



Ministry of Tourism  
Republic of Maldives

# MALDIVES VISITOR SURVEY

---

SEPTEMBER 2016

START READING

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# INTRODUCTION

This is the 13th report in the series of the Maldives Visitor Survey (MVS) conducted by the Ministry of Tourism. MVS is a regular harmonized series of surveys conducted biannually since 2013. Previous surveys were also undertaken in 2012, 2011, 2008, 2004, and 1999. This report presents the findings from September 2016 survey.

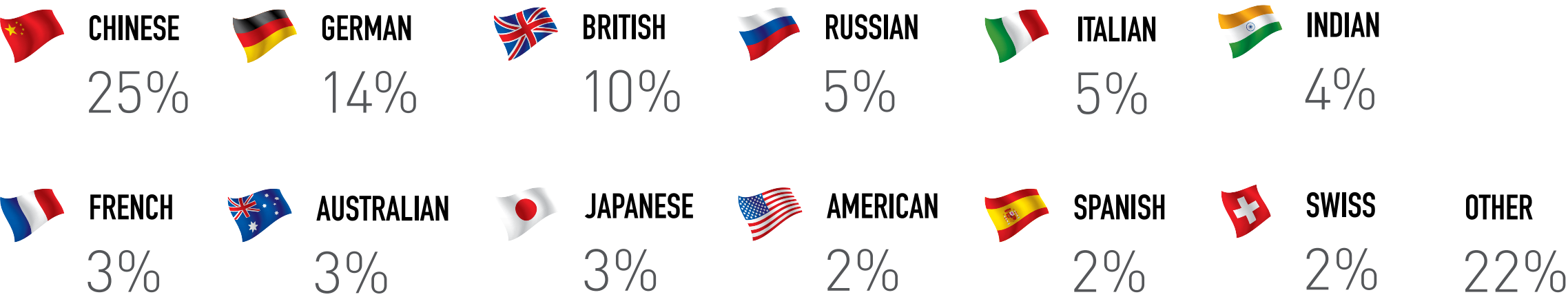
MVS presents the profile of international visitors to the Maldives and their opinions about holiday experience in the Maldives. The MVS September 2016 survey was targeted to capture the opinions of the international visitors to the Maldives during off-peak tourist season of 2016. The survey was carried out at the International Departure Terminal of the airport. The survey was conducted

## LANGUAGES

8

- English
- Italian
- German
- French
- Japanese
- Chinese
- Russian
- Arabic

## NATIONALITIES OF SURVEY RESPONDENTS



as an exit survey at Ibrahim Nasir International Airport (INIA), between 24th September and 7th October 2016.

The sample for the survey was selected based on 5-year averages of the top ten inbound markets to the Maldives between 2011 and 2015. The total number of questionnaires collected was 2194 and 2170 questionnaires were deemed fit for data analysis. The survey was conducted in eight different languages: English, Italian, German, French, Japanese, Chinese, Russian and Arabic.

The survey respondents represent all the international visitors to the Maldives during the survey period. The survey respondents are Chinese (25%), German (14%), British (10%), Russian (5%), Italian (5%), Indian (4%), French (3%), Australian (3%), Japanese (3%), American (2%), Spanish (2%), Swiss (2%) and respondents from all other nationalities (22%). For the purpose of market comparisons, the top 8 respondent nationalities have been used.

The statistical data presented in this report was collected and processed by CDE Consulting. The reports of the previous surveys are accessible online at

[www.tourism.gov.mv](http://www.tourism.gov.mv)

# SUMMARY OF KEY FINDINGS

1

For 46% of international visitors to the Maldives, the main motivator for traveling is the natural beauty of Maldives.

4

Online Travel Agencies (OTAs) are used by 47% of visitors to the Maldives to book their accommodation.

2

The main purpose of visit is 'Honeymoon'. Of the visitors 40% stated 'Honeymoon' as the purpose while 28% visited for 'rest and relaxation'.

5

Of the international visitors, 19% booked their flights to Maldives directly with the airline, 12% through flight search website, while 67% booked through travel agents/tour operators.

3

Internet (30%) is the most important source of information to discover the Maldives followed by word of mouth (23%).

6

Of the visitors to the Maldives in September 2016, 32% booked their holiday 1-2 months in advance while 25% booked 3-5 months in advance.

7

Of the visitors to the Maldives 57% belong to the 25-34 years age group while 16% belonged to 35-44 years age group.

10

More than 85% of visitors to the Maldives travelled with their partner or family.

8

Of the visitors to the Maldives in September 2016, about 18% have visited the Maldives more than once.

11

Speedboat transfers (47%) is the main mode of transport from international airport to place of stay followed by seaplane transfers (35%) and domestic flights (13%).

9

More than half of the visitors (58%) stayed in the Maldives for 4-7 nights.

12

Half of the international visitors waited at the airport for less than half an hour to get transfer to place of stay.

13

Journey time from airport to place of stay is less than 30 minutes for about one third of visitors.

14

Of the visitors to the Maldives, 84% stayed in tourist resorts while 12% stayed in hotels/guesthouses.

15

Of those who travelled by speed boat to place of stay, 61% perceived the price charged as 'value for money', while 57% of those who travelled by seaplanes and 71% of those who travelled by domestic flights perceived price charged for travel as 'value for money'.







# REASONS AND MOTIVATIONS FOR VISITING

## Motivations to Visit

Natural beauty of the Maldives motivated 46% of the international visitors to the Maldives. Of the natural beauty motivators, beaches of Maldives motivated 19% of the visitors while the underwater beauty motivated 16% of the visitors and small islands of the Maldives motivated 11% of the international visitors to the Maldives.

The International visitors also stated that peacefulness (13%), weather (12%), uniqueness (10%), reputation (8%) and privacy (8%) were also vital motivating factors to visit the Maldives.

International visitors from different nationalities appreciate the beaches, underwater beauty and small islands of the Maldives equally. For Indian visitors, beach (24%) and peacefulness (17%) were key motivators. Japanese visitors

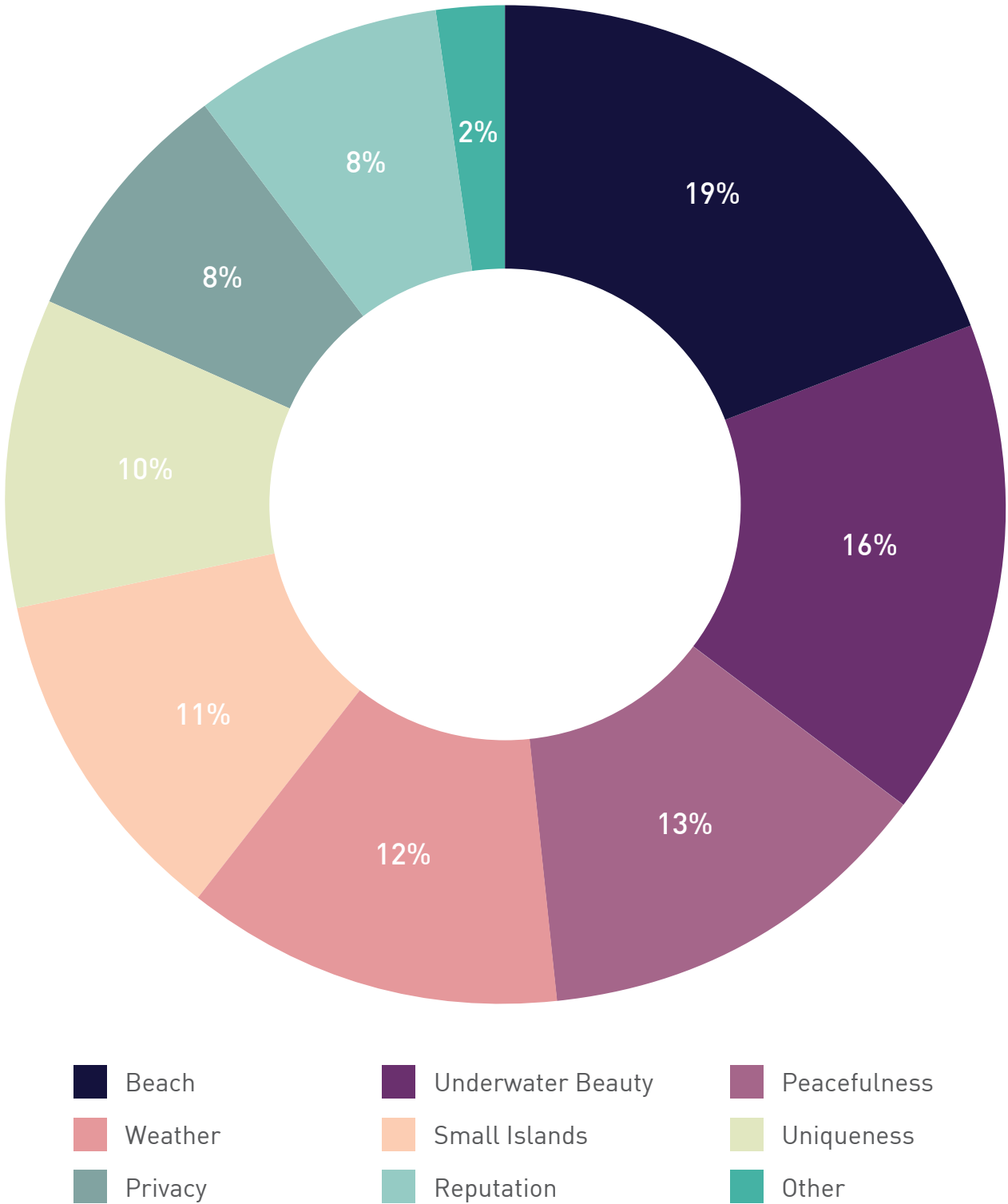


Figure 1. Motivators for choosing the Maldives

show a high preference for underwater beauty (30%) and peacefulness (30%), while the Chinese visitors rated reputation (13%) as an important motivator. The French (16%), German

(15%) and British (15%) visitors stated weather as an important motivating factor for them. Russian visitors value privacy (15%) as an important motivator to visit the Maldives.

