate in a grants scheme for getting financial support to qualify for the green key label - Elaboration of a grants scheme key and selection criteria for the blue flag local island councils (managing beaches and marinas) - Awareness raising program among local island councils (managing beaches and marinas) to participate in a grants scheme for getting financial support to qualify for the blue flag label
Locations	Valid for all inhabited Islands of the Maldives which are considered for tourism development.
Project implementation period	<ul style="list-style-type: none"> - More than 2 years
Scheme	<ul style="list-style-type: none"> - Technical cooperation - Grants aid scheme - Possibility to involve JICA volunteers
Inputs	<ul style="list-style-type: none"> - The following support would be required to implement the project: - International tourism expert on quality and sustainability - Budget to establish a grants scheme to support tourism enterprises and destinations in the Maldives to meet the requirements of the Blue Flag and Green Key labels - Maldives side: office space, and transportation to be provided by the Quality Assurance and Registrations department of the Ministry of Tourism
Implementation structure	The Quality Department of the Ministry of Tourism would commission a campaign with representatives of the labels informing the accommodation sector about the Green Key Label and additionally involving the Island City Councils of inhabited island for the topic of the Blue Flag Beaches
Pre-conditions / external conditions and public relations activities	A close cooperation with the activities of the Ministry of Environment is considered as fruitful.
Remarks for implementation	The Quality Department of the Ministry of Tourism would develop and manage grants scheme.
Minimum budget	<ul style="list-style-type: none"> - Up to USD 1.000.000: medium budget, depending on the number of participants which should be participating in a grants scheme

Others	For the Green Key Label, it is recommended to exchange information with the Sun Island and Royal Island Resort, which implemented the label in March 2022
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Project title	1.4 Measuring the Sustainability of Tourism (MST)
Objectives and necessity	<p>Key objective: Establishing a standards-based framework for sustainability in tourism measurement and monitoring in national and subnational statistics will strengthen international comparability and benchmarking, improve communication and awareness for sustainability issues among tourism stakeholders, and provide a basis for better strategic tourism planning and management.</p> <p>Project background and rationale: While sustainability is nowadays widely embraced as the leading development paradigm, the exact meaning of the term, and, most notably, its applicability, are still subject to different interpretations, notably from the perspectives of businesses and the wider public. UNWTO's Measurement of Sustainability in Tourism initiative aims at developing an international statistical framework for measuring tourism's role in sustainable development, including economic, environmental and social dimensions.</p> <p>At the national level, the proposed project aims at integrating UNWTO's MST framework into the system of tourism statistics and measurement in the Maldives across different institutions. Inter alia, a specific focus may be on integration of links between tourism and the environment into the newly established Tourism Satellite Account (e.g., ecosystem services valuation for the tourism sector, positive and negative externalities of tourism on the environment, environmental goods and services and green jobs associated with the tourism sector).</p> <p>Sustainability monitoring is also required at the local level, at which there is a general lack of statistical data available in the Maldives. Such data, however, is crucial for the strategic planning of regional and local sustainable tourism structures and value chains, notably with regard to strengthening SMEs and the local guesthouse sectors. This sector has experienced substantial growth over the past decade; however, development has largely followed a laissez-faire approach which may lead to unsustainable and inappropriate outcomes in the future.</p> <p>The measures proposed at the local level should be first implemented in one or several pilot destination(s) and can be subdivided as follows: (a) strengthening of local tourism statistics as basis for an economic impact assessment and benchmarking and (b) assess local carrying capacity as basis for sustainable tourism planning and management. (a) Is proposed to follow the internationally established method of input-output modelling, which will ensure comparability and</p>

	<p>trustworthiness of results. For (b) it is important to adopt a holistic perspective, considering ecological as well as socio-economic parameters. The Limits of Acceptable Change framework may provide a conceptual basis for the project, acknowledging that every tourism activity will have some kind of (negative) impact. Defining the degree of negative (e.g., environmental) impact that is deemed acceptable, and the level and distribution of positive (e.g., economic) impact that is desirable and achievable, shall ideally be the outcome of a participatory process, including both experts as well as tourism stakeholders and local communities.</p>
<p>Contents (main activities)</p>	<p>National level:</p> <ul style="list-style-type: none"> - Gap analysis on sustainability aspects in tourism statistics - Capacity building on MST - Integration of sustainability aspects in national statistics system, e.g. TSA - Strengthening of guidelines for data collection and monitoring, e.g. for tourism businesses - Awareness raising among involved stakeholders for better cooperation with regards to tourism data and measurement <p>Local level:</p> <ul style="list-style-type: none"> - Demand-side pilot study on economic impacts of tourism (visitor survey, input-output analysis)⁷ - Awareness raising among local tourism stakeholders for the importance of tourism statistics, benchmarking and carrying capacity assessments for (sustainable) planning and management - In-depth Environmental and Social Impact Assessment (ESIA) of tourism at the local level, including planned and future infrastructure and products - Participatory assessment of Limits of Acceptable Change (socio-ecological carrying capacity), taking into account economic, socio-cultural and environmental criteria - Participatory process for the planning and development of sustainable tourism planning based on established Limits of Acceptable Change - Dissemination and awareness raising of pilot region outcomes in other destinations in the Maldives, with the aim of facilitating future upscaling of approaches <p>Overall:</p> <ul style="list-style-type: none"> - Project management - Dissemination and communication
<p>Locations</p>	<ul style="list-style-type: none"> - National level - Local pilot region (destination level; it is recommended to select a destination with a sufficient size of the local tourism

⁷ For the proposed methodology see, for instance: Arnegger J. (2014) Protected Areas, the Tourist Bubble and Regional Economic Development. Two Case Studies from Mexico and Morocco. Würzburg: Geographische Gesellschaft Würzburg. URL: <https://doi.org/10.25972/WUP-978-3-95826-001-6> (accessed 15 Oct 2022)

	sector and an established guest house market, which is expected to experience further growth in the future)
Project implementation period	- More than 2 years
Scheme	- Technical cooperation
Inputs	The following support would be required to implement the project: <ul style="list-style-type: none"> - Team Leader, international experts on tourism statistics, regional economics, sustainable tourism development, ESIA, stakeholder dialogue - National experts on tourism statistics, tourism planning, tourism law, local project manager (central level and pilot region level) - Project assistance, accounting - Maldives side: office space (national and pilot destination level), transportation, equipment
Implementation structure	Key partners: <ul style="list-style-type: none"> - For overall project implementation and institutional stakeholder coordination: MOT - For tourism statistics: MBS - For environmental aspects of statistics: MOE - For pilot region activities: Local Island Council(s)
Pre-conditions / external conditions and public relations activities	<ul style="list-style-type: none"> - Political will to strengthen sustainable (local) tourism planning based on scientific data - Continued decentralization process - Participation of relevant stakeholders in participatory planning processes at the local level
Remarks for implementation	<p>Due to the dual structure of the proposed project with measures to be implemented in parallel at the national and the local (pilot destination) level, sound coordination and regular exchange of information between these two main components is crucial.</p> <p>It is proposed to establish project infrastructure (offices, staff) both at the national level (international team leader and experts) and the pilot destination level (local project manager).</p>
Minimum budget	- More than USD 1,000,000 (about USD 1,000,000 would be the absolute minimum)
Others	

