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*A brief analysis on tourism indicators
end June 2010*

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



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Major Indicators for Jan – June 2010

During the period Jan to June, two new hotels came into operation. There were a total of 97 resorts with a bed capacity of 20,961 and 16 hotels with 1,366 beds registered in the Maldives by the end of June 2010. Out of the registered capacity, on an average 20,169 beds in 91 resorts and 1360 beds in 15 hotels were in operation during this period. Tourist arrivals to the Maldives during the period Jan to June recorded an increase of 20.1% compared to the same period last year. Bed nights of tourist resorts, hotels and safari vessels recorded a growth of 14.7% during this period. Average occupancy rate of resorts, hotels and safari vessels was 70.7% for the period Jan to June and the average duration of stay was 7.8 days.

Table 1: Major Indicators for the First 2 Quarters of 2010

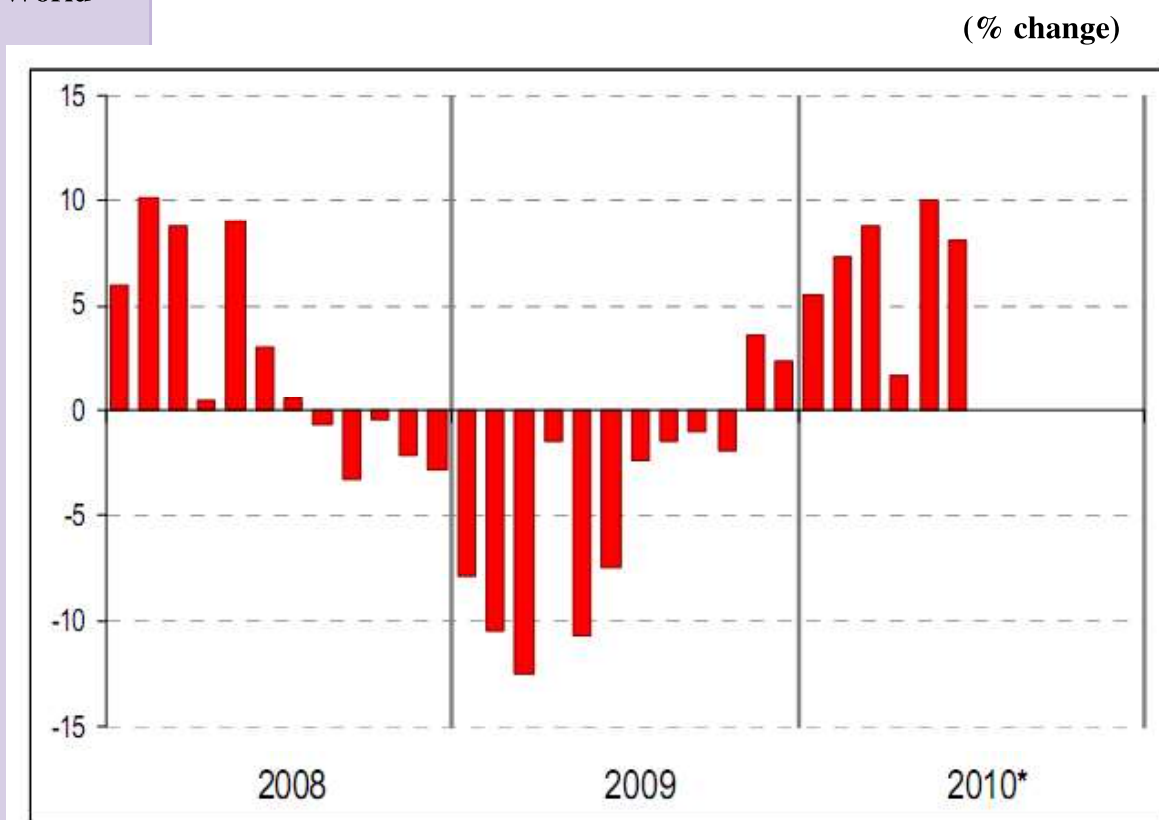
Indicators 2010	Jan - Mar	Apr -Jun	Jan - Jun
Arrivals	219,516	163,116	382,632
% Change over 2009	20.5	19.5	20.5
Bed Nights (Resorts & Hotels)	1,661,754	1,242,451	2,904,205
% Change over 2009	11.6	12.4	12.0
Occupancy Rate (Resorts & Hotels)	84.7	61.8	73.3
% Change over 2009	0.0	2.0	1.0
Operational Bed Capacity (Resorts & Hotels)	21,845	22,040	21,943
% Change over 2009	11.9	9.8	10.7
Average Duration of Stay (Days)	7.8	7.8	7.8
% Change over 2009	-12.4	-12.4	-12.4

