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*A brief analysis on tourism indicators  
First Quarter 2014*

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



**STATISTICS SECTION**

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## MAJOR INDICATORS – end March 2014

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By the end of March 2014 there were 111 Resorts with 23,897 beds, 19 hotels with 1626 beds, 153 Guesthouses with 2,160 beds and 162 Safari Vessels with 2,692 beds registered in the Maldives. Within these registered capacity, an average of 26,053 beds were operational at the end of the year. These include 105 Resorts with 23,019 beds, 18 hotels with 1,596 beds, 92 Guesthouses with 1241 beds and 61 Safari Vessels with 1045 beds. No new resorts have been opened during the first quarter of this year.

Tourist arrivals to the Maldives recorded a heavy growth of 9.7% in 2014 compared with the same period in 2013.

The Bed nights of the tourist resorts, hotels, guesthouses and safari vessels registered an increase of 5.4% compared with that of last year. While the average occupancy rate increased by 1.9% and the average duration of stay was recorded to be 6.4 days which was a drop of 0.3% compared with the same period last year.

*Table: 1: Major indicators at end of March 2014*

| Major Indicators                | Jan - Mar |
|---------------------------------|-----------|
| Arrivals                        | 321,561   |
| % Change over 2013              | 9.7       |
| Bed Nights                      | 2,048,964 |
| % Change over 2013              | 5.4       |
| Occupancy Rate                  | 84.5      |
| % Change over 2013              | 1.9       |
| Operational Bed Capacity (Avg.) | 26,999    |
| % Change over 2013              | 4.3       |
| Average Duration of Stay (Days) | 6.4       |
| % Change over 2013              | -0.3      |

*Source: Ministry of Tourism*

# INTERNATIONAL TOURISM TRENDS

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## **Asia and the Pacific fastest growing region, while Europe takes biggest share**

Figures released by the UNWTO shows that Europe, which accounts for 42% of international tourism receipts worldwide, saw the biggest growth in absolute terms: up US\$ 35 billion to US\$ 489 billion. Asia and the Pacific (31% of worldwide tourism receipts) earnings increased by US\$ 30 billion to US\$ 359 billion, and in the Americas (20% share) earnings were up by US\$ 16 billion to a total of US\$ 229 billion.

In relative terms, Asia and the Pacific (+8%) recorded the largest increase in receipts, followed by the Americas (+6%) and Europe (+4%).

## **International arrivals continue on a similar growth trend in early 2014**

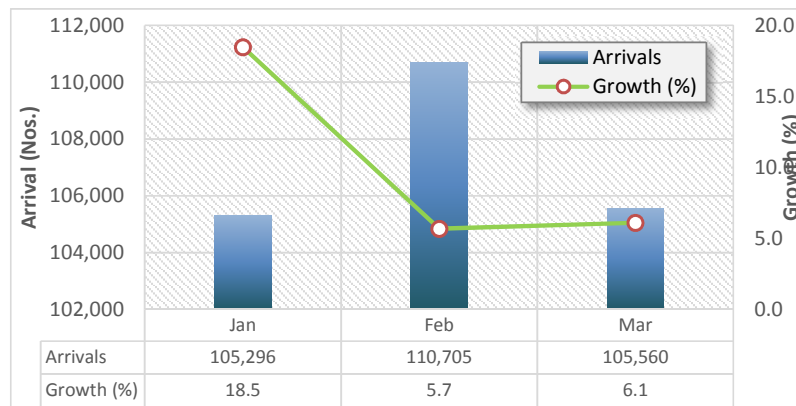
During the first two months of 2014, international tourist arrivals grew an estimated 5% compared to the same period last year, based on the comparatively scarce data reported so far to the World Tourism Organization (UNWTO).

According to the UNWTO, this preliminary growth figure is similar to that of the full year 2013. Asia and the Pacific (+7%) saw the strongest growth in this early part of 2014, followed closely by the Americas and Europe (both +6%).

