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Changing Dynamics in the Maldivian Tourism Industry: Chinese Tourists and Average Length of stay

Azeema Adam and Aishath Zara Nizar

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CHANGING DYNAMICS IN THE MALDIVIAN TOURISM INDUSTRY: CHINESE TOURISTS AND AVERAGE LENGTH OF STAY

*by: Azeema Adam and Aishath Zara Nizar**

Abstract

This paper attempts to analyse the changes in the seasonality of tourism activity caused by the surge in Chinese tourist arrivals; examine and identify the possible reasons why Chinese tourists spend a relatively shorter period in Maldives; and discuss the effects of this on the revenue earned from tourism. Simple analytical tools were used to study changes in tourist arrivals, seasonality and average stay over the past decade. The peak season for Chinese tourists in Maldives was identified as the first quarter and third quarter of the year, thus softening the high level of seasonality prevalent in the industry. Meanwhile, the cost of travel and the level of repeat visitors were found to influence the average stay of Chinese tourists in the case of Maldives as well. Finally, a strictly non-negative impact of a shorter average stay on tourism expenditure was found, although there is very little data on tourism expenditure in Maldives to come to any conclusion.

1. Introduction

The tourism sector in the Maldives has developed rapidly since its inception in the early 1970s. The sector has transformed the economic structure of the country from primarily a fishing community to a world-class service industry. While the tourism sector continues to perform well, there have been some significant changes in the dynamics of the industry. One important change is the transformation of the market composition of the tourism in the Maldives, with China becoming the single largest source market overtaking the traditional European markets such as United Kingdom (UK) and Italy. In conjunction with this, a marked change in the average stay of the tourists has been observed. Although the number of tourists visiting the Maldives has been increasing,

* Azeema Adam is the Governor of the MMA. Aishath Zara Nizar is from the Monetary Policy and Research Division of the MMA. The authors would like to thank Mariyam Rashfa and Hassan Fahmy for their comments on the article.

there has been a significant decline in the average stay of the tourists in recent years. This has important implications for the industry, in terms of earnings and capacity utilisation in the industry. The average stay is an important determinant of the overall expenditure of the tourists in a country, which ultimately influences the income earned from the tourists. In this context, it is important to study these changing dynamics in the Maldivian tourism industry and its implications.

This article begins with a brief review of the recent trends in tourist arrivals and composition of the Maldivian inbound tourism market. This is followed by an analysis of the changes in the average stay of tourists in the Maldives and its relationship with the rapid increase in tourist arrivals from China in the last 2–3 years. The main determinants of average stay of international tourists found in the literature are also highlighted. Finally, this article also briefly discusses the impact of changes in average stay on the earnings of the tourism industry and revenue of the government.

2. Developments in Tourist Arrivals and Market Composition

Since its inception in 1972, tourism in the Maldives has mostly attracted Europeans seeking the tropical “sun-and-sand” holidays. The first group of tourists to a resort came from Europe, and over the next three decades tourists from the region grew impressively with Italy, UK and Germany becoming the top markets for Maldives’ inbound tourism.

Figure 1: Arrivals from Major Markets, 1986–2013
(in thousands)

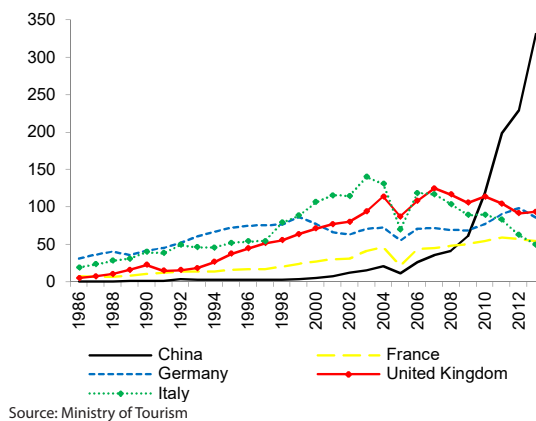
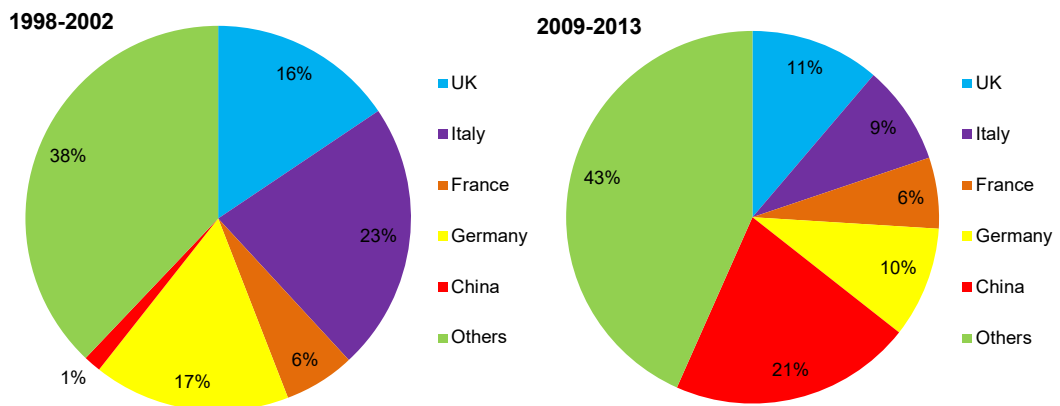