Source: Ministry of Tourism, Arts and Culture

Tourist Arrivals

According to the August 2010 issue of the United Nation's World Tourism Organization's (UNWTO) World Tourism Barometer (WTB), at the end of the first half of 2010, international tourist arrivals is estimated to have increased by 7%. On a month by month basis, May (+10%), March (+9%) and June (+8%) were the strongest of the first 6 months. April was the weakest (+2%) due to the closure of the European airspace as a consequence of the ash cloud from the Icelandic volcano eruption. (Refer Figure 1)

Figure 1: International Tourist Arrivals, Monthly Evolution World



Source: United Nation's World Tourism Organization (UNWTO) © World Tourism Barometer

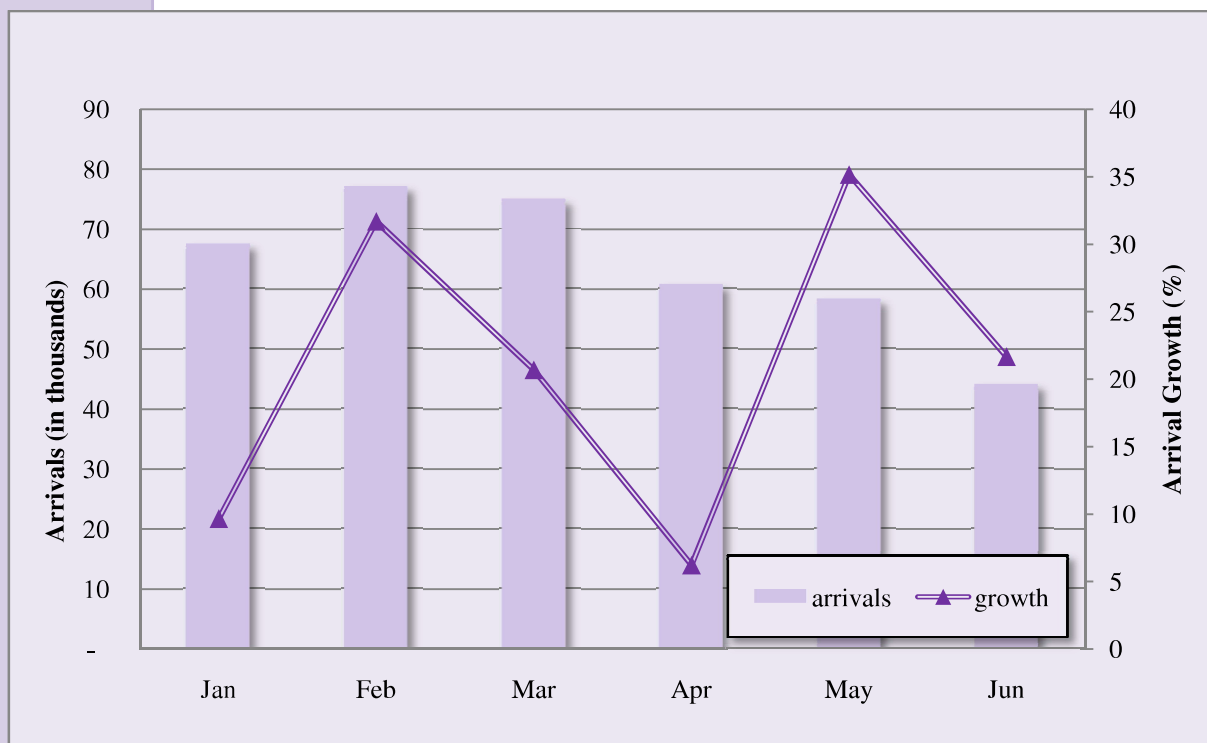
* Provisional data

Furthermore, the WTB also reveals that growth was strongest in the Middle East (+20%), but compared to very weak arrivals in 2009. Asia and the Pacific was the first to recover from the economic crisis that began in 2008 and has posted an impressive 14% growth in international tourist arrivals in the first half of this year. South Asia and South East Asia (both +14%) were the fastest growing sub regions.

