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*A brief analysis on tourism indicators  
end December 2010*

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



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

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## Major Indicators at End December 2010

During the year 2010, one new resort and 2 hotels came into operation. There were a total of 98 resorts with a bed capacity of 21,432 and 17 hotels with 1,449 beds registered in the Maldives in 2010. Out of the registered capacity, on an average 20,195 beds in 90 resorts and 1,346 beds in 15 hotels were in operation during the year. Tourist arrivals to the Maldives recorded a growth of 20.7% during 2010, bed nights of tourist resorts and hotels also recorded a growth of 13.3% compared with 2009. Average occupancy rate of resorts and hotels was 74.2% for the year and the average duration of stay was 7.4 days. (Refer: Table 1)

**Table 1: Quarterly Indicators for 2010**

Indicators for 2010	Jan - Mar	Apr - Jun	Jul - Sep	Oct - Dec	Jan - Dec
<b>Arrivals</b>	219,516	163,116	186,071	223,214	<b>791,917</b>
<b>% Change over 2009</b>	20.5	19.5	26.5	17.5	<b>20.7</b>
<b>Bed Nights (R &amp; H)</b>	1,661,754	1,242,451	1,344,317	1,580,696	<b>5,829,218</b>
<b>% Change over 2009</b>	11.6	6.4	15.6	13.8	<b>13.3</b>
<b>Occupancy Rate (R &amp; H)</b>	86.2	62.9	68.1	79.6	<b>74.2</b>
<b>% Change over 2009</b>	1.9	-5.9	1.0	7.9	<b>4.0</b>
<b>Operational Bed Capacity (R &amp; H)</b>	21,472	21,650	21,455	21,587	<b>21,541</b>
<b>% Change over 2009</b>	10.0	7.8	4.9	5.5	<b>7</b>
<b>Average Duration of Stay (Days)</b>	7.6	7.6	7.4	7.1	<b>7.4</b>
<b>% Change over 2009</b>	-7.3	-6.2	-6.3	-2.7	<b>-0.5</b>

Source: Ministry of Tourism, Arts & Culture

## Tourist Arrivals

The United Nation's World Tourism Organization (UNWTO) states that international arrivals had a multi-speed recovery in 2010 experiencing a growth by almost 7% in 2010 compared to -4% in 2009. A press release issued by the UNWTO on January 2011 said that this growth shows that international tourism has recovered faster than expected from the impacts of the global financial crisis and economic recession of late 2008 and 2009. According to the

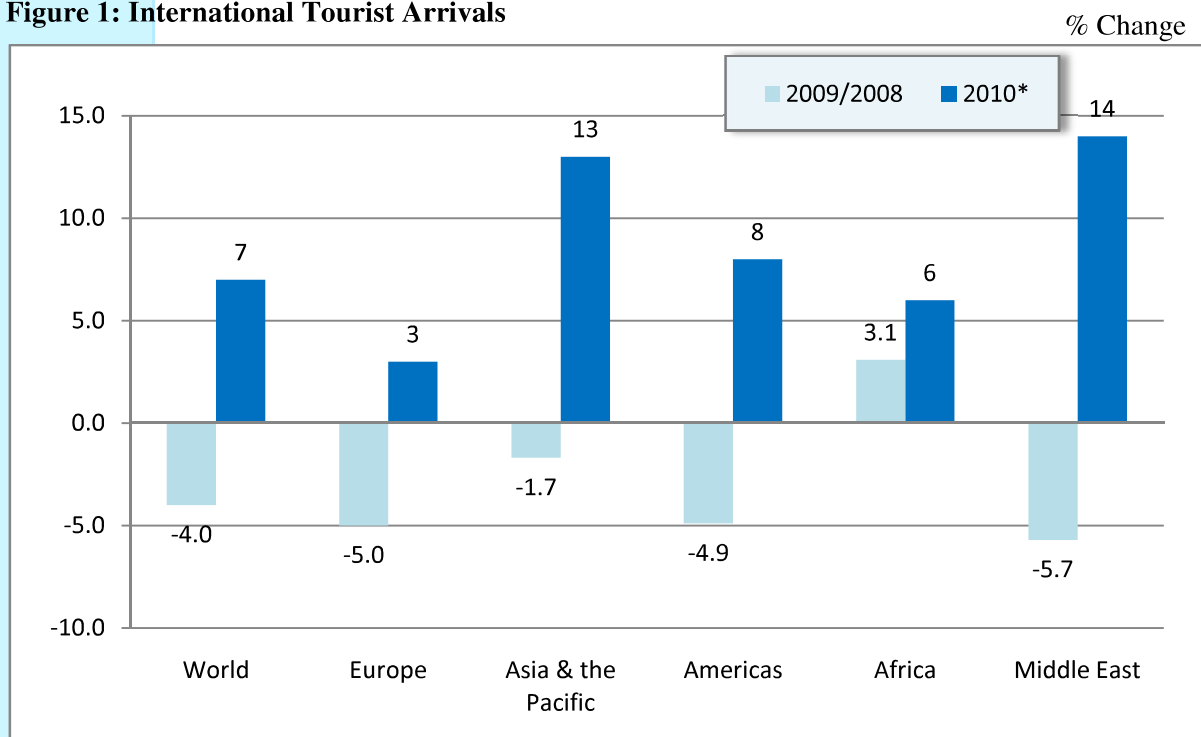
January 2011 edition of the UNWTO World Tourism Barometer (WTB), growth was positive in all regions of the world.