## TOURIST ARRIVALS TO THE MALDIVES

Tourist arrivals reached a million for the first time last year November and has been increasing its growth till March 2014. Growth rate increased by 18.5% in January compared to the same period last year with a total of 105,296 arrivals. However, the growth rate was slower in February (5.7%) and March (6.1%) compared that of January. Arrivals to the Maldives totaled to 321, 561 visitors by the end of the quarter (Figure 1)

**Figure1: Tourist Arrivals to the Maldives, 2013**



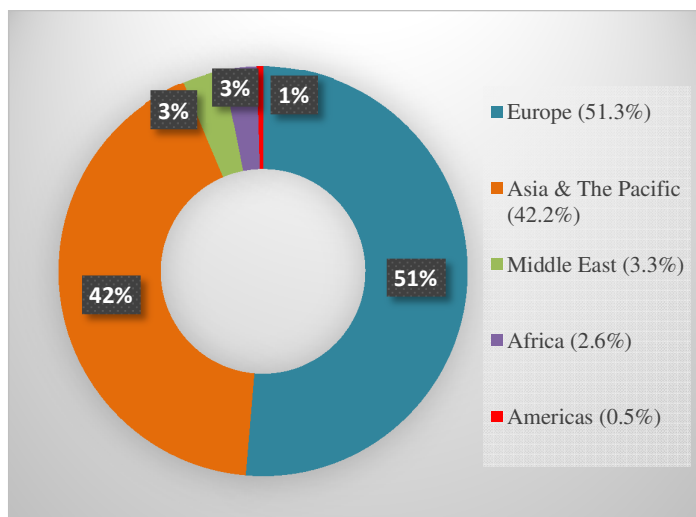
According to the Maldives Visitor Survey conducted during the month of February 2014 it was found that the main reason visitors came to the Maldives was for rest and relaxation (54%). The second most popular reason was honeymoon (16%) followed by diving (11%). Out of the 54% who said they chose for rest and relaxation, the highest were Japanese (55%). While French (23%) came for diving and Germans (20%) came for snorkeling.

## MAJOR MARKETS

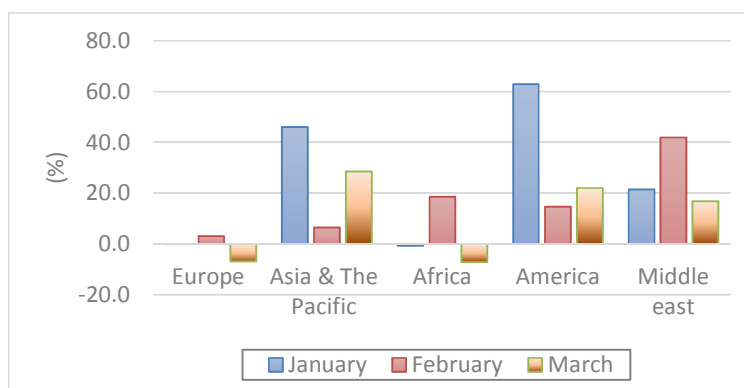
In terms of market share Europe was leading with 51% followed by Asia and the Pacific (42%) at the end of the first quarter of 2014. Chinese arrivals has been increasing and has contributed 33% to the shares in the Asia and the Pacific region which also shows a growth of 24% in shares compared to the same period last year.

The Middle East market represented 3.3% of the total arrivals during the first quarter of 2014 with an impressive growth rate of 25% for the period. Africa accounted for 2.6% of the market share while Americas has the lowest market share with 0.5% of the total arrivals

**Figure 2: Market Share by Regions, First Quarter 2014**



**Figure 3: Tourist Arrival Growth by Regions, 2013**



Europe recorded a growth in arrivals during the month of February by 3% while arrivals declined during January and March resulting in a negative growth (-1.5%) for the quarter, however Europe stayed as the leading market region with over 51% shares.

An impressive growth of 24% was recorded from Asia & the Pacific during the first quarter of 2014. The highest growth rate was during January (46%) probably with the increased number of Chinese tourists compared to last year.

Americas performed best during the month of January with a 63% growth rate. The region posted positive growth rates throughout the period from January to March 2014.

Middle East shows the highest growth rate in February by 42% increase compared to the same period last year.

African tourist arrivals increased significantly during the month of February (18%) and saw declines during January (-0.7%) and March (-7%).

## Major European Markets

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From the European region, best performance, in terms of growth rate, was seen from Greece with a growth rate of 40.1% during the first quarter of 2014, while the second best was Bulgaria (27.1%) followed by the Netherlands (26.9%) (Figure 7). Eight major market contributors in this region showed negative growth rates during the period.

