

Volume 1, Issue 7

December 2009

*A brief analysis on tourism indicators  
end November 2009*

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



**STATISTICS SECTION**

**Ministry of Tourism, Arts & Culture**

*1st Floor, Ghazee Building, Ameer Ahmed Magu, Male', Maldives*

*Tel: +960 332 3224*

*Fax: +960 332 2512*

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

## Major Indicators at End November 2009

At the end of November 2009, the total registered bed capacity of 96 resorts and 14 hotels was 21,792 (20,604 beds in resorts and 1,188 beds in hotels). Out of the registered capacity, on average 20,065 beds were in operation during this period. Tourist arrivals to the Maldives recorded a decline of 4.9% for the period and tourist bed nights of resorts and hotels also dropped by 5.9% compared with the same period in 2008. Average occupancy rate of resorts and hotels was 70.1% for the period and the average duration of stay was 8.7 days.

**Table 1: Quarterly Indicators for 2009**

<b>Indicators 2009</b>	<b>Jan - Mar</b>	<b>Apr -Jun</b>	<b>Jul-Sep</b>	<b>Oct</b>	<b>Nov</b>	<b>Jan - Nov</b>
<b>Arrivals</b>	182,178	136,545	147,116	62,432	61,986	<b>590,257</b>
<b>% Change over 2008</b>	-10.8	-10.0	-2.0	10.8	6.9	<b>-4.9</b>
<b>Bed Nights (R &amp; H)</b>	1,488,960	1,105,532	1,167,609	461,279	456,690	<b>4,680,070</b>
<b>% Change over 2008</b>	-9.1	-25.3	-11.7	1.8	0.3	<b>-5.9</b>
<b>Occupancy Rate (R &amp; H)</b>	84.7	60.6	62.1	73.6	75.1	<b>70.1</b>
<b>% Change over 2008</b>	-10.3	-10.4	-7.0	-2.6	-3.5	<b>-8.1</b>
<b>Operational Bed Capacity (R &amp; H)</b>	19,552	20,079	20,449	20,215	20,260	<b>20,065</b>
<b>% Change over 2008</b>	1.9	7.0	7.0	5.3	5.0	<b>5.3</b>
<b>Average Duration of Stay (Days)</b>	8.9	8.9	8.6	8.1	8.1	<b>8.7</b>
<b>% Change over 2008</b>	0.8	0.9	0.5	0.0	0.3	<b>0.7</b>

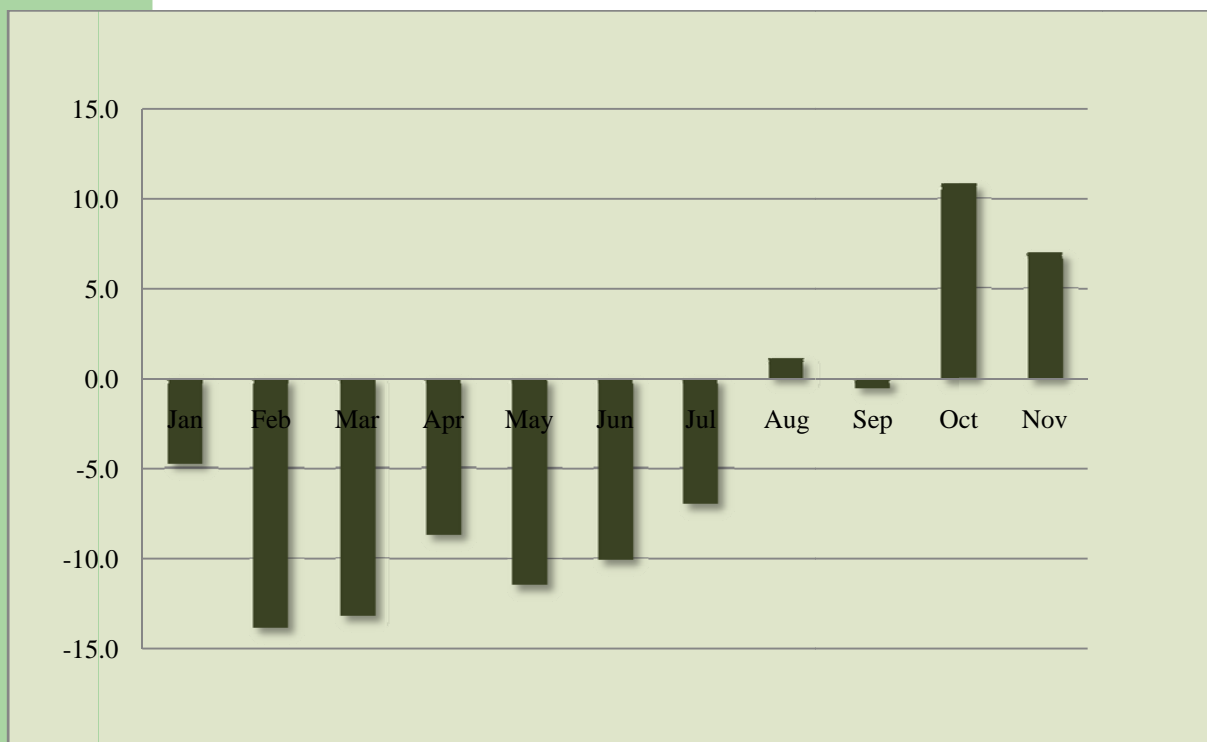
*Source: Ministry of Tourism, Arts & Culture*