Project title	1.5 Tourism climate change adaptation and mitigation measures
Objectives and necessity	<p>Key objective: Upon the work that has been done so far by the Government and other international organizations about climate change measures, this project's objective is to make policies for the tourism sector businesses to be able to implement climate change adaptation and mitigation measures.</p> <p>Project background and rationale: The Maldives is one of the most low-lying countries in the world, and climate change, notably sea-level rise (SLR), poses an existential threat to every part of the country. At the same time, the Maldives have been a pioneer in climate change adaptation and mitigation initiatives.</p> <p>Tourism represents by far the most significant economic sector (and is largely dependent on environmental resources that are themselves threatened by climate change impact, e.g., pristine beaches, coral reefs, and other nature-based attractions. The tourism sector needs to contribute and be integrated in adaptation and mitigation initiatives.</p>
Contents (main activities)	<p>The project adopts an integrated approach, focusing on</p> <ul style="list-style-type: none"> - policy level (e.g., strengthening of the national regulatory framework based on a legal gap analysis), - tax level (e.g., recommendations for tax reductions for the import and installation of all mechanisms, equipment, services, etc. directed at the mitigation and adaptation to climate change such as renewable energies, water and energy-efficiency, beach and coral restoration, etc.); - capacity building, - awareness raising and - implementation of pilot measures. - Innovative market-based mechanisms may be specifically considered (e.g., a reef insurance scheme based on the one implemented in the Mexican Caribbean).⁸
Locations	N/A
Project implementation period	- Within 2 years
Scheme	<ul style="list-style-type: none"> - Technical cooperation - Grants aid scheme to support the implementation of pilot measures - Possibility to involve JICA volunteers

⁸ see <https://www.swissre.com/our-business/public-sector-solutions/thought-leadership/new-type-of-insurance-to-protect-coral-reefs-economies.html>

	- Possibility to collaborate with Japanese companies to make investments in the Maldives
Inputs	The following support would be required to implement the project: <ul style="list-style-type: none"> - international experts on environmental impact analysis, environmental data analyst, environmental economist, - national experts on environmental law, energy supply, institutional policy, legislative drafting, Maldives side: office space, transportation
Implementation structure	Key partners: <ul style="list-style-type: none"> - MOT, Ministry of Environment (MOE), Ministry of Finance
Pre-conditions / external conditions and public relations activities	Continued willingness to make significant investments in climate change adaptation and mitigation. Support from the Government for tax reductions on climate change adaptation and mitigation investments.
Remarks for implementation	It is proposed to build on previous initiatives such as the GEF-funded <i>Increasing Climate Change Resilience of Maldives through Adaptation in the Tourism Sector</i> project ⁹ and launch a new large-scale adaptation and mitigation project with a specific focus on the tourism sector.
Minimum budget	- More than USD 1.000.000
Others	The project should be carried out through active citizen participation

⁹ see <https://www.gcfprojects-undp.org/projects/lcf-climate-resilient-tourism-maldives>

Project title	1.6 Tourism Crisis Communication Plan
Objectives and necessity	<p>Key objective</p> <p>The development of a comprehensive crisis communications plans specifically aimed at providing guidance to deliver key information regarding tourism related incidents and events to the local and international media and travel and tourist trade, including visitors currently in the Maldives or with firm plans or intent to visit.</p> <p>Specific objectives</p> <ul style="list-style-type: none"> - The project will identify the most suitable chain of command by working closely with the Ministry of Tourism, Office of the President of the Maldives and the MMPRC to ensure that the appropriate levels are involved and featured in local and international communications. - Establish a line of communications between the rescue and recovery services involved in the resolution of the issue and the crisis communications team. - A protocol and set of principles to guide any and all communications relating to tourism related incidents in the Maldives. - Establishing a line of communication from the local islands / atolls and resorts to the crisis communications team to establish and speed up the distribution of the correct and relevant information. - Establish a clear line of communications from Male to the international travel trade and international press and news associations. <p>Project Background and rationale</p> <p>The Maldives faces a multitude of possible and potential risks that could negatively affect tourism reputation, arrivals and the economy of the Maldives. From weather and natural events, e.g., tsunamis and pandemics; to man-made disasters, e.g., a fire in a resort or inhabited island, acts of terrorism; and a risk of accidents involving local and international transport on boats, ferries, planes; or water sports activities popular with tourists, e.g., diving.</p> <p>This project would use the learnings from the Maldives response to the COVID pandemic to create, develop and build a robust and resilient plan to communicate and support the entire Maldives tourism industry during future issues.</p> <p>The response to a crisis or incident is often more important than the incident itself, in order to demonstrate immediate control of the situation and thereby restore confidence to locals and to international travelers, either those already in the Maldives or those about to travel to the Maldives. An incorrect response can lead to larger issues than</p>

	<p>the original incident, with a wider and more damaging knock-on effect across the whole tourism industry.</p> <p>Serious incidents can stretch a well-organized and well-managed senior team, let alone an inexperienced and ad hoc collection of organisations and individuals. Having an agreed and executable plan saves vital time and avoids unnecessary and potentially damaging delays in filling an information void when serious incidents do occur.</p> <p>This project is about the process and way of communicating after incidents; it does not need to be concerned with the type of incident per se, although the scope could easily be widened to include a comprehensive Risk Assessment for the Maldives Tourism Industry. Having an agreed process and a senior crisis communications team is important in order to react quickly and decisively with trusted, correct and up to date information, delivered in a trustworthy and competent way.</p> <p>As 'The World's Leading Destination' it is only befitting that the Maldives also has the World's leading crisis communications plan to help tourism recover as quickly as possible from any future event.</p>
Contents (main activities)	<ul style="list-style-type: none"> - A comprehensive Tourism Crisis Communications Plan written and ready to be implemented for any incident, based on best practice and practical experience. - Optional: Detailed Risk Analysis of potential issues, crises and threats to Maldivian Tourism Industry. - Formation of the Crisis Communications Team (CCT). - Media training for key tourism officials from the public and private sector on crisis communication. - Capacity building exercises including dummy crisis drill/s undertaken by the CCT to test weak points and ensure that the team understand their roles.
Locations	Male, but possibly with regional crisis centres in all atolls and even inhabited islands with a large number of tourists, e.g. Maafushi.
Project implementation period	-Up to 2 years
Scheme	Technical cooperation
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - Individual international expert (several short-term missions) for crisis communication - Maldives side: Access to key Government and political communications teams, rescue services and even armed forces if necessary.
Implementation structure	Ministry of Tourism. Maldives Marketing and PR Corporation. (MMPRC)
Pre-conditions / external	Must work alongside current international communications networks and PR systems employed by Ministry of Tourism and the MMPRC.

conditions and public relations activities	
Remarks for implementation	Work in conjunction with an established Risk Assessment of the Maldives tourism industry.
Minimum budget	Up to USD 200.000
Others	Additional budget and capacity would need to be made available by the Government if regional crisis centres are to be established.