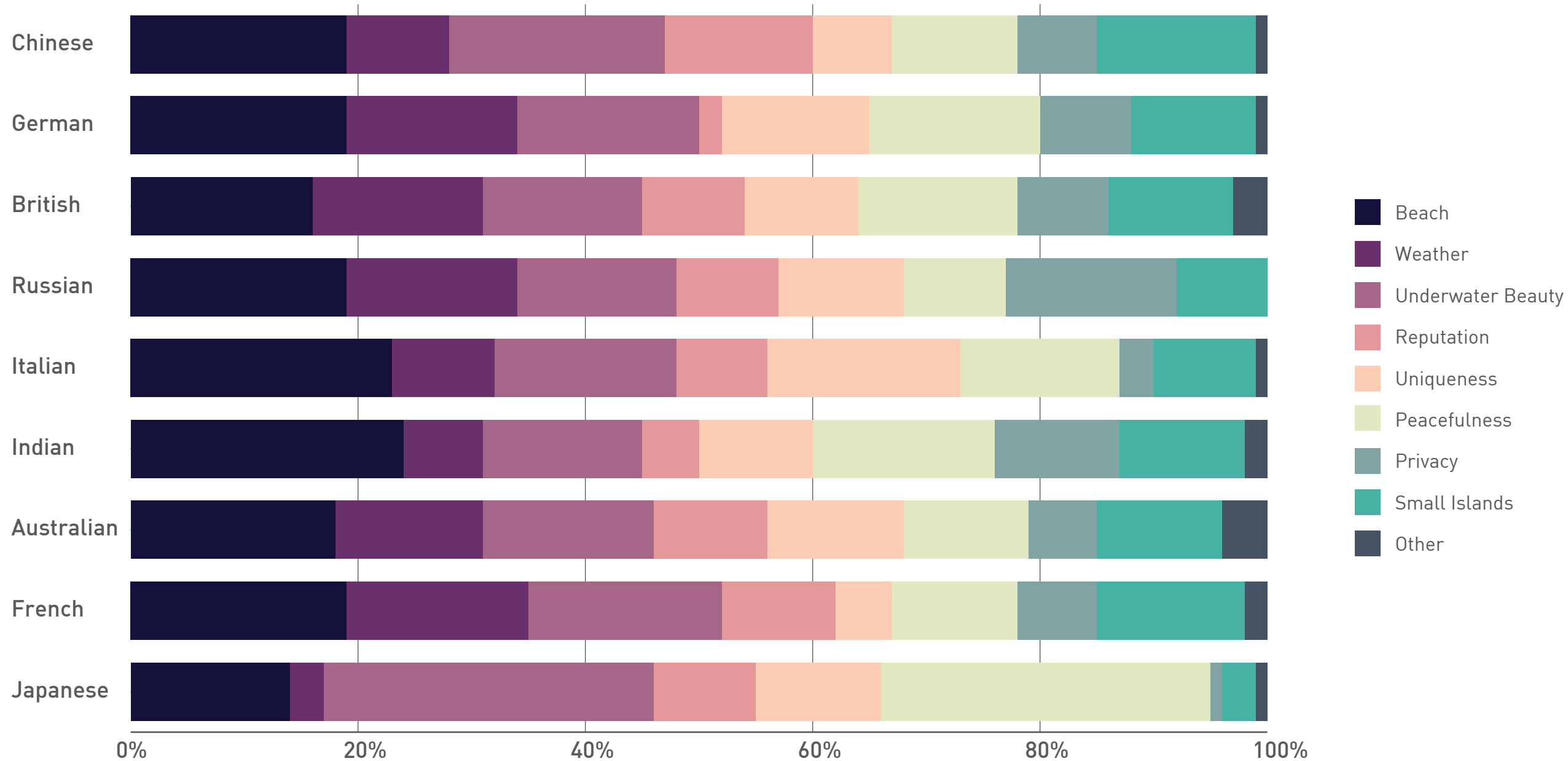
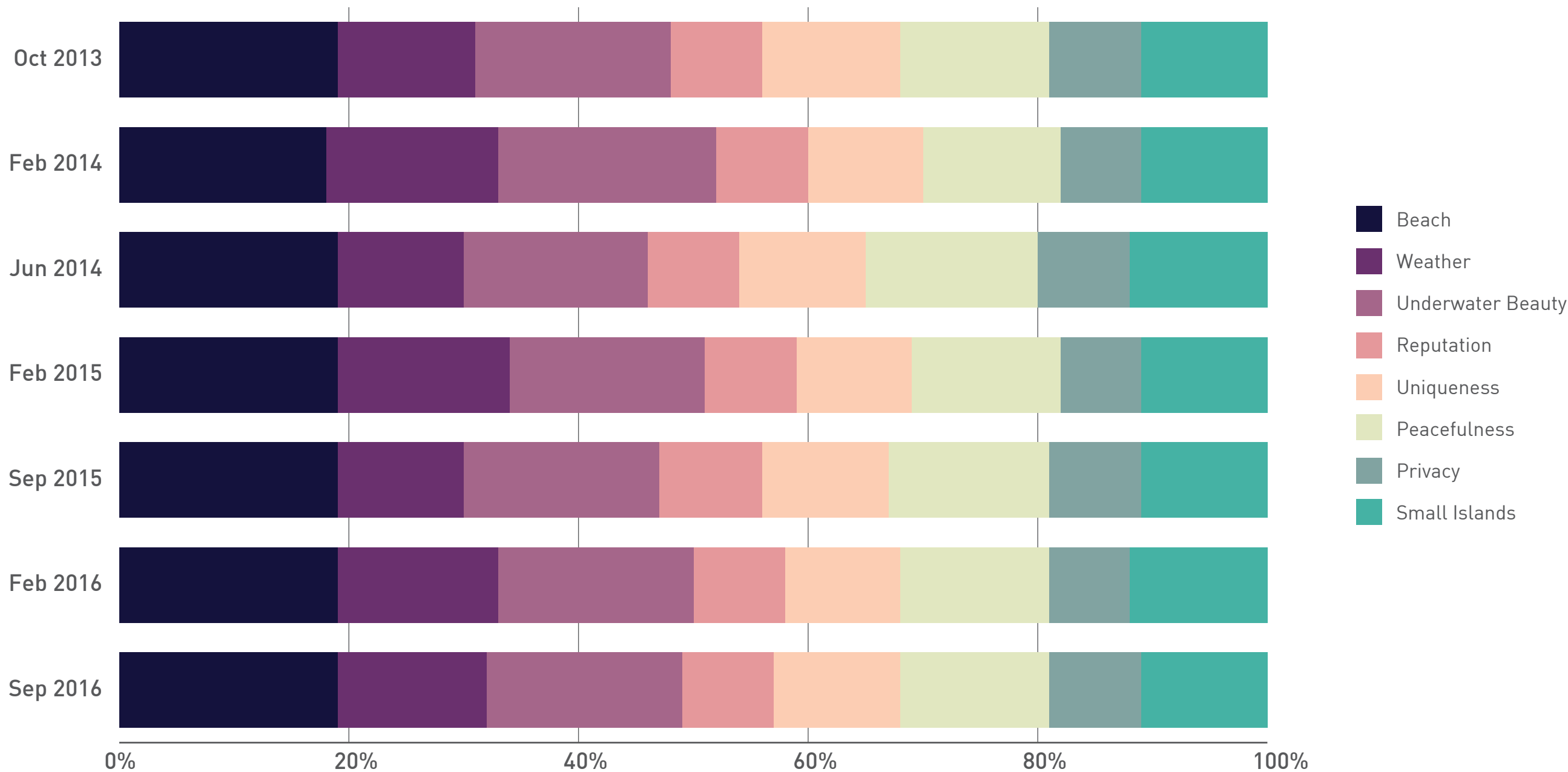


Figure 2. Motivators for choosing the Maldives by nationalities



Trends analysis from the past seven surveys between 2013 and 2016 show that for international visitors, peacefulness and small islands as motivators to visit the Maldives has been on the rise.



**Figure 3.** 5-year trend of motivators for choosing Maldives

# Reasons for Visit

In September 2016, 40% of the visitors stated honeymoon as the main reason for visiting the Maldives. Other international visitors stated, rest and relaxation (28%), snorkeling (14%), and diving (9%) as the most popular reason to visit the Maldives.

Amongst the Japanese visitors (63%) visited for their honeymoon to the Maldives, followed by 57% of the Chinese, who also visited for their honeymoon. Of the French (41%) and British (39%) visited for rest and relaxation. Swiss (34%) and Germans (31%) stated snorkeling as the most common reason to visit the Maldives.

me trends of survey responses between 2013 and 2016 show that during the peak season, rest and relaxation is the most popular reason to visit, while during the off peak season, honeymoon is the most popular reason for international visitors to the Maldives. This is further observed by comparisons in the trends in age group of visitors to the Maldives. Trends in age group of respondents show more visitors between 18 and 34 years visiting during the off peak season whereas more visitors in the age groups above 34 years visit during the peak season. Furthermore, there has also been a shift in preference between diving and snorkeling as

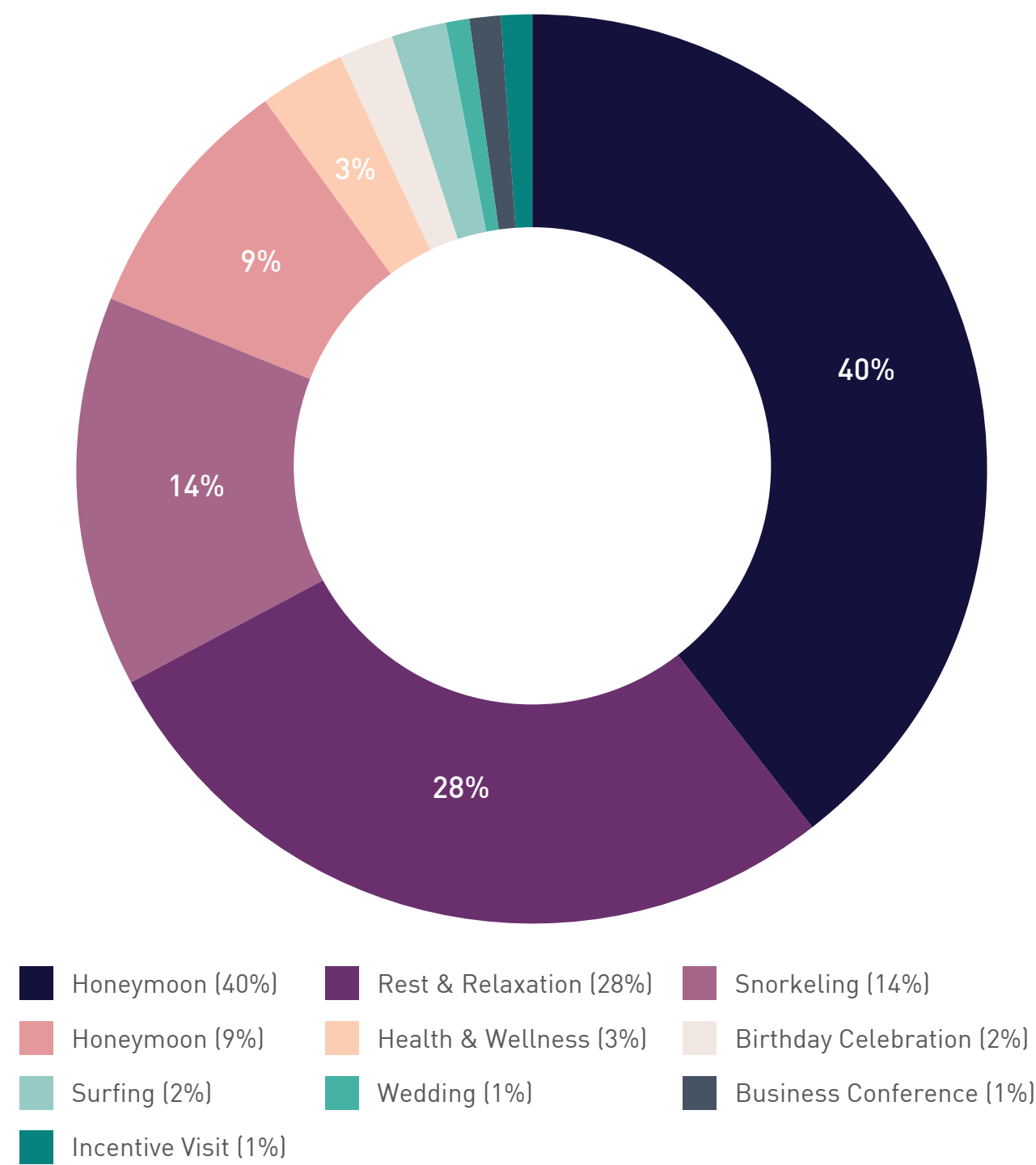


Figure 4. Purpose of visit to the Maldives

the percentage of people who stated diving as the purpose of visit declined while snorkeling as a reason for visit increased. Snorkeling increased from 9% to 14% while diving declined from 14% to 9%.