Tourist Arrivals to Maldives

At the end of the first half of 2010, a total of 382,632 tourists visited the Maldives. This was a growth of over 20.1% compared with the same period in 2009. The recovery that started in the last quarter of 2009 continued till the 1st quarter of 2010 and has remained favorable. As shown in Table 1, while during the first quarter of 2010 the growth in arrivals was 20.5%, during the second quarter, it was recorded to be 19.5%.

Figure 2: Tourist Arrivals to the Maldives (January – June 2010)



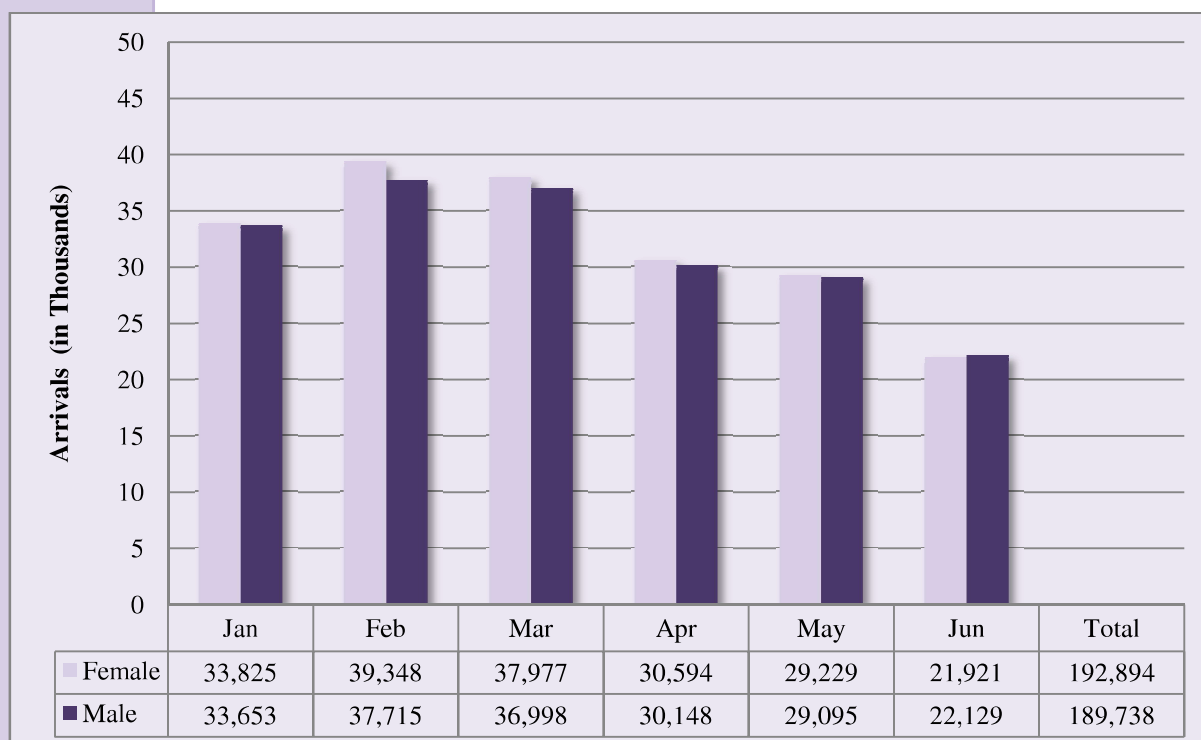
Source: Ministry of Tourism, Arts and Culture

As per data received from Department of Immigration and Emigration, most number of tourists arrived in the Maldives during the month of February 2010 with the second highest arrival growth rate for the period with 31.7% compared with 2009. With 44,050 tourists, the month of June was recorded to have the lowest count in arrivals. Nevertheless, the growth rate of 21.7% for the month of June was registered to be the third highest growth rate for this period.