Project title	1.7 Improving and developing the marketing of the local islands
Objectives and necessity	<p>Key objective To ensure that marketing efforts are successful in attracting more visitors to the Maldives through communicating appealing messages for both the resorts and the local islands.</p> <p>Specific objectives</p> <ul style="list-style-type: none"> - Collate, review and audit all marketing activity undertaken by the MMPRC over the last 2-3 years. - Review marketing messages and identify those most appealing to current and future audiences. - Analyse current and future likely audiences for all sectors of the Maldivian holiday experience and recommend how to segment the messages accordingly so that the right message appears to the most likely audiences. - Review the costs, benefits, opportunities and weaknesses of developing a sub-brand specifically for local island tourism. - Establish benchmark practices in social media. - Develop and create islands.mv with a clear vision, direction and structure to be the 'go-to' information website for the local islands, including accommodation, shops, tour operators, events, activities and how to travel within the Maldives. - Prepare a marketing plan of recommended promotional activities, messaging, media and budget split according to the priorities and tasks of broadening the marketing message. <p>The above will lead to:</p> <ul style="list-style-type: none"> - An increase in the number of total visitors to the Maldives. - A proportionally larger increase in people staying on local islands. - An increase in travel around the Maldives and multiple islands stays. - A broadening out of the tourism sweet spot from the Male area to more widespread atolls and islands. - An increase in specialty holidays taken, through people taking advantage of the local island offerings e.g. diving, surfing, cuisine, sailing etc. - An increase in demand to open guesthouses, hotels and homestays in atolls away from the central Male region. - Economic growth and increased employment in the local island economies, with many opportunities for all aspects of the tourism trade across every Atoll and island. - An increase in local inter island demand for transport and travel. - An increase in demand for authentic Maldivian culture.
Contents (main activities)	<ul style="list-style-type: none"> - A comprehensive brand and marketing review and audit. - A marketing plan that allows for a broader scope of messaging with the ability to attract new audiences to the Maldives as well as continue the important task of attracting people to and filling the main holiday offering – the resorts.

	<ul style="list-style-type: none"> - A centrally produced islands.mv website that has a fully functioning team of people to keep the site up to date on a regular, daily basis. <p>Project Background and Rationale</p> <p>The Maldives holiday offering has expanded to include local island accommodation, experiences and activities. But the marketing of the Maldives, and perception of visitors is still focused on the luxury ‘one island one resort’ styled holidays.</p> <p>The Maldives is currently marketed as a single destination, when it is in fact a diverse series of wide-ranging archipelagos and hundreds of different islands. When tourism started in the Maldives just 50 years ago, there was only one choice of holiday accommodation: the one island, one resort concept. But today, an increasing number of travelers stay in guesthouses, hotels and homestays on inhabited islands. This is a big shift for international visitors who experience true Maldivian culture, food, activities and the local population on their terms and not those of an international resort.</p> <p>The marketing of the Maldives now needs to reflect this change by expanding and broadening the messages to support holidays and accommodation on local islands, whilst retaining the lure and appeal of the unique one island one resort concept.</p> <p>By starting with a thorough analysis of the current marketing plans and messages, recommendations will be put forward as to how to broaden the message possibly including several different strategies e.g.:</p> <ul style="list-style-type: none"> - Market segmentation. Cultural, demographic and even geo splitting of messages to target specific sectors with different messages to attract those more likely to enjoy and appreciate the local island style holiday vs the resort style holiday. - Creating a sub-brand to promote local island tourism as a distinct style of holiday operating under the Maldives umbrella Masterbrand message (The Sunny Side of Life). - Use the islands.mv project which is currently under development, to be the go-to source of local island information, intra-island travel, attractions, events, activities, shops, restaurants and of course guesthouse and hotel bookings. - Capacity building of the marketing teams at MMPRC and Ministry of Tourism to ensure that the strategies can be implemented through proper teams of e.g. social media specialists and of course reaching out to trade to showcase FAM trips for both local island holidays and resorts.
Locations	N/A

Project implementation period	Up to 1 year
Scheme	- Technical cooperation - Possibility to involve JICA volunteers, in particular for marketing activities targeting the Japanese market
Inputs	The following support would be required to implement the project: A team of Individual experts with specific skills in marketing, tourism, digital communications and websites. Maldives side: Access to MOT and MMPRC, transportation.
Implementation structure	Ministry of Tourism & MMPRC.
Pre-conditions / external conditions and public relations activities	Need to ensure that the current workload of the MMPRC is undisturbed during the process.
Remarks for implementation	Need to determine who is responsible for islands.mv; the Ministry of Tourism or the MMPRC.
Minimum budget	Up to USD 1.000.000
Others	

1.8 Project title	Tourism regulatory environment and SME development
Objectives and necessity	<p>Key objective</p> <p>The key objective of the project is to improve business and SME environment in the tourism sector and thus make investment, including by SMEs, more attractive in the Maldives. In this context it is vital to contribute to legalization of business activities and reduction of activities in the tourism sector that are not fully covered by the regulatory framework.</p> <p>The specific objective of the project is to review the relevant tourism related regulation and draft targeted, actionable recommendations aimed at simplifying and streamlining rules applying to the private sector.</p> <p>Project Background</p> <p>SME development and small business in tourism, including guest houses etc., on inhabited islands are actively encouraged in the Maldives. Streamlining of the regulatory framework will help facilitate the development of tourism on inhabited islands, among others through SME development, and would include review and reform of areas such as business licensing, issuance of construction permits (e.g., for hotels and guesthouses), certification rules for hotels and tour operators, and taxation of businesses in the tourism sector.</p>
Contents (main activities)	<ul style="list-style-type: none"> - Assessment of the existing business and SME regulation in the tourism sector - Drafting of recommendations aimed at the improvement of business and SME environment through regulatory streamlining, optimization of rules of conducting business and ensuring that tourism enterprises do operate in line with the existing regulatory framework. - Intensive stakeholder consultations, including with government, but also important with the private sector, including SMEs; - Support in the implementation of the provided recommendations (could be an extension of the project)
Locations	N/A
Project implementation period	Up to 1 year Alternatively, 2 to 3 years in case the objective of the project includes implementation of the provided recommendations.
Scheme	- technical cooperation
Inputs	The following support would be required to implement the project:

	<ul style="list-style-type: none"> - two international experts, namely a) business environment, private sector and SME expert, and b) regulatory framework expert; - one local expert with knowledge of business environment and SME matters. <p>Maldives side: counterparts, office space if needed, etc.</p>
Implementation structure	<p>The office of the President or the Prime Minister is advised to be the key counterpart and the leading stakeholder given that several ministries and agencies are likely to be concerned and involved in the project.</p> <p>For this reason, it will be more efficient to coordinate their work and activities from the President's or PM's office in order to ensure that there is sufficient political buy-in and commitment to initiate and implement recommended reforms.</p>
Pre-conditions / external conditions and public relations activities	<p>For this project to work successfully, it is of paramount importance to have a political will at the government level to initiate reforms, introduce legal amendments where necessary and embark on their implementation.</p> <p>Given that the focus of the project may span different ministries or agencies, a proper coordination and cooperation among them is an important precondition for efficient functioning of the project.</p>
Remarks for implementation	<p>For the successful implementation of the project, the Ministry of Tourism would have to facilitate active collaboration with other Ministries that are dealing with the regulatory framework for SMEs.</p>
Minimum budget	<ul style="list-style-type: none"> • Up to USD 200.000 in case the objective of the project is to draft recommendations for the improvement of the business and SME environment • Up to USD 1.000.000 in case the project will be extended to provide support to the implementation of the recommendations
Others	-

2. Operational level project proposals

Chapter 2 presents project proposals for the operational level.

Project title	2.1 Development of agrobiodiversity and eco-gastronomy tourism product
Objectives and necessity	<p>Key objective The project objective is to elaborate a nation-wide culinary tourism strategy including a 5-year action plan as well as specific Slow Food Travel destinations around selected atolls.</p> <p>Project background and rationale The agricultural system, its agrobiodiversity and the traditional fishing techniques in the Maldives are unique in the world and thus represent an interesting niche tourism product.</p> <p>Slow Food Travel is a tourism product that combines responsible tourism and sustainable agriculture culminating in agrobiodiversity and eco-gastronomy tourism activities. A specific Slow Food Travel destination is developed on a certain atoll for visitors interested in culinary tourism and distinctive Maldivian culinary experiences. This project is also linked to the local blue economy.</p>
Contents (main activities)	<p>The project activities aim to link small scale farmers, food markets, restaurants, accommodation structures and the fishery sector with national and international tour operators and travel agents. In such a way the Maldives can position itself as a culinary tourism destination with various activities and experiences related to the local gastronomy.</p> <p>Given that the local cuisine is very much based on fish, this project is linked to the local blue economy.</p> <p>Project activities:</p> <ul style="list-style-type: none"> - creation of specific eco-gastronomy tourism itineraries; - establishment of the Maldives Culinary Center; - specific trainings with chefs and gastronomy tour guides; - elaboration of a proper culinary tourism marketing concept; - supply-chain analysis of certain agricultural products and fish; - creation of agrobiodiversity and eco-gastronomy tourist experiences; - capacity-building about ecological agriculture and tourism opportunities to farmers and fishermen; - Slow Fish marketing campaign; - Production of Slow Food Travel videographic and photo material for marketing activities; - Production of Slow Food Travel destination brochures and marketing content.

	<p>The supply-chain analysis is important for linking the local small-scale farming and fishing businesses with the tourist resorts and the guesthouse sector. The aim is to increase the amount of locally produced food served at resorts: this improves the livelihood of farmers and contributes to local environmental sustainability.</p> <p>Moreover, with the Slow Food label the tourists gain awareness about the origin of the food they eat which creates further value added.</p> <p>In addition, the Slow Fish campaign raises awareness about the value chain behind fish, because fish is not just simply food but reflects a system of relationships between microorganisms, human activities – fishing, selling, trading, cooking – and environmental factors.</p>
Locations	Pilot locations for the implementation could be the atolls / islands of Addu, Hanimadoo, and other islands with considerable agricultural production
Project implementation period	- Within 1 year
Scheme	Technical cooperation
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - international experts on Gastronomy Tourism, gastronomy marketing, and Slow Food Travel destination management, and on agricultural and tourism value-chains; videographer and photographer; - national experts on agrobiodiversity, chef with knowledge about national cuisine, dishes and ingredients. <p>Maldives side: office space, transportation</p>
Implementation structure	<p>Maldivian side:</p> <ul style="list-style-type: none"> - MOT, MMPRC, agricultural and fishing associations, regional island councils, Ministry of Fisheries, marine resources and agriculture
Pre-conditions / external conditions and public relations activities	For the implementation of this project, information and experiences can be exchanged with Food and Agriculture Organization (FAO) as they are also implementing projects about the development of agricultural structures in the Maldives.
Remarks for implementation	<p>The project can build on existing local initiatives. For example, the farmer cooperative in Hulhumeedhoo island on the most southern atoll in the Maldives is producing food for the local population and the tourism businesses. The cooperative is already linking the agricultural production with tours for visitors.</p> <p>With the support of the Slow Food Travel project, the farmer cooperation can be supported with setting up a proper network of tourism stakeholders (supply-chain), trainings for distinctive Slow Food Travel workshops such as degustation and tours (tourism products and activities), capacity building about organic farming</p>

	(increased knowledge of sustainable farming), organization of a vegetable and fruit market in Addu City (powered with renewable energy from photo-voltaic panels which are installed with a project financed by the World Bank), machinery and equipment, e.g., for making fruit juices (storage, preservative methods, cooling, bottling, labelling, etc.), among others.
Minimum budget	- Up to USD 200.000: small budget
Others	Slow Food is an international association with headquarters in Italy and is specialized on the development of Slow Food Travel ¹⁰ destinations.

¹⁰ Source: <https://www.fondazione Slow Food.com/en/what-we-do/slow-food-travel/>

Project title	2.2 Development of eco- and cultural tourism products
Objectives and necessity	<p>Key objective</p> <p>The key objective is to create sustainable economic opportunities for local SMEs in the eco- and cultural tourism sector. Moreover, eco-tourism activities are linked to topics such as climate change, environmental protection and the blue economy; cultural tourism activities are linked to social sustainability and the preservation of tangible and intangible cultural heritage.</p> <p>Project background and rationale</p> <p>Distinctive activities with regards to eco-tourism and cultural tourism have hardly been developed so far in the Maldives. The core business is focused on resort tourism and these tourists hardly ever leave the resort island.</p>
Contents (main activities)	<p>Development of the eco-tourism product:</p> <p>The many islands offer vast opportunities to explore mangrove woods, bird-watching activities, local fauna, natural island habitats, fishing, diving, snorkelling, etc. The project activities include:</p> <ul style="list-style-type: none"> - a gap analysis of protected areas, parks and reserves with regards to regulatory framework, management structure and finance; - training needs assessment of staff of existing protected areas in tourist destinations; - establishment of strategic partnerships with international organisations and NGOs¹¹ about eco-tourism; - Capacity building for tour operators and tour guides about eco tourism and relevant locations; - Elaboration of business and site management plans for protected areas in tourist destinations. <p>Cultural tourism - defined by the UNWTO as tourism centred on cultural attractions and products - is one of the fastest-growing segments of the tourism industry, accounting for an estimated 40% of all tourism worldwide.¹² It intersects with heritage, religious sites, crafts, performing arts, gastronomy, festivals and special events, among others.</p> <p>In the Maldives there are various elements of the culture and creative industries¹³ that can be supported for being further commodified by cultural tourism. The cultural tourism product in the Maldives can especially be dedicated to experiences around the intangible cultural heritage of the islands. The project activities include:</p>

¹¹ More information: <https://www.bigvolcano.com.au/ercentre/assoc.htm>

¹² Source: <https://en.unesco.org/news/cutting-edge-bringing-cultural-tourism-back-game>, retrieved in March 2022.