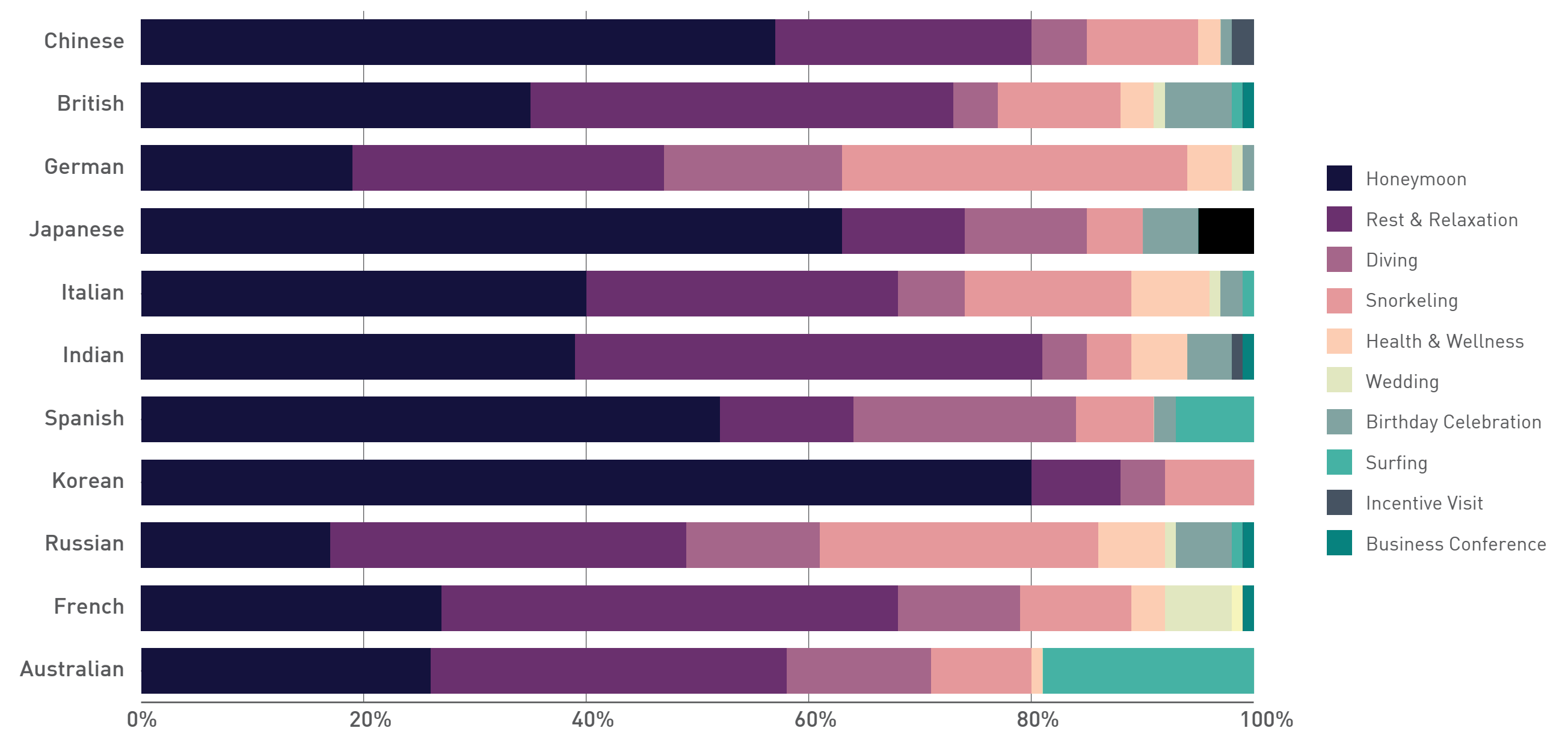
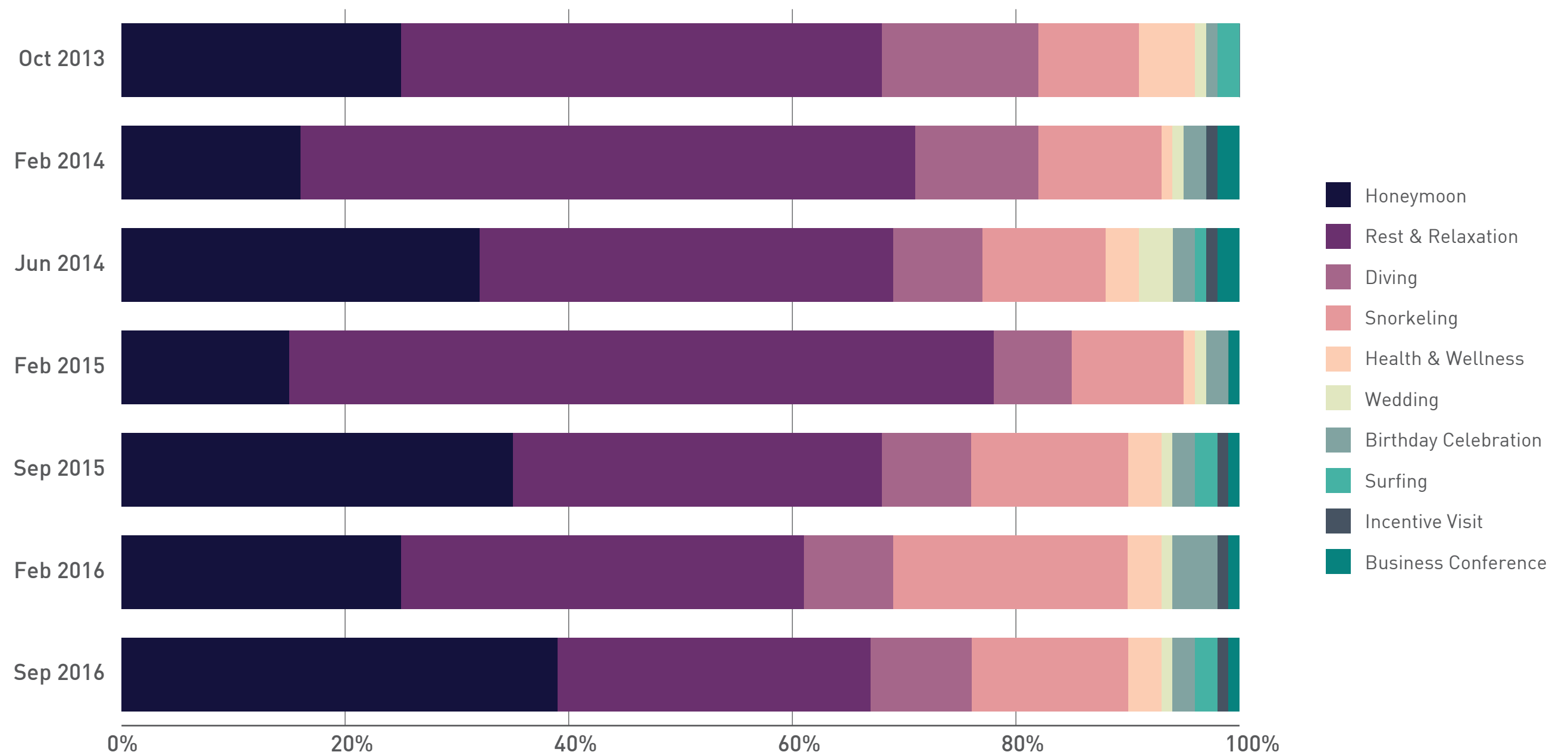


Figure 5. Purpose of visit to the Maldives by nationality





**Figure 6.** 5-year trend of purpose of visit to the Maldives



# PLANNING THE TRIP

## Sources of Information

Of the international visitors to the Maldives, 30% obtained pre-arrival information about the Maldives via Internet while 23% of the respondents discovered Maldives through word of mouth and 15% learned through travel agents.

Internet is the main source of information about the Maldives for visitors from China (30%) and Britain (29%), in the September 2016 survey. Word of mouth is the most important source of information about the Maldives especially for Indian (41%), Japanese (36%) and Russian (34%) visitors. For the Italian visitors (22%) the main source of information is the travel agents.

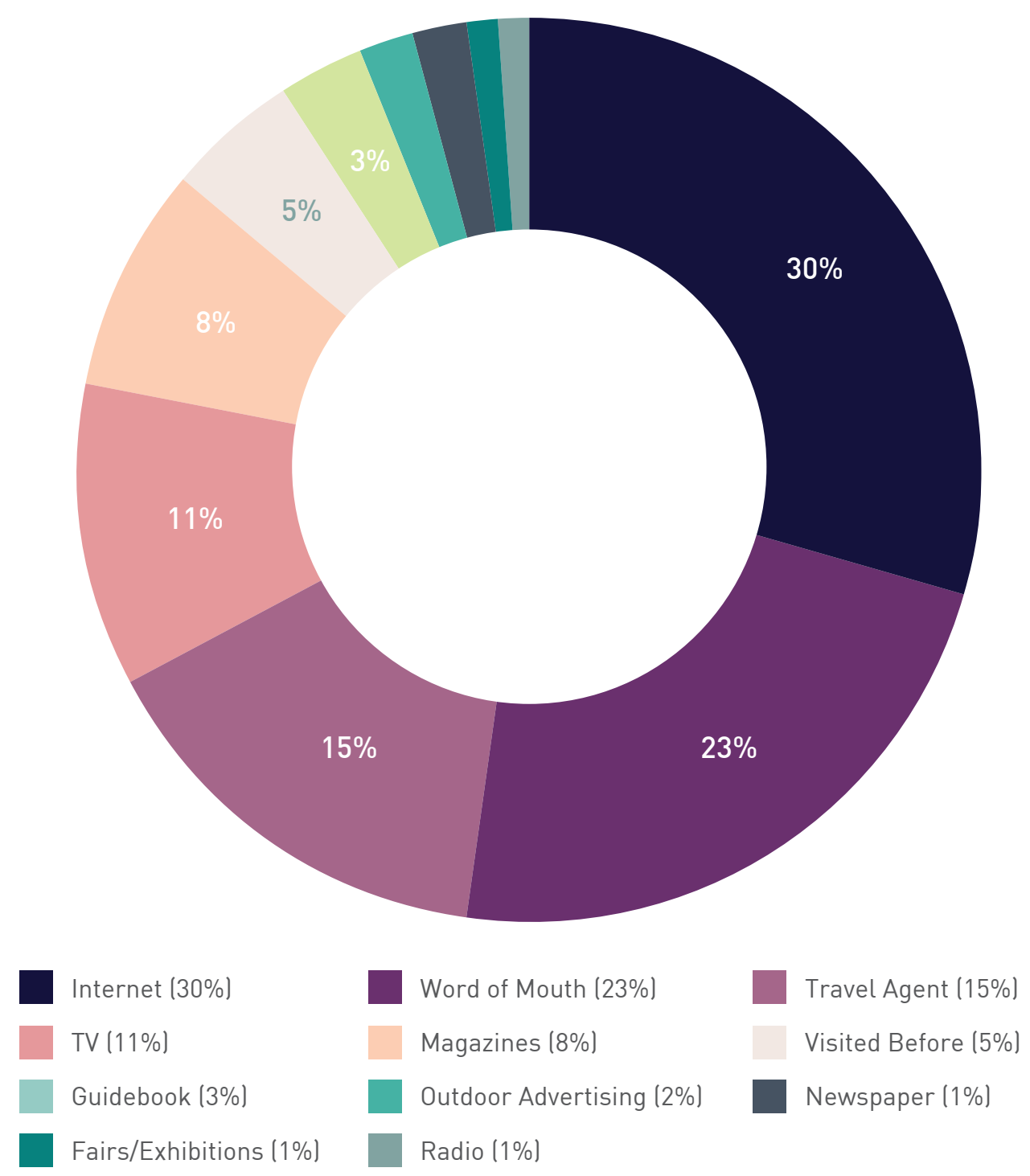
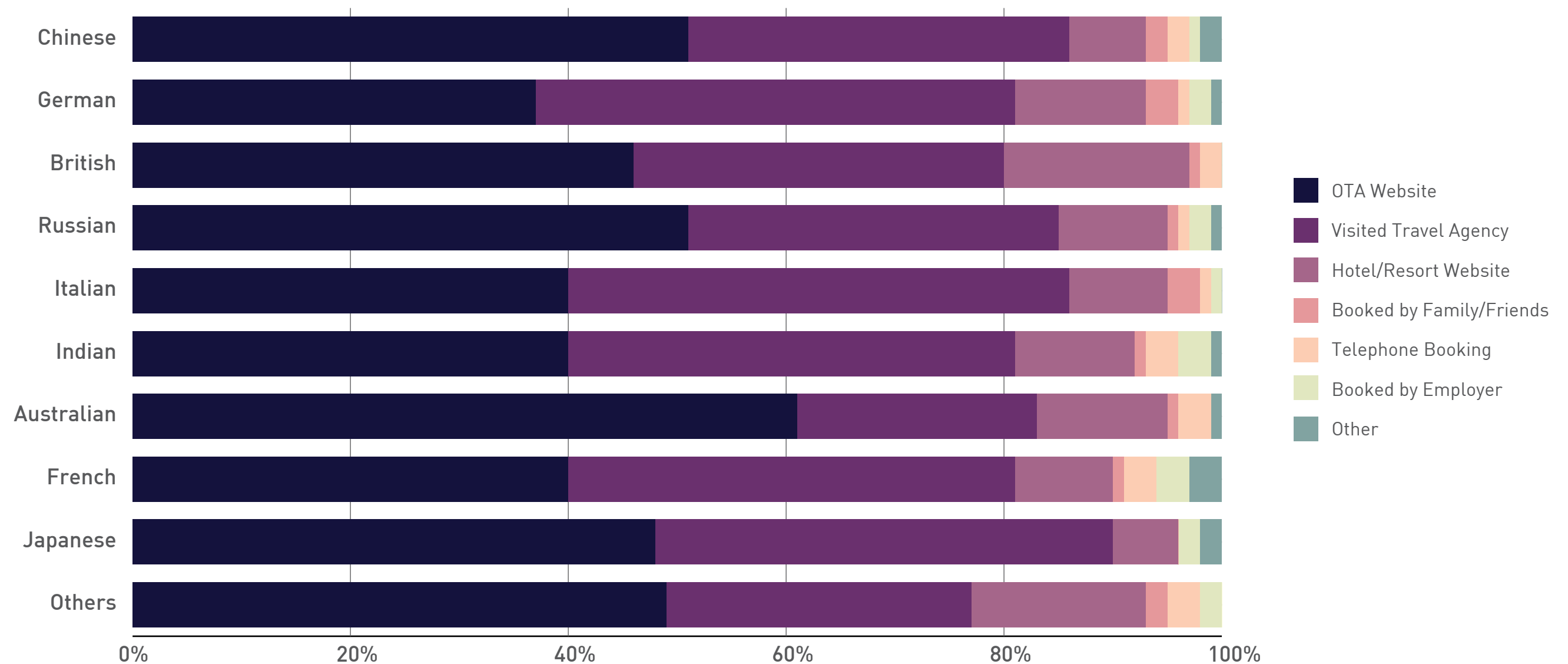