## Tourist Arrivals

The October 2009 edition of the United Nation's World Tourism Organization's (UNWTO) World Tourism Barometer (WTB), highlighted that even though the unfavorable economic conditions are expected to continue affecting tourism demand, the rates of decline are easing, and are expected to continue doing so during the remainder of the year. According to WTB, international tourism demand declined by 7% for the first eight months of this year compared to the same period of last year. UNWTO's latest forecast is that international tourist arrivals for the year 2009 will decrease by around 5%.

Tourist arrivals to the Maldives recorded a decline of 4.9% at the end of November 2009, compared to the same period in 2008. However, as shown in Figure 1, arrivals to Maldives started increasing from August with a positive growth of 1.1%. Although a slight decline of 0.6% was recorded for the month of September, arrivals increased by 10.8% in October and 6.9% in November 2009.

**Figure 12: Arrival Growth Percentage: January to November 2009**



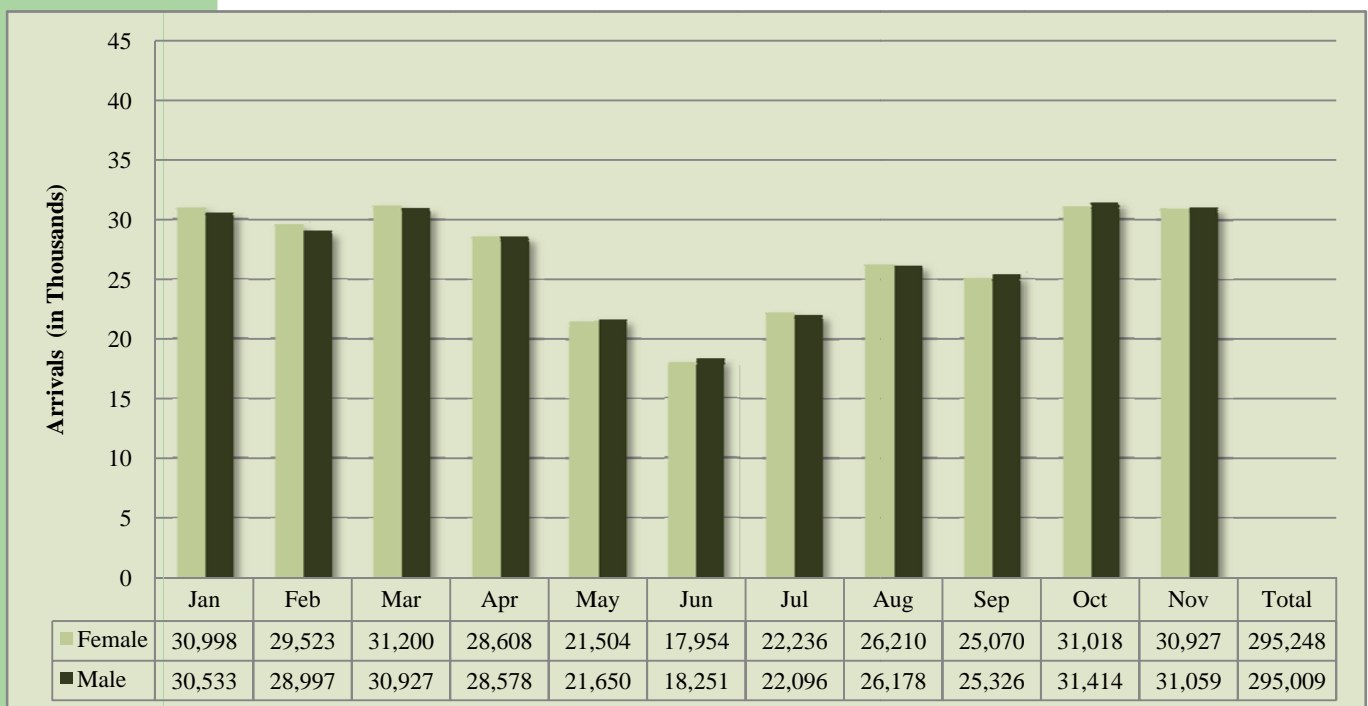
Source: Ministry of Tourism, Arts and Culture

