

Volume 3, Issue 12

October 2011

*A brief analysis on tourism indicators  
end September 2011*

t o u r i s m  
U P D A T E



**STATISTICS SECTION**  
**Ministry of Tourism, Arts & Culture**

*5<sup>th</sup> Floor, Velaanaage, Ameer Ahmed Magu, Male', Maldives*

*Tel: +960 332 3224*

*Fax: +960 332 2512*

*Email: [stat@tourism.gov.mv](mailto:stat@tourism.gov.mv)*

## Major Indicators for January – September 2011

By the end of September 2011 there were 100 resorts with 21,792 beds, 18 hotels with 1,503 beds, 34 guest houses with 614 beds and 156 safari vessels with 2,492 beds, registered in the Maldives. It is expected that 5 new resorts will commence operation during the year 2011, out of which, by end September 2011, 2 have come into operation, namely Six Senses Laamu in L. Olhuveli during March 2011 and Jumeirah Devanafushi in G.A. Meradhoo during April 2011. Out of the registered capacity, on average 92 resorts with 20,929 beds, 17 hotels with 1,467 beds, 25 guest houses with 492 beds and 104 safari vessels with 1,591 beds were operational during the period January to September 2011.

Tourist arrivals to the Maldives during the period January to September 2011 recorded a robust growth of 17.7% compared with the same period in 2010. While there was a 12.8% growth in arrivals during the first quarter of the year, the second quarter recorded the highest growth rate in arrivals with over 22% increase. During the third quarter of the year, the growth rate was recorded to be 18.9% (refer Table 1). While tourist bed nights registered a double digit growth of 12% during the period January to September, the average duration of stay of tourists in the country was recorded to be 7.1 days, which is a decline of -0.4%, compared with the same period in 2010.

**Table 1: Major Indicators for the First 3 Quarters of 2011**

INDICATORS 2011	Jan - Mar	Apr -Jun	Jul –Sep	Total (end Sep)
<b>Arrivals</b>	247,617	200,350	221,205	<b>669,172</b>
<b>% Change over 2010</b>	12.8	22.8	18.9	<b>17.7</b>
<b>Bed Nights</b>	1,852,564	1,441,406	1,477,846	<b>4,771,816</b>
<b>% Change over 2010</b>	10.7	16.0	9.9	<b>12.0</b>
<b>Occupancy Rate</b>	84.2	64.0	66.3	<b>71.5</b>
<b>% Change over 2010</b>	-0.2	1.0	-1.7	<b>-0.3</b>
<b>Operational Bed Capacity</b>	24,487	24,740	24,212	<b>24,480</b>
<b>% Change over 2010</b>	10.7	14.3	12.9	<b>12.6</b>
<b>Average Duration of Stay (Days)</b>	7.5	7.2	6.7	<b>7.1</b>
<b>% Change over 2010</b>	-0.1	-0.4	-0.5	<b>-0.4</b>

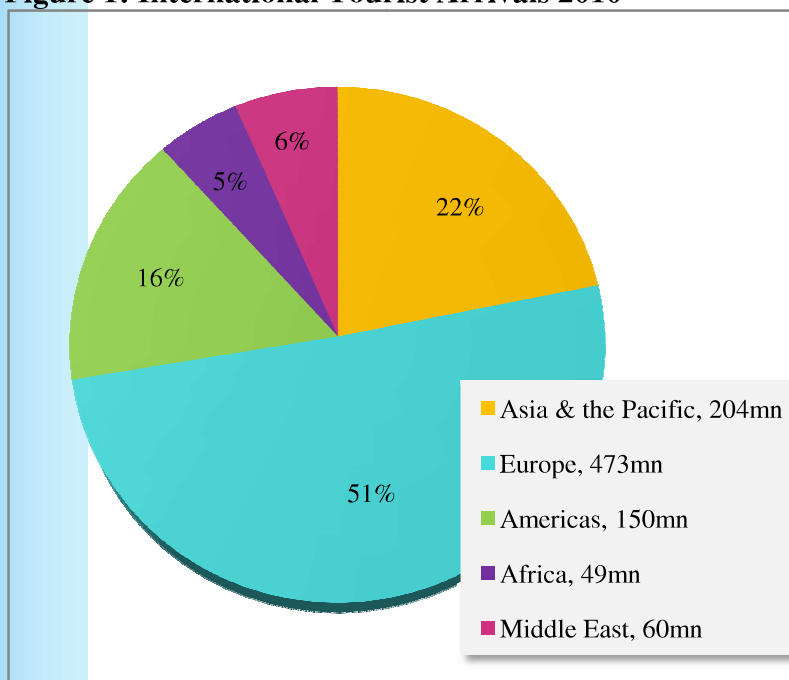
Source: Ministry of Tourism, Arts and Culture

