

# Tourism Update

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BRIEF ANALYSYS ON THE TOURISM INDICATORS

END JUNE 2016



STATISTICS & RESEARCH SECTION

MINISTRY OF TOURISM

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# Quarterly Tourism Update- Second Quarter 2016

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## Major indicators

Second quarter of the year ended with a total of 619,921 arrivals which is an increase of 1.8% compared to 2015. However in the second quarter itself, arrivals declined by -1.2% compared to the same period in 2015.

In terms of new developments in this quarter Finolhu Maldives in Baa atoll was opened with 272 beds.

By the end of the second quarter of 2016, the registered number of establishments in the Maldives reached 629 with 34,992 beds. Within these registered properties, on average 297 facilities with 27,822 beds were operational upto the second quarter of 2016. These includes 109 resorts with 24,060 beds, 11 hotels with 1348 beds, 84 Guest houses with 1344 beds and 97 Safari vessels with 1791 beds.

The occupancy rate in the second quarter was 59.9% which is a decline of -3.3% from 2015. Average duration of the stay remained as 5.7 day, same as last year.

**Figure: 1: Major indicators at end of June 2016**

Major Indicators 2016	Jan - Mar	Apr-Jun	Total
Arrivals	179,943	275,755	619,921
% Change over 2015	8.3	-1.2	1.8
Bed Nights	1,992,743	1,567,042	3,559,785
% Change over 2015	1.2	-1.7	-0.1
Occupancy Rate	78.2	59.9	69.1
% Change over 2015	-0.4	-3.3	-1.9
Operational Bed Capacity (Avg.)	28,411	28,715	28,563
% Change over 2015	1.7	2.7	3.7
Average Duration of Stay (Days)	5.8	5.7	5.7
% Change over 2015	-0.2	0.0	-0.1

Source: Ministry of Tourism

## INTERNATIONAL TOURISM TRENDS

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Asia and the Pacific (+9%) recorded the highest growth in international arrivals across world regions in January-April 2016, with robust results in all four subregions. South-East Asia and Oceania both achieved 10% growth, while arrivals in North-East Asia increased by 8% and in South Asia by 7%.

In Africa (+7%), international tourist arrivals experienced a clear rebound in Sub-Saharan Africa (+13%), while in North Africa results were down by 8%.

In the Americas (+6%), all four subregions continued to enjoy significant growth in the first four months of 2016, led by Central America and South America (both at +7%). Arrivals in the Caribbean (+6%) and North America (+5%) were fuelled by continued strong outbound demand from the United States, where tourism expenditure increased by 9% through May.

Europe (+4%), the world's most visited region, consolidated its healthy growth of recent years with Northern Europe and Central and Eastern Europe (both at +6%) in the lead, followed by Southern and Mediterranean Europe (+4%) and Western Europe (+3%).

International tourist arrivals in the Middle East are estimated to have declined by 7% through April according to available information.

Results for both Africa and the Middle East should be read with caution, as they are based on currently limited data available for these regions.