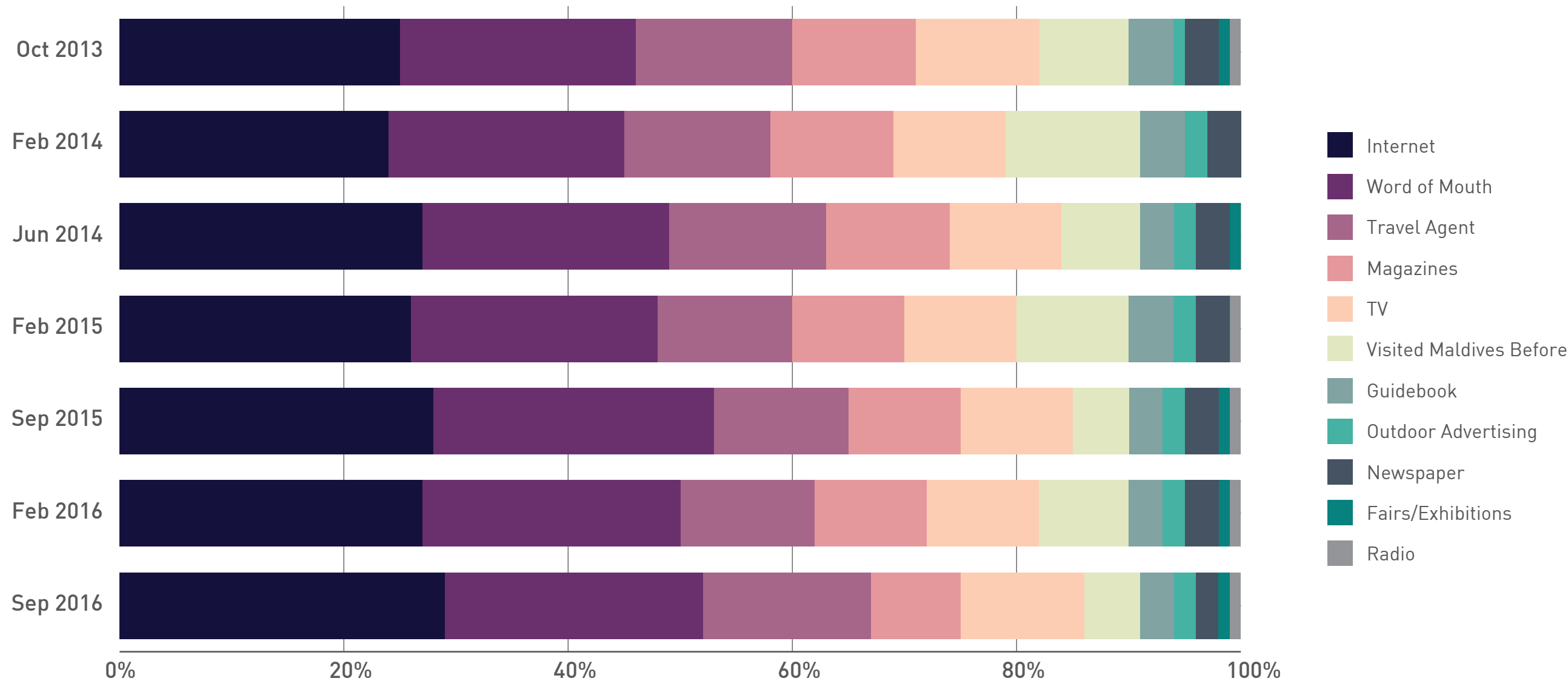
Figure 7. Source of pre-arrival information about the Maldives





**Figure 8.** Source of pre-arrival information about the Maldives by nationalities

Time trend analysis from the past seven surveys undertaken between 2013 and 2016 show, Internet as a source of information is growing in importance. Likewise, international visitors who discover the Maldives through word of mouth as a source of information also show increasing trends.



**Figure 9.** 5-year time trend of source of pre-arrival information about the Maldives

## TRIPADVISOR

One in every three international visitors to the Maldives referred to TripAdvisor to plan the trip to the Maldives. Of those who referred to TripAdvisor, 58% of users are from Europe, while 15% users are from Asia and 27% users are from other nationalities.

The most common use of TripAdvisor is by French (78%), British (66), Swiss (42%), Indian (34%) and Italian (32%). On the other hand, only 1% of Chinese stated they refer to TripAdvisor. TripAdvisor is the most commonly used reputation check website by visitors to the Maldives.





# Booking Method

Internet is the most preferred type of booking visitors used to book their holidays to Maldives. Of the internet sources, 47% used Online Travel Agencies (OTA) websites to book their trip, and 12% organized their trip using the resort or hotel website. However, there are still a significant amount of visitors (35%) who stated that they visited a travel agency to organize the trip.

The trend for the past few years shows that there is an increase in percentage of visitors who book their holiday through internet. Visitors who booked their holiday through internet based travel agents and tour operators increased from 41% to 47% in the last three years. Furthermore, visitors who used hotel or resort website to book their holidays have increased slightly. Hence, there was a slight decline in percentage of visitors who visited a travel agency but the most significant decline has been in the category of booking by family or friends. 9% of visitors stated that family or friends booked their holiday in October 2013 while 2% stated the same in September 2016.

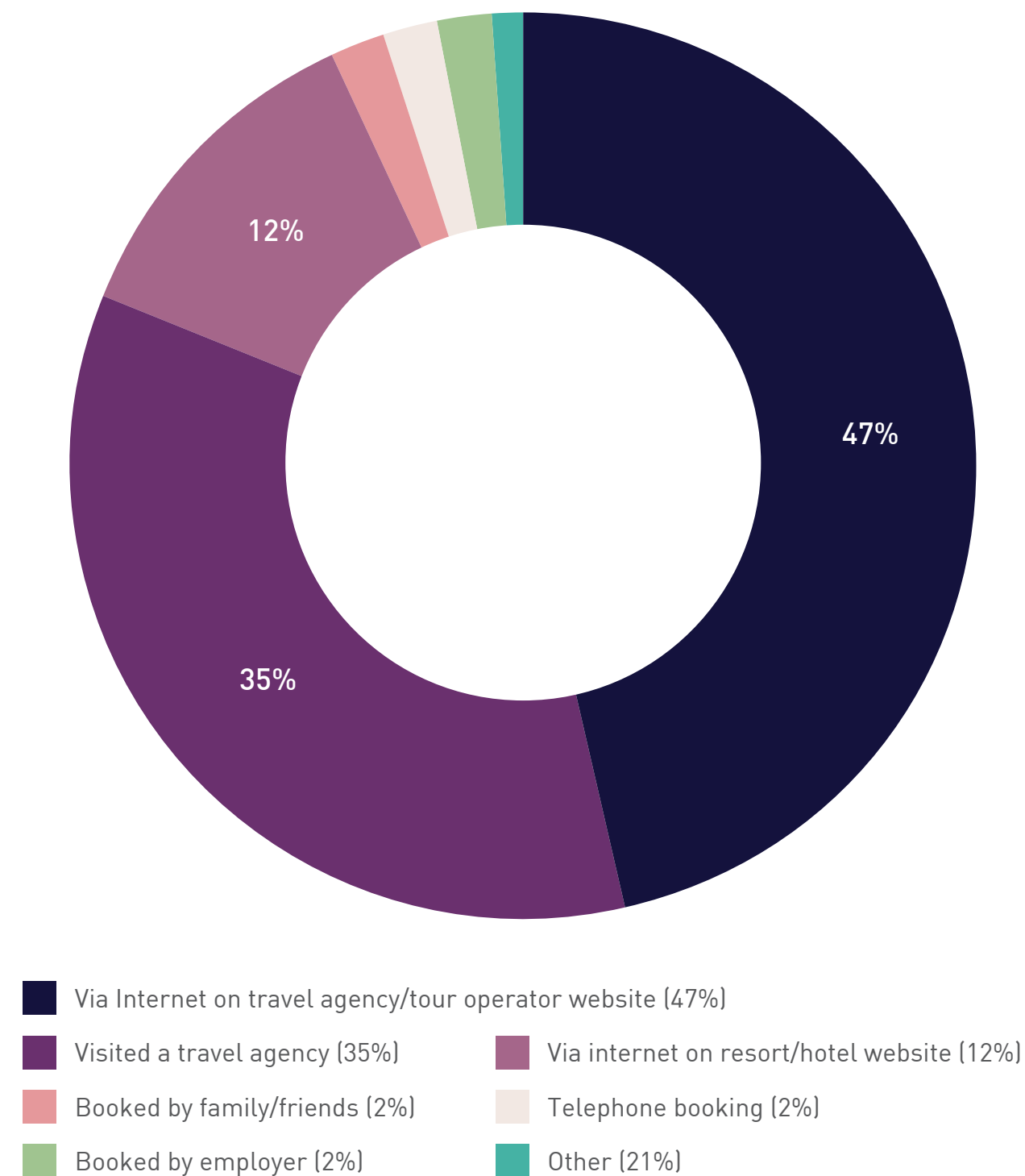
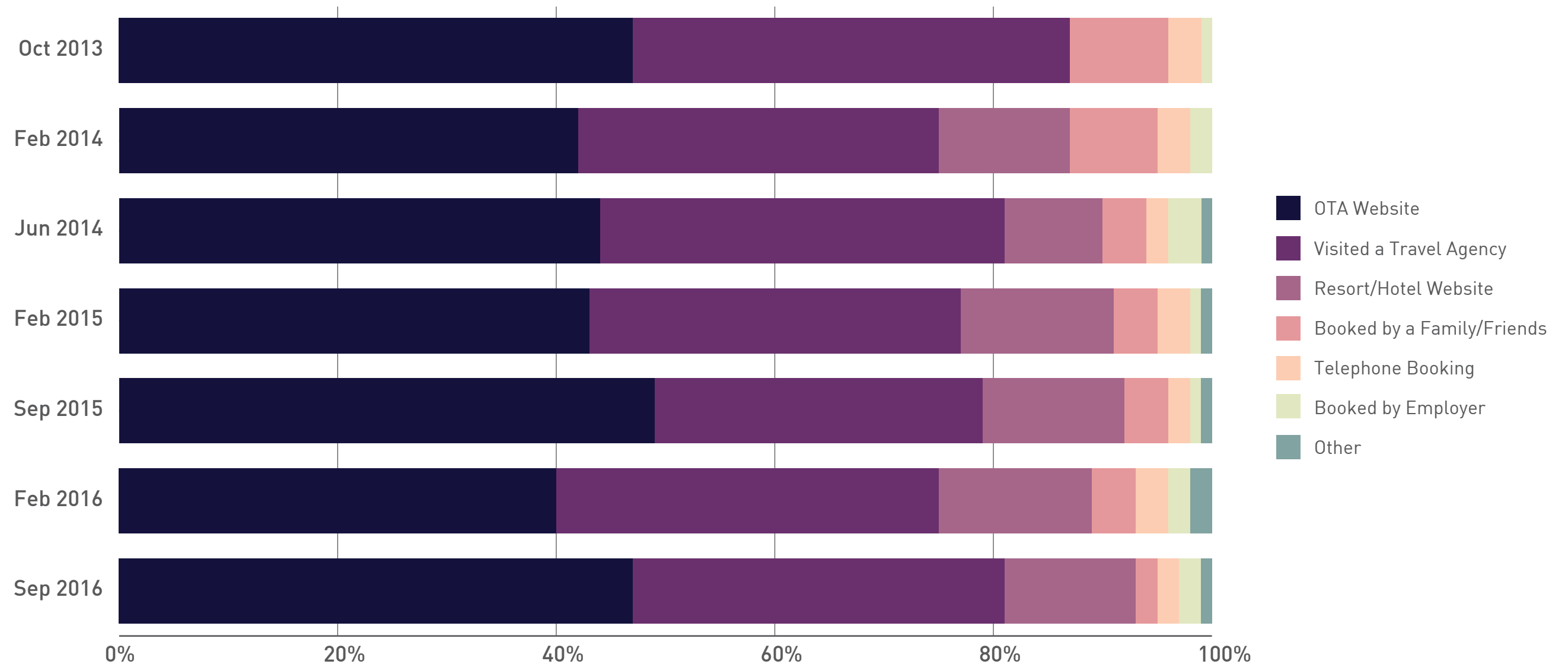