Figure 2: Changes in Market Composition between 1998–2002 and 2009–2013



Source: Ministry of Tourism

However, as seen in Figure 1, the market composition has begun to change significantly since 2008, with arrivals from the major European countries stagnating as the global financial crisis contracted the economies of these countries. This period, however, coincided with a massive increase in tourists from China, which has grown exponentially since 2008. For instance, the number of tourist arrivals from China in 1998¹ was less than 4000 compared to 331,719 tourists from the country in 2013. Given these changes, China has now become the leading inbound tourist market for the Maldives since 2010.

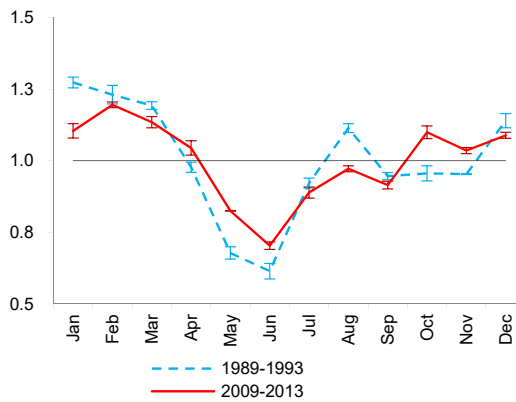
In terms of market composition, as seen from Figure 2, Chinese arrivals accounted for a mere 1% of total arrivals during the period 1998–2002. During this period, the dominant market shares were captured by Italy (23%), Germany (17%) and the UK (16%). This composition has changed significantly when compared to the last five years; China accounted for 21% of total arrivals, whereas the market share for UK, Germany and Italy dwindled considerably, accounting for 11%, 10% and 9% of the total arrivals, respectively.

2.1 Seasonality

The changes in market composition of the tourism industry experienced in recent years have lessened the strong seasonality of the industry. The tourism sector in the Maldives

¹ Tourists from China were first recorded in 1998, whereas in previous years, they were classified under “Other Asia”. The number of tourists from China has been extrapolated for the previous years in Figure 1.

Figure 3: Seasonal Factor, 1989–1993 and 2009–2013



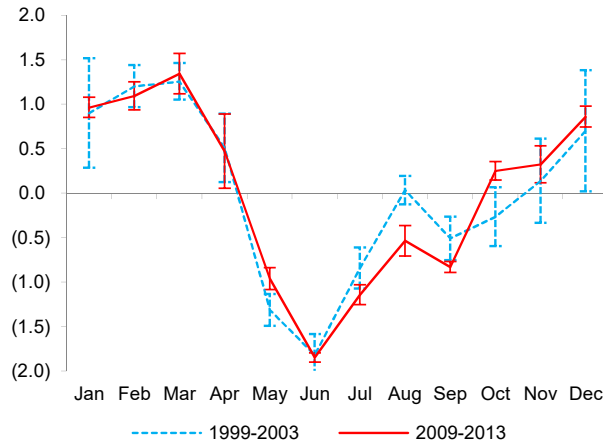
Source: Ministry of Tourism

Note: In the above graph, the total arrivals for the two periods have been adjusted to capture only the seasonal factor. A seasonal factor of 1 describes no seasonal trend whereas a factor greater (less) than 1 implies a positive (negative) seasonal trend. For instance, a seasonal factor of 1.2 implies that tourist arrivals have increased by 20% at that particular point due to the seasonal pattern of arrivals. These numbers have then been averaged to capture the mean for the two periods. The vertical lines at each point represent the standard deviation of each seasonal factor for the month over the respective period.

