

A Brief Summary on the Tourism
Performance at End 2011

**MALDIVES TOURISM
PERFORMANCE REPORT
2011**

Ministry of Tourism, Arts & Culture

Overview

Tourist arrivals to the Maldives in 2011 recorded a healthy growth of 17.6% compared with 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). Fourth quarter registered a growth of 17.4%. With over 6.5 million nights, the tourist bed nights recorded a growth of 9.1% in 2011. With the increase in bed capacity, the occupancy rate and average duration of stay registered negative growths with -2.5% and -0.5% respectively.

A total of 101 resorts with 22,094 beds, 19 hotels with 1,603 beds, 37 guest houses with 641 beds and 157 safari vessels with 2,514 beds, were registered in the Maldives at the end of 2011. Out of which, on an average 93 resorts with 21,035 beds, 17 hotels with 1,467 beds, 24 guest houses with 468 beds and 98 safari vessels with 1,518 beds were in operation at the end of 2011.

Out of the 5 new resorts that were expected to open during the year 2011, 3 resorts came into operation, which included Six Senses Laamu (194 beds) in L. Olhuveli, Jumeirah Devanafushi (74 beds) in G.A. Meradhoo and Ayada Maldives (200 beds) in G.Dh. Magudhdhuva.

Table 1: Major Indicators 2011

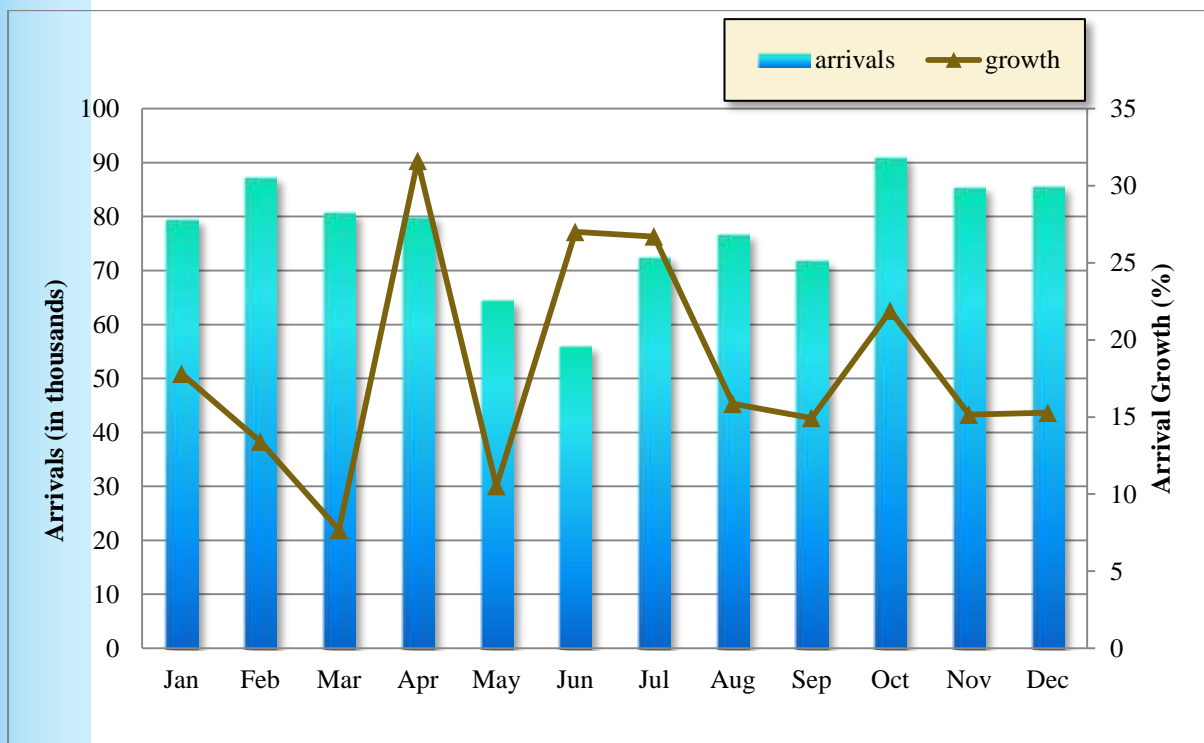
INDICATORS 2011	Jan - Mar	Apr -Jun	Jul -Sep	Oct -Dec	Total (end Dec)
Arrivals	247,617	200,350	221,205	262,161	931,333
% Change over 2010	12.8	22.8	18.9	17.4	17.6
Bed Nights	1,852,564	1,441,406	1,477,846	1,762,891	6,529,141
% Change over 2010	10.7	16.0	9.9	11.5	11.8
Occupancy Rate	84.2	64.0	66.3	78.3	73.1
% Change over 2010	-0.2	1.0	-1.7	-1.1	-2.5
Operational Bed Capacity	24,487	24,740	24,212	24,413	24,490
% Change over 2010	10.7	14.3	12.9	13.1	12.9
Average Duration of Stay (Days)	7.5	7.2	6.7	6.7	7.0
% Change over 2010	-0.1	-0.4	-0.5	-0.4	-0.4