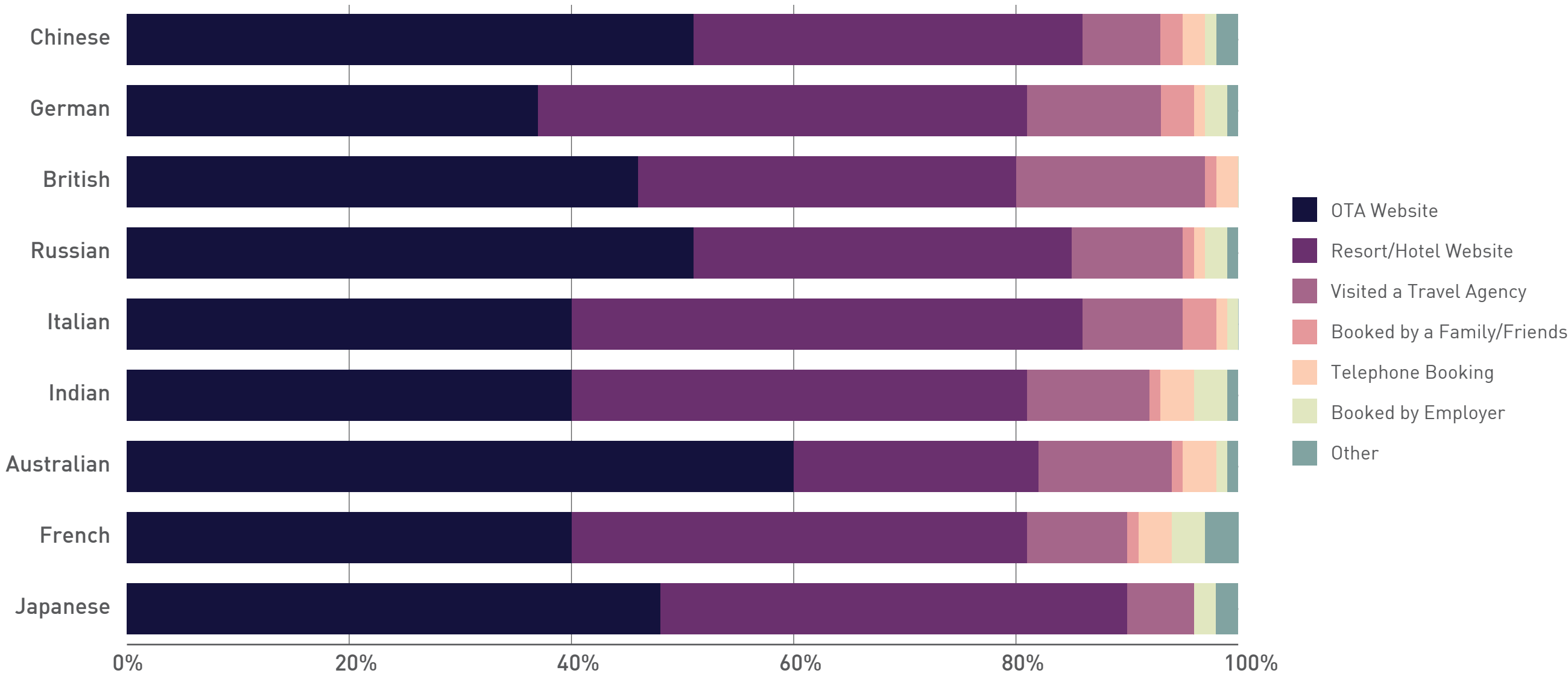
Figure 10. Mode of trip organization used by international visitors



**Figure 11.** 5 year trend for mode of trip organization used by international visitors

Of bookings through OTA websites Chinese (51%), British (46%) and Russian (51%) visitors preferred booking through travel agency or tour operator website. However, Germans (44%) Italians (46%) and Indian (41%) preferred too book through resort or hotel website. Few percentage of visitors preferred to book their travel through

non-internet channels which include visiting a travel agent, booking by family or friends, telephone bookings and bookings by employer. The percentage of visitors who opted for these methods of booking was less than 20% for all popular nationalities.



**Figure 12.** Mode of trip organization used by international visitors by nationalities



# OTAs used for booking

The top five Online Travel Agencies (OTAs) used by international visitors to the Maldives in September 2016 are Trip Advisor, Booking.com, HolidayCheck, CTrip, and Agoda. Of the international visitors, 27% used Trip Advisor and 19% used Booking.com.

There is variation in the OTAs preferred by different nationalities. Booking.com and Trip Advisor are the most popular OTAs among European visitors to the Maldives. However, German visitors mostly used HolidayCheck. Of the Chinese visitors who used OTA websites, CTrip (36%) is the most popular followed by Qunar.com (12%). The preferred OTA of Indian visitors (26%) is Trip Advisor.