Even though arrivals to the Maldives has started easing up and showing positive growths since August, it is still expected that arrivals will show a negative growth of around 3-4% by the end of the year due to the strong negative growths recorded for the first half of this year.

### Tourist Arrivals by Gender and Age Group

The Gender ratio of tourists who visited the Maldives during the period January to November 2009 was 1:1. While a total of 295,248 female tourists visited the Maldives during this period, the number of male tourists was 295,009.

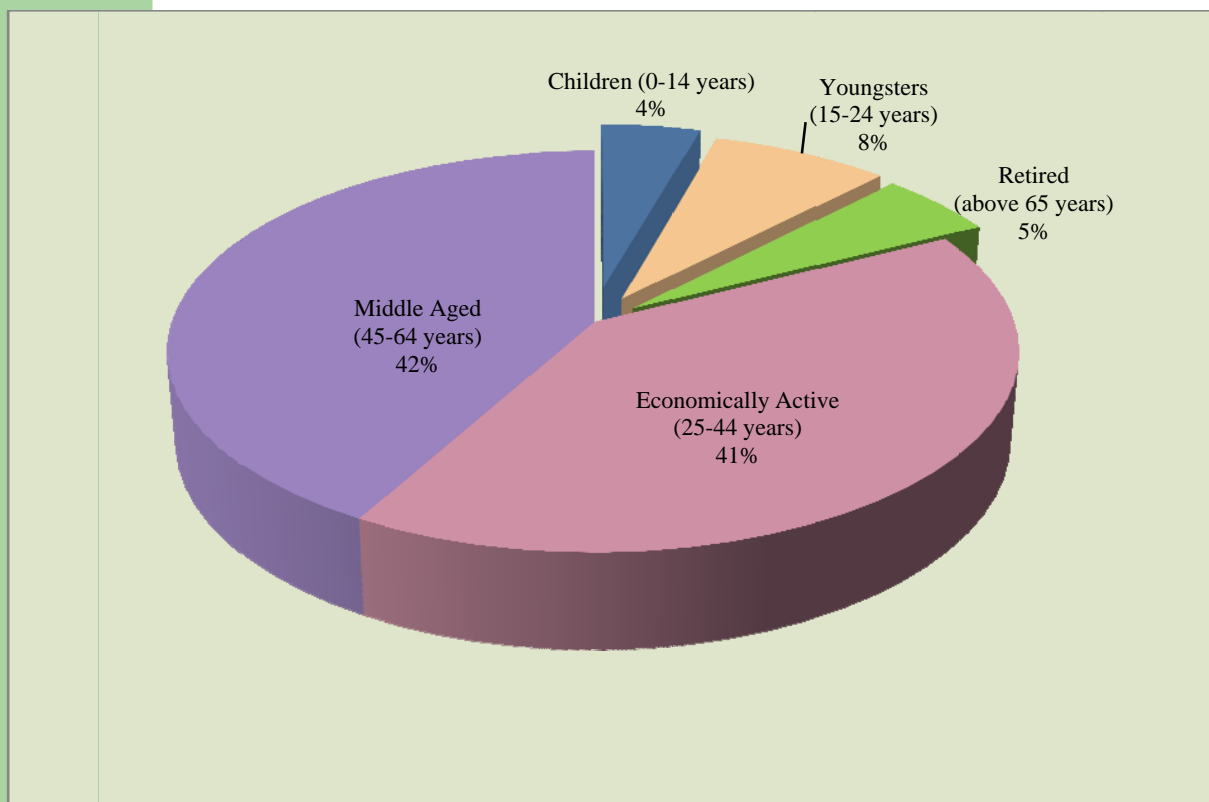
**Figure 2: Tourist Arrivals by Gender: January to November 2009**



