

Tourism Update

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BRIEF ANALYSYS ON THE TOURISM INDICATORS

DECEMBER 2015



STATISTICS & RESEARCH SECTION

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Quarterly Tourism Update- Fourth Quarter 2015

Major indicators

Fourth quarter ended with a positive growth rate of 3.7% compared to the same quarter in 2014. The highest arrival was observed in the month of December with 119255 arrivals.

Fourth quarter started with a decline in arrivals (-4.4%) however it picked up in November by 0.5%. Highest arrivals in this quarter was observed in the month of December with 119,255 arrivals which is a 15% increase in arrivals compared with the same period in 2014.

In the fourth quarter of 2015, Dh. Dhoores came into operation with 66 beds, Amari Havodda opened with 240 beds and Drift Thelueliga at Alif dhaalu atoll was opened with 60 beds. By the end of the fourth quarter registered guest house numbers increased from 289 to 314 with a total of 4641 beds by the end of December 2015.

With the opening of new properties the registered number of establishments reached 616 with 34,105 beds. Within these registered properties, 302 facilities with 28,276 beds were operational by the end of December 2015.

These include 108 resorts with 23,936 beds, 14 hotels with 1444 beds, 86 guest houses with 1208 beds and 94 Safari vessels with 1688 beds.

The recorded bed nights have been decreasing over the year with an average of -4.3%

The average occupancy rate for the year was 69% which is a decline of 5.1% compared to 2014. The average duration of stay was 5.7 days which is a decline of -0.4% days compared with 2014.

Figure: 1: Major indicators at end of December 2015

Major Indicators 2015	Jan - Mar	Apr - Jun	July- Sept	Oct-Dec	Total
Arrivals	329,968	279,137	310,172	314,971	1,234,248
% Change over 2014	2.6	-0.3	3.6	3.7	2.4
Bed Nights	1,812,852	1,495,693	1,582,970	1,732,946	6,976,333
% Change over 2014	-3.5	-5.7	-4.1	-5.5	-4.3
Occupancy Rate	78.8	63.2	66.8	67.2	69.0
% Change over 2014	-5.0	-5.5	-3.0	-6.7	-5.1
Operational Bed Capacity (Avg.)	27,827	27,694	27,339	1,701	27,748
% Change over 2014	2.7	3.2	1.1	3.8	2.8
Average Duration of Stay (Days)	6.0	5.7	5.4	5.5	5.7
% Change over 2014	-0.4	-0.3	-0.4	-0.5	-0.4

Source: Ministry of Tourism

TOURIST ARRIVALS TO THE MALDIVES

In the fourth quarter of 2015, started with a decline in arrivals in October (-4.4%) compared to the same period last year. The highest arrivals were recorded in the month of December (Fig. 2) with 119255 with a growth of 15% compared to the same period in 2014.

Figure 3, shows the growth patterns of all markets for the 4th quarter of the year compared to the 4th quarter of 2014. All markets showed a negative growth rate in the month of October hence the decline in the month compared to October 2014.

Middle East, Americas and Africa showed positive growths in the month of November and all markets showed a steep incline in the growth rate in the month of December 2015.

Figure 2: Tourist Arrivals and growth percentage to the Maldives 2015, 4th quarter