Asia & the Pacific was the first region to recover and had the strongest growth of 13% with international tourism arrivals at a new historic record of 204 million in 2010. The Middle East region experienced a growth of 14% but compared to depressed figures in 2009. The Africa's had a growth of 6% supported by the worldwide exposure created by the FIFA World Football Cup while the European region being the region hit the hardest during the economic crisis of late 2008 has been experiencing the slowest recovery out of all the regions. Further contributing to the slow recovery is the closure of its airspace in April 2010. Thus this region has only experienced a growth of 3%. (Refer Figure 1)

According to the UNWTO the year 2010 is a year in which international tourism demand held up well despite the natural disasters, political and social unrest, problematic weather conditions in parts of Europe and serious disruption of air travel due to the volcanic eruption in Iceland.

The UNWTO press release predicts that growth will continue in 2011 but at a more moderate pace around 4% to 5%, somewhat above the long term average of 4%.

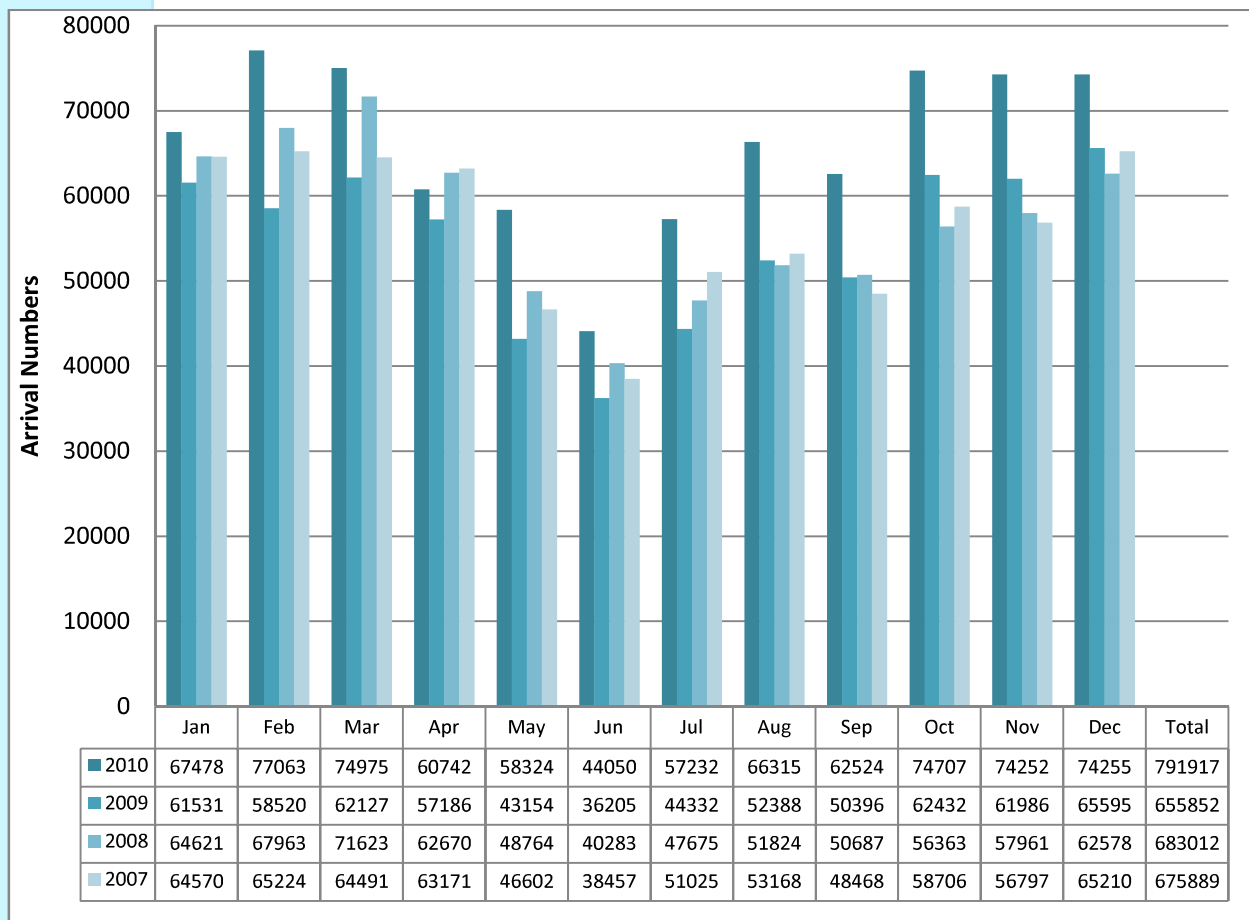
**Figure 1: International Tourist Arrivals**



Source: United Nation's World Tourism Organization, World Tourism Barometer (WTB) – January 2011 edition

Tourist arrivals to the Maldives registered a positive growth of 20.7% in 2010 compared with 2009. Tourist arrivals reached and exceeded the expected 700,000 target for the year, with a total of 791,917 by the end of 2010. This was a record figure in tourist arrivals to the Maldives. The tourist arrivals in 2010 are higher in all months compared to previous years from 2007 to 2009 except for April 2010. This is likely to be caused by the closure of the European Airspace due to the volcano eruption in Iceland during this month. (Refer Figure 2)