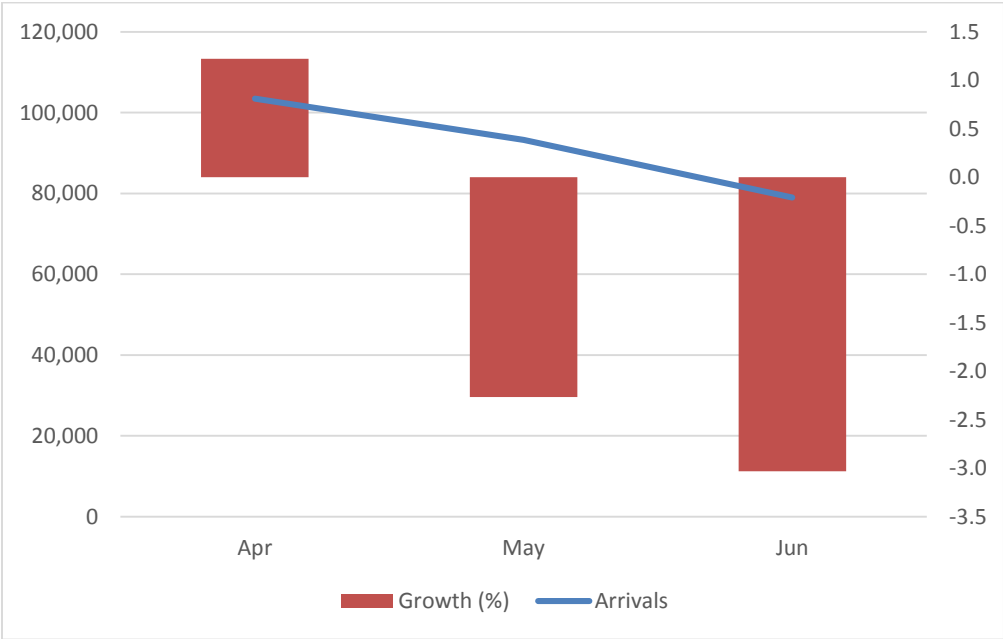
*Source: UNWTO World Tourism Barometer*

# TOURIST ARRIVALS TO THE MALDIVES

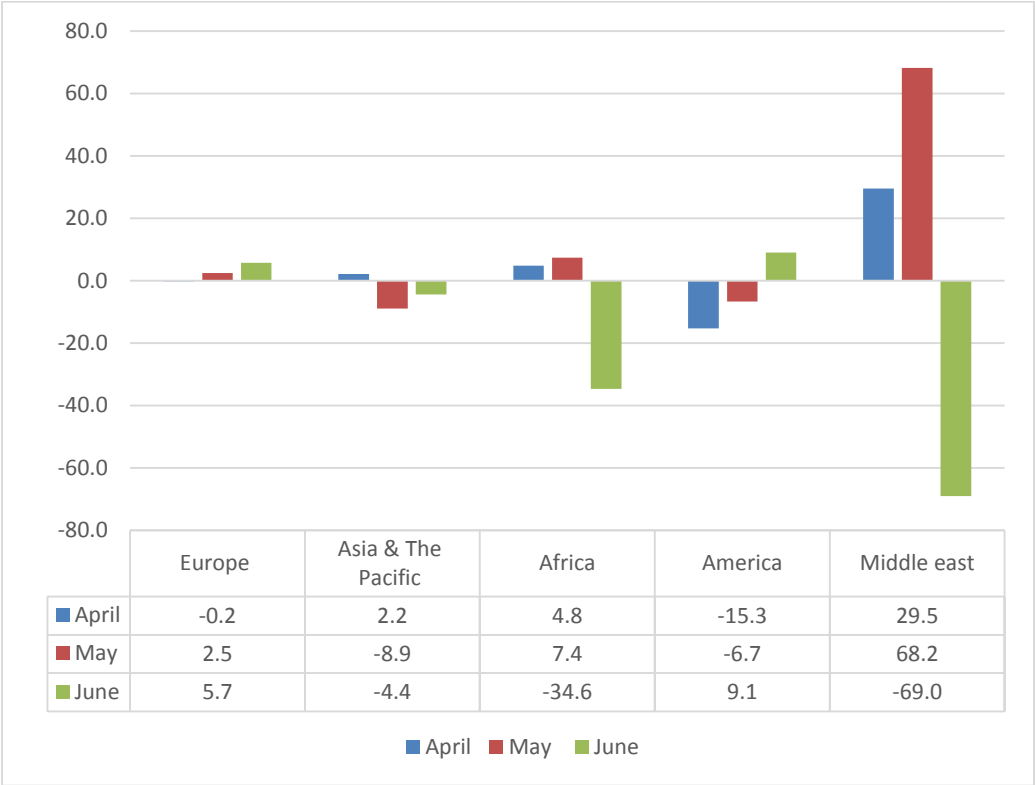
Overall arrivals to the Maldives increased by the end of the second quarter with a growth of 1.8%, however for the second quarter itself the arrivals showed a decline compared to 2015. Month of May and June observed negative growths while arrivals were positive in the month of April. (Fig.2)

Different markets perform differently at different times of the quarter. Europeans performed better in the last 2 months of the quarter, while Asia and the Pacific showed a negative growth in the month of May and June. Middle East and Africa showed positive growths in the month of June 2016. On average all markets performances were negative during the month of June. (Fig.3)