## Tourist Arrivals

The United Nation's World Tourism Organization's (UNWTO) World Tourism Barometer (WTB), February 2011 edition reported that the worldwide, international tourism rebounded strongly in 2010, with arrivals up by 6.7% over 2009 to 935 million. According to the WTB, this increase in international arrivals more than offsets the economic downturn with an additional 22 million arrivals over the former peak year 2008.

The August 2011 edition of the WTB reported that international tourist arrivals increased by almost 5% reaching 440 million, during the first half of 2011 compared with the same period of 2010, despite new challenges emerging since the beginning of the year. As per the WTB, Europe with a positive 6.4% growth, exceeded expectations and posted the highest growth during this period. Growth in Asia and the Pacific (+5.1%) was said to be in line with the world average, but not as strong as initially expected. Americas increased by 5.6% which according to the WTB was mostly driven by South America's remarkable performance (+17%). While Africa posted a positive growth of 1.3%, international arrivals to the Middle East is said to have registered a negative growth of 10.8%. The WTB highlighted that arrivals to the Middle East have been substantially affected by the popular uprisings in several of the region's destinations.

**Figure 1: International Tourist Arrivals 2010**

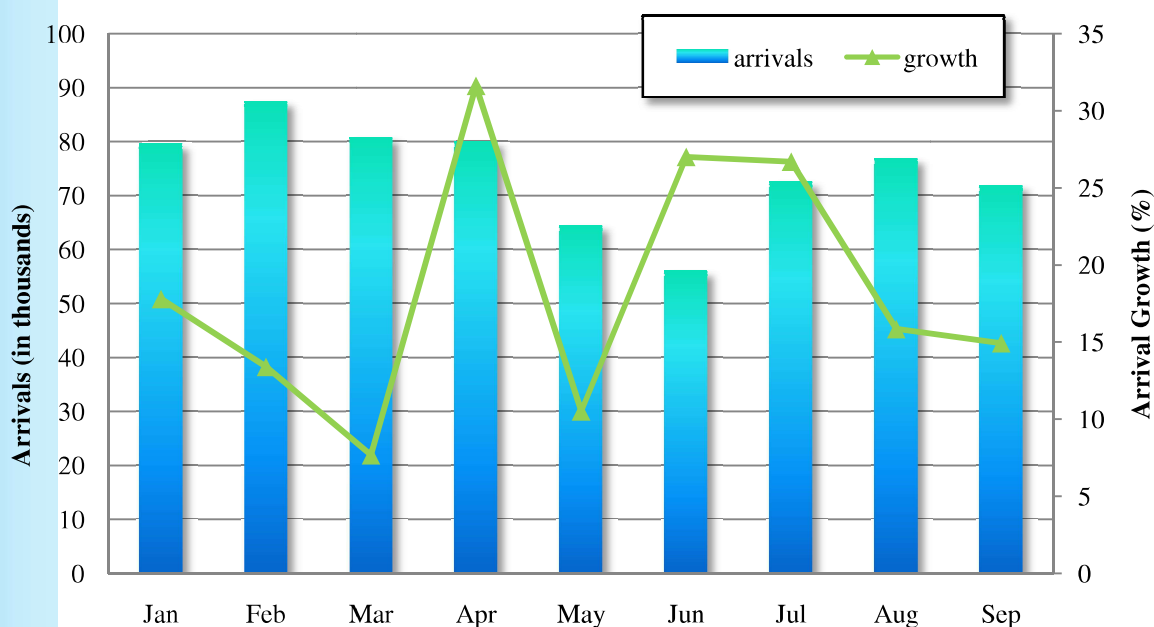


Source: World Tourism Organization (UNWTO)