¹³ More information about the cultural and creative industry is added in annex 6.3.1 of the component 2 report about the tourism recovery plan.

	<ul style="list-style-type: none"> - the conduct of a nation-wide culture and creative economy census focused on tangible and intangible assets such as musicians, dancers, authors, artisans and artists, mosques, cemeteries, among others. - This data collection activity is followed by the establishment of an artist-client matchmaking system so that supply (cultural actors) and demand side (tourism industry actors) can find each-other more easily. - Furthermore, the institutional relations of the Ministry of Tourism as well as the Ministry of Arts and Culture with UNESCO shall be fostered; - Museums exhibition management at the National Art Museum; - Capacity building for tour operators and tour guides about cultural tourism and relevant locations;
Locations	On potential islands for eco-tourism parks, on islands with relevant cultural heritage, such as performances by artists, mosques and museums
Project implementation period	<ul style="list-style-type: none"> - Within 1 year
Scheme	<ul style="list-style-type: none"> - Technical cooperation - Possibility to involve JICA volunteers
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - international experts on cultural heritage, cultural tourism development, tourism product development strategy, eco-tourism development, environmental conservation, museum exhibition management; - national experts on environmental conservation, cultural heritage <p>Maldives side: office space, transportation</p>
Implementation structure	<p>Maldivian side:</p> <ul style="list-style-type: none"> - MOT, Ministry of Arts, heritage and culture, regional island councils, Ministry of environment
Pre-conditions / external conditions and public relations activities	Careful planning is required regarding the development of tourism in protected areas, including the decision if new resorts will be allowed. It must be clear to the tourism industry and the regional island authorities that protected areas must be seen as an opportunity for tourism product diversification which is for the benefit for all.
Remarks for implementation	Local context: the UNESCO Biosphere Reserve in Addu City is an extraordinary example of a Nature Park, providing a good example of a well-managed eco-tourism site in the Maldives. The Park opened in 2018 and has welcomed 32.000 visitors so far, mainly Maldivian school groups. The Park is an important competitive advantage for the whole atoll and can function as the key driver for tourism to the atoll. However, more eco-tourism activities can be developed, and the Park is in need of establishing strategic international partnerships with NGOs, associations and tour operators which focus on eco-tourism.

Minimum budget	- Up to USD 1.000.000: medium budget
Others	

Project title	2.3 Conservation of biodiversity and awareness raising campaign for the protection of the environment
Objectives and necessity	<p>Key objective</p> <p>The awareness raising campaigns for the protection of the environment have two main objectives:</p> <ul style="list-style-type: none"> - Capacity building and training of trainers to diving and snorkelling centers as well as boating operators who further conduct awareness raising for the location population, especially the youth; - Awareness raising through the production and distribution of books with stories and fairy tales to local children and an international audience. <p>Project background and rationale</p> <p>Tourism in the Maldives is largely dependent on intact environmental resources, and future diversification of the tourism product may further increase nature’s importance for specific tourism products (e.g., ecotourism or diving tourism). However, the linkages between the tourism sector and the environment are not fully understood by all stakeholders, including the local population, and conservation measures are partly implemented in a fragmented manner (e.g., by individual resorts on a limited local scale). Opportunities exist for a better cooperation and coordination of biodiversity conservation initiatives and the tourism sector, which are expected to lead to win-win situations (e.g., conserving natural attractions, coordinate tourism offers and USP across different atolls and islands, and provide better funding and capacities for protected areas).</p> <p>The Maldives’ unique environment must be better protected not only by the tourism industry but also by its local population. This project is linked to the awareness raising about the impact of climate change, environmental protection and the blue economy.</p>
Contents (main activities)	<p>The proposed project activities about tourism and biodiversity conservation focus on:</p> <ul style="list-style-type: none"> - provide capacity building for stakeholders (notably for diving and snorkelling centers as well as boating operators; the capacity building can be provided in collaboration with protected area management bodies), and - Edit and publish books with stories about the unique natural and ecological heritage of the Maldives and distribute to schools, related educational institutions, book and souvenir stores. <p>Two specific awareness raising campaigns are proposed for this project as follows:</p> <ol style="list-style-type: none"> 1. In order to raise awareness about the protection of the coastal zones, beaches, oceans and the underwater world the local

	<p>diving centers, and snorkelling and boating operators are important partners. Specific trainings and capacity building actions about environmental protection are envisaged for these stakeholders. This addresses illegal activities that have a negative impact on the biodiversity, such as feeding the wildlife e.g. sharks, whale sharks, and mantas, and eating turtles and their eggs (as it is a common habit on various local islands). Those partners that have received trainings shall then implement awareness raising activities in particular with local school kids, students, teachers and other multipliers such as local island councils. These activities will happen on the spot with snorkelling classes, boat tours and excursions to marine protected areas.</p> <p>2. The Maldivian literature is rich in fairy tales, legends, myths and stories that speak about the environment such as the ocean, underwater world, its species, and beaches. This project activity aims at editing various volumes with tales and stories about the environment of the Maldives. A series of books, in particular directed at the audience of the local youth shall be published in the local language Dhivehi. These books will further be translated into English and other languages and sold as tourist souvenirs to create an economic impact for local authors and editors.</p>
Locations	Around the whole country
Project implementation period	- Within 3 years
Scheme	- Technical cooperation - Possibility to involve JICA volunteers
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - international experts on environmental conservation, campaign planning manager, content editor, - national experts on environmental conservation; environmental capacity building; national literature about stories and fairy tales; book editors and designers; <p>Maldives side: office space, transportation, management of volunteers</p>
Implementation structure	<p>Maldivian side:</p> <ul style="list-style-type: none"> - MOT, regional island councils, Ministry of environment - Associations of diving centers and boating tourism - Active citizen participation would be required for the implementation of the project
Pre-conditions / external conditions and	The diving, snorkelling and boating businesses in the Maldives must be considered as the most important partners for the awareness raising campaigns. Their support is prerequisite for its implementation.

public relations activities	
Remarks for implementation	The implementation of activities about general environmental capacity building and the awareness raising campaign with the books can start at the same time.
Minimum budget	- Up to USD 1.000.000: medium budget
Others	The sale of books to international tourists could be linked to fund raising for ongoing awareness raising projects.