**Figure 2: Tourist Arrivals and growth percentage to the Maldives 2016**



**Figure 3: Arrival growth by regions**



## MAJOR MARKETS

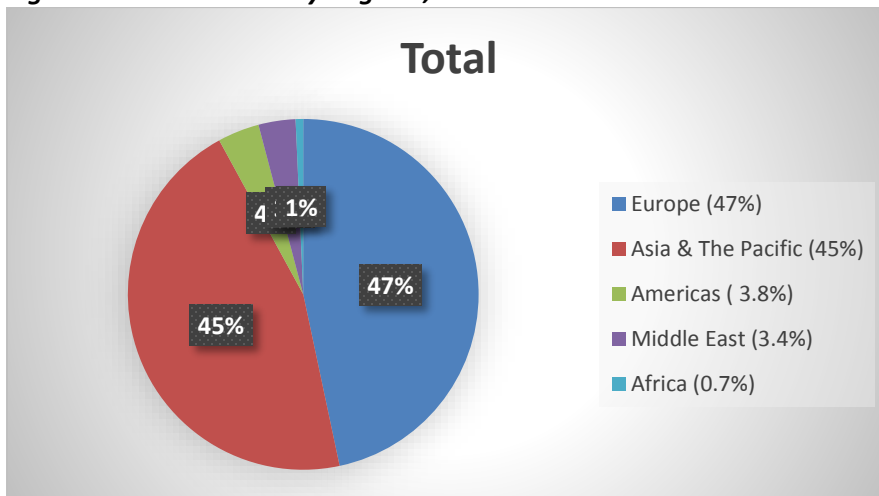
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In terms of Market share, Europe has remained on top by 47% of shares of the total arrivals to Maldives with 289,240 visitors. The region observed a growth of 5.8% compared to the second quarter in 2015.

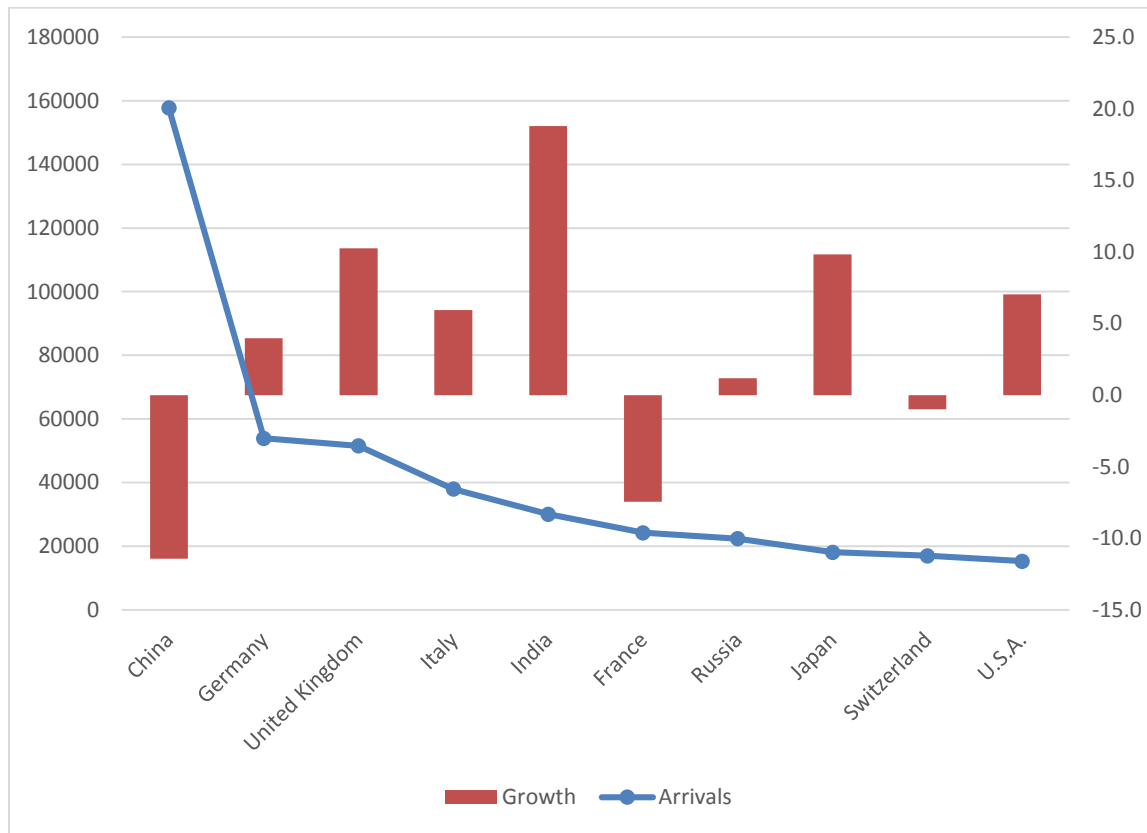
Asia and the Pacific is the next best market generator with 45% shares however observed a negative growth of -2.8%.