## Tourist Arrivals to the Maldives

At the end of first three quarters of 2011, over 669 thousand tourists visited the Maldives registering a positive growth of 17.7%. On a quarterly basis, the first quarter of the year recorded best performance in terms of arrival numbers with 247,617 tourists however growth rate was the lowest for the year during this quarter with 12.8%. With a total of 200,350 tourists, the second quarter recorded the highest growth rate for the year with 22.8%. During the third quarter, the growth rate was recorded to be 18.9% and the number tourist arrival to the Maldives during this quarter was 221,205.

**Figure 2: Tourist Arrivals to the Maldives (January – September 2011)**



Source: Ministry of Tourism, Arts and Culture

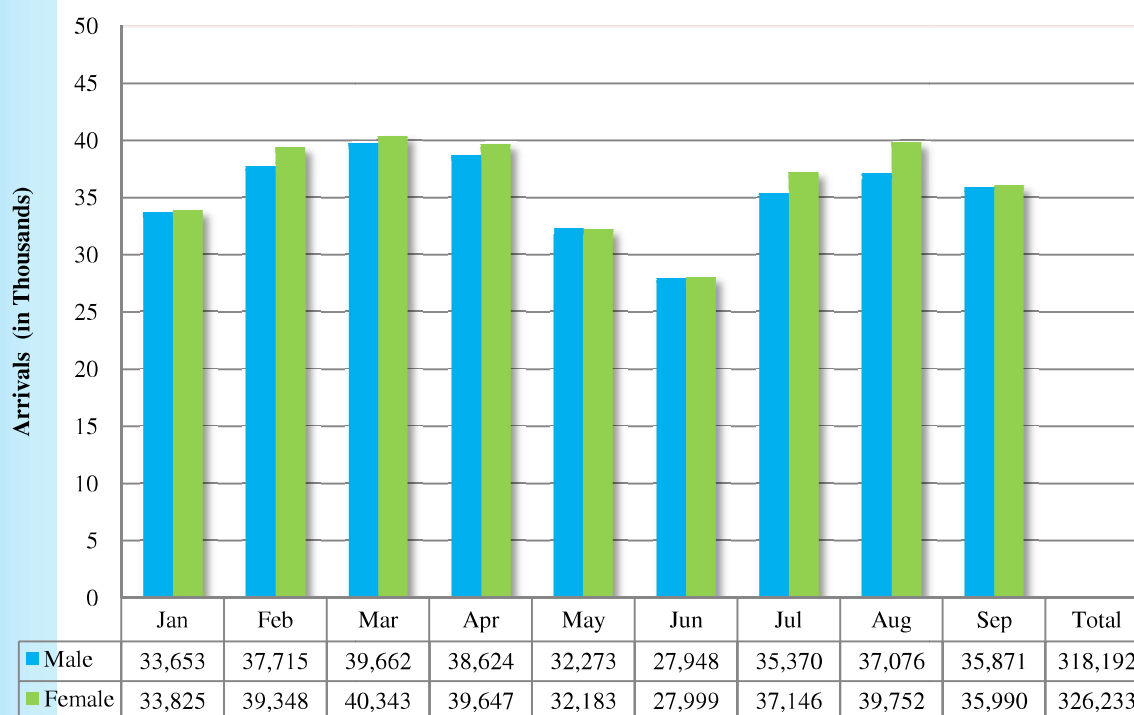
As per data received from Department of Immigration and Emigration, the best performed month in 2011 in terms of arrival numbers was the month of February with 87,392 tourists. However, this month was also recorded to register third lowest growth rate for the year. While the month of March was recorded to be the second most tourist visited month, this month yielded the lowest growth rate thus far with 7.7%. The month of April recorded the highest growth rate for the year with 31.7%. April was also the third best performed month in

terms of arrival numbers during the year 2011. While the month of June recorded the lowest arrival count, this was the second best month in terms of growth rate with 27%.