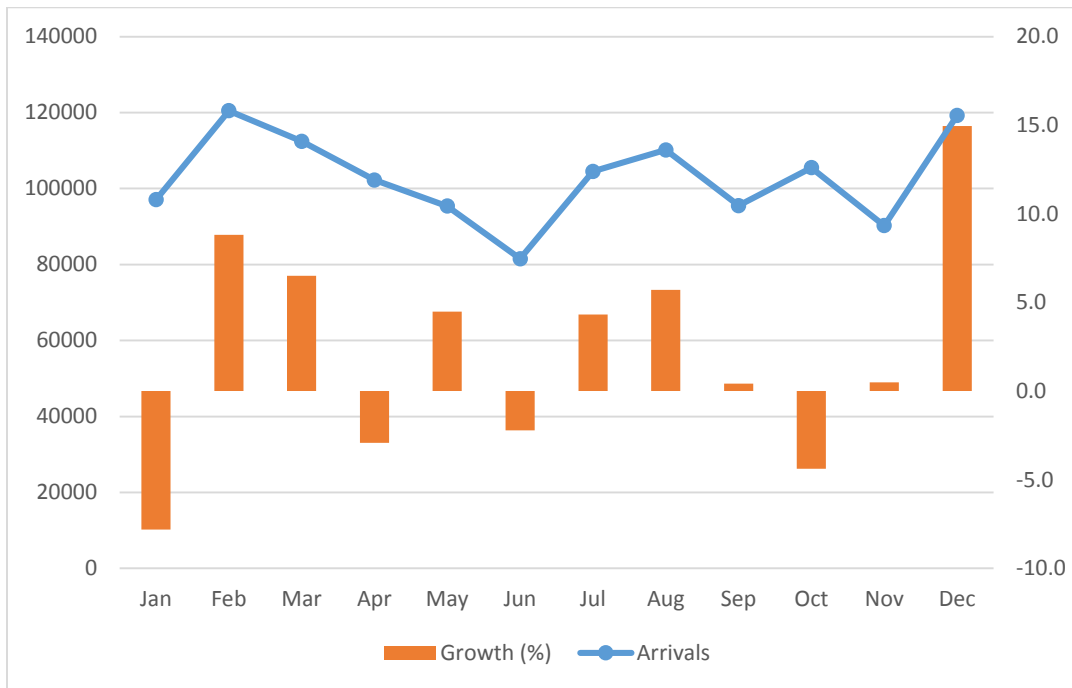
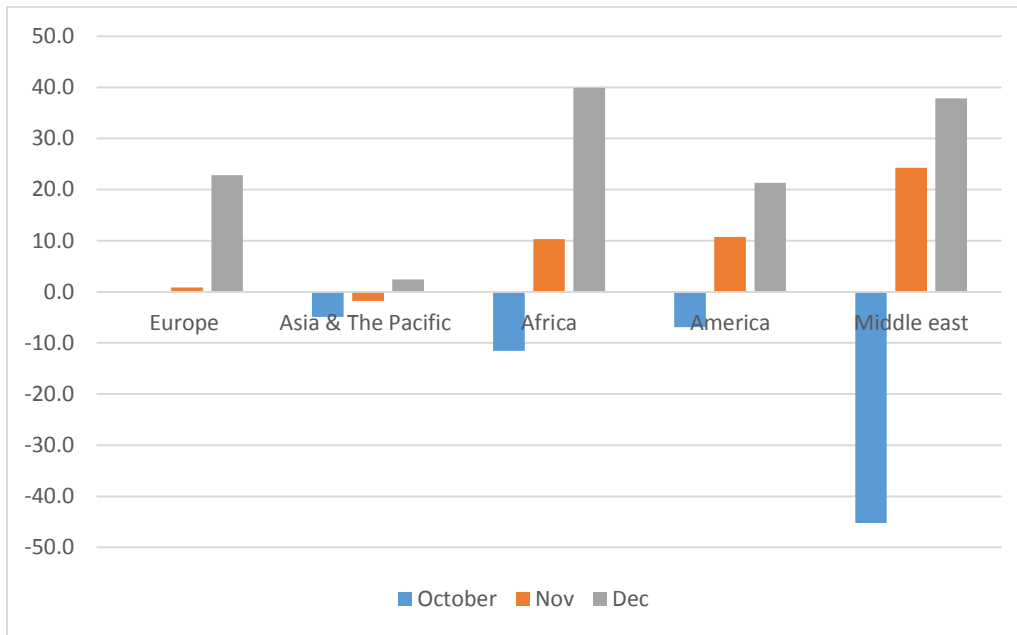


Figure 3: Market growth for the last quarter of 2015



MAJOR MARKETS

In terms of market share, Asia and the Pacific tops with a total share of 48.6% of shares in the 4th quarter of 2015. With arrivals reaching 600,099 the region observed a growth of 2% by the end of the fourth quarter of 2015.

Europe is the next best market generator with 43% shares and received 535,937 tourists which is a growth of 1.3% compared to 2014. Third is the Americas with 4% market share and 13.6% in growth rate by the end of year 2015.

Middle East is the 4th best market generator to the Maldives with 3.4% share and showed a growth of 12.8% compared to the same period in 2014. African region is the lowest market generator with 0.8% shares of the total arrivals.