Third leading market in the region was Americas with 3.8 shares and a growth of 2.8% from last year. Middle East contributed 3.4% to the market share with the highest growth rate of 11%. Africa was the least contributing market with only 0.7% market shares.

**Figure 4: Market Share by Regions, 2016**



**Figure 5: Top 10 markets to the Maldives, Jan – June 2016**



**Figure 5 Top 10 markets to Maldives, Arrivals vs growth rate from Jan - June 2016**

In terms of arrival numbers China still tops from all main markets to Maldives. However since last quarter of 2015 Chinese arrivals have been declining. By the end of second quarter of 2016 Chinese arrivals showed a decline of 11.4% from the same period in 2015.

Germany, United Kingdom, Italy, India, Japan and USA market has performed well by this quarter, all showing positive growth rates. India was observed to have the highest growth in arrivals compared with 2015 with 18% growth.

## MAJOR EUROPEAN MARKETS

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From the top 10 markets in the region, all markets except French, Swiss and Austrian observed positive growths during the period. French market has been declining since 2015, but Russian market has picked up and has shown a positive growth of 1.2%.

The leading market in the region is Germany with a market share of 8.7% of the total arrivals to the Maldives. German market has also showed a growth of 4% in arrivals compared to 2015.

Second best in the region is United Kingdom with 8.3% shares and observed a growth of 10% compared to the same period last year.

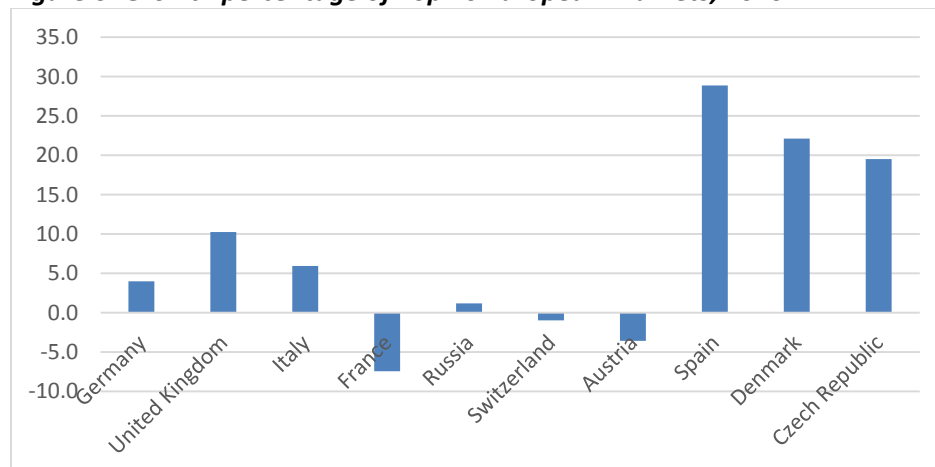
Italians are the next best contributor in the European region with 6.1% shares and indicated a growth of 5.9% in arrival numbers.

French being the 4<sup>th</sup> best market in the region has been declining in its arrival over the years. It showed a negative growth of -7.4% in arrivals compared with 2015.

The next market performer is Russian with 3.6% shares and showed a positive growth of 1.2% from last year. Russian market has been picking up since December 2015 and has been showing positive growth rates till the second quarter of 2016.

Spanish market has also been performing well in terms of arrivals, which is one of the fastest recovering and growing nations in the Euro Zone.

**Figure 6: Growth percentage of Top 10 European Markets, 2016**





# MAJOR MARKETS FROM ASIA AND THE PACIFIC

By the end of June 2016, Asia and the Pacific is the second best market generating region for the Maldives with a share of 45% of the total arrivals. Asian Market has been on a downward slope mainly due to the decline in one of the biggest market generators like China and Korea.