## Tourist Arrivals by Gender and Age Group

At the end of first nine months of 2011 a total of 318,192 male tourists and 326,233 female tourists visited the Maldives. The percentage contribution of female tourists remained at 50.6% and male tourists represented 49.4% of the total arrivals to the Maldives during the period. Except for the month of May the number of female tourists remained slightly higher than that of male tourists. (Refer Figure 3).

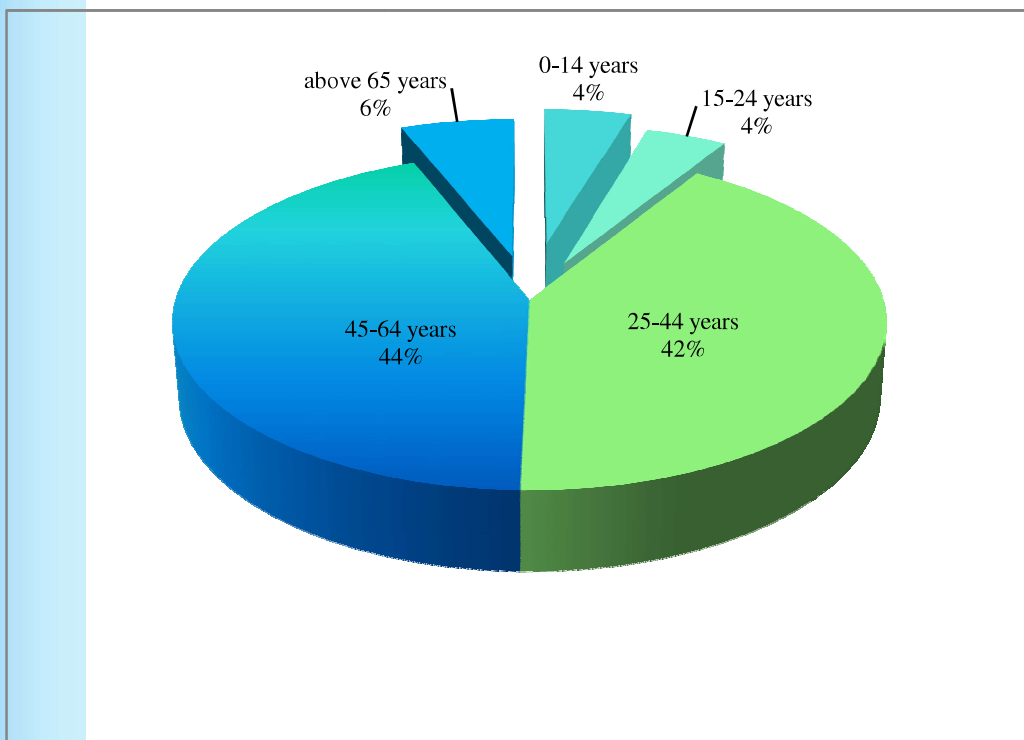
**Figure 3: Tourist Arrivals by Gender (January-September 2011)**



Source: Ministry of Tourism, Arts and Culture

With respect to the age group of tourists who visited the Maldives during the first three quarters of 2011, the working age groups of citizens dominate tourist population of the Maldives. As seen in Figure 4, during the period January to September 2011, 86% of the total arrival to the Maldives was represented by tourists aged between 25 and 64 years. While tourists aged between 45 and 64 years contributed 44% of the total arrivals to the Maldives at the end of first nine months of 2011, 42% of the tourists were between the ages of 25 to 44 years. Youngsters between the ages of 15 to 24 years and children under the age of 14 contributed 4% each. The percentage share of tourists aged above 65 years was recorded to be 6% for the period from January to September 2011.