Source: Ministry of Tourism, Arts and Culture

Tourist Arrivals

At the end of 2011, over 931,000 tourists visited the Maldives registering a positive growth of 17.6%. On a monthly basis, tourist arrival was at its peak during the month of October 2011 with a total of 91,059 tourists. However, in terms of growth rate, highest growth was recorded during the month of April 2011 with 31.6%.

Figure 2: Tourist Arrivals to the Maldives 2011

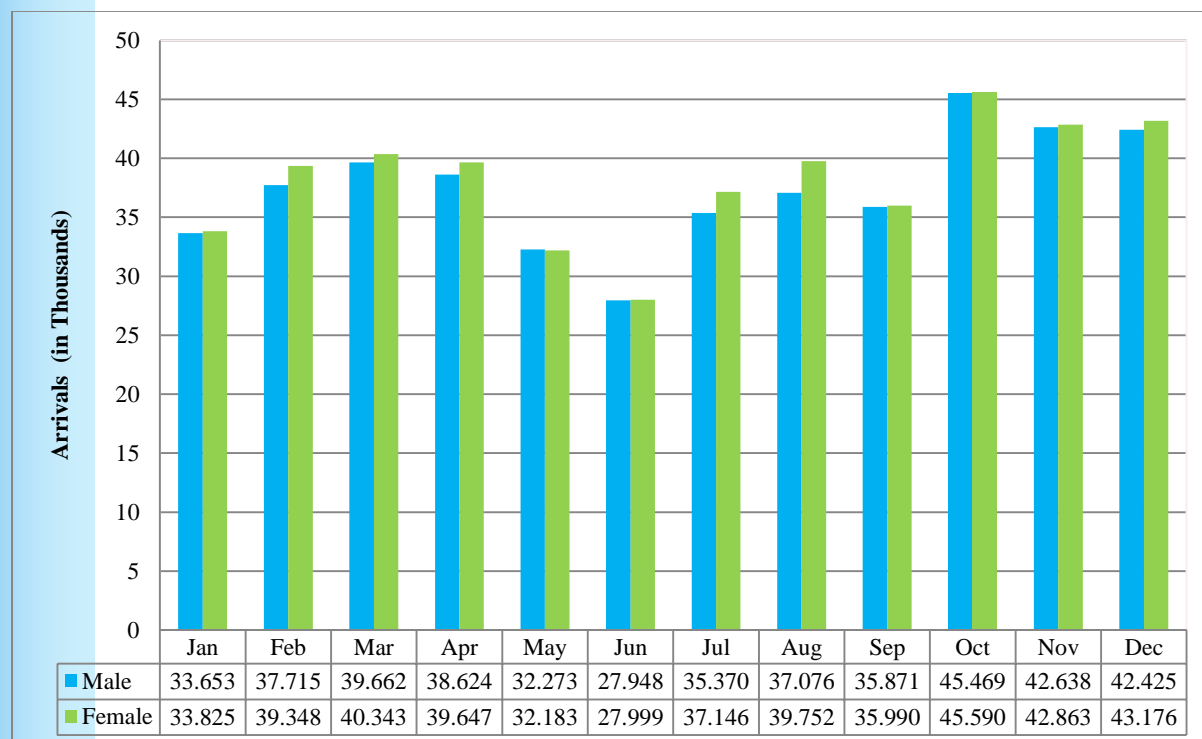


Source: Ministry of Tourism, Arts and Culture

Tourist Arrivals by Gender and Age Group

At the end of 2011 a total of 448,724 male tourists and 457,862 female tourists visited the Maldives. The percentage contribution of female tourists was higher than that of male tourists. While females represented 71% of the total arrivals to the Maldives in 2011, male tourists represented 69.6%. (Refer Figure 3).