Tourist Arrivals by Gender and Age Group

During the first half of the year 2010, a total of 192,894 female tourists and 189,738 male tourists visited the Maldives. While the percent contribution of female tourists remained at 50.4%, male tourists contributed 49.6% of the total arrivals to the Maldives during the period. Although during the first five months of 2010, female visitors remained slightly higher than that of male visitors, during the month of June 2010, the percent of male tourists were higher than that of female tourists (refer Figure 3).

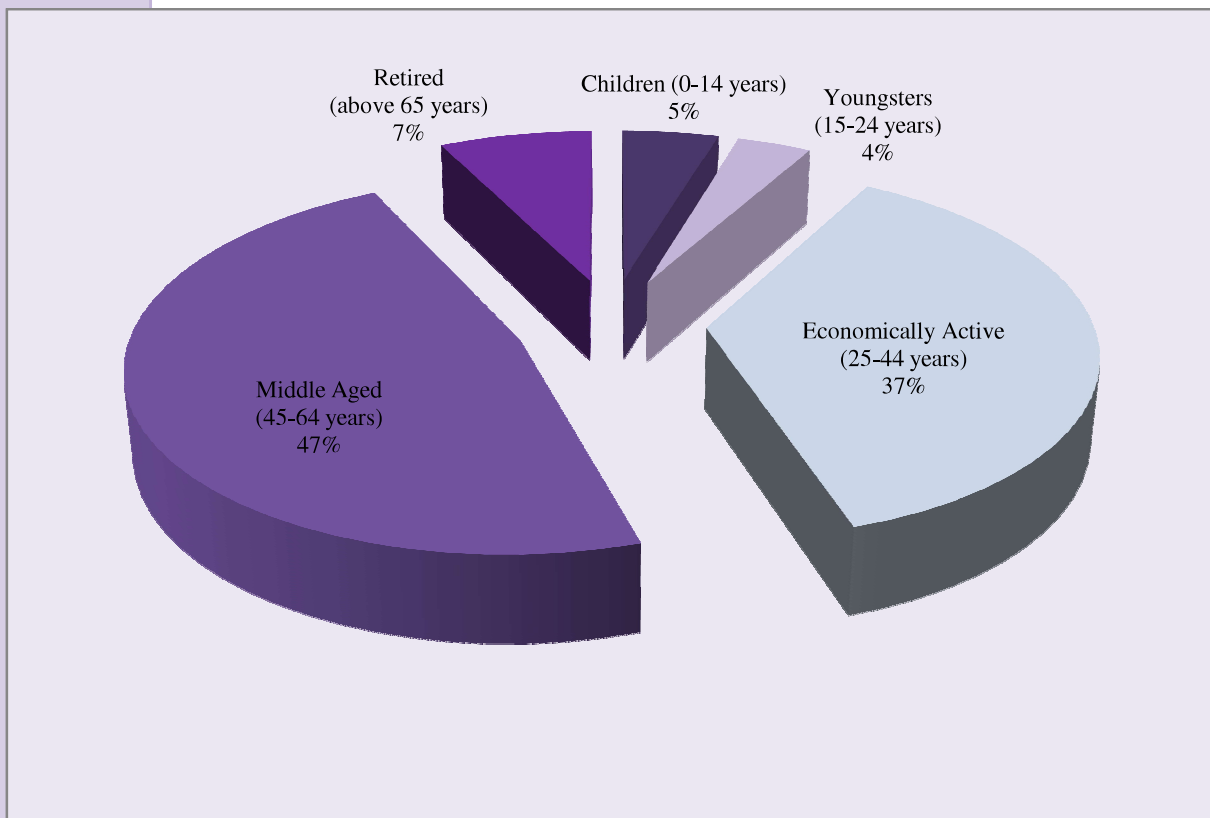
Figure 3: Tourist Arrivals by Gender (January-June 2010)



Source: Ministry of Tourism, Arts and Culture

With respect to the age group of tourists visiting the Maldives, as seen in Figure 3, tourists aged between 25 and 64 dominate the total arrivals to the Maldives. While tourist aged between 45 and 64 years contributed 47% of the total arrivals to the Maldives during the first half of 2010, 37% of the tourists were between the ages of 25 to 44 years. 5 percent of the tourists who visited the Maldives during the first half of 2010 were children under the age of 14 years. While youngsters between the ages of 15 to 24 contributed 4%, the percent share of tourists aged above 65 years was recorded to be 7% for the period from January to June 2010.