Figure 4: Market Share by Regions, end of December 2015

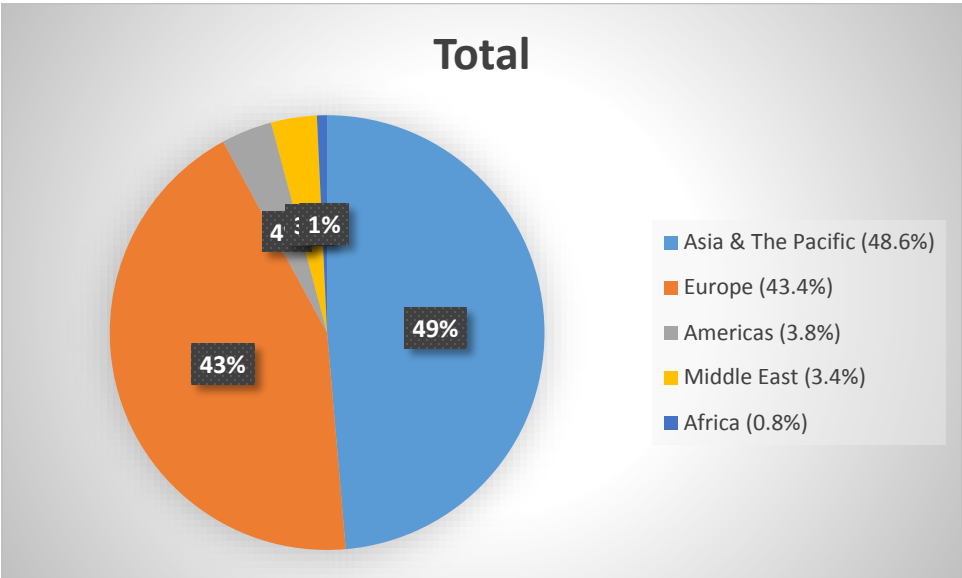
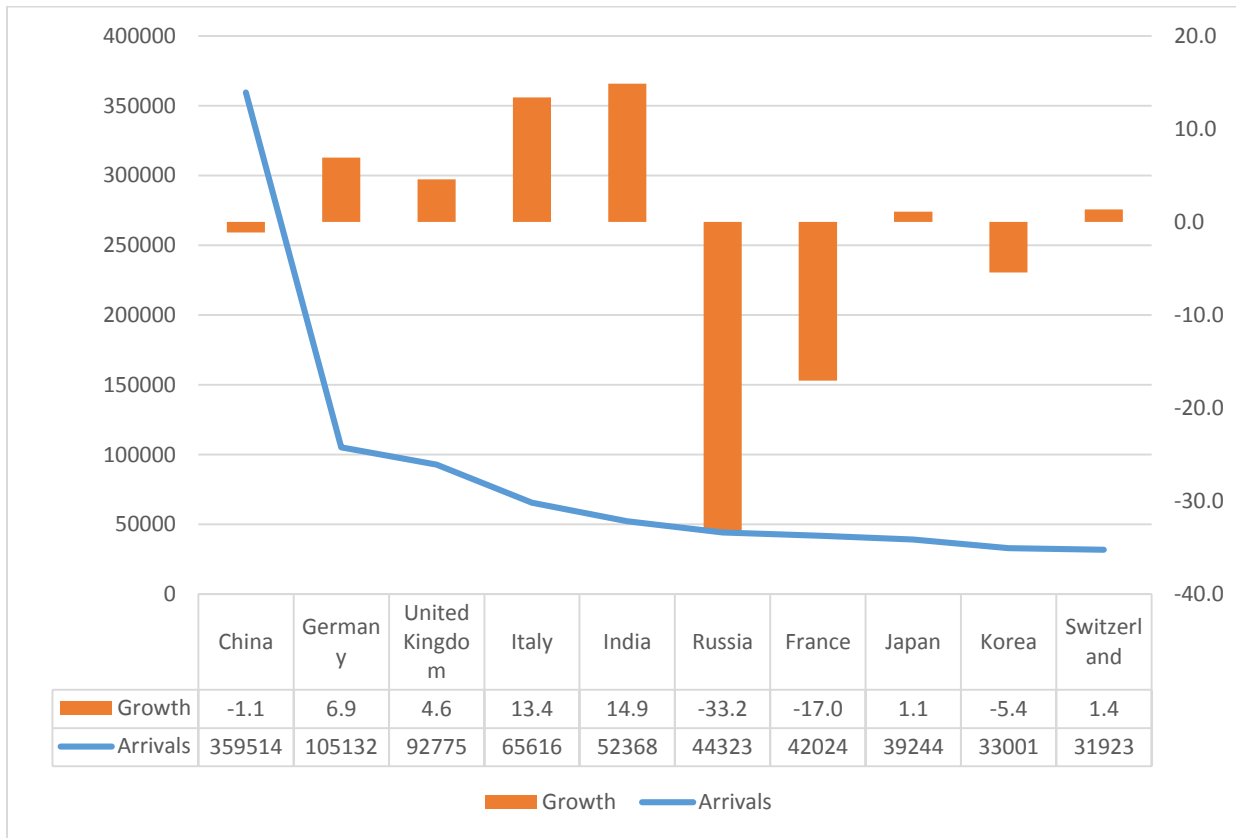