**Figure 2: Tourist Arrivals to the Maldives-monthly evolution (2007-2010)**

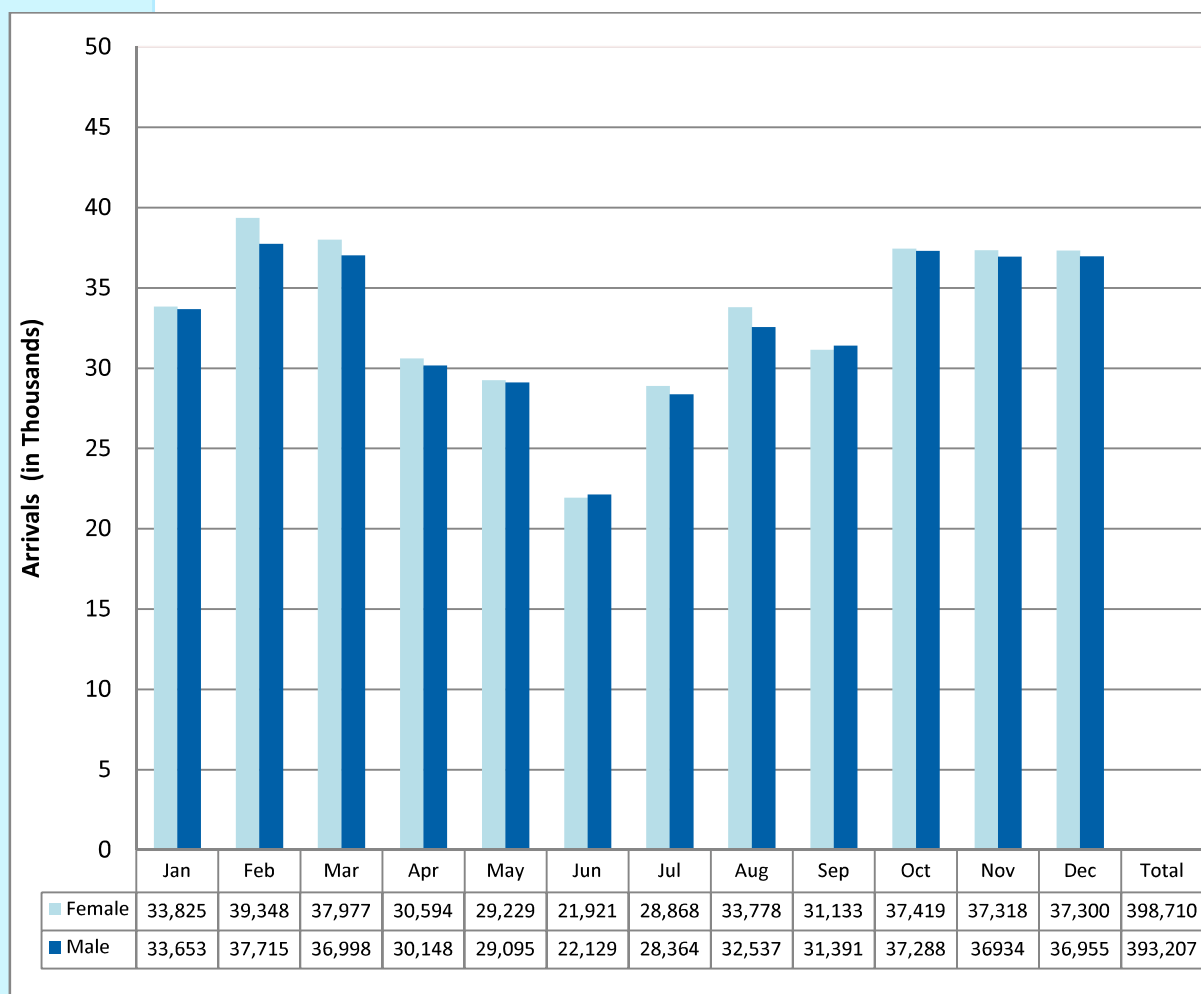


Source: Ministry of Tourism, Arts and Culture

## Tourist Arrivals by Gender

The 791,917 tourists that visited the Maldives in 2010 consisted of 393,207 male visitors and 398,710 female visitors. Number of females visiting the Maldives is slightly higher than males in all months of 2010 except June and September. (Refer Figure 3)