used to have very significant peak and off-peak seasons, with tourist arrivals peaking towards the beginning of the year and at the end. Given the strong European dominance of the industry before the 2000s, the peak season coincides with the winter months in Europe especially the months from December to February which include Christmas and New Year holidays. The months of May, June and July are meanwhile traditionally off-peak months, with the lowest number of tourist arrivals observed during these months.

As evident from Figure 3, the expansion of the Chinese market has softened the seasonality of the tourism industry considerably. This is indicated by several changes in the seasonal trend between the two periods, complemented by relatively small standard deviations for these changes. The small standard deviations imply that the change in seasonality has been consistent throughout the respective periods, thus being statistically significant. The analysis of seasonal factors shows two important observations in the months of August and October. August used to have a very strong seasonal factor during the early 1990s due to a large number of Italians taking their vacation during this period two decades ago. However, this trend has become less pronounced later on, due to the share of Italians as a percentage of total tourists being relatively small. In contrast, the seasonal factor for the month of October has strengthened during the past five years due to the large influx of Chinese tourists during October. This is attributed to October being a holiday season for Chinese tourists. (This will be explained later).

Figure 4: Seasonality of European Arrivals, 1999–2003 and 2009–2013



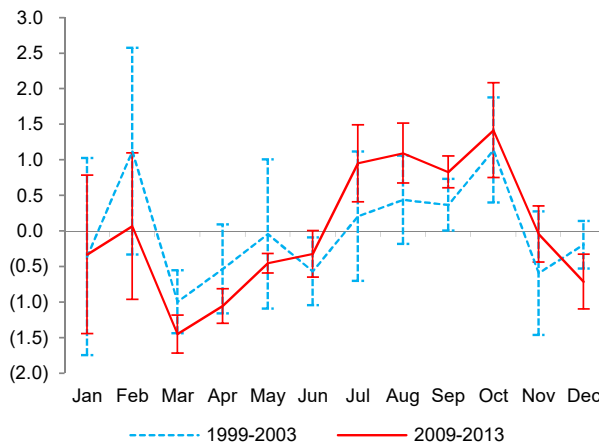
Source: Ministry of Tourism

Note: The above graph shows the average tourist arrivals from Europe for two different periods – 1999–2003 and 2009–2013, and the standard deviation of each averaged data point. The arrival numbers have been normalised to 1, to depict the seasonal movements with respect to the annualised mean of European tourist arrivals. Data points above the x-axis represent arrivals higher than the average of the year, and data points below represent arrival numbers lower than the average of the year.

Figure 4 analyses the changes in the seasonal patterns of the Europeans overtime, by considering the monthly arrival numbers of European tourists for two distinct periods. It can be seen from this figure that the seasonal pattern of Europeans has not changed significantly over the decade. Moreover, it can be observed that the standard deviation (as indicated by the vertical lines at each data point) for the past five years (2009–2013) has shrunk significantly compared to the standard deviation of the data points a decade ago (1999–2003), indicating that the variability of arrivals in the respective months has decreased and that the overall arrival patterns have strengthened with respect to seasonality. These trends confirm the findings that the high season of the calendar year for the Europeans is still from December to February, while the low season takes place around June.

In contrast, the seasonality of Chinese tourist arrivals varies markedly compared to the arrival pattern of European tourists. As seen from Figure 5, the peak season is seen to be around July to October, although this is less pronounced in the period 1993–2003. However, large standard deviations are associated with these seasonal patterns, which