Figure 5: Top10 markets arrivals and growth rate, 2015



MAJOR EUROPEAN MARKETS

By the end of the year 2015, European region showed a positive growth in market share compared to 2014. Amongst the top 10 market generators France and Russia continue to decline even in the last quarter which is the peak season for the European market.

Germany remains as the top market generator in the region with 8.5% of market share from the total arrivals to the Maldives.

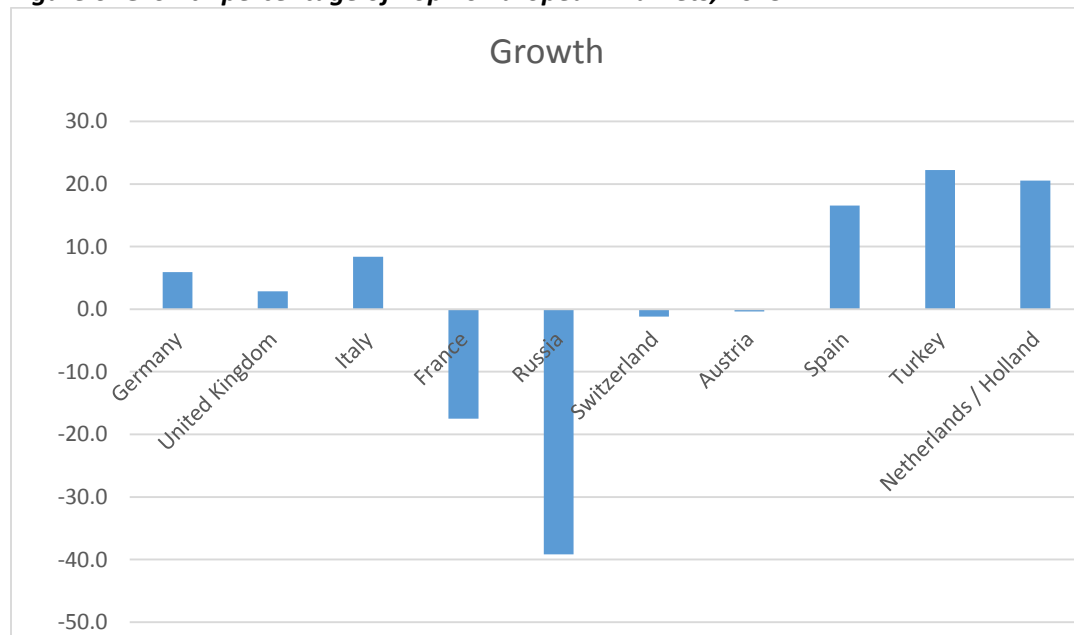
Second best performer in the region is United Kingdom with 7.5% shares and observed a growth of 4.6% compared to the fourth quarter of 2014.

Italian Market was the third best market in the region with 5.3% shares and recorded a steep growth of 13.4% compared to 2014.

Russian came 3rd in the market share with 3.6%, and continuing negative growth of -33% compared to 2014.

French came 5th in terms of Market share of 3.4% of the total visitors to Maldives and continues its decline with a negative growth of 17% in arrivals.

Figure 6: Growth percentage of Top 10 European Markets, 2015



MAJOR MARKETS FROM ASIA AND THE PACIFIC

Asia and the Pacific market is the highest market generator due to the huge number of Chinese contribution in the market group.

In terms of market share, Chinese have been the top market generator in the Maldives for the past 5 years. By the end of 2015 Chinese contributed 29% of the total arrivals. However the market share has declined compared to 2014 and showed a negative growth of -1.1% in arrivals for 2015 compared to 2014.