Source: Ministry of Tourism, Arts and Culture

In terms of age of tourists who visited the Maldives during the period January to November 2009, 42% were middle aged (between the ages of 45 to 64 years) people and 41% were the economically active population between the ages of 25 to 44 years. While youngsters, aged between 15 to 24 years contributed 8%, four per cent of the tourists who visited the Maldives during this period were children under the age of 14 years. Percentage contribution of retired people (65 years of age and above) for the period was 5%. (Refer Figure 3)

**Figure 3: Tourist Arrivals by Age Group: January-November 2009**



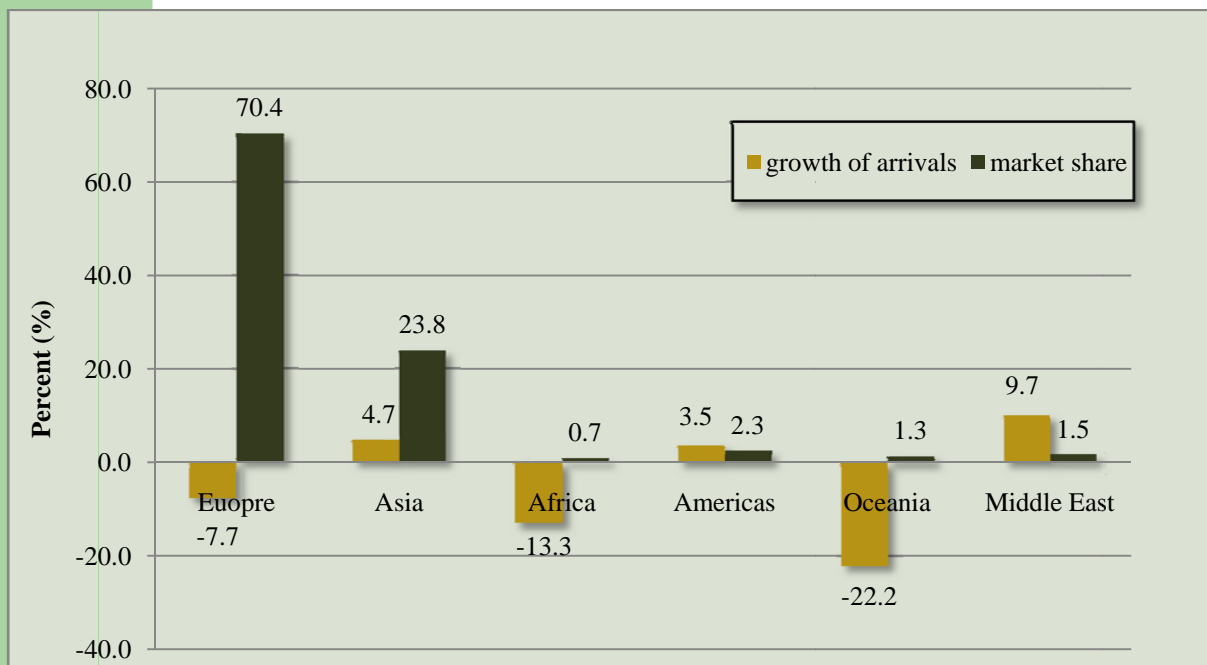
Source: Ministry of Tourism, Arts and Culture