**Figure 4: Tourist Arrivals by Age Group (January-September 2011)**

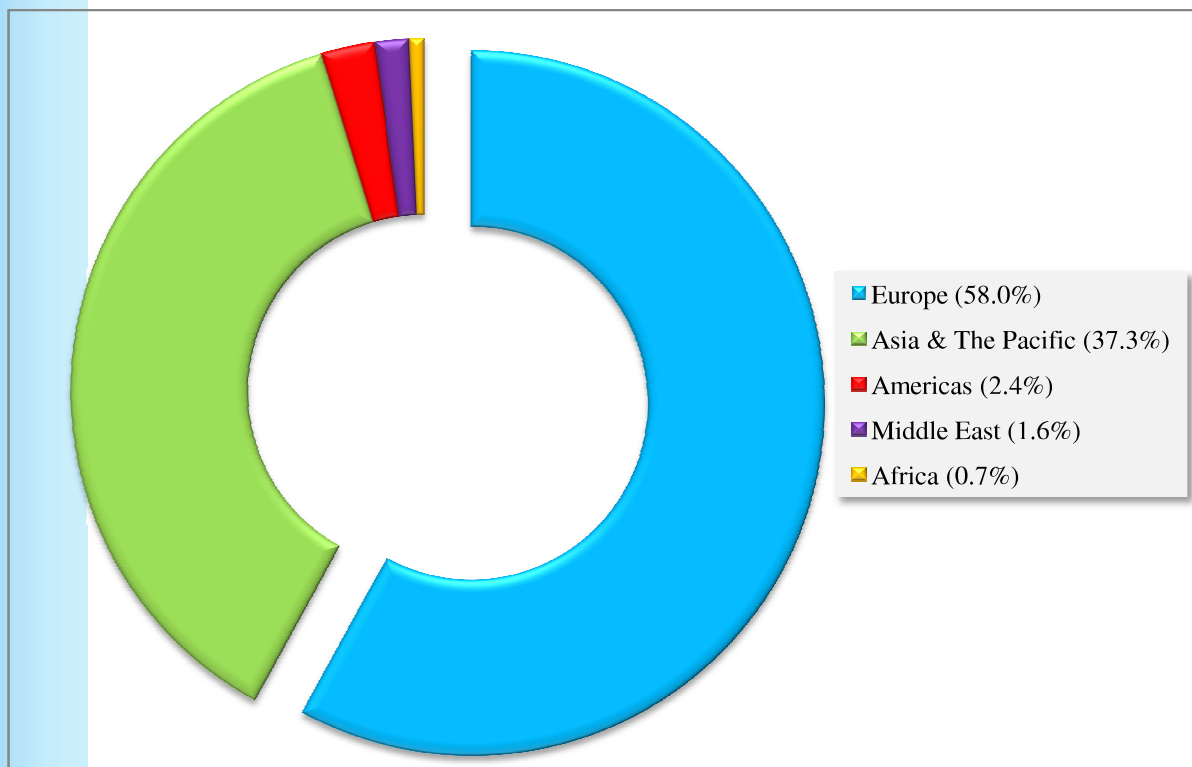


*Source: Ministry of Tourism, Arts and Culture*

## Major Markets

Although Europe has been losing its shares to the growing Asia Pacific region over the years, this region captured the largest share with 58%, at the end of September 2011. Capturing a market share of 37.3% Asia & the Pacific remained as the second market generator to the Maldives. While Americas contributed 2.4% to the total arrivals during this period, market share of Middle East was at 1.6% and Africa captured the lowest share of 0.7% by the end of first three quarters of 2011 (refer Figure 5)