**Figure 3: Tourist Arrivals by Gender: 2010**

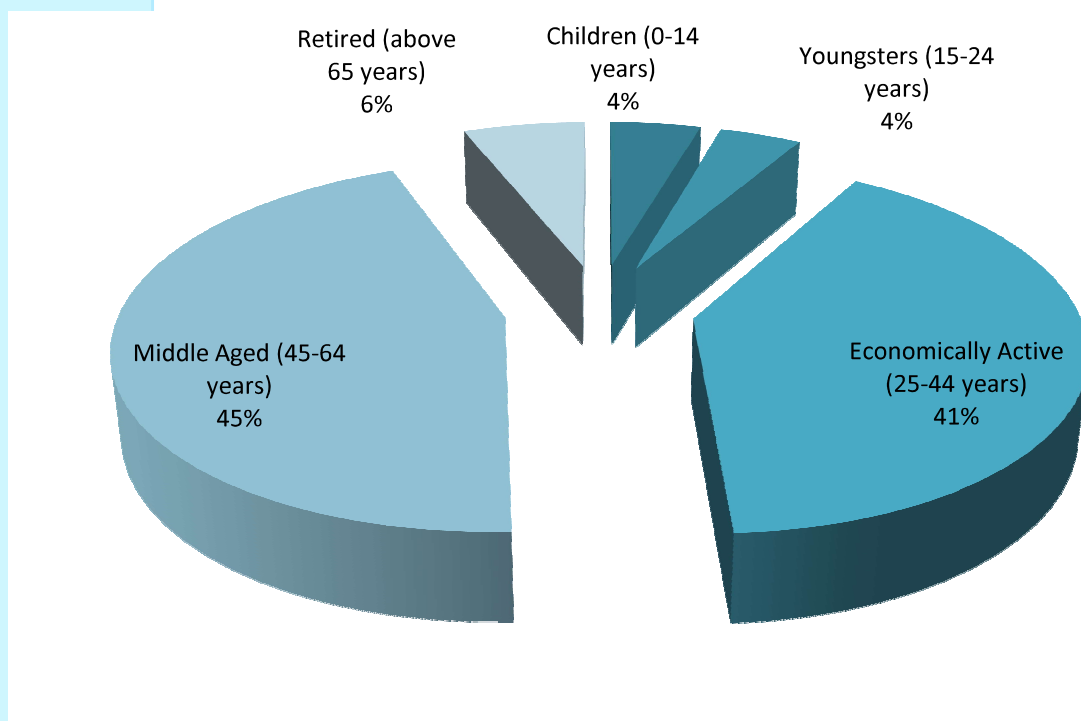


Source: Ministry of Tourism, Arts and Culture

## Tourist Arrivals by Age Group

In terms of age groups of tourists who visited the Maldives during the year 2010, 45% belonged to the age group of 45 to 64 years and 41% were the economically active population between the ages of 25 to 44 years. Youngsters, between ages 15 to 24 and children both contributed a total of 8% of the tourists who visited the Maldives during the year 2010 with 4% each. Percentage contribution of retired people (65 years of age and above) was 6%. (Refer Figure 4)

**Figure 4: Tourist Arrivals by Age Group: 2010**



Source: Ministry of Tourism, Arts and Culture

## Major Markets

At the end of 2010, with a market share of over 60%, Europe remained as the leading market generator to the Maldives. This region recorded a growth of 9.4% compared with 2009 with a total of 505,421 tourist arrivals to the Maldives in 2010.

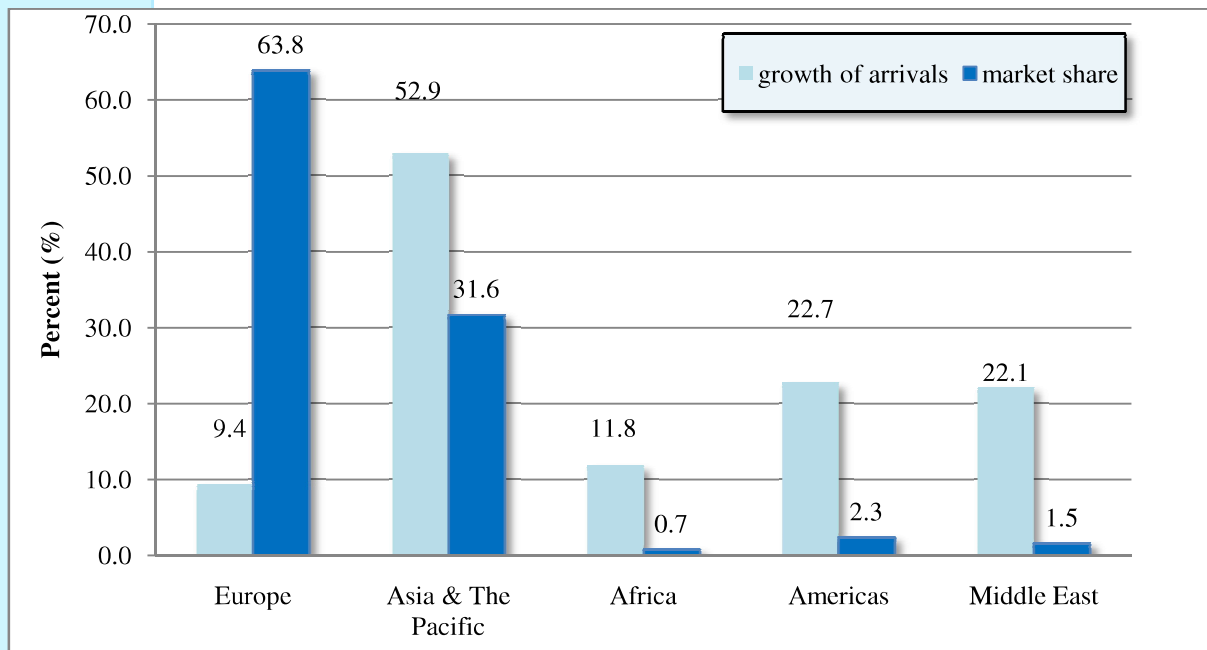
Asia & the Pacific region recorded the highest growth in arrivals with 52.9% compared to 2009. This region captured a considerable market share of 31.6% with 250,638 tourist arrivals to Maldives in 2010.

With a total of 18,601 tourists, Americas captured a market share of 2.3% in 2010. The region was recorded to have a positive growth of 22.7% at the end of 2010 compared with 2009. Brazil, Canada and U.S.A from this region registered positive growths of 35%, 25.4% and 21.7% respectively. The U.S.A capturing a market share of 1.4% is considered as an emerging market and one with potential to the Maldives.

Middle East region is captured a market share of 1.5% and registered a positive growth of 22.1% compared to a growth of 4.2% at the end of 2009. Arrivals from Saudi Arabia and United Arab Emirates increased by 33.1% and 7.5% respectively.

Unlike 2009, the African region has showed signs of improvement in 2010. Arrivals from the African region recorded a positive growth with 11.8% capturing a market share of 0.7%. (Refer Figure 5)