## Major Markets

Europe, the leading market generator to the Maldives, captured a market share of over 70% by the end of November 2009. Asia remains as the second market generator with a market share of nearly 24%. With the 94% contribution by Europe and Asia, only 6% of the tourists were from other regions of the world. While Americas contributed 2.3%, Oceania captured a market share of 1.3%, Middle East 1.5% and Africa captured 0.7% of the market share (refer Figure 4)

While Europe, Africa and Oceania recorded decline in arrivals for the period January to November 2009, Asia, Americas and the Middle East region showed positive growths for the period. Europe showed a decline of nearly 8% by the end of November 2009 compared to the same period in 2008. Africa declined by more than 13%, whereas Oceania recorded a decline of more than 22% for the period. Middle East showed the best performance during the period January to November with a positive growth of nearly 10%. The Asian region increased by 4.7% and Americas showed a positive growth of 3.5% by the end of November 2009 compared to the same period in 2008. (Refer Figure 4)

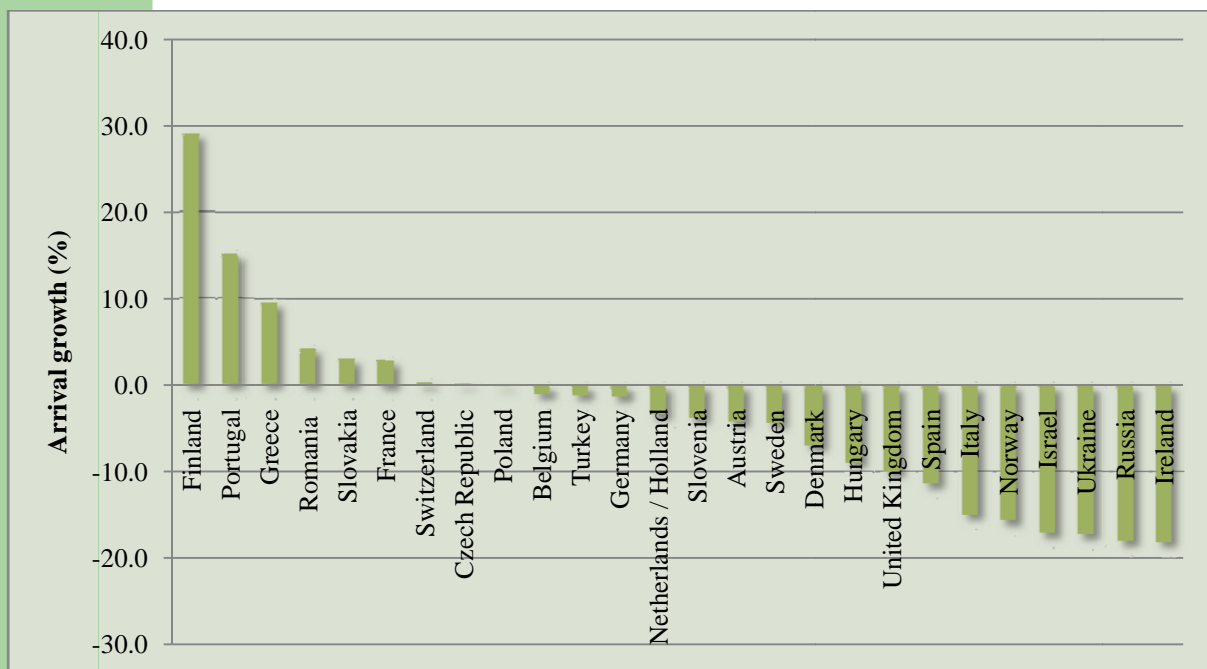
**Figure 4: Market Share and Growth Percent by Regions- January to November 2009**