Figure 4: Tourist Arrivals by Age Group (January-June 2010)



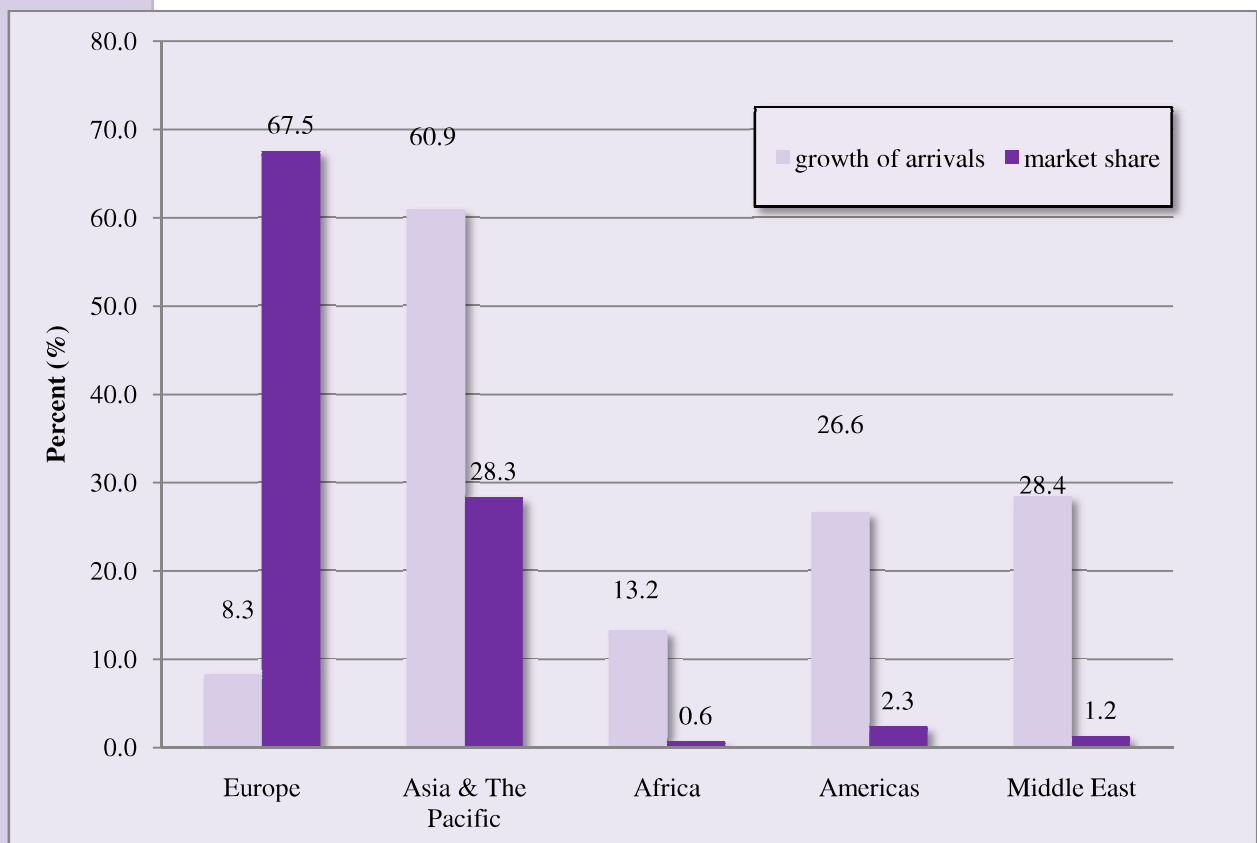
Source: Ministry of Tourism, Arts and Culture

Major Markets

In terms of market generating regions, Europe captured the largest share with 67.5%, at the end of June 2010. Asia & the Pacific remained as the second market generator to the Maldives with 28.3% while the Americas contributed 2.3%. Market share of Middle East was at 1.2% and Africa captured the lowest share of 0.6% by the end of June 2010.