Project title	2.4. Local Island Master Plan
Objectives and necessity	<p>Project Rationale</p> <p>This project will develop a holistic Master Plan on a selected inhabited island to develop a centre of high-quality tourism with a view to maximizing the travelers holiday experience whilst immersing in the local Maldivian culture, to the benefit of the locals and tourists alike.</p> <p>Project Background</p> <p>The world class image of tourism in the Maldives is based on the experience offered by resorts on uninhabited islands. The planning and development of tourism on inhabited islands comes with challenges of limited infrastructure and sustainability measures, which may affect the tourism experience.</p> <p>The difference in quality is reflected in the cost difference: Rooms in guesthouses and hotels on local islands average \$65 per night while resorts average \$436 per night. Issues on inhabited islands include low quality of guesthouses, hotels and tourist activities; lack of sustainable energy production; large land reclamation projects; protection and maintenance of local beaches, fish stock, quality of surrounding water and reefs; provision of fresh, clean water; treatment of and management of sewerage, refuse collection, recycling and disposal.</p> <p>In addition, there is a lack of local employees in the tourism, hospitality, catering and activity sectors. This Master Plan would enable the islands' hotels to be priced significantly above current guesthouse and hotel rates but still below resorts, by creating truly boutique hotels and bespoke and shared tourism facilities.</p> <p>It will review the requirements of tourism, existing side by side with the local population for a sustainable and prosperous future.</p> <p>Key objective</p> <ul style="list-style-type: none"> - To create a centre of high-quality tourism that will bridge the gap between current resorts and local islands holiday experience and cost. <p>Specific objectives</p> <ul style="list-style-type: none"> - Establish a Technical Master Plan for development of one specific local island. - Implement infrastructure and logistical changes to oversee the development of that island to deliver a seamless and high-quality holiday experience, combined with the culture and appeal of a traditional Maldives inhabited island. - Ensure this Master Plan delivers improved quality and way of life for the local islanders and tourists alike.

	<ul style="list-style-type: none"> - Ensure quality of tourism accommodation and set a guideline for appropriate development, style, aesthetics and facilities including setting a cap on the number of rooms on the island. - Establish a training centre for local islanders across the island / atoll to learn more about and get experience in the tourism sector including catering, serving and front of house and learning foreign languages. - Identify specific tourism activities and activity centres with suitable and appropriate training for locals. - Deliver sustainable solutions to energy production, supply, waste management and recycling. - Consider a quality aesthetic to island development in keeping with local Maldivian culture and art. - Assess and recommend transport infrastructure to and from Male and other islands within the local atoll for travelers and locals alike. - Set guidelines on how to develop tourism in an ecologically friendly, sustainable and efficient way, involving the local islanders, and preserving the culture and world-leading image of the Maldives for all on and off-island activities including quality of beaches, water, reefs and wildlife around the island.
Contents (main activities)	<ul style="list-style-type: none"> - An inhabited island Master Plan to show how the local islands can be developed for maximum benefit for locals and tourists alike. - A working pilot project using a selected island. - Implementation of the Master Plan in line with the specific recommendations above and the main investments proposed in the Master Plan
Locations	Male but with access to be able to determine the most appropriate island for selection of the project.
Project implementation period	<ul style="list-style-type: none"> - Phase 1 Master Plan: Up to 1 year. - Phase 2 Implementation: More than 2 years.
Scheme	<ul style="list-style-type: none"> - Technical cooperation - Grants aid scheme - Possibility to involve JICA volunteers - Possibility to collaborate with Japanese companies to make investments for the implementation of the Master Plan
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - A team of Individual and organisational experts with specific skills in sustainability, energy production, design and planning, tourism, civil engineering, water treatment, marine and biosphere protection and development, staff training and community-based projects. - Maldives side: Working with the island council, National planning team, energy, sustainability, water, tourism etc. etc.
Implementation structure	The Ministry of Tourism should take the lead in this initiative in close collaboration with the Ministry of National Planning.

Pre-conditions / external conditions and public relations activities	- The Master Plan would need to be working for the local islanders and local island council as well as deliver the needs of international travellers. NB There is an opportunity to target this project at a specific travel segment e.g. nationality, culture, or activity.
Remarks for implementation	Would need to work with the island council, Ministry of Tourism and various Government ministries covering sustainability, ecology, training, inter-island connectivity, and Planning.
Minimum budget	- Phase 1 Master Pan: Up to USD 1.000.000: medium budget - Phase 2 Implementation: More than USD 1.000.000 big budget.
Others	

Project title	2.5 Tourism Hotel Training & Boarding School (Feasibility Study)
Objectives and necessity	<p>Currently, the Maldives face the challenge of finding enough local workforce for the tourism industry. Furthermore, there is a dependence for education taking place in Male. Thus, an educational center in another part of the country will be helpful to achieve the goals for more educated and qualified personnel for the tourism industry.</p> <p>It is the objective to increase decentralization and create an International Tourism Hotel Training & Boarding School. This may further foster educational networking on an academic and vocational level through collaborating with both local and international teaching staff.</p>
Contents (main activities)	<p>A Feasibility Study should be carried out that addresses the following points:</p> <ul style="list-style-type: none"> - Market Analysis including the actual demographics of the envisaged area, the development of the tourism industry and implications for further employment. Research design including in depth interviews and an acceptance – competition analysis - Design of the Academic and Educational Program including Standard Module Courses, academic programs including diploma, master and bachelor opportunities. Trainings Hotel. - Marketing Concept - Operating Costs - Investment Costs including Construction Costs - Break Even Analysis - Business Partner Structure - Project Evaluation - Campus Concept Development - Preliminary Design – Architectural Drawings - Five Year Business Plan including investment evaluation indicators, critical success factors and legal assumptions.
Locations	The school should be built in a lesser developed part of the Maldives, e.g., in the North as it is understood there is an initiative with Swiss support taking place in the South.
Project implementation period	<ul style="list-style-type: none"> - Phase 1 Feasibility Study: Up to 1 year. - Phase 2 Implementation: More than 2 years.
Scheme	<ul style="list-style-type: none"> - Technical cooperation - Grants aid scheme (for the implementation phase)
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - The feasibility study would be carried out with an international and interdisciplinary team including an architect, Marketing expert, HR and training Expert, financial expert, tourism curricula expert.