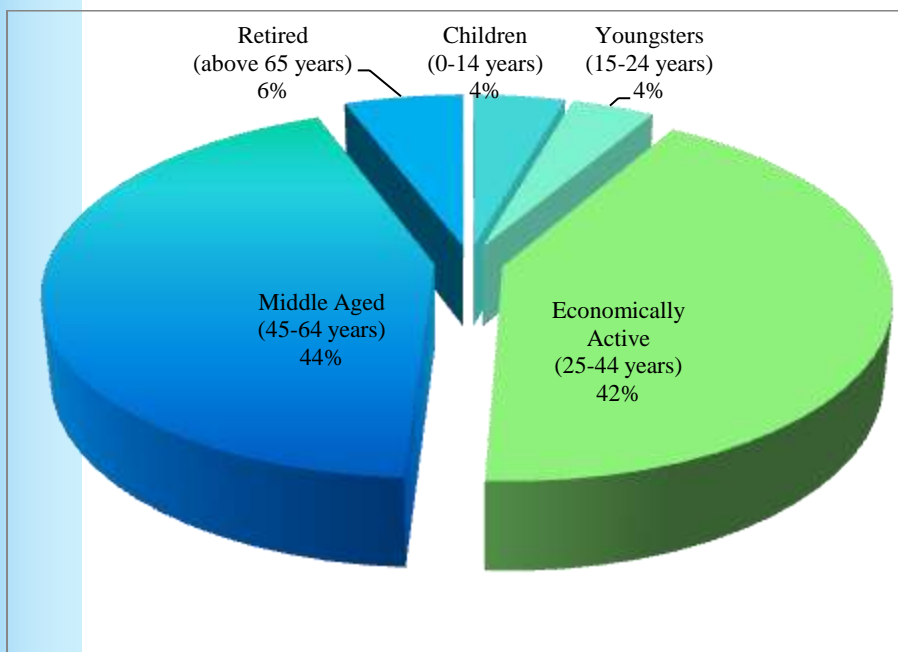
Figure 3: Tourist Arrivals by Gender - 2011



Source: Ministry of Tourism, Arts and Culture

With respect to the age group of tourists who visited the Maldives in 2011, the working age groups of citizens dominate tourist population of the Maldives. As seen in Figure 4, 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 during 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%.