**Figure 5: Market Share and Arrival growth: 2010**

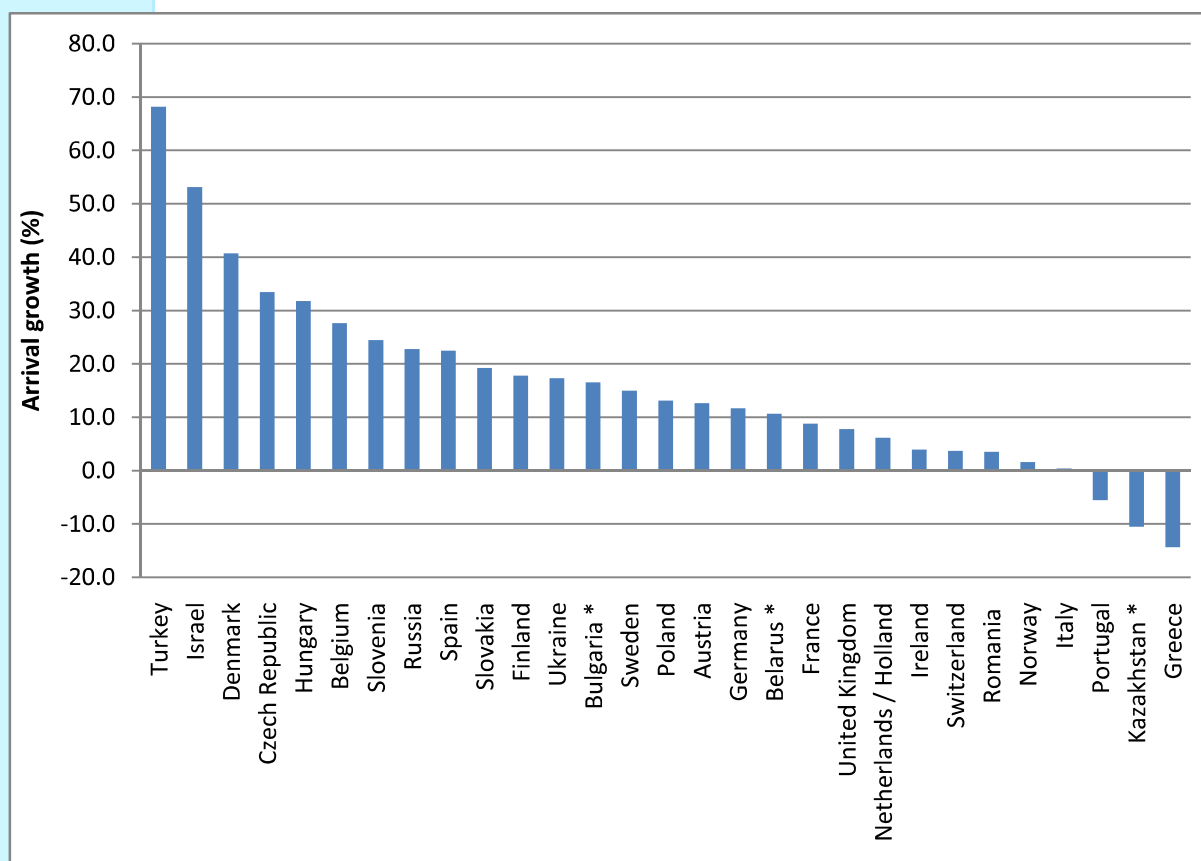


Source: Ministry of Tourism, Arts and Culture

## Performance of Markets in the European Region

Most of the major markets from the European region performed with positive growths for the year 2010. The British market, capturing the second highest market share with 14.4%, registered a positive growth of 7.7% while the Italian market capturing the third highest market share with 11.3%, performed with a positive growth of 0.3%. The German, French, Russian and Swiss markets which are included in the top ten markets with the highest market share recorded a growth of 11.6%, 8.8%, 22.7% and 3.7% respectively. Markets which recorded negative growth in this region include Portugal, Kazakhstan and Greece with -5.5%, -10.5% and -14.4% respectively. (Refer Figure 6)