In terms of market shares, **Germany** was the leading market from the region with 7.6% of the total arrivals during the period. Despite the high number of arrivals contributing the market, Germany has shown a negative growth rate of -4.4% compared to the same period last year.

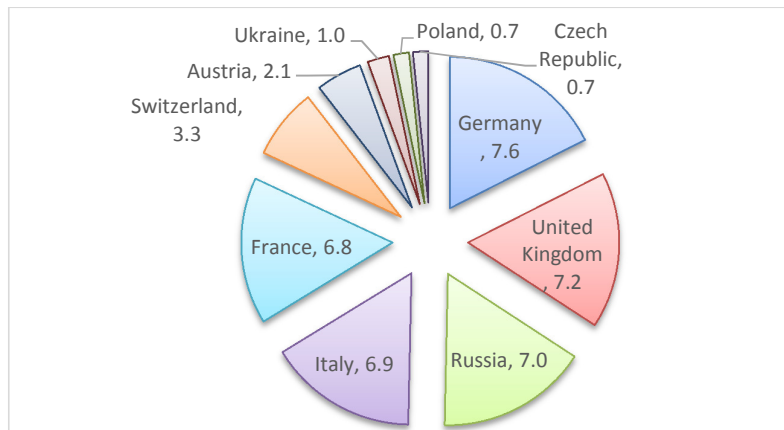
The second best performer in the region is **United Kingdom** with 7.2% of the market share which also has increased in Market share by 3.3% by the same period last year.

Third highest market is **Russian** market with 7% of market share, however the market posted a negative growth (-6.9%) at the end of the first quarter of 2014.

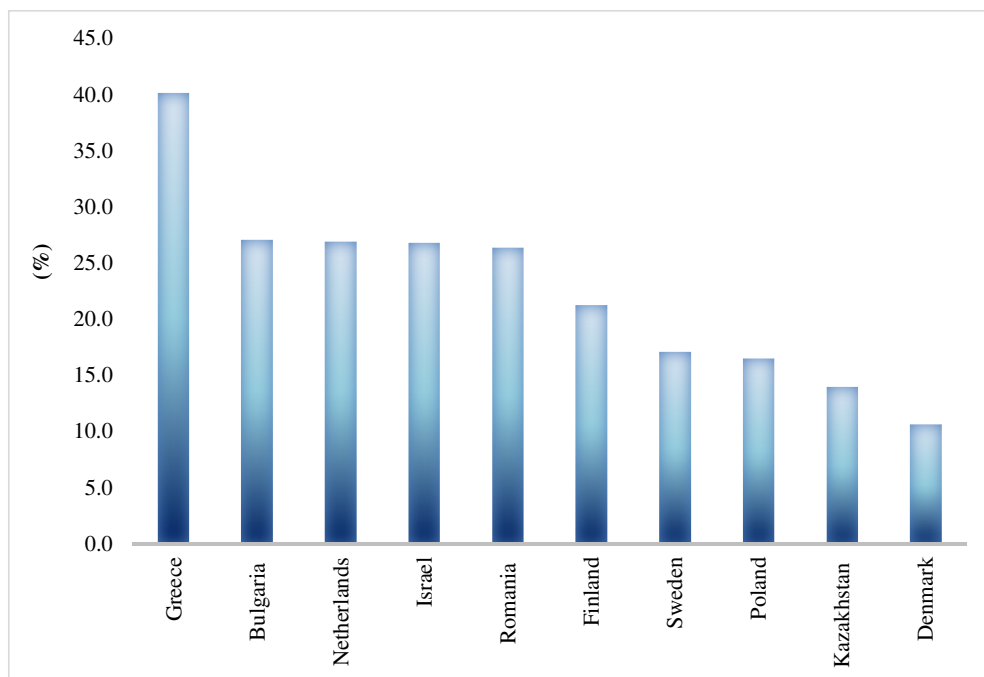
**Italian** market as the fourth best contributor in the region with a market share of 6.9% also registered a negative growth (-4.1%) for the period.