Figure 4: Tourist Arrivals by Age Group - 2011

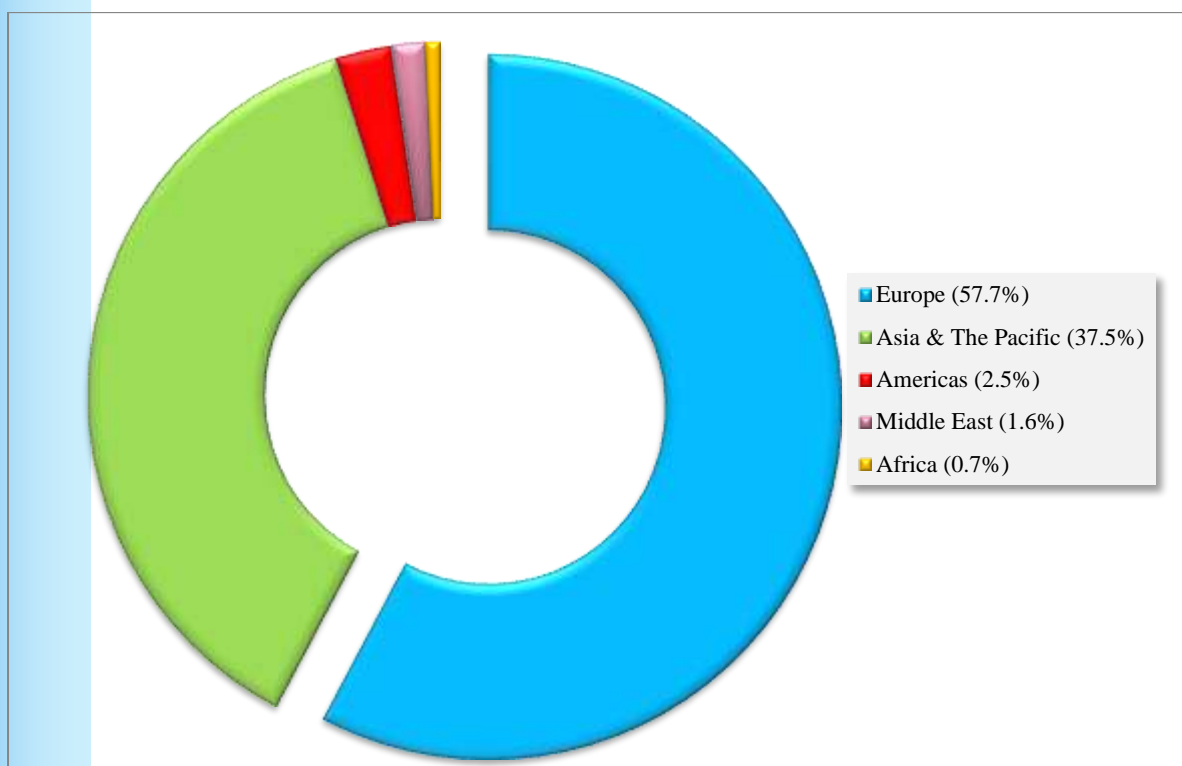


Source: Ministry of Tourism, Arts and Culture

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 nearly 58%, in 2011. Capturing a market share of 37.5% Asia & the Pacific remained as the second market generator to the Maldives. While Americas contributed 2.5% 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% in 2011 (refer Fig. 5)

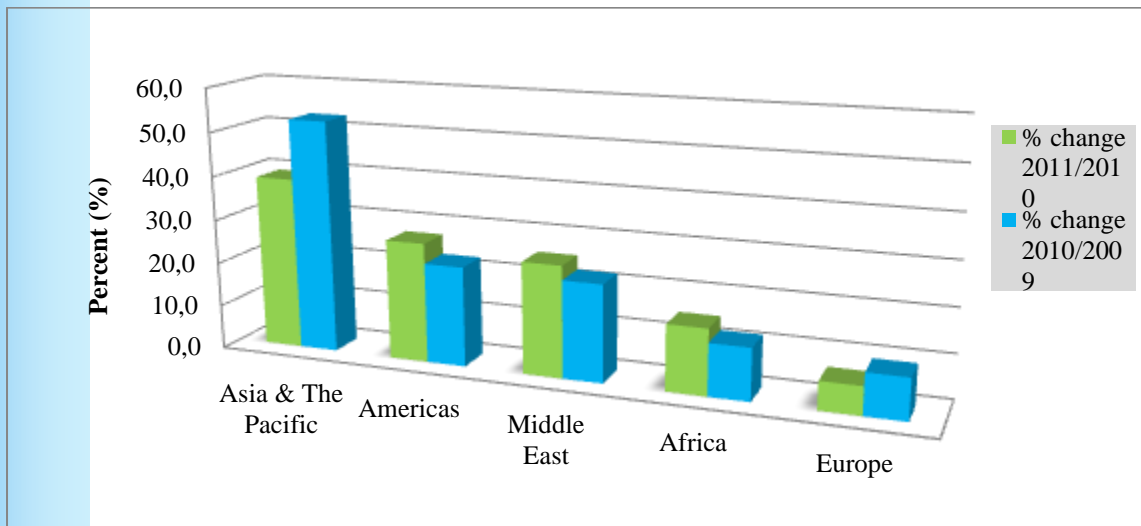
Figure 5: Market Share by Regions - 2011



Source: Ministry of Tourism, Arts and Culture

At the end of 2011 except for Europe, all regions posted double digit growth rates compared with 2010. Europe, while remaining the market leader registered the lowest growth rate of 6.4% in 2011. The highest growth rate for the period was recorded for the Asia and the Pacific region with 37.5%. Arrivals from Americas and the Middle East grew by 27.2% and 25.3% respectively. Africa posted a growth rate of 14.9% in 2011 compared with 2010 (refer Figure 6).

Figure 6: Arrival Growth by Regions - 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 34% in 2011 compared with 2010. Second best performance for the period from this region was observed from Denmark with an increase of 31%. Third best performance was recorded from the Belgium market with a positive growth of 30.8%. While Greece registered the lowest growth rate with a negative 35%, the Italian market and U.K market, two of the key source markets from this region, registered negative growths at the end of 2011 with -7.3% and -8.5% respectively.

From the Asia and the Pacific region, the Chinese market maintained its number one rank with a healthy growth of 67% capturing 21% shares at the end of 2011. The only major market from this region which registered a negative growth in 2011 was Japan with 7.8%.

From the Africa, the South African market registered a healthy growth of over 16%, however, this market represents only 0.4% of the total arrivals in 2011.

The U.S market from the Americas is considered as one of the potential markets increasing its market share from 1.4% in 2010 to 1.6% 2011. U.S posted a strong positive growth of 26.2% in 2011 compared with 2010.

Middle East region did well in 2011 registering double digit growth rates from all major source markets.