**Figure 6: Arrival Growth of Major European Markets: 2010**

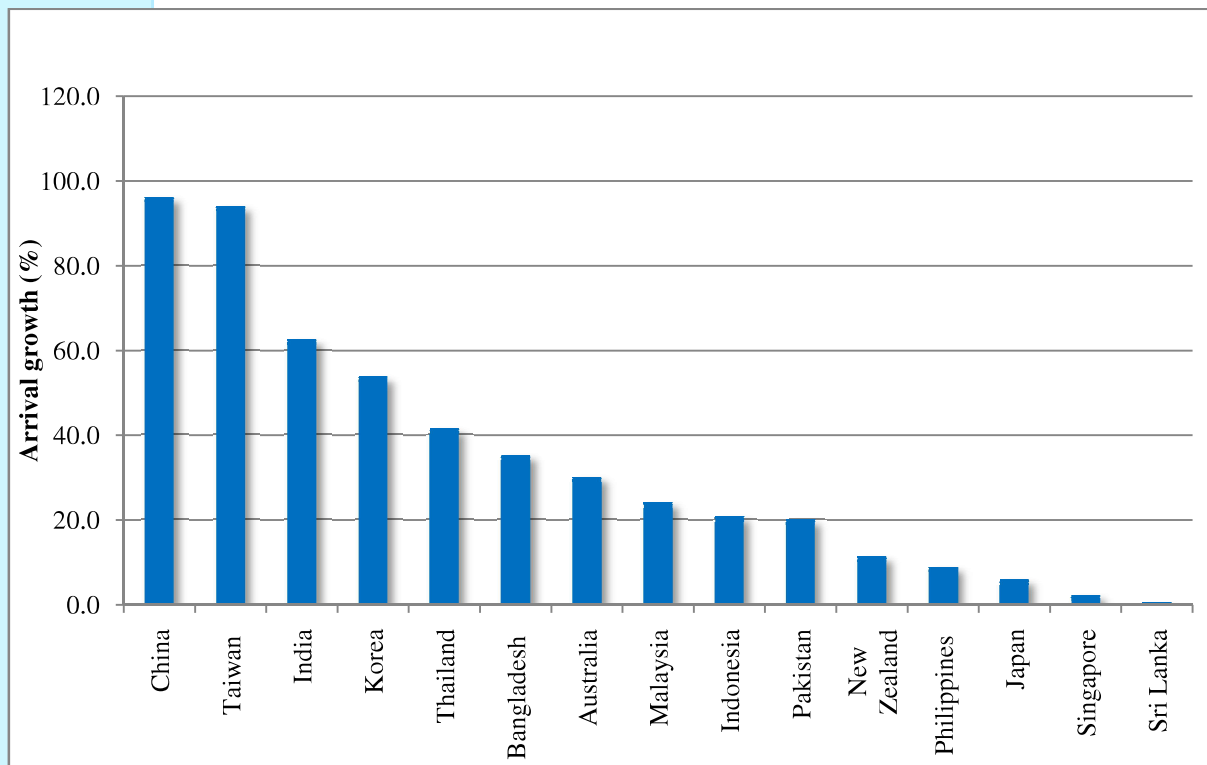


Source: Ministry of Tourism, Arts and Culture

## Performance of Markets in Asia & the Pacific Region

Asia & the Pacific region captured a market share of 31.6% remained as the second most tourist generating region to the Maldives in 2010 whereas in the year 2009 this region captured a market share of 23.7%. With a total of 250,638 tourists, this is an impressive growth of 52.9%. The positive growth registered from this region is contributed by the robust increase from the Chinese market which is now the market with the highest market share of 15%. The Chinese market recorded a growth of 96.1% compared to 2009. Other markets from Asia which are included in the top ten markets include Japan, India and Korea recording 5.9%, 62.5% and 53.8% growth in arrivals respectively. (Refer Figure 7)

**Figure 7: Arrival Growth of Major Asian Markets: 2010**



Source: Ministry of Tourism, Arts and Culture

## Top Ten Markets 2010

Table 2: Top Ten Markets for 2010

Rank '10	Market	% Share '10	Arrivals	% Change 10/09	Rank '09
1	China	15.0	118,961	96.1	4
2	United Kingdom	14.4	114,158	7.7	1
3	Italy	11.3	89,596	0.3	2
4	Germany	9.7	77,108	11.6	3
5	France	6.9	54,789	8.8	5
6	Russia	6.2	49,111	22.7	6
7	Japan	4.9	38,791	5.9	7
8	Switzerland	3.5	27,766	3.7	8
9	India	3.3	25,756	62.5	10
10	Korea	3.1	24,808	53.8	9

Markets in the top four positions have changed compared to 2009. In 2010, the top most tourist generating market is China which was in 4<sup>th</sup> position last year. Last year's number one market, United Kingdom, has moved down one place to 2<sup>nd</sup> position. Likewise Italy and Germany both have also moved down one place to 3<sup>rd</sup> and 4<sup>th</sup> position in 2010 respectively. India and Korea have switched places with each other to 9<sup>th</sup> and 10<sup>th</sup> positions compared to 2009. However markets such as France, Russia, Japan and Switzerland remained in the same positions as 2009 in 5<sup>th</sup>, 6<sup>th</sup>, 7<sup>th</sup> and 8<sup>th</sup> positions respectively.

The *Chinese* market moved up from 4<sup>th</sup> position in 2009 to 1<sup>st</sup> position in 2010 gaining 3 places whereas this market gained 2 places from 6<sup>th</sup> position in 2008 to the 4<sup>th</sup> position at the end of 2009. Chinese market has been showing remarkable performance over the last 6 years and is the first Asian market in history to gain the top position. Market share increased from 2.5% in 2005 to 9.2% by 2009 and to 15% in 2010. In terms of arrival growth, this market registered heavy growths during 2009, with 46.1% as annual average growth for the year. By the end of 2010, this market has recorded an impressive growth of 96.1%. The growth in this market accounts for the new schedule flight which started its operation in April 2008 and the increase in the standard of living of Chinese citizens during the last few years.

**United Kingdom**, with a market share of 14.4% is now the 2<sup>nd</sup> most tourist generating market to Maldives. The market however showed a decline of 9.3% in 2009 compared with 2008 due to the global economic crisis. This decline has improved to a positive growth of 7.7% in 2010 compared to 2009 showing signs of recovery for this market.

**Italy** is now the third market leader to the Maldives with 11.3% market share. This market has been on the decline since 2006. Market share dropped from 19.8% in 2006 to 17.3% in 2007 to 15.2% in 2008 and to 13.6% in 2009. Italy was recorded to have a positive growth of 0.3% in 2010 compared with 2009.

**Germany** moved down one position to the fourth most tourist generating market to the Maldives capturing a market share of 9.7% at the end of 2010. Although market share has decreased, this market has recorded a growth in arrivals with 11.6% compared to 2009 with 77,108 tourists visiting Maldives in 2010.

**France** remained at the 5<sup>th</sup> position for the third year in a row with a market share of 6.9% in 2010. The French market has recorded a market share of 7% in 2008 and 7.7 % in 2009. In terms of growth, the French market recorded 6.2% in 2008, 4.7% in 2009 and 8.8% in 2010. It is important to note that the French market is one of the few major markets which recorded a positive growth in 2009 despite the fact that 2009 was a year of recession.

**Russia** has remained in the same position as 2009 in the 6<sup>th</sup> place. This market has recorded a growth in arrivals with 22.7% in 2010 compared to -18.3% in 2009. A total of 49,111 tourists visited Maldives from this market in 2010 capturing a market share of 6.2%.