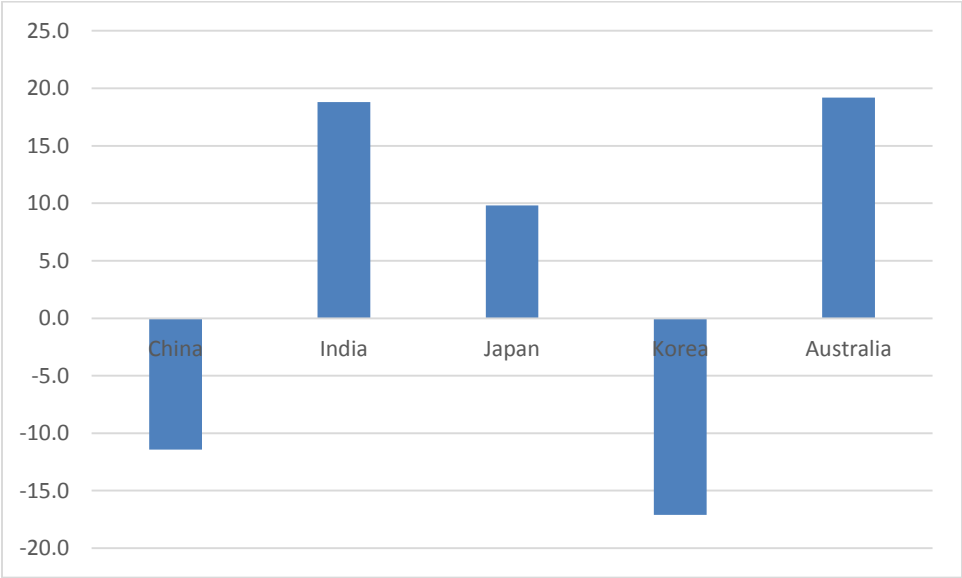
China has remained as the top market generator in the region as well as the main market for the Maldives with 25.4% market shares. However it has continued its declining trend since October 2015. By the second quarter of 2016 China observed a decline of -11.4% of arrivals compared to the same period in 2015.

Second in the region was Indian Market with 4.9% shares and has been performing tremendously over the year. We observed a significant growth of 18.8% in arrivals and is continuing to grow.

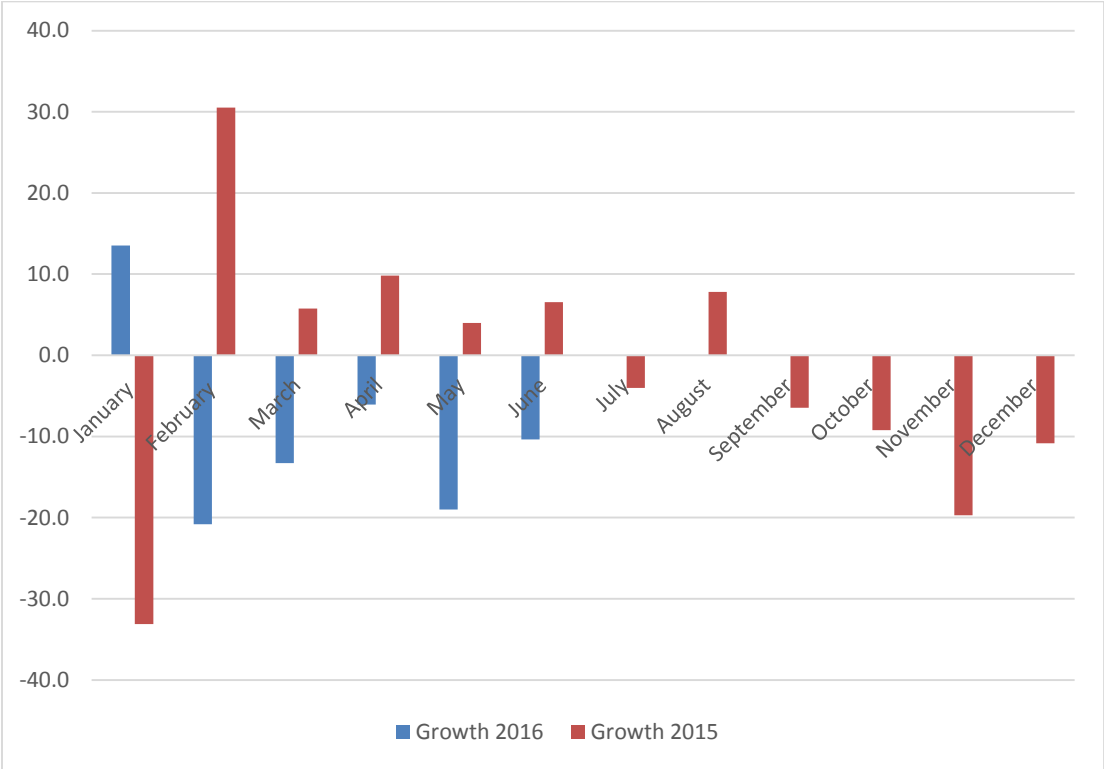
Japanese is the third best market contributor to the Maldives with 9.8% shares and showed a positive growth of 9.8% from 2015. The main motivating factor for Japanese visiting Maldives has been the underwater beauty and peacefulness. (Visitor Survey 2016, February)