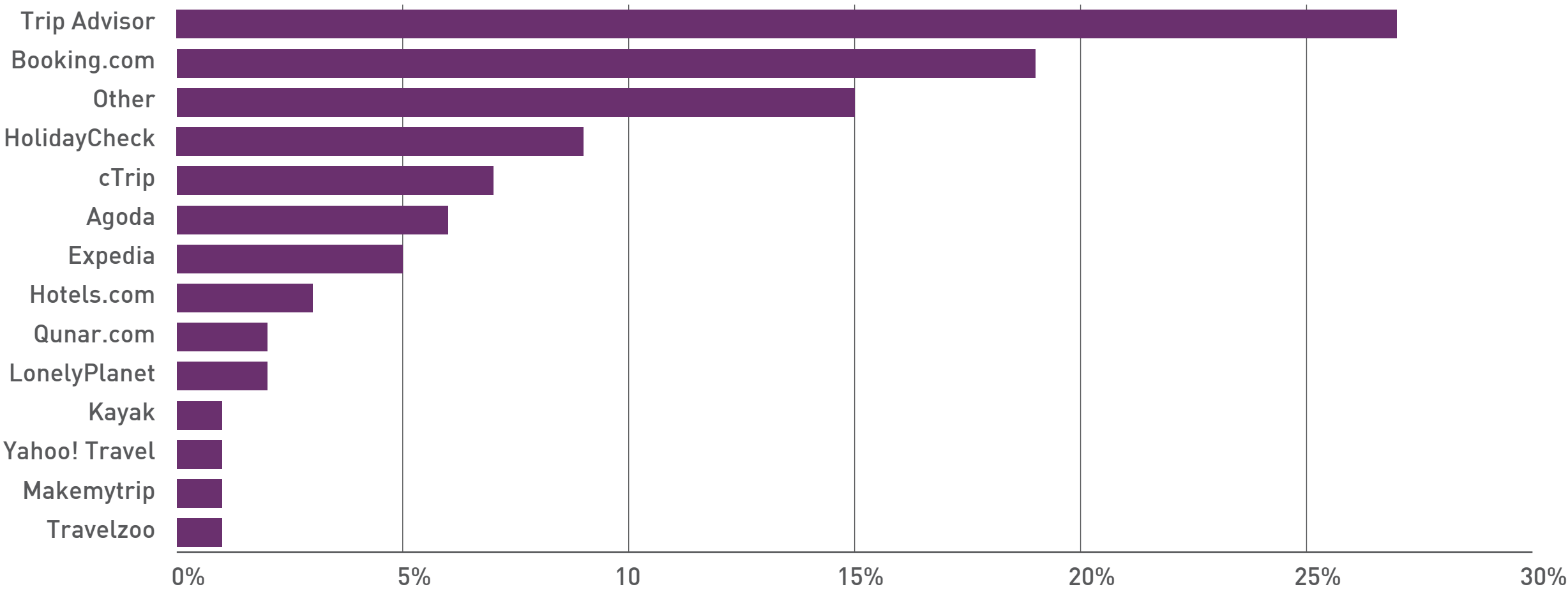


Figure 13. OTAs used to book trip

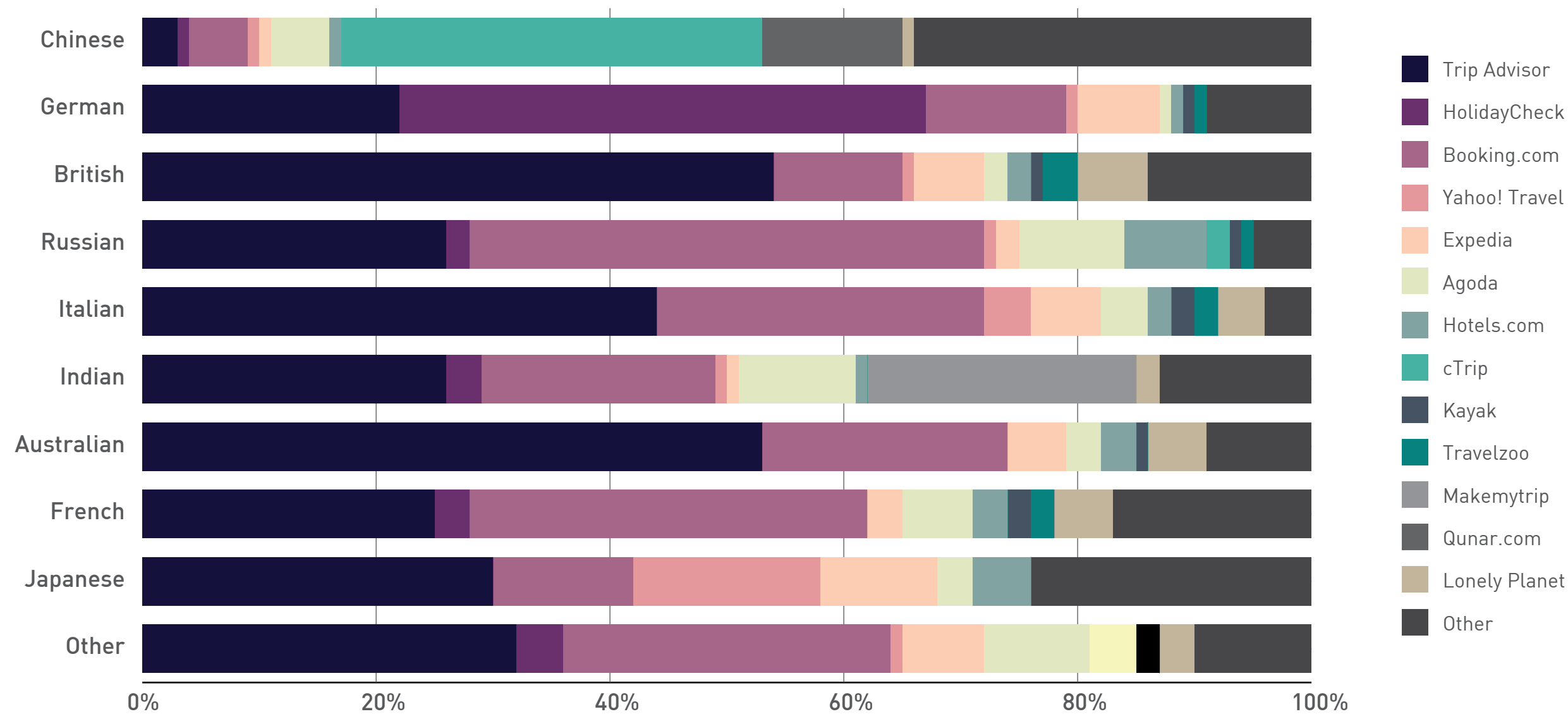


Figure 14. OTAs used to book trip by nationalities

# AIRLINE BOOKING

In September 2016, half of the visitors to the Maldives booked their airline ticket via a travel agent. Other sources used to book airline ticket are directly from airline (19%), tour operator (18%) and flight search website (12%).

Of booking airline fare, 77% of Japanese visitors booked their air fare using a travel agent and 77% Italian, 65% German and 65% British also used a travel agent to book their air fare. Even though Chinese visitors (45%) used a travel agent 38% stated that they booked their air fare via a tour operator.

It is notable that air fare booking method is significantly different among visitors who opted to stay in a resort and guesthouses. Even though half of the visitors who stayed in resorts booked their air fare by a travel agent, visitors who stayed in guest houses booked their airline fare directly from the website.

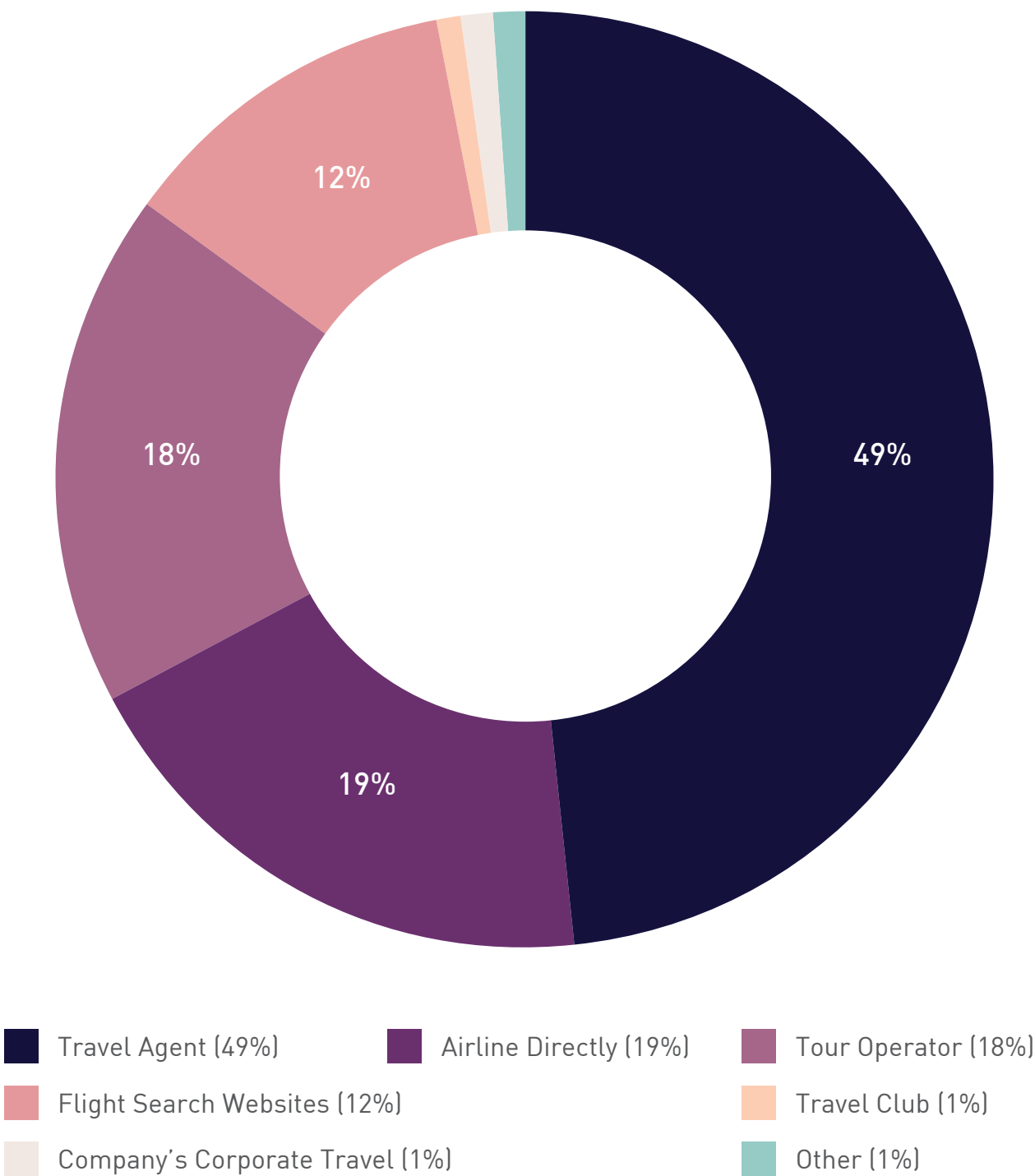
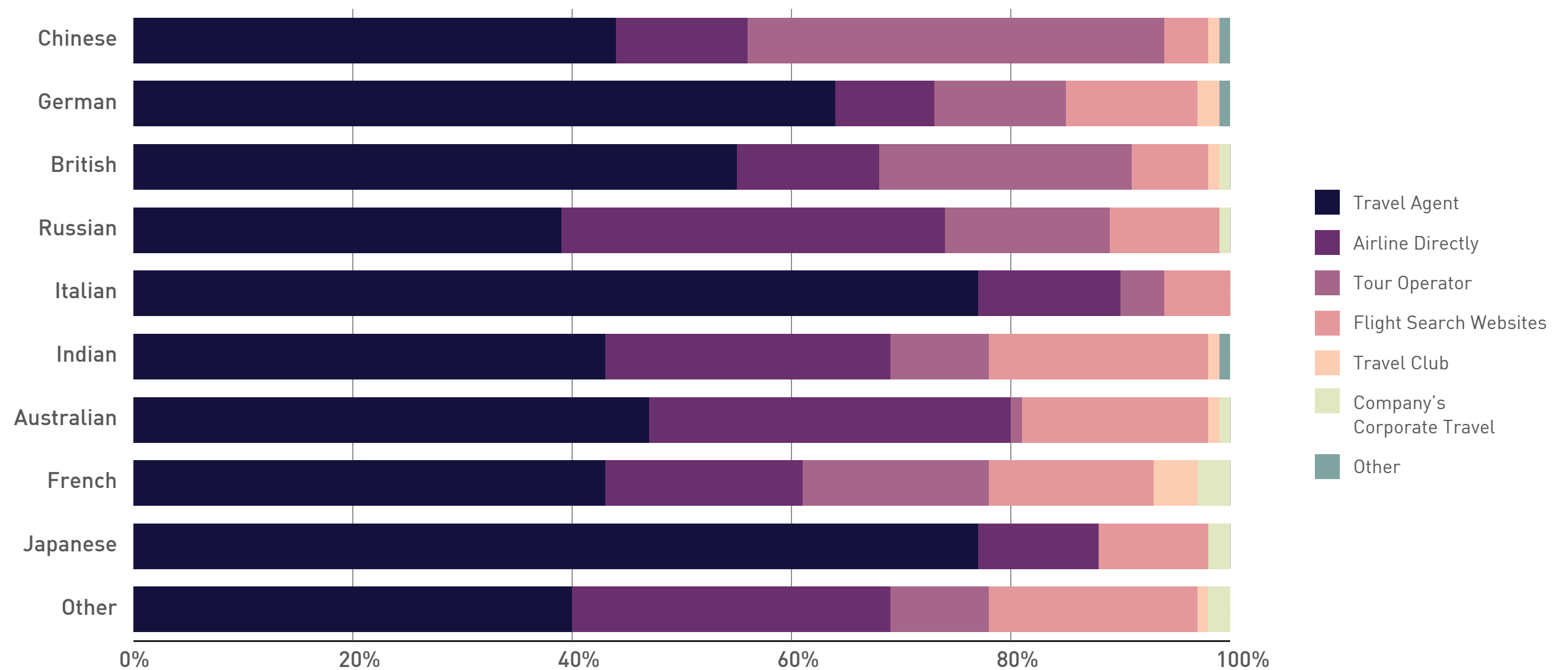
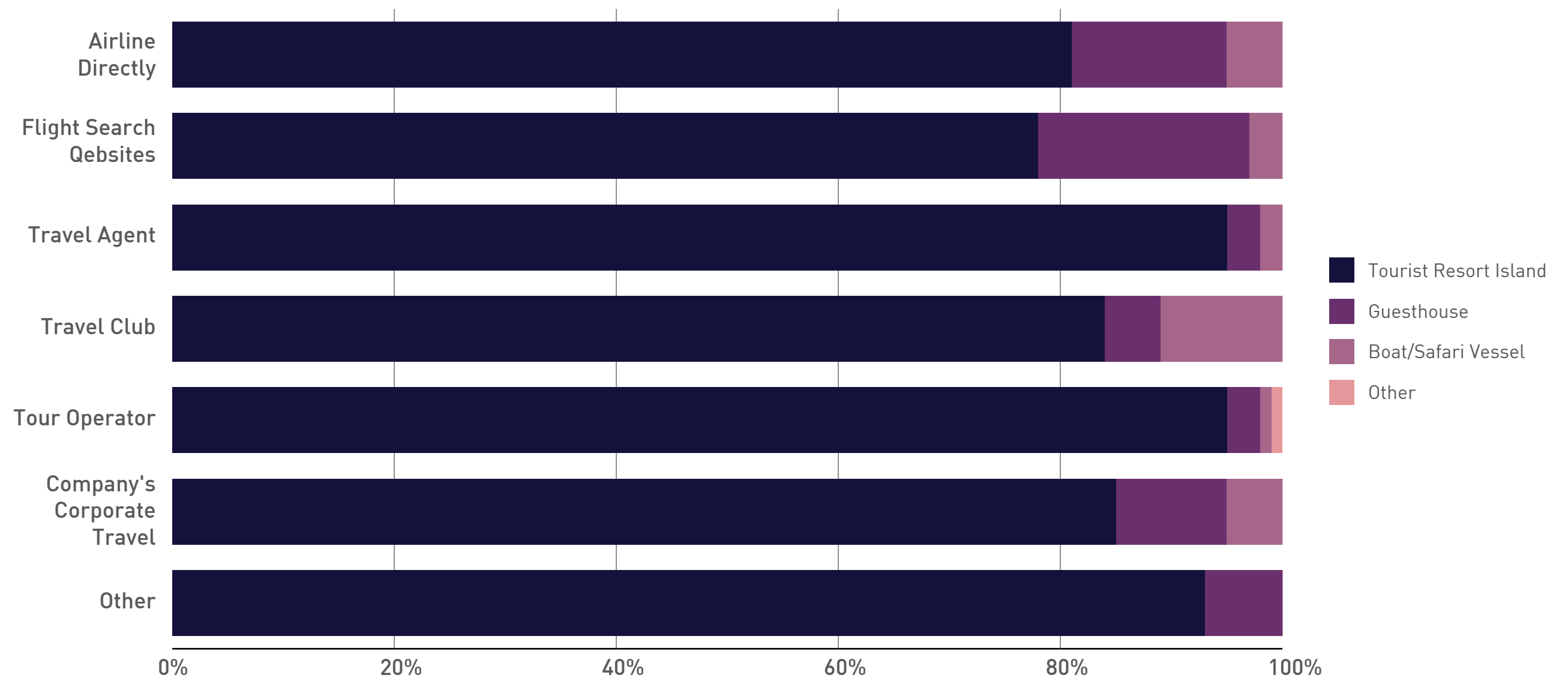