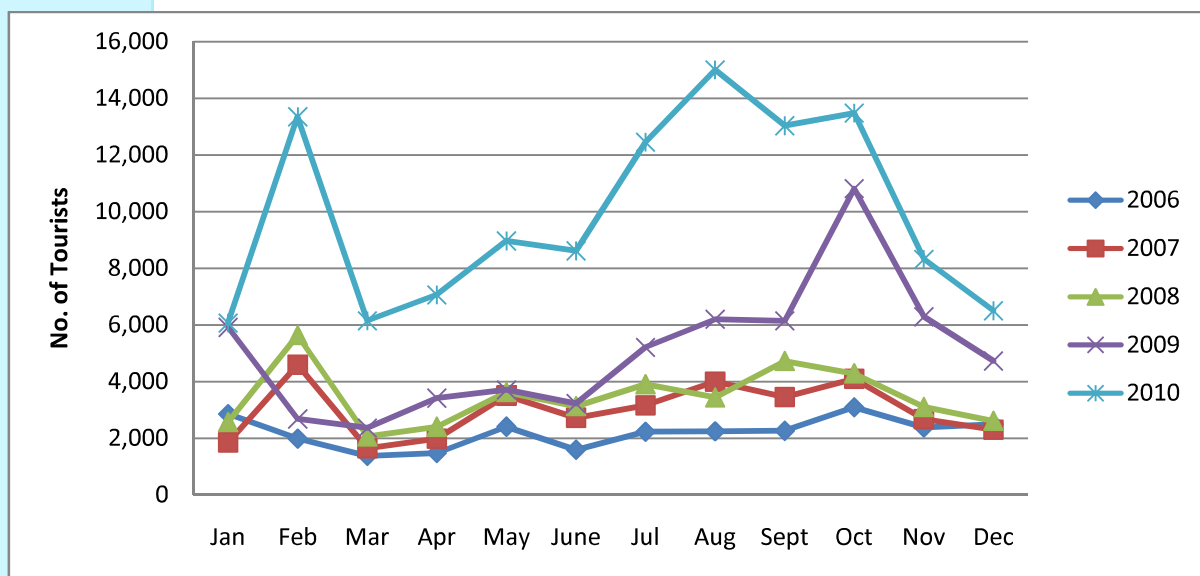
The **Japanese** market has remained in the 7<sup>th</sup> position for three consecutive years. This market has captured a share of 4.9% in 2010 whereas the market share was at 5.6% in both 2008 and 2009. In terms of arrival growth, this market has recorded negative figures in both 2008 and 2009 with -7.1% and -4.1% respectively whereas in 2010 this market has recorded a positive figure of 5.9% with a total of 38,791 tourists visiting the Maldives from this market.

**Switzerland, India** and **Korea** maintained its market positions as the 8<sup>th</sup>, 9<sup>th</sup> and 10<sup>th</sup> markets respectively. While Switzerland has remained in the 8<sup>th</sup> position for the fourth year in a row,

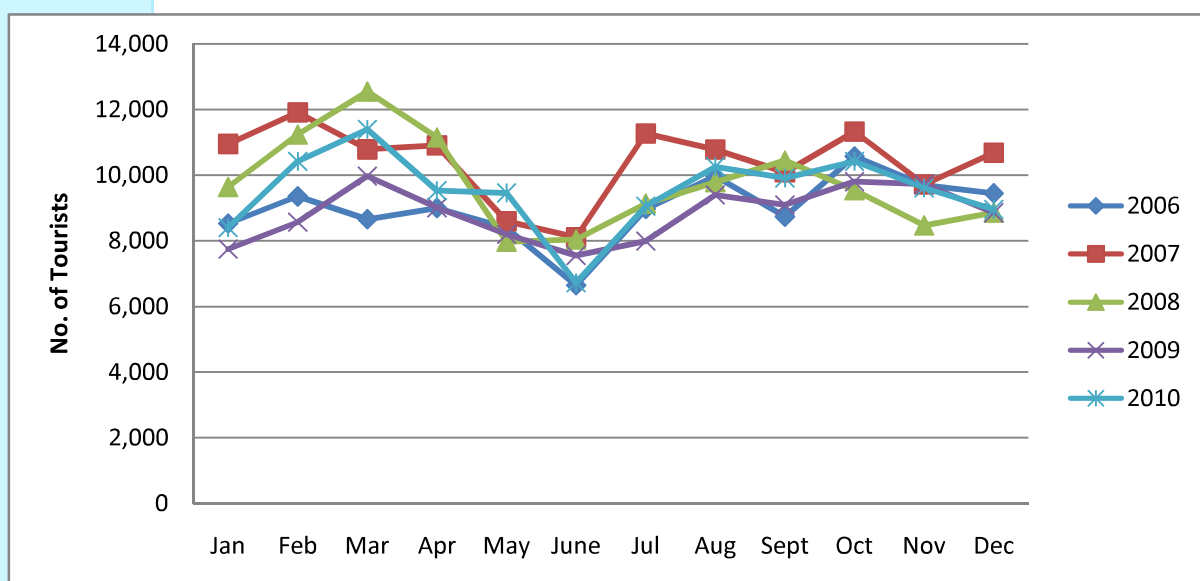
India and Korea have switched places with each other in 2010. Korea has been in the 9<sup>th</sup> position for the last four years in a row from 2006 to 2009 while India was in the 10<sup>th</sup> position since 2007 to 2009. The market share captured by Switzerland is 3.5%, while India and Korea captured a market share of 3.3% and 3.1% respectively. Although arrival growth was negative for these 3 markets in 2009, in 2010 these 3 markets have recorded positive figures.