Figure 5: Average Chinese Arrivals for 1999–2003 and 2009–2013



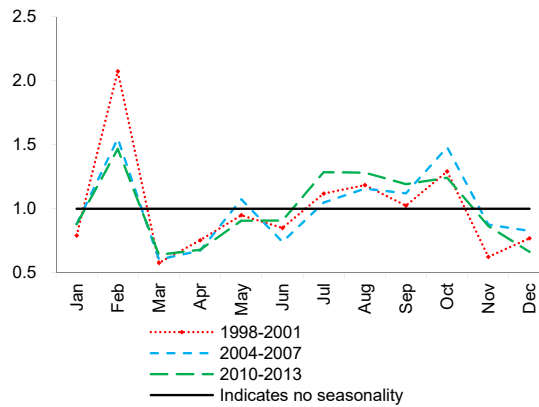
Source: Ministry of Tourism

Note: The above graph shows the average tourist arrivals from China for two different periods – 1999-2003 and 2009-2013, and the standard deviation of each averaged data point. The arrival numbers have been normalised to 1, to depict the seasonal movements with respect to the annualised mean of Chinese tourist arrivals. Data points above the x-axis represent arrivals higher than the average of the year, and data points below represent arrival numbers lower than the average of the year.

imply large fluctuations. As a result, the change in seasonality between the two periods, although discernible from the graph, may not be statistically significant. The large variations observed for the month of January and February particularly, can be explained by the Chinese New Year holidays falling in either of the months for the years. However, the fluctuations observed in the July to October period are less pronounced, and it can be inferred that the shift in seasonality during this period is likely to be statistically significant.

Although the standard deviations have become relatively smaller in the latter period (2009–2013), the variability observed in arrivals is nevertheless stronger for Chinese tourists than their European counterparts. This reinforces the notion that while European tourists have firmly established their seasonal patterns, the arrival trends for the Chinese are not as distinct, due to their emergence as a relatively new source market for Maldives.

Figure 6: Seasonal Factor of Chinese Tourist Arrivals, 1998–2013



Source: Ministry of Tourism

Note: The graph above shows the seasonal factor for Chinese tourist arrivals from 1998 to 2013

2.2 Chinese Outbound Market

In general, the Chinese outbound market has seasonal patterns that are closely linked to the two major holidays received by its residents (Wang and Wei, 2010): the Chinese Spring Festival Holiday (in accordance with the Chinese New Year) and the National Day Golden Week (marked together with the national day of China). On each occasion, Chinese residents receive seven days of public holidays, which result in large numbers of Chinese travelling, both within China and outside. The first holiday—Chinese New Year holiday—is marked based on the lunar calendar and usually falls in the month of January or February. As for the National Day Golden Week, it has consistently been marked in October.

As such, these periods of high outbound tourism for China is replicated in the arrival patterns of Chinese tourists in Maldives as well. As seen in Figure 6, which depicts the seasonal factor of Chinese tourist arrivals, there is a significant spike during the first quarter of each year. This is attributed to the influx of tourists experienced in Maldives associated with the Chinese New Year. Towards 2013, this seasonal factor has become more stable, as is expected as a market develops. The second positive seasonal factor is seen from July to October and as mentioned earlier, has softened overtime. Still being a portion of the off-peak season of the traditional tourism calendar, the high arrival of

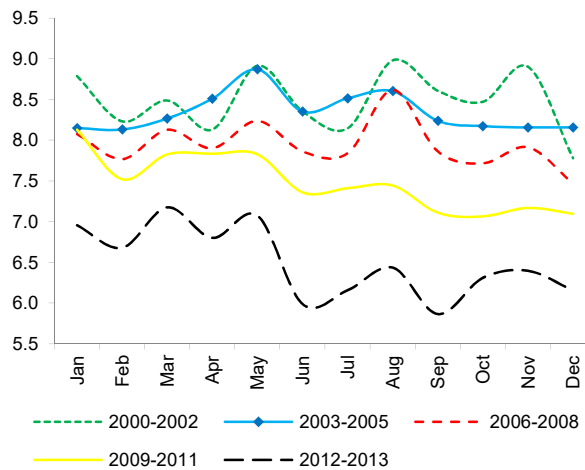
Chinese during this period could be due to low room rates and discounted packages offered in this low season. While consistently high Chinese tourist numbers in October can be attributed to the National Day Golden Week, high arrivals from July to September could also be attributed to families taking their vacation in the summer, as this period also coincides with the school vacation period for China.

According to Wang and Wei (2010), destinations such as Thailand, Singapore and Australia received the largest number of Chinese tourists during the month of February in 2009 and 2010. Meanwhile, most Chinese tourists visited South Korea and Canada during July and August. Although it is believed that the 'steady state' or the stable level of Chinese arrival trends have not been established in the context of Maldives, it appears that the same trend for most Asian countries also holds for the Maldives.