During the first half of 2010, all the regions showed an increase in arrivals compared to the same period of last year. The highest growth was recorded for Asia and the Pacific with nearly 28.3%. It is important to note that the growth was negative for all regions during the first half of 2009 (refer Figure 5).

Figure 5: Market Share and Growth Percent by Regions (January-June 2010)



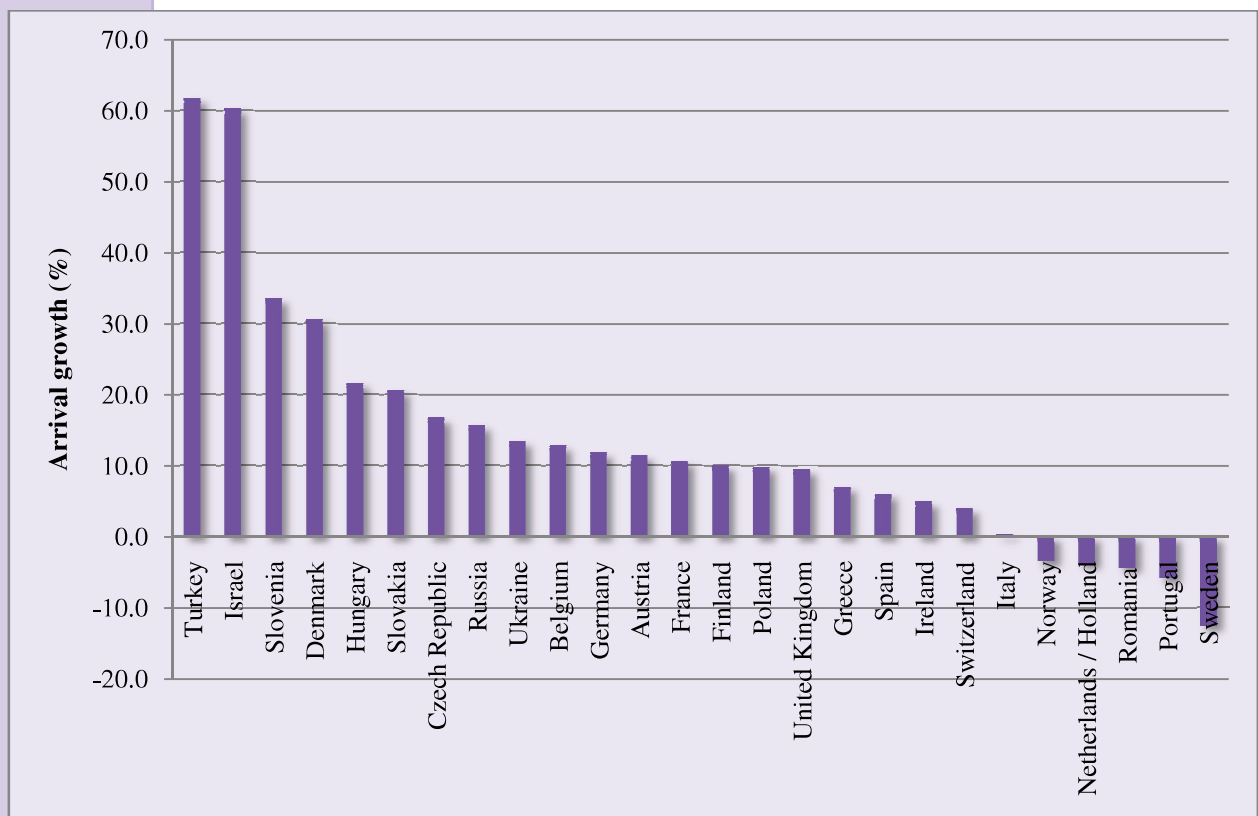
Source: Ministry of Tourism, Arts and Culture

Most favorable performance from the European region was recorded for the Turkish market with a positive growth of over 60% for the period of January to June 2010 compared with the same period in 2009. Second best performance for the period from this region was observed from Israel with an increase of 60.3%. Markets which recorded a negative growth were

Sweden with -12.6%, Portugal with -5.9%, Romania with -4.4%, Netherlands with -3.9% and Norway with -3.5%.