	<ul style="list-style-type: none"> - The project would be ideally implemented with an international educational institution which can proof successful projects. - Maldives site: a proposed site should be identified where the proposed school can be established
Implementation structure	Ministry of Tourism – International Educational Institution, Ministry of Education, Ministry of Youth and Employment.
Pre-conditions / external conditions and public relations activities	The involvement of the local population, especially young people is considered as essential and would be asked for the in-depth interviews during the feasibility study.
Remarks for implementation	Depending on the outcome of the feasibility study transport of building equipment and furnishing will be needed.
Minimum budget	<ul style="list-style-type: none"> - Up to USD 200.000: small budget for the feasibility study - More than USD 1.000.000: big budget for the development of the institution
Others	

Project title	2.6 Tourism Competence Boat (Feasibility Study)
Objectives and necessity	<p>Key objective To provide locally specific training and consultancy support, carry out ecological research, organize events and tourism awareness campaigns.</p> <p>Project background and rationale In the Maldives there are tourism related ecological challenges, lack of information and advisory services on tourism development for the Island City councils as well as a lack of participation of the Maldivian Nationals in the tourism workforce. Furthermore, there is a dependence for activities taking place predominantly in Male. Thus, a tourism competence boat would be able to cruise the islands with a regular schedule and stimulate cultural, educational and scientific exchange having a community of national and international experts on board.</p> <p>Such a Tourism Competence Promotion Boat could circle the Maldives Islands with a predetermined schedule to increase tourism awareness activities throughout the Maldives and stimulate Research & Development and the dissemination of results.</p>
Contents (main activities)	<p>A Feasibility Study should be carried out that addresses the following points:</p> <ul style="list-style-type: none"> - Compilation of a Program comprising Academic activities, Scientific Research, Educational Events. - Study of required staff, including international and national experts - Dissemination Concept - Operating Costs - Investment Costs including Vessel building or rehabilitation Costs - International Partner Structure <ul style="list-style-type: none"> o Five Year Research Plan including investment evaluation indicators, critical success factors and legal assumptions.
Locations	<ul style="list-style-type: none"> - The whole Territory of the Maldives
Project implementation period	<p>Phase 1 Feasibility study: Up to 1 year.</p> <ul style="list-style-type: none"> - Phase 2 Implementation: More than 2 years.
Scheme	<ul style="list-style-type: none"> - Technical cooperation - Grants aid scheme (for the implementation phase)
Inputs	<p>The following support would be required to implement the project:</p> <ul style="list-style-type: none"> - The feasibility study would be implemented with international experts from the nautical sector, tourism, social sciences and natural sciences (Short term). For the implementation both national and international experts in these fields would be required on a long-term basis. - Maldives side: The vessel could be thought of to be donated by a sponsor or to be obtained via e.g., the Ministry of Defense,

	e.g., dismissed, unused vessels. Counterparts should be Ministry of Education, Ministry of Environment, Ministry of Tourism, Ministry of Youth, Sports & Community Empowerment
Implementation structure	The Ministry of Education should take the lead in this initiative in close collaboration with the Ministry of Tourism
Pre-conditions / external conditions and public relations activities	<ul style="list-style-type: none"> - Ministry of Youth, Sports & Community Empowerment should play an active role in events planning; - Ministry of Environment should play an active role in research activities
Remarks for implementation	The project can be either implemented through refurbishing of a used vessel or building of a new vessel
Minimum budget	<ul style="list-style-type: none"> - Up to USD 200.000 for the feasibility study - More than USD 1.000.000 for the implementation
Others	

Project title	2.7 Handicraft and souvenir design upgrade
Objectives and necessity	<p>Key objective</p> <p>This project aims at improving socio-economic stability among handicrafts producers and artisans increasing the resilience of local island communities and individuals and integrating young women and men productively into the economy.</p> <p>Another objective is to disseminate this project and its results with the organization of a workshop and symposium about socially and environmentally engaged art (ISEAS)¹⁴ in the Maldives versus the end of implementation.</p> <p>Project background and rationale</p> <p>The Maldivian handicraft and artisan sector lacks in attractive souvenirs that are locally produced. Most of the products are of low quality, mainly imported and of unattractive design. The distinctive recognizing pattern as well as the typical Maldivian touch is missing in most of the products.</p> <p>As a result, the project is expected to contribute to revitalize the local economy and to provide youths in targeted communities with higher skills, hence improving their livelihoods.</p>
Contents (main activities)	<p>The activities focus on:</p> <ul style="list-style-type: none"> - identifying skilled artisans, their workshops and availability of local materials, e.g., coconut, palm leaves, wood types, and in particular ocean resources such as coral stone and other marine products (shells, bones, etc.) that could be used for souvenirs – respecting national legal aspects and international regulations. This is strongly linked to the use of sustainable ocean resources and the local blue economy; - analysis of the demand market, sales channels and sales partners along the tourism value chain; - proposals for new designs, products, materials and ideas for demanded souvenirs; - dissemination and promotion: organization of a workshop and symposium about socially and environmentally engaged art (ISEAS)¹⁵ in the Maldives in 2023. This event connects local and international artisans and artists with scientists in the natural and environmental disciplines linking it to the topics of climate change, environmental protection and the blue economy.
Locations	Around the whole country with pilot destinations to be selected

¹⁴ More information: <https://www.researchcatalogue.net/view/696352/696353>

¹⁵ More information: <https://www.researchcatalogue.net/view/696352/696353>

Project implementation period	- Within 1 year
Scheme	- Technical cooperation - Possibility to involve JICA volunteers
Inputs	The following support would be required to implement the project: <ul style="list-style-type: none"> - international experts on cultural and creative economy, product and graphic design, - national experts on cultural and creative economy, product and graphic design, Maldives side: handicraft workshop space, transportation facility
Implementation structure	Maldivian side: <ul style="list-style-type: none"> - MOT, regional island councils, Ministry of culture, arts and heritage - Business Center Corporation (BCC)
Pre-conditions / external conditions and public relations activities	The BCC is currently collaborating with more than 120 artisans and distribute their products via the “Authentic Maldives” souvenir shops The BCC is considered a strategic partner for this project.
Remarks for implementation	There are several initiatives at local level that the project could support. For example, the local island women association of Addu City counts around 50 skilled members who would like to be more active in producing souvenirs as they already did before the pandemic. With the delivery of training seminars on topics as production methods, design, and materials the women association will generate family friendly job opportunities. The set-up of a specific website with B2C and B2B sales features and a business match-making platform further supports the sales opportunities. This project is implemented with the partnership of the Business Center Corporation and the Authentic Maldives initiative.
Minimum budget	- Up to USD 200.000: small budget
Others	The sale of souvenirs to international tourists could be linked to fund raising for ongoing awareness raising projects.

Project title	2.8 Tourism local economy business linkages programme
Objectives and necessity	<p>Key objective</p> <p>This project is aimed at establishing business linkages between the tourist resorts and indirect tourism industry suppliers such as local farmers, fishermen and handicraft producers.</p> <p>Project background and rationale</p> <p>Tourist resorts are the backbone of the tourism industry and the economy of the Maldives but they are poorly connected to the local island SMEs and family businesses. In order to create a more sustainable resort tourism system all these actors need to be linked to each other.</p>
Contents (main activities)	<p>Project activities include the following:</p> <ul style="list-style-type: none"> - demand analysis (what is the actual demand of tourist resorts for products that can be sourced locally: such as agricultural products, fish, handicraft souvenirs, musicians, performers, among others etc.) - in-depth supply chain analysis of tourist resorts, farmers, fishermen, artisans, etc. - planning, programming, design, development, testing and dispatch of a digital business match-making platform to strengthen the economic ties among these sectors.
Locations	Around the whole country with pilot destinations to be selected
Project implementation period	- Within 1 year
Scheme	- Technical cooperation - Possibility to involve JICA volunteers
Inputs	The following support would be required to implement the project: - international experts on tourism value-chain analysis, web programmer and designer for a digital business platform Maldives side: hosting services for a digital platform
Implementation structure	Maldivian side: - MOT, regional island councils, Ministry of Culture, Arts and Heritage, Ministry of Agriculture and Fisheries - Business Center Corporation (BCC) - Ministry of Economy
Pre-conditions / external conditions and public relations activities	Active collaboration from BCC in the project is required.
Remarks for implementation	The digital platform shall be tested with a considerable number of users before the end of the project implementation.