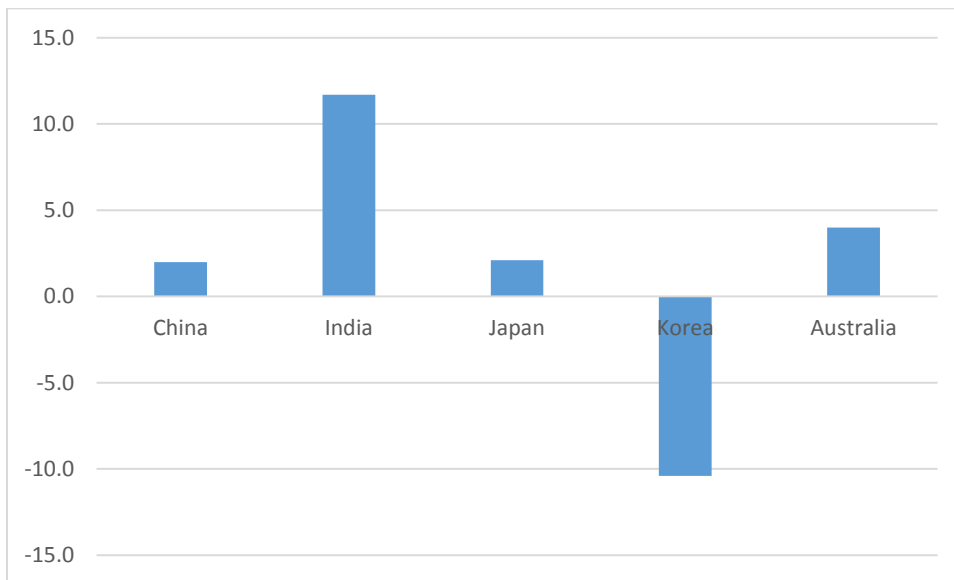
The second best performer is India with 4.2% shares of the total arrivals and recorded significant growth of 14.9% compared to the same quarter in 2014.

Japan was the third best performer in the region contributing 3.2% to the market share and recorded a growth of 1.1% compared to 2014.

Korean market came 4th in the region with 2.7% shares, however it has observed that it showed a negative growth of -5% in compared to 2014's performance.

Australian market has been a significant new market blooming in the region with 1.6% of the total arrivals. It has also recorded a growth of 4.6% compared to this period in 2014.

Figure 7: Market Growth percentage of main markets of Asia & the Pacific, 2015



OTHER MAJOR MARKETS

In the African region, the best performer is South Africa with 0.3% of shares, which is a total of 4170 visitors by the end of 2015.

Within Americas, USA market was the best performer with a growing market share of 2.4%, followed by Canada with 0.6% share. Brazil recorded a steep growth rate of 17.6% however their performance is insignificant compared to the total arrivals to the Maldives.

In the Middle East region, Saudi Arabia is seen as a significant contributor with 1.3% of shares and a growth of 27% compared with 2014. Egypt showed a huge growth in arrivals by 30% compared to 2014.

Trade fairs participated by Maldives in 2015

	Name of Fair	City Country	Dates	Type of Fair
1	EMITT	Istanbul, Turkey	22-25 Jan	Trade & Consumer
2	FITUR	Madrid, Spain	28 Jan - 1 Feb	Trade & Consumer
3	Fespo	Zürich, , Switzerland	29 Jan - 1 Feb	Trade & Consumer
4	ITB	Berlin, Germany	4-8 Mar	Trade & Consumer
5	Luxury Travel Show	Prague, Czech Republic	3/9/2014	Trade
6	MITT	Moscow, Russia	18-21 March	Trade & Consumer
7	AITF	Baku, Azerbaijan	2-4 April	Trade
8	Marine Dive Fair	Japan	3-5 April	Dive
9	COTTM	Beijing, China	14-16 April	Trade & Consumer
10	Expo Milano	Milan, Italy	1 May-31 Oct	Consumer
11	ATM	Dubai, UAE	4-7 May	Trade & Consumer
12	Vivaha (Bridal fair)	New Delhi, India	31 Jul - 2 Aug	Consumer
13	Travel Industry Exchange (TIX)	Florida, USA	15-17 Sept	Trade
14	JATA WTF	Tokyo, Japan	24 - 27 Sep	Trade & Consumer
15	ABAV	Sao Paulo, Brazil	24-26 Sept	Trade
16	IFTM Top Resa	Paris, France	29 Sept-2 Oct	Trade
17	TTG Incontri	Rimini, Italy	8 - 10 Oct	Trade
18	ITB Asia	Singapore	21-23 Oct	Trade
19	TTW	Zürich, Switzerland	29 Oct	Trade
20	Thomas Cook (Neckerman) Trade Fair	Frankfurt, Germany	30 - 31 Oct	
21	WTM	London, UK	2-5 Nov	Trade