Figure 15. Airline reservation methods





**Figure 16.** Airline reservation methods by nationalities



**Figure 17.** Airline reservation methods by place of stay

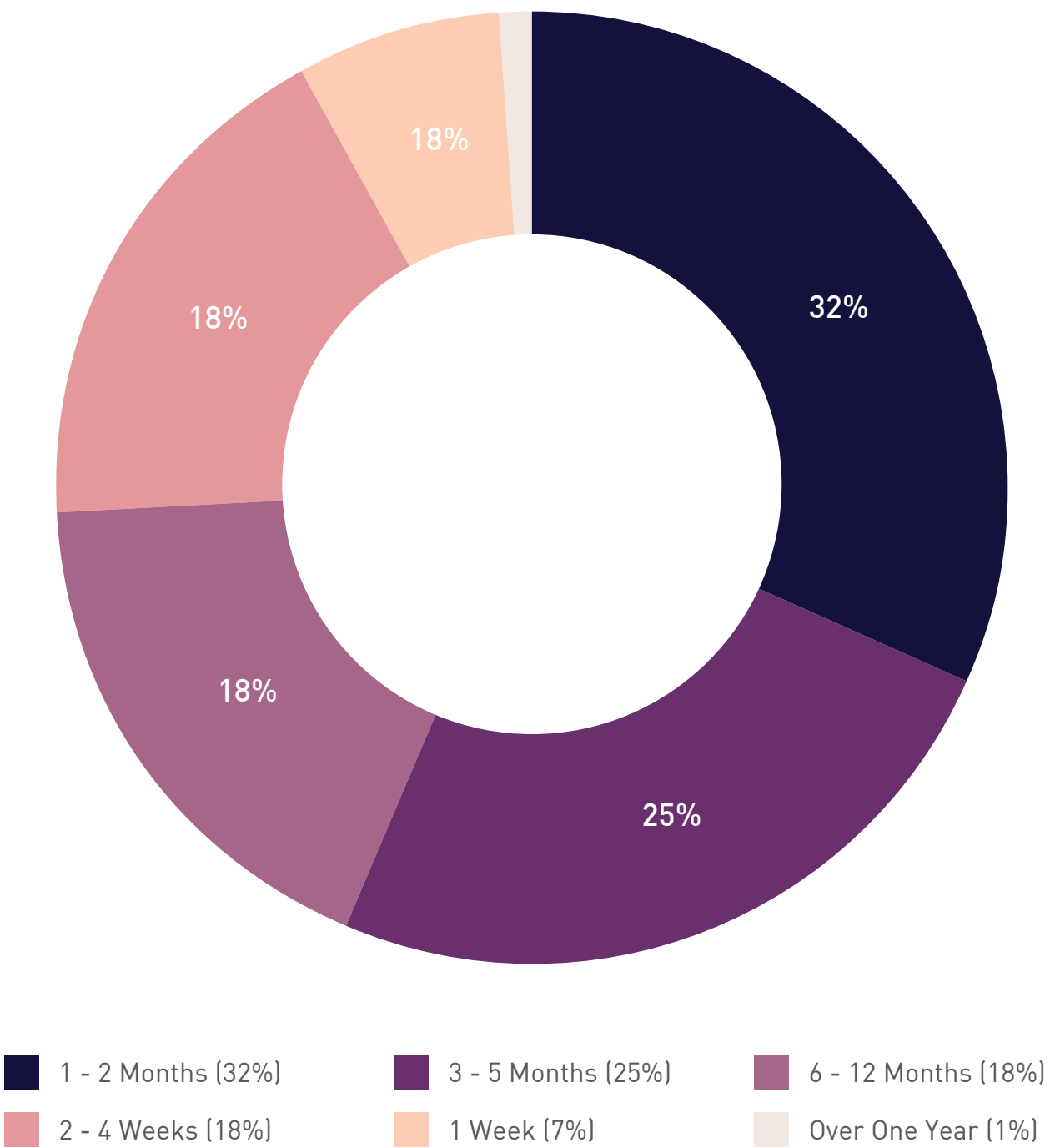
# Booking Period

Of the international visitors to the Maldives, 32% book their trip between 1 and 2 months before their travel while 25% book their holiday 3 to 5 months in advance and 18% book their holiday 6 to 12 months in advance. There are also 18% of visitors who book their holidays 2-4 weeks before their travel while 7% of visitors book their holidays 1 week before.

In the last five years, there has not been significant changes in booking period. Most people have booked their holidays 1-2 months in advance in the last five years. There is a slight increase in percentage of people who book their holidays in less than one week.

There is variation in duration of advance booking among different European nationalities. While most German and British visitors booked their stay one week prior to their travel, Russian, Italian and French visitors booked their stay 6-12 months in advance.

Most Chinese visitors booked their travel 6-12 months in advance (46%) and 28% booked 3-5 months in advance. Likewise, most Indian visitors booked their travel 6-12 months in advance (45%) and 25% booked 3-5 months in advance.



**Figure 18.** Duration of advance booking of holiday by respondents



Most Japanese visitors also booked 6-12 months in advance (40%) however, 34% of visitors booked their travel 2-4 weeks in advance.

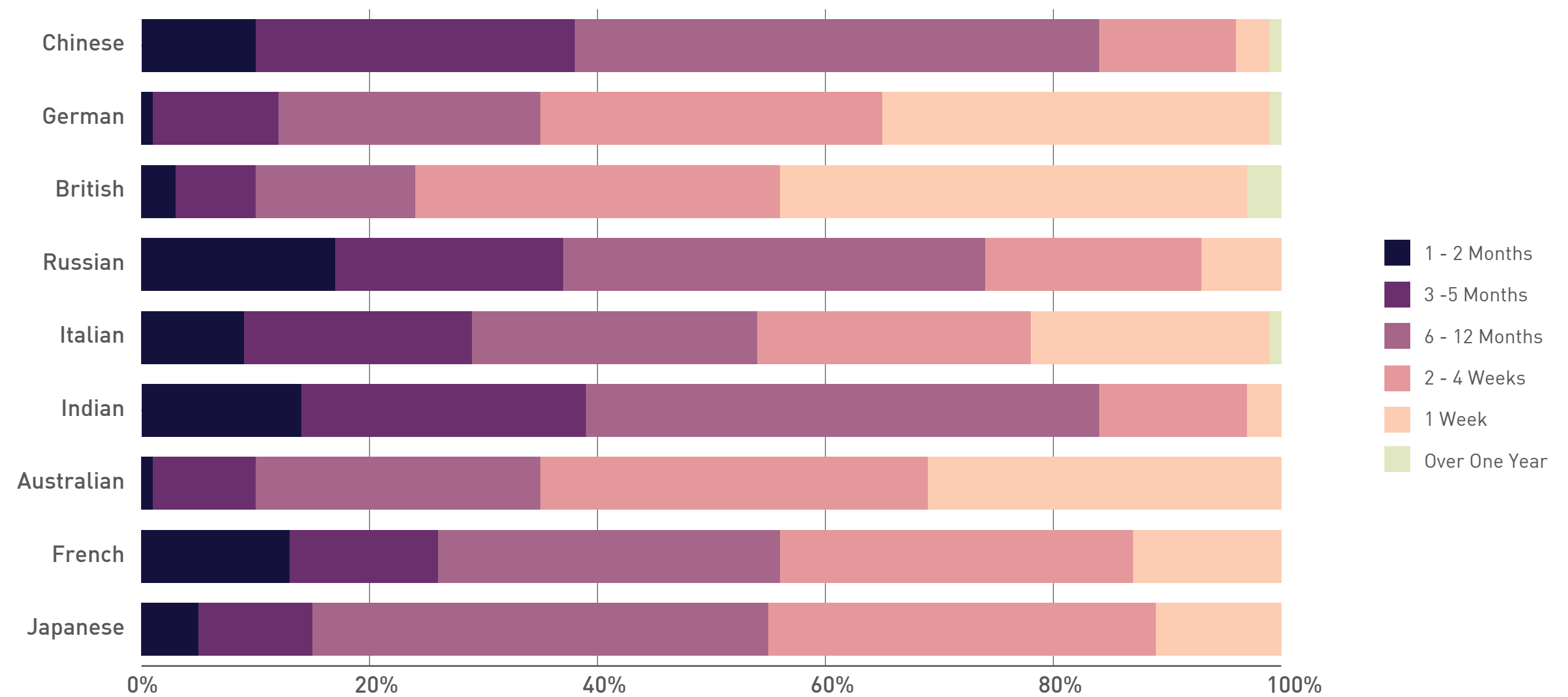


Figure 19. Duration of advance booking of holiday by nationalities







# VISITOR PROFILE

## Age of Visitors

Of the international visitors to the Maldives in September 2016, 57% are between 25 to 34 years of age while 16% are between 35-44 years of age. Maldives Visitor Survey (MVS) results also show that more young visitors travel during the off peak season in comparison to the peak season.

Most of the visitors from Asia are between the ages of 25 to 34 years in September 2016. 70% of Chinese visitors are from the age group 25 to 34 years, 65% of Japanese visitors and 54% of Indian visitors are from the same age group. Asian visitors in the age group 18 to 24 are more compared to European visitors in the same age group. Visitors from China, India and Australia in this age group accounted for 10% to 17% while visitors from Europe in this age group is below 8%.