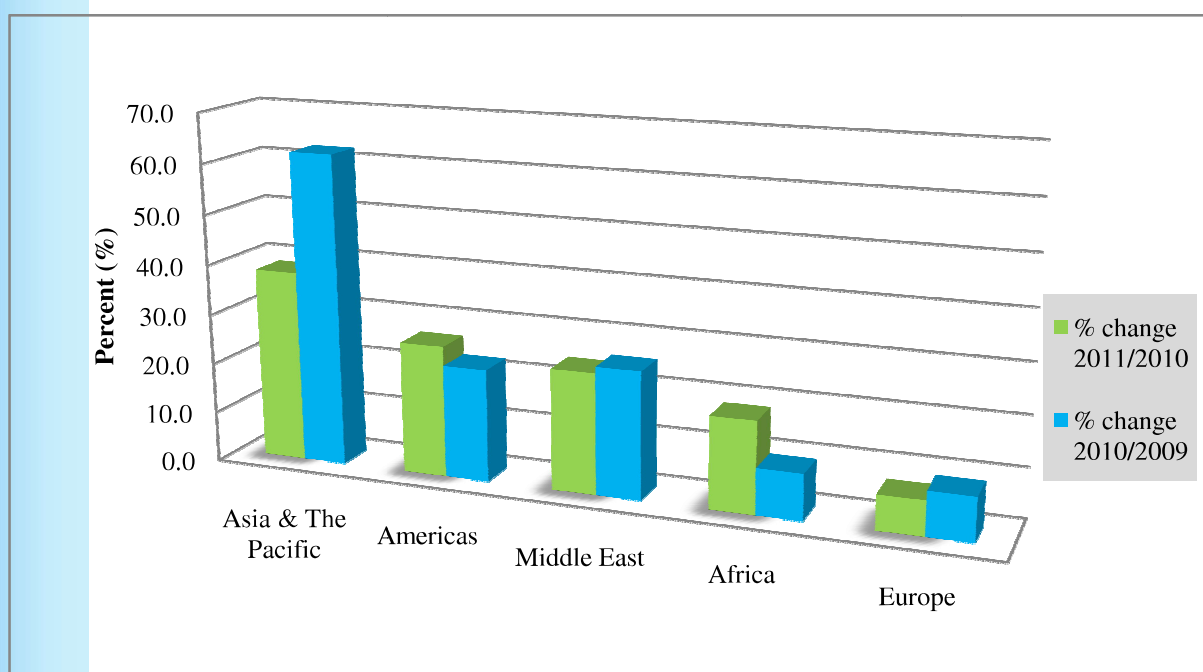
**Figure 5: Market Share by Regions (January-September 2011)**



Source: Ministry of Tourism, Arts and Culture

At the end of first three quarters of 2011, except for Europe, all regions posted double digit growth rates compared with the same period of 2010. Europe, while remaining the market leader registered the lowest growth rate of 6.9% during this period. The highest growth rate for the period was recorded for the Asia and the Pacific region with 38.3%. Arrivals from Americas and the Middle East grew by 26.2% and 24.1% respectively. Africa posted a growth rate of 18.3% at the end of September 2011 compared with the same period in 2010 (refer Figure 6).

**Figure 6: Arrival Growth by Regions (January-September 2010 & 2011)**



Source: Ministry of Tourism, Arts and Culture

Most favorable performance from the European region was recorded for the Swedish market with a positive growth of over 54% for the period of January to September 2011 compared with the same period in 2010. Second best performance for the period from this region was observed from Belgium with an increase of 43.3%. Third best performance was recorded from the Bulgarian market with a positive growth of 41.2%. Four major markets from this region registered negative growths for the period which include Italy, Ireland, United Kingdom and Greece.

## Major European Markets

The **United Kingdom**, although was the second largest market to the Maldives as a whole and first within the region capturing a total share of 11.8% at the end of September 2011, the market has been registering negative growths during the first three quarters of 2011, with -8.2%, -0.9% and -12.6% respectively.

With a market share of 9.6%, the **Italian** market was the second from the region and third as a whole. Italy has also been posting negative growths over the last three quarters of 2011 with, -2.6%, -3.2% and -15% respectively.