The increase in the number of Chinese who vacation abroad may also be a result of some loosening of travel restrictions that were placed by the government of China on its citizens. Before the 1990s, Chinese citizens were only allowed to visit specific nearby countries such as Thailand, Malaysia and Singapore; even then, there were several restrictions placed on the conditions of travel in order to maintain the outflow of foreign currency. Liberalisation of outbound travel gained much improvement with the formal implementation of the Approved Destination Status (ADS) policy in 1995. The ADS scheme is a bilateral agreement between the government of China and other destinations, which permits travel in organised groups to visit only approved countries. The number of countries that received ADS increased rapidly from 2000 onwards, allowing greater choice for Chinese citizens when travelling abroad. As such, Maldives received ADS in 2003, being the 22nd country to be granted this status.² Based on a study comparing growth rates of Chinese tourists pre- and post-ADS, Arita et.al (2011) concluded that, the granting of ADS in general, spurred travel to ADS countries, although this was not guaranteed in every case. For instance, in the Maldives, the effect of ADS did not immediately reflect in significantly improved growth rates of Chinese arrivals, which may be due to the unfamiliarity of Maldives to the Chinese market at that time and also due to the Indian Ocean tsunami in 2004. However, in the years that followed, tourists arrivals from China started growing rapidly, and ADS is believed to have been a

2 China National Tourism Administration – (translated webpage) <http://www.cnta.gov.cn/html/2009-5/2009-5-13-10-53-54953.html>

Figure 7: Evolution of Average Stay, 2000–2013
(average stay in days)



Source: Ministry of Tourism

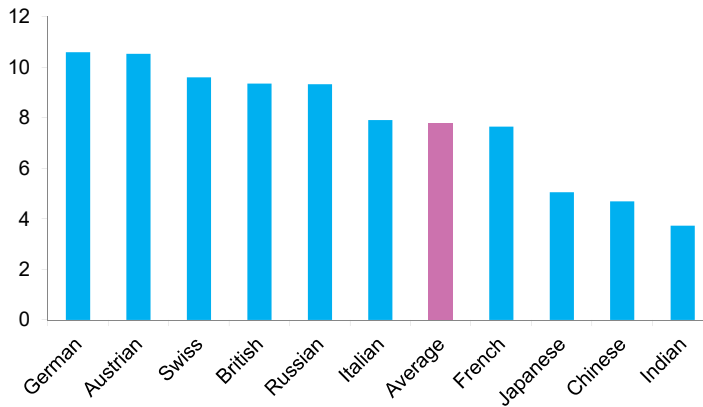
welcome policy that has increased both the number of outbound tourists and the choice of outbound destinations.

Another interesting feature that has affected Chinese outbound travel is the arrangement of annual paid leave granted by the government. The labour law that was first introduced in 1995 did not stipulate any specific provisions for employers to grant paid leave to their workers. New labour laws that took effect in January 2008 explicitly states that employees who have worked more than a year are entitled to paid leave. This was described to be 5 days (for workers served between 1–10 years), 10 days (for workers served between 10–20 years) and 15 days (for workers served more than 20 years). Thus, although there are still hindrances faced in the implementation of the rule, the formalisation of annual paid leave is widely believed to have been an impetus to increased outbound tourism from China.

2.3 Average Stay by Chinese tourists

One trend that has become ubiquitous in global tourism today is that, while international trips being taken are increasing, tourists are taking shorter trips (ITB World Travel Trends Report, 2011/2012). This trend has been observed in the Maldives as well,

Figure 8: Average Stay by Nationality
(average stay in days)



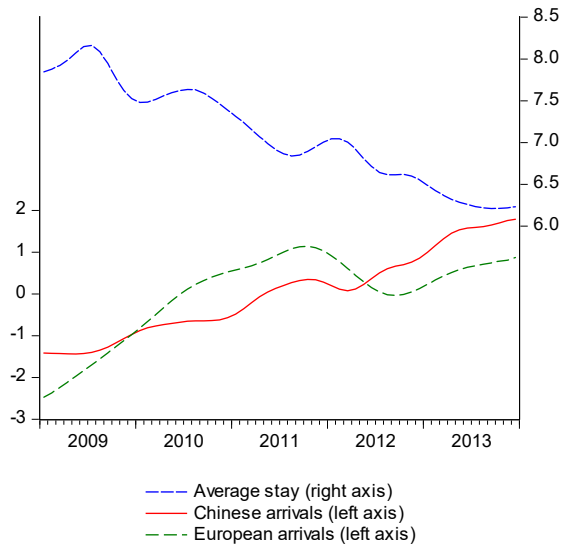
Source: Maldives Visitors Survey 2013 February