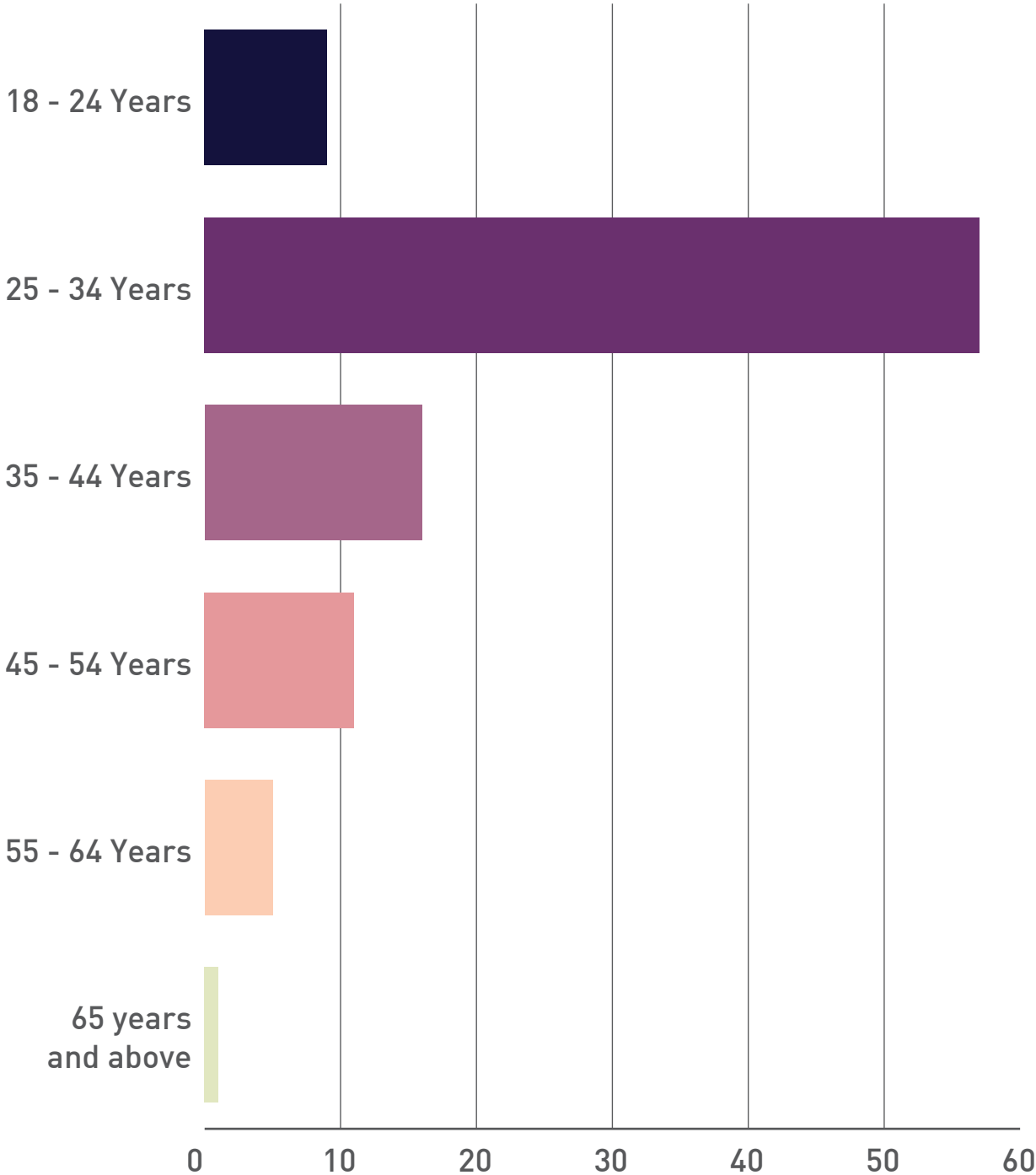
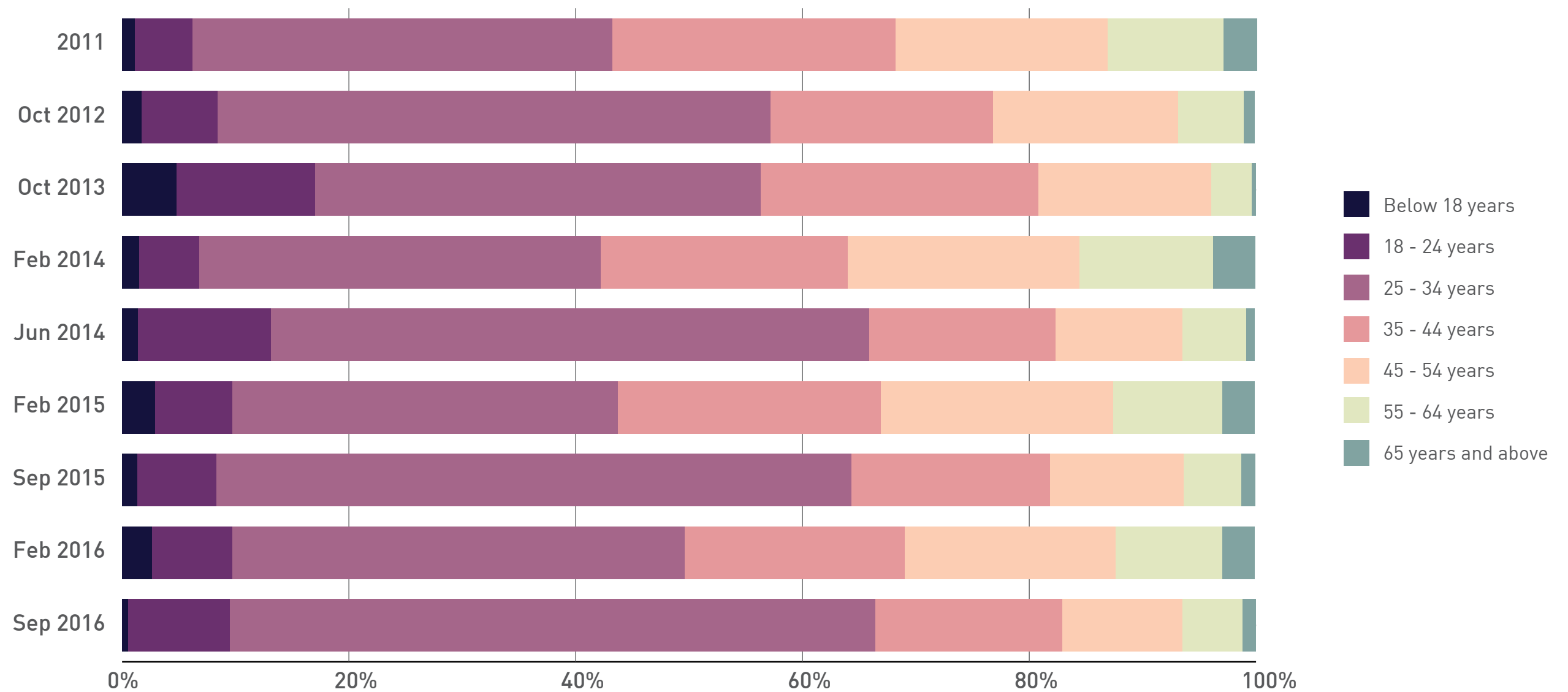


Figure 20. International visitor arrival age groups





**Figure 21.** International visitor arrival age groups by nationalities

# Repeat Visitors

Repeat visitors in September 2016 survey account for 18% of international visitors to the Maldives. Of the repeat visitors, 14% have visited the Maldives between two to five times and 2% stated they have visited between 6 to 10 times and 1% have visited more than 10 times.

A seasonal pattern in the repeat visitors is observed in the past 5 years. Data show that percentage of repeat visitors is higher during peak season and lower during off-peak season. The seasonal pattern in age groups can be a contributor to the seasonal pattern in repeat visitors.

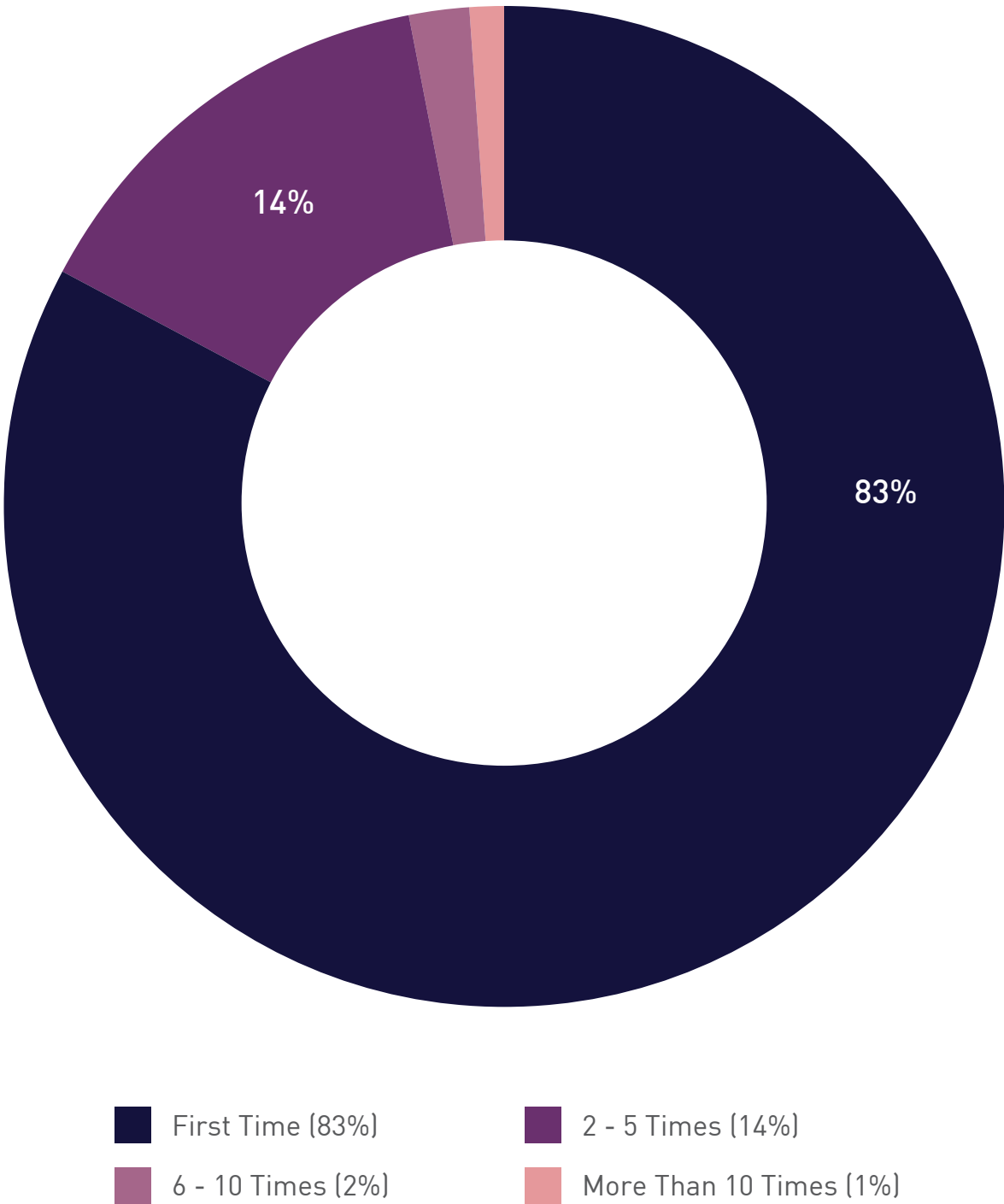