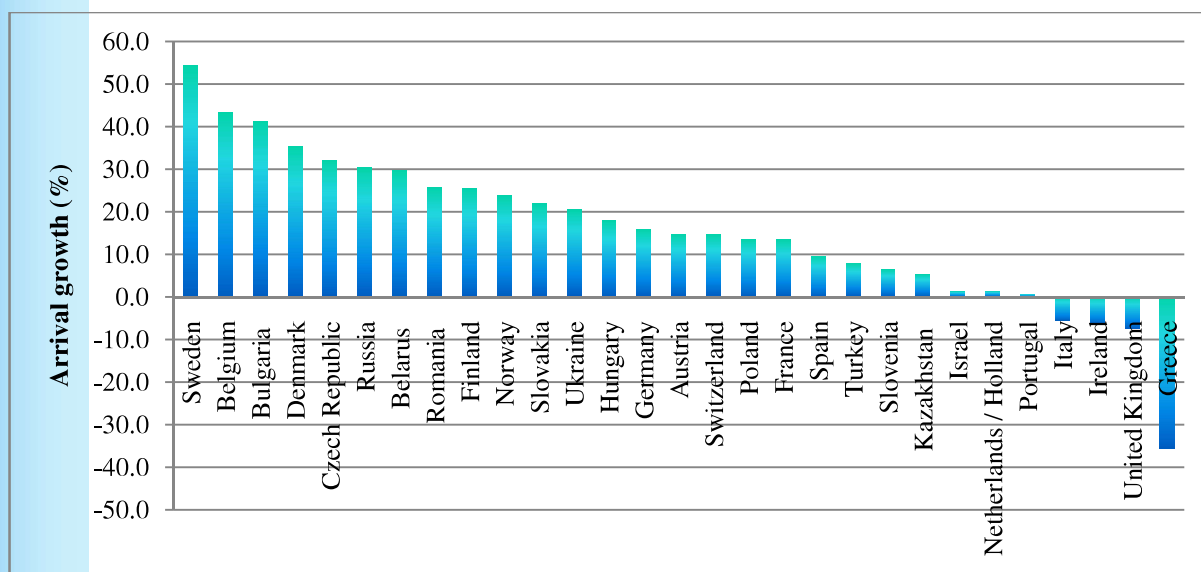
The **German** market captured a market share of 9.3% at the end of September 2011. This market has been ranked the 4<sup>th</sup> largest market as a whole and 3<sup>rd</sup> within the region thus far this year. The German market has been performing well this year registering strong positive growth over the last three quarters with, 4.0%, 32.5% and 13.7% respectively.

The **Russian** market is one of the best performing markets from the European region registering double digit growths over the last three quarters with 23.7%, 35.8% and 33.6% respectively each quarter. While Russia is ranked as the 5<sup>th</sup> largest market as a whole, it is also the 4<sup>th</sup> largest market within the region during the period January to September 2011, capturing a market share of 6.7%.

With 6.4% shares and a total of 43,002 tourists at the end of September 2011, the **French** market was the fifth within the region and 6<sup>th</sup> out of all the markets to the Maldives during the period. French arrivals to the Maldives registered strong growth rates during the first two quarters of the year with 13.2% and 17.0% respectively. Although, during the third quarter the growth rate was not as high as that of the first two quarters, by the end of the third quarter, the market posted an impressive 13.6% increase compared with the same period in 2010.

The **Swiss** market was the 8<sup>th</sup> largest market to the Maldives at the end of first three quarters of 2011. With 3.3% shares at the end of September, the Swiss market performed with a strong growth of 14.6% during the period and was ranked the 6<sup>th</sup> largest market from the European region.