Minimum budget	- Up to USD 200.000: small budget
Others	The BCC is interested in supporting SMEs and is considered as potential local partner and beneficiary. Eventually they can be considered as owner and manager of the platform.

Conclusions

The present report contains the recommendations for the implementation of 16 projects. Eight projects are designed for implementation on a policy and strategy level, another eight are to be carried out on an operational level.

The global tourism industry is very competitive, constantly changing, and has the power to significantly contribute to economic and social development, directly and indirectly throughout the population of a country. However, the industry is also contributing to global climate change due to its high consumption of energy for transport and electricity for running related businesses.

The tourism industry of the Maldives has been very successful despite the global downturn of the pandemic starting in spring 2020. At the same time, the tourism industry of the Maldives is significantly dependent on its best-selling product: resort tourism. The tourism recovery plan (presented with the report of component 2) is directed at making the Maldives more competitive through strengthening its resilience and sustainability. It is recommended that this shall be carried out as follows: on the one hand, the tourism value-chain of the resort industry shall be extended to the local businesses and people, and better linked with national resources. On the other hand, the development of local island tourism is of high significance for distributing the economic and social benefits of tourism to a larger population of the Maldives.

In order to do so, certain policies and laws need to be adapted and updated, specific initiatives and a conceptual change in designing the tourism industry towards sustainable structures and processes are necessary. At the same time, operational activities such as capacity building, awareness raising, as well as support in linking businesses along the tourism value-chain shall be implemented during the next years.

In the Maldives, the environmental impact of tourism is significant. Global climate change effects are threatening the country's most important tourism assets such as beaches, corals and underwater wildlife. Man-made waste such as residual waste and wastewater are further challenges to keep the environment of the Maldives healthy. The recommendations of the proposed projects under both the policy and strategy level and operational level all tackle these urgent matters.

This report has presented proposals for 16 projects that address the topics described above. Eight projects are designed for implementation on a policy and strategy level, another eight focus on an operational level.

Based on the main areas of work of JICA and UNWTO, as well as the expertise and experience developed by both agencies on supporting countries to enhance the sustainability, competitiveness and resilience of the tourism sector, several projects proposed in this report arguably offer good opportunities to extend the JICA-UNWTO collaboration in the Maldives.

Some recommended proposals could be considered for joint action in the short-term, while some others in the longer term. Furthermore, there are also good opportunities to merge components from several proposals into one larger comprehensive program to help enhance the local economic impact from tourism in the Maldives.

Short-term Joint Actions

At policy and strategy level, proposals that seem to have high relevance for joint action in the short term include:

- **The development of a DMO model and destination development plans (project 1.1)**, which could be tested in a priority destination of JICA in the Maldives, e.g. Addu atoll, with a view to establishing a destination management structure that can deliver tangible benefits for the planning and development of sustainable forms of tourism in the destination.
- **Tourism and climate change adaptation and mitigation (project 1.5)** sets well within the high priority that both JICA and UNWTO attach to climate change action as well as the high importance for the Maldives to address this issue. By making for and supporting the tourism sector to implement climate change adaptation and mitigation measures, a leading example can be set on how to address this challenging topic. Good opportunities may exist to establish links with Japanese companies that can help make innovative technological solutions available to address climate change challenges.
- **The development of a tourism crisis communication plan (project 1.6)** would help build structures and capacity in the tourism sector to communicate with media, tourism trade and visitors in case of any future crisis. Both JICA and UNWTO place high importance to the topic of crisis management and both agencies' expertise and experience on the subject can be of benefit to the Maldives.
- **Improving and developing the marketing of the local islands (project 1.7)** would be a key activity for the Maldives to help promote and expand the development of

tourism to inhabited islands, increasing opportunities for local people to make a livelihood from tourism. This will help advance tourism's contribution towards poverty reduction and development, which are important priorities for JICA and UNWTO as well as for the Maldives Government. UNWTO has worked with many countries and destinations on strengthening tourism marketing, sometimes in collaboration with JICA, which provides a strong basis to offer further support to the Maldives on this topic.

At operational level, it could especially be relevant to consider undertaking joint actions for the following projects:

- **Development of eco- and cultural tourism products (project 2.2)** can contribute to the further diversification of the tourism product of the Maldives, in particular on inhabited islands, and in this way, help create new income generating opportunities for local people in the tourism sector, which is very much in line with activities that JICA and UNWTO support through their respective work.
- **Conservation of biodiversity and awareness raising campaign for the protection of the environment (project 2.3)** is important for strengthening environmental sustainability, a thematic area that is of high importance to JICA and UNWTO as well as to the Government of the Maldives. A project in this field can build on the methodology developed and experiences gained by UNWTO to provide training in various destinations in Africa and Asia on “turning tourism employees into champions of biodiversity conservation and environmental protection” and can also benefit from the vast knowledge and experience of JICA on environmental conservation in the Maldives.
- **The development of a Local Island Master Plan (project 2.4)** could be a holistic project to plan and develop a centre of high-quality tourism on a selected inhabited island. It could incorporate several components of the above-mentioned project proposals and serve to test and develop best practices on one island that subsequently could be replicated on other islands with possible further support from JICA and UNWTO.

Medium and long-term Joint Actions

There are a number of good possibilities for medium- and long-term joint action for JICA and UNWTO to collaborate on. These include project proposals addressing other thematic areas such as measurement (project 1.2; 1.4), quality control (project 1.3), training and education (project 2.5; 2.6), and tourism SME and value chain development (project 1.8, 2.1; 2.7 and 2.8). When opting for developing and implementing a comprehensive program for a selected

destination/atoll, some of these components may have already been integrated at an early stage.

Further consultations between JICA and UNWTO would help to specify the scope and content for a follow-up project that will help put in practice various valid recommendations and specific proposals generated through the JICA-UNWTO COVID-19 Tourism Recovery Project for the Maldives. The project could be implemented through JICA's technical cooperation scheme with technical assistance provided by UNWTO and possibilities to implement some of the proposed actions through support of JICA volunteers and/or with investments by Japanese companies. The new project would serve to further expand the JICA-UNWTO collaboration as a leading international partnership on Tourism and Sustainable Development, both for the benefit of the Maldives and possibly for other tourist destinations in the world.