**France** (6.8%) and **Switzerland** (3.3%), ranked as the fifth and sixth markets from the region showed negative market growths compared to the same period last year.

**Figure 4: Top Ten European Markets in terms of market share, First Quarter 2014**



**Figure 5: Top Ten European Markets in terms of market growth, First Quarter 2014**



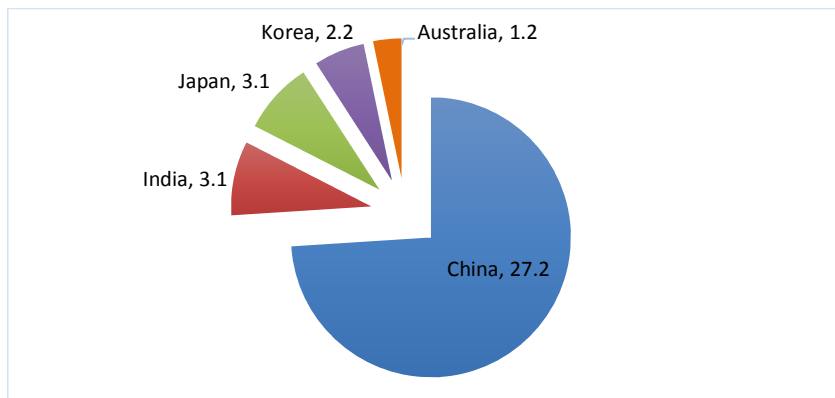
## Major Markets from Asia and the Pacific

From the Asia and the Pacific region, China has been leading for the past 5 years and is the largest market generator to the Maldives. With a market share of 27.2%, the market registered an impressive growth rate of 24.1% during the first quarter of 2014 compared to the same period last year.

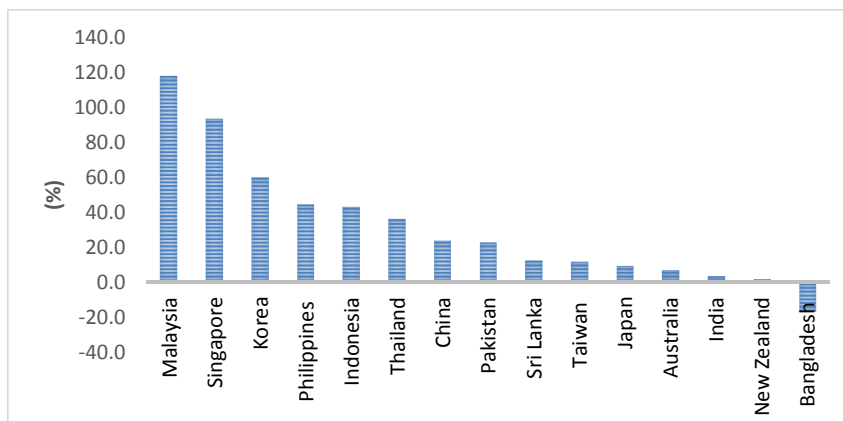
Indian market was the second best performer from the region with 3.1% shares and a growth rate of 3.7% for the period. Japan followed closely behind India also with 3.1% shares, stepping down to the third position with just 222 tourists less than India. The Japanese market posted an impressive growth rate of nearly 10% during the first quarter of 2014.

Korean market as the fourth best performer from the region with 2.2% shares recorded a robust growth of 60% during the period.

**Figure 6: Top Five markets from Asia & the Pacific in terms of market share, First Quarter 2014**



**Figure 7: Growth percentage of Asia & the Pacific Markets, First Quarter 2014**



## **Major Markets from Other Regions**

In Americas, USA stays on top as the largest market generator within the region with 2% shares and has posted a robust increase of 31.4% during the quarter, while Canada was the second best market within the region with 0.7% followed by Brazil (0.3%)

All major Middle East Markets have shown sharp increases during the period. Saudi Arabia was the leading market within the region taking hold of 1.1% share of arrivals with an increase of 34.1% for the period. While Kuwait and U.A.E contributed 0.5% and 0.3% respectively to the total arrivals during the period, Lebanon's share was 1.1%.

From the African region South Africa remains as the only market with a significant number of arrivals to the Maldives from the region. While the market share stood at 0.2%, arrivals from the market recorded a heavy decline of 19.3% for the period.