**Figure 7: Growth Percent of Major European Markets (January-September 2011)**



Source: Ministry of Tourism, Arts and Culture

### Major Markets from Asia & the Pacific

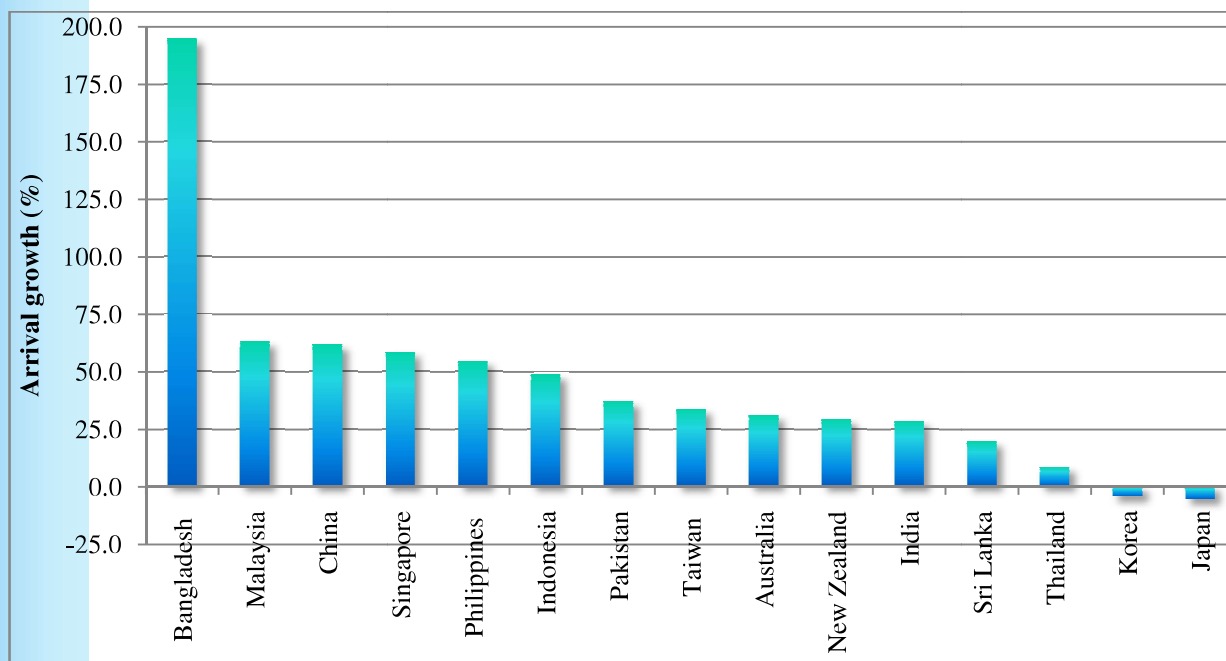
From the Asia and the Pacific region, **China** continues its remarkable performance, remaining at the top rank as the market leader to the Maldives with a healthy 21.9% shares by the end of September 2011. China has been posting robust growth rates over the first three quarters of the year with 56.9%, 64.2% and 63.3% respectively. The market share has increased from 16.2% at the end of first quarter to 20.2% during the second quarter and during the third quarter the market share was registered to be 29.9%.

**Japan**, while remaining as the second largest market from the Asia Pacific region was ranked as the 7<sup>th</sup> most tourist generating market to the Maldives among all nationalities at the end of September 2011. The Japanese market, which has been deteriorating over the years, has registered a negative growth of 5.7% at the end of first three quarters of 2011. Although the market has posted a slight improvement with a positive 0.1% growth at the end of 1<sup>st</sup> quarter of the year, the second and the third quarter posted negative growths of 5.4% and 9.9% respectively.

**India** and **Korea** are ranked the 9<sup>th</sup> and 10<sup>th</sup> largest markets to the Maldives respectively by the end of September 2011. While the Indian market has been doing significantly well with healthy growth rates during the three quarters of the year with 40.6%, 22.3% and 19.8%

respectively each quarter, the Korean market has been weakening registering a negative growth of 4.5% at the end of first three quarters of 2011.

**Figure 8: Growth Percent of Major Asian Markets (January-September 2011)**



Source: Ministry of Tourism, Arts and Culture

### Major Markets from Other Regions

From the African region, the South African market has done very well during the first 9 months of the year 2011 registering a robust growth of 24.1% compared with the same period in 2010.

The U.S market from the Americas posted strong positive growths in 2011 ending the first three quarters of the year with a strong positive growth of 23.1%. The U.S market has been doing well increasing its market share from 1.4% in 2010 to 1.5% by the end of September 2011. The U.S market is showing high potential with robust growth rates during the first three quarters of 2011. While during the first quarter the market registered 16.0% growth, the second quarter recorded 26.1% increase and the third quarter was up by 28%.

All the major markets in the Middle East region registered double digit growth rates at the end of September 2011. While the Saudi market captured the largest share from this region with 0.6%, Kuwait and United Arab Emirates took hold of 0.2% shares each by end September 2011.