Note: This graph uses data obtained from the Maldives Visitor Survey 2013 February, to estimate the average stay of the interviewees. Thus, these estimates will not be consistent with the official data for average stay, as published by the Ministry of Tourism.

though only becoming more marked since the late 2000s. The average stay has declined considerably by 26% from 2000 to 2013, as evident from Figure 7. In 2000, the average length of stay of a tourist was 8.4 days. On the other hand, the average stay of tourists visiting Maldives at the end of 2013, stood at 6.3 days, compared to 6.7 days and 7.0 days for 2012 and 2011, respectively. In international tourism, the shorter length of stay mainly reflects increased constraints on time. In Maldives, the reduction in the duration of stay of tourists in recent years has coincided with the rapid growth in the Chinese market, showing a strong negative correlation between the two.

It is seen from Figure 7 that the average stay of tourists has been on a declining trend since 2000, and that it naturally varies with the different seasons along with fluctuations in the number of bednights. Further, the decline in average stay has become more pronounced in the last four years, and industry experts have attributed this to the relatively short average length of stay by Chinese tourists. Results obtained from the Maldives Visitor Survey 2013 February, shown in Figure 8, conducted by Ministry of Tourism, Arts and

Figure 9: Average Stay by Nationality
(average stay in days)



Source: Ministry of Tourism

Culture confirm these assertions. It was found that an overwhelming majority of Chinese tourists (87%) spent 4–5 days in Maldives, in stark contrast to most European tourists spending up to seven days during their holidays. Thus, the recent decline in average stay has been considerably affected by the surge in Chinese tourists and their shorter average stay, contributing to the recent downward trend in the national average stay of a tourist’s visit to the country.

A further analysis of the relationship between the average stay and the number of Chinese tourists is depicted in Figure 9. It can be observed that, over the past five years, there has been a clear and gradual decline in the average stay. Conversely, the trend of Chinese arrivals has been on a steady increase. In particular, it can be observed that slumps in the average stay, especially in mid-2011 and 2012 correspond to peaks in tourist arrivals from China, explaining the noticeable decrease in the average length of stay to well below seven days over the past few years.

With regard to quantifying this relationship between Chinese tourist arrivals and the average length of stay, the correlation coefficient³ between these two variables shows that the relationship has strengthened considerably overtime. In the five year period, 1999–2003, the correlation coefficient between the aforementioned two variables was -0.32; this value stood much lower for 2009–2013, at -0.87, indicating that the relationship has become much stronger over the past decade. Moreover, there is a considerably strong and negative relationship between the level of Chinese tourists and the average length of stay.

3. Determinants of Average Stay

There have been several studies undertaken to identify the main determinants of average stay by tourists in a particular destination. Unsurprisingly, nationality appears frequently in literature as a significant attribute that determines the length of stay; in addition to this, cost of travel, repeat visitor behaviour, age, occupation and social attitudes have been highlighted as other variables that affect the length of stay.

Mak (2004) identifies the cost of travel to be one of the main factors that determine a person's length of stay in a tourist destination. It is believed that the higher the cost incurred to reach a destination, the longer the trip duration is likely to be. This is because cost of staying an additional night is deemed a small amount for tourists who spend a relatively high amount for their flights (greater proportion of fixed cost), compared to tourists who spend a relatively small amount for international travel. In Mak's (2004) study, Japanese visitors to Hawaii in 2001 were observed to have an average stay of 6.0 days whereas for visitors from Europe and eastern United States, who travel a longer distance and thus experience a higher cost, this figure is much higher—at 12.1 and 10.4 days, respectively.