Source: Ministry of Tourism, Arts and Culture

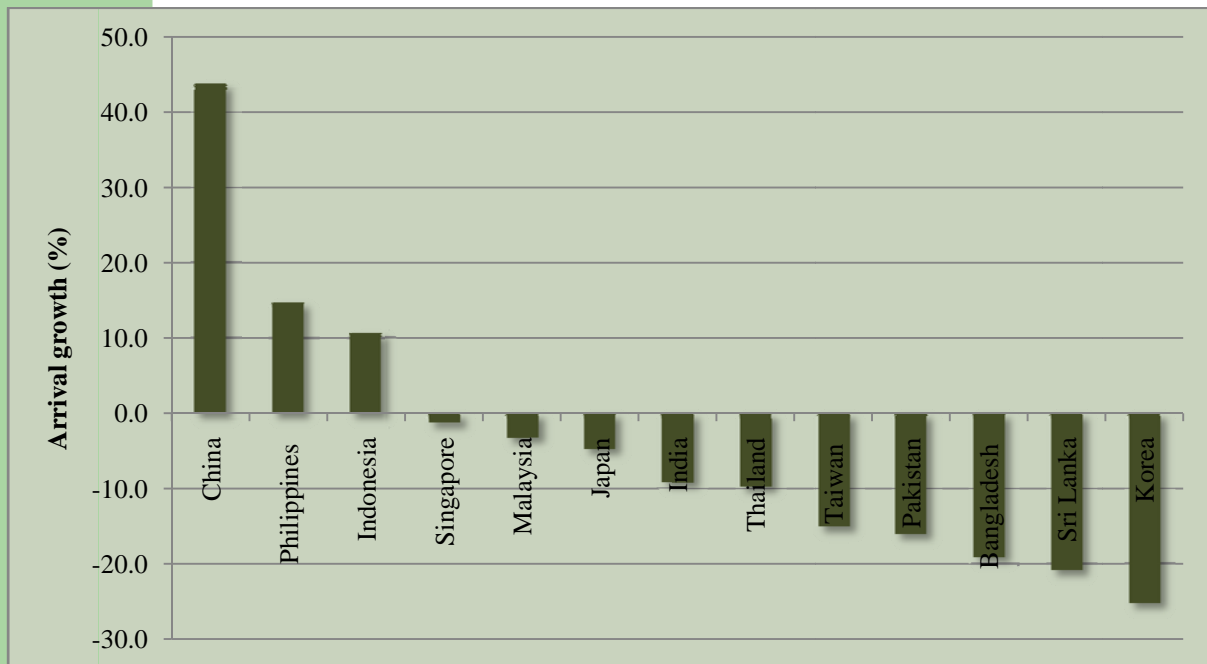
Although Europe captured the largest market share, most of the individual markets from this region showed negative growths for the period January to November 2009 compared with the same period in 2008. While Italian market declined by 15%, the British market showed a negative growth of 10% (refer figure 5). Among the top ten markets from this region, Russia was recorded to have the highest decline for the period with 18%. While Spanish and Swedish market showed negative growths of 11.4% and 4.5% respectively, the German market has been showing signs of improvement. The market growth went from -10.6% in January to -9.0% at end June and by the end of November the market decline was recorded to be -1.3%. From this region, the best performance for the period, January to November 2009 was recorded for the Finnish market with a positive growth of nearly 30% compared to the same period of 2008. Portugal also showed a positive growth of 15%. Out of the top ten markets to the Maldives, French and Swiss markets has shown complete recovery with +2.8% and +0.4% growths respectively by the end of November 2009 compared with the same period in 2008.

**Figure 5: Growth Percentage of Major European Markets – January to November 2009**



Source: Ministry of Tourism, Arts and Culture

**Figure 6: Growth Percentage of Major Asian Markets – January to November 2009**



Source: Ministry of Tourism, Arts and Culture

China, Philippines and Indonesia continue to do well maintaining strong positive growths of +43.8%, +14.8% and +10.6% respectively at the end of November 2009 compared with the same period in 2008 (refer Figure 6). Japan, which recorded a negative growth of 4.8% for the period January to November 2009, showed a positive growth for the month of November 2009. Markets such as Malaysia and Singapore also performed with positive growths of 30.4% and 71.3% respectively in November 2009 compared to November 2008.

Tourist arrivals to the Maldives from United States of America increased by 5.3% during the period January to November 2009 compared with the same period in 2008. Most markets from the Middle East region also showed positive growth during this period. Arrivals from the United Arab Emirates and Saudi Arabia showed positive growths of 20.1% and 16.6% respectively.