Italy and United Kingdom were the top two most tourist generating markets to the Maldives during the first half of the year 2010. Both markets have experienced a growth of 0.3 % and 9.5% respectively compared the same period of 2009 (refer Figure 6).

Figure 6: Growth Percent of Major European Markets (January-June 2010)



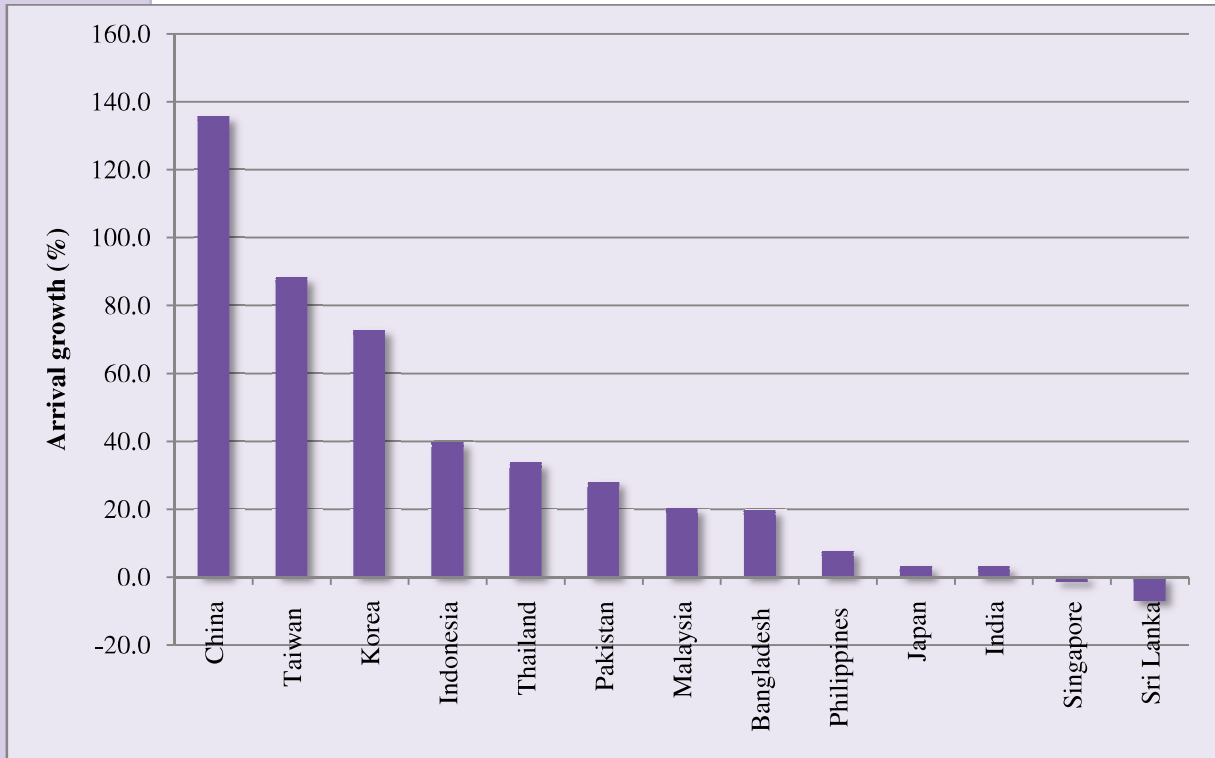
Source: Ministry of Tourism, Arts and Culture

While France, which is the third most tourist generating market to the Maldives from the European region, showed a growth of 10.6%, the Russian market, which was considered to be one of the fastest growing markets to the Maldives, grew by 15.7% during the first half of 2010 compared with the same period in 2009.

China continues to do well with strong positive growths along with Taiwan and Korea. The market shares for these countries are at 135.6%, 88.0% and 72.7% respectively. China is the third most tourist generating market to the Maldives among all nationalities and number one market from the Asian region by the end of June 2010. Singapore and Sri Lanka are the only

countries with negative growth in the Asian region with -1.6% and -7.2% respectively (refer Figure 7).

Figure 7: Growth Percent of Major Asian Markets (January-June 2010)



Source: Ministry of Tourism, Arts and Culture