### Graphs: Arrival Trends for the Top 5 Major Markets 2006 -2010

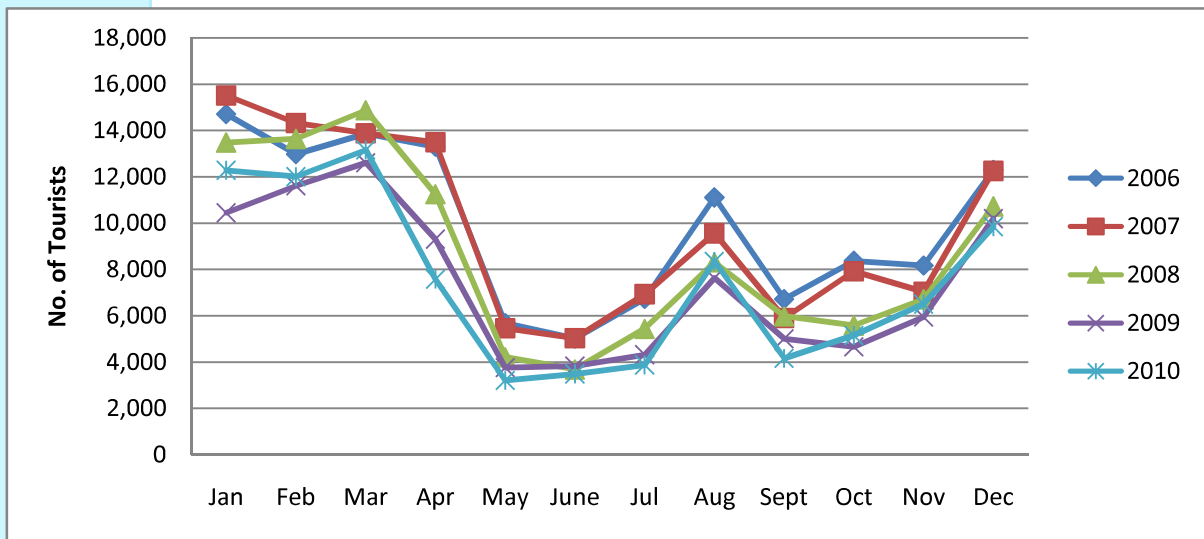
#### 1. China



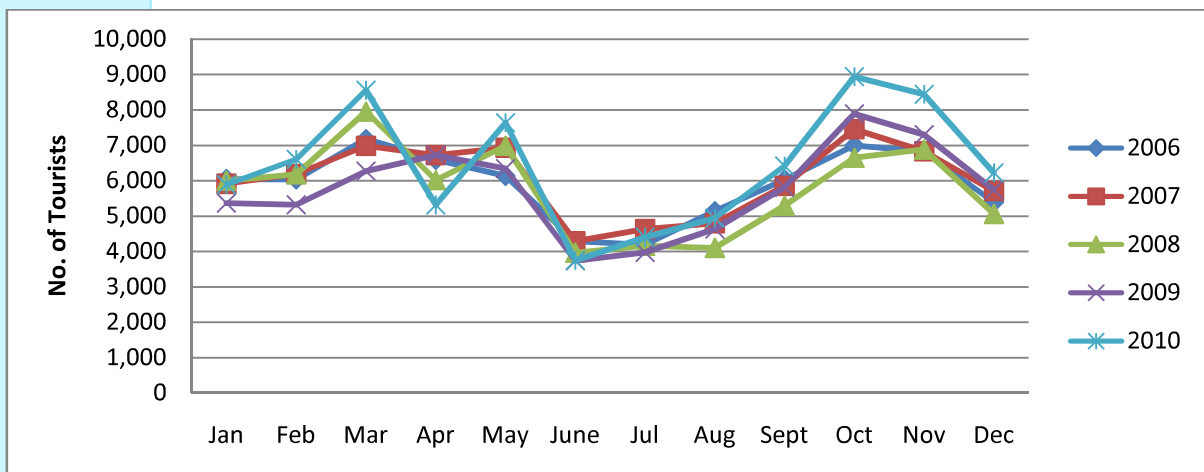
#### 2. United Kingdom



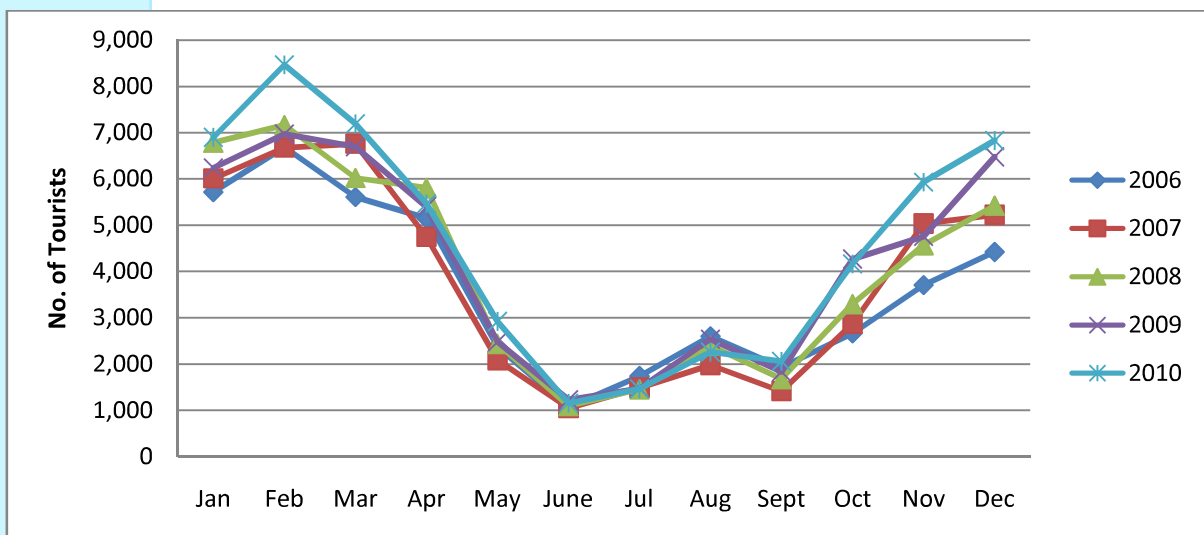
### 3. Italy



### 4. Germany



### 5. France



## Total Tourist Arrivals 2006 -2010