Korean market stands as the 4<sup>th</sup> best in Asia and the Pacific region with 2.1% shares and has shown a negative growth of -17% by the end of the 2<sup>nd</sup> quarter of the year. While Australian market has been growing with a positive growth of 19.2% in arrivals compared to the same period in 2015.

**Figure 7: Market Growth percentage of main markets of Asia & the Pacific, 2016**



**Figure 8: Growth of Chinese market for 2015 till June 2016**



# OTHER MAJOR MARKETS

In the African region, the largest contributor was South Africa with 0.3% market share and a growth of 0.6% from 2015.

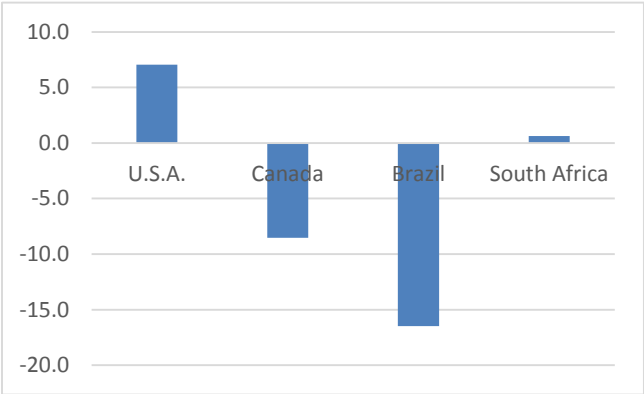
USA is the best performing market amongst the Americas with a share of 2.5% of the total visitors. Also showed a positive growth of 7% in arrivals compared with the second quarter in 2015.

Second best in the region was Canada with 0.6% market share and showed a negative growth of -8.5% in arrivals.

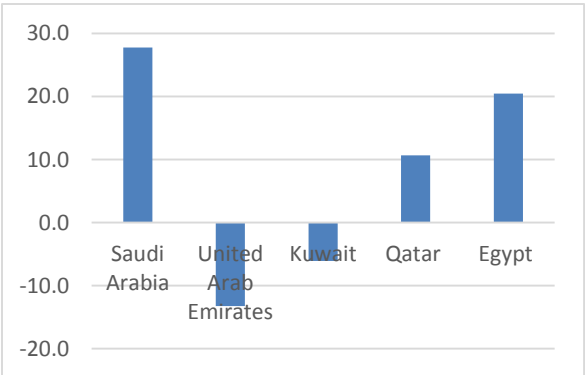
Saudi Arabia contributed 1.5% to the market share of the total arrivals, which is the highest among the Middle Eastern markets.

Saudi Arabia also showed the highest growth rate in the region with 27.8% compared to 2015. UAE and Kuwait showed negative growths of -13.2% and -6.1% while Qatar and Egypt spiked up in its arrivals compared to the same period in 2015.

**Figure 9: Market Growth percentage of main markets of Africa and Americas, 2016**



**Figure 10: Market Growth percentage of top 5 markets of Middle East, 2016**



## Trade fairs participated by Maldives from April to June 2016

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	Name of Fair	City   Country	Dates
1	WTM Africa	South Africa	6th - 8th April 2016
2	ATM - Dubai	UAE	25th - 28th April 2016
3	4th China-South Asia EXPO	Kunming, China	12th - 17th June 2016