This holds in the context of Maldives as well; European tourists, who naturally incur higher costs due to longer distances travelled (up to eighteen hours), are observed to spend an average of seven days. This contrasts with Chinese tourists who on average travel ten hours to reach Maldives, and have greater access to direct flights to Maldives with fewer stopovers. Their relatively lower cost for travelling combined with the

³ The correlation coefficient is a statistical measure of strength and direction between two variables. It takes a value strictly between or equal to -1 and 1 where values closer to -1 or 1 represent a stronger relationship, and the sign of the coefficient represents whether or not the relationship is positive or negative. Monthly data has been used for this analysis in this context.

likelihood of them combining several destinations in a single trip, may also reduce the length of stay in each destination.

A study on the Chinese outbound market (Wang and Wei, 2010) relays similar findings: the length of stay for destinations in Asia are reported to be generally shorter compared to long haul destinations. Statistics for 2009 on the average length of stay shows that for Hong Kong it was 3.4 nights, Thailand 7.5 nights, and for Singapore 4.1 nights. In stark contrast, the average length of stay for UK was 13 nights.

Duval (2004) looked at the Caribbean islands as holiday destinations and found that Europeans stay a longer period in general (two weeks) compared to Americans (one week). This is attributed to the fact that Europeans have more paid holidays, travel further and airfare is a greater proportion of their vacation costs than for Americans.

A number of studies also observe that repeat visitors spend on average a longer duration on their holiday. In both models used in his parametric survival analysis, De Menezes et al. (2009) find that, repeat visitors are associated with a higher probability of experiencing a stay of a longer period. Artal Tur et al. (2008) support this finding as well, citing “sun-and-sand” tourists visiting Murcia, Spain, for the first time tends to stay for a shorter time than those previously acquainted with the destination. In the context of the Maldives, looking at repeat visitor statistics as per Maldives Visitor Survey 2013 February, 29% identified themselves as having visited Maldives before. Among this, repeat visitors were generally high from European countries such as Switzerland, Italy, UK and Germany. Conversely, Chinese tourists were observed to have the lowest repeat visitors (5%) among the major nationalities noted in the survey. Other Asian countries including India and Japan had a relatively lower level of repeat visitors as well. This disparity in repeat visitors between European and Asian countries could be attributed to the fact that Maldives may still be a relatively new tourist destination for the Asian countries, especially China. Therefore, it is too early to infer that the Chinese market will continue to have lower repeat visitors to the Maldives.

Regarding the determinants of length of stay in ‘sun-and-sand’ tourism, Artal Tur et al. (2008) identify accommodation as a significant factor. The authors find that tourists staying at a rented apartment or villa stay significantly longer than those staying at a high class hotel. However, this conclusion cannot be directly applied to the context of Maldives, as the range accommodation facilities are rather limited in the Maldives, restricted mainly to serviced luxury hotels.

With regard to other variables, De Menezes et al. (2009) find age to be statistically insignificant in his analysis, and assert that this may be owing to the inclusion of other covariates closely related to age.⁴ Besides this, although Mak (2004) identifies a positive correlation between the cost of travel and length of stay, he recognises that higher destination prices reduce a visitor's length of stay. Moreover, he highlights that the availability of a wider range of tourism products and services can entice visitors to spend a longer period.

4. Average Stay and its Implication on Earnings

A longer average stay is generally associated with higher expenditure, as higher the number of days that a tourist spends at a holiday destination, the higher his spending will be on accommodation, food and recreational expenses. However, the relationship between the average stay of a tourist and tourist expenditure is not very firm as international research carried out in this field shows mixed results. Further, without comprehensive data on tourist expenditure and research, it is difficult to ascertain the relationship between average stay and expenditure in the Maldives.

In his research, Mak (2004) analyses the tourism expenditure of Japanese tourists in Hawaii in relation to tourists of other nationalities. He finds that although Japanese tourists have the highest daily spending rates per person, their total expenditure for the trip is lesser than most tourists due to their shorter stay. Delving into specific categories, he found that tourists from Japan spent significantly less for food and beverages, transport and entertainment. On the other hand, they outspend American visitors for shopping—as much as 3.0 to 3.5 times more. Mak (2004) cites several possibilities for the higher shopping culture for the Japanese. He noted that social customs dictate returning tourists to bring home gifts for their family and friends, especially those who gave them send-off money for the trip. Additionally, he identified that western branded goods, which symbolise social status are hard to come by in Japan, and even then, may not entirely be authentic. It has been widely observed in global tourism that Chinese tourists as well, spend a large amount on western name-brand goods when they visit America and Europe. The lack of shopping avenues for tourists in Maldives, however, may then be of relevant concern; the tendency of Chinese tourists to spend on branded goods is unlikely to be exploited to obtain revenue for the Maldives.

⁴ This claim was originally made by Alegre, J. and Pou, L. (2006). The length of stay in the demand for tourism. *Tourism Management* Vol 27.

Although the average stay of a Chinese tourist is generally shorter, some industry experts believe that the greater number of Chinese arrivals contributes to higher tourism receipts in terms of increased airport transfers to and from the resort; the transfer trips depend on the number of arrivals and not the duration of their stay. Transfer costs, which is usually a sea plane or boat ride between the airport and the resort, are incurred as a per person cost. Hence, there may be some compensation in terms of revenue for the shorter average stay, although there are no data to specifically support this.

According to the balance of payments data on receipts from tourism⁵ in the Maldives, receipts from the tourism sector increased by 0.5% in 2012, despite a reduction in bednights of 1.2%. In 2013, following a bednight growth of 9.2%, tourism expenditure is estimated to have grown by a much larger magnitude of 19.0%, reflecting the rebounding of the tourism sector from a year of sluggish growth in 2012. These figures suggest that, although the average stay of tourists declined in both these years, the overall expenditure of tourists rose, and hence there may not be a strictly positive relationship between the average stay and expenditure of tourists. There may be other factors such as those discussed that may have affected the nature of spending by tourists. Nevertheless, the figures from the balance of payments should be used with caution as a comparison on expenditure growth cannot be made for earlier years due to data limitations.

It is difficult to quantitatively assess the impact of shorter duration of stay on tourist expenditure without more comprehensive data and research, specifically on the Maldives. Further, expenditure patterns found in international studies may not be that applicable to the case of the Maldives. This is because tourist expenditure is very much linked to the type of tourism product and also other characteristics of the holiday destination.

5. Conclusion

The role of Chinese tourism, especially as a major international source market, has been expanding rapidly over the last decade. According to China National Tourism Administration, China is expected to overtake the US as the largest tourism market in 2014. Additionally, statistics from the United Nations World Tourism Organisation

⁵ This is based on tourism goods and services tax (T-GST) data collected by the Maldives Inland Revenue Authority (MIRA).

indicate that China overtook long-time top spenders Germany and the US to become the top global tourism spender in 2012. Chinese travellers spent a record US\$102.0 billion on international tourism in 2012, boosted by rising disposable incomes, relaxation of restrictions on foreign travel and an appreciating currency.

In the Maldives, the surge of Chinese tourists and the subsequent transformation of the market composition have had a significant impact on industry dynamics such as seasonality and the average stay. With regard to seasonality, the patterns of traditional 'peak' and 'off-peak' seasons of the tourism calendar have softened due to the emergence of a different seasonal pattern ascribed to the Chinese tourists. This change in the seasonal factor has contributed to changes observed in the average stay of tourists as well, in addition to other factors that were discussed in this article.

It was seen clearly that the average stay of tourists has been on a significant declining trend, and has been augmented by the large arrival numbers of Chinese tourists, particularly in their peak season. Identifying the factors that lead tourists to determine their average stay at a destination, has thus become an interesting topic of research in the context of Maldives. From literature written on the subject, variables such as cost and distance associated with travel, in addition to repeat visitors have been identified as key. These hold well in the tourism trends of Maldives as well, especially as proven by findings from the Maldives Visitor Survey 2013 February.

Understanding the motives behind the length of stay by a tourist is crucial in aiding the design of more effective marketing strategies and tourism policies. This is especially true since the duration of stay largely affects the pattern of tourist expenditure within the destination. It is difficult to assert the directness of the link between average stay and expenditure patterns; a number of other variables such as spending culture of specific nationality of tourists, tourist lifestyle and activities must be taken into consideration. In the Maldives, tourism expenditure receipts which are calculated on the basis of the revenue from tourism goods and services tax may be insufficient to fully understand the effect on tourist expenditure from changes in average stay. The analysis in this article also highlights the importance of further research on the changing tourism dynamics in the Maldives, especially with regard to tourism expenditure and the factors that influence the tourism market. Such research can assist in more effective policy making in areas related to tourism marketing and national planning to further develop and enhance the vibrancy of the tourism sector in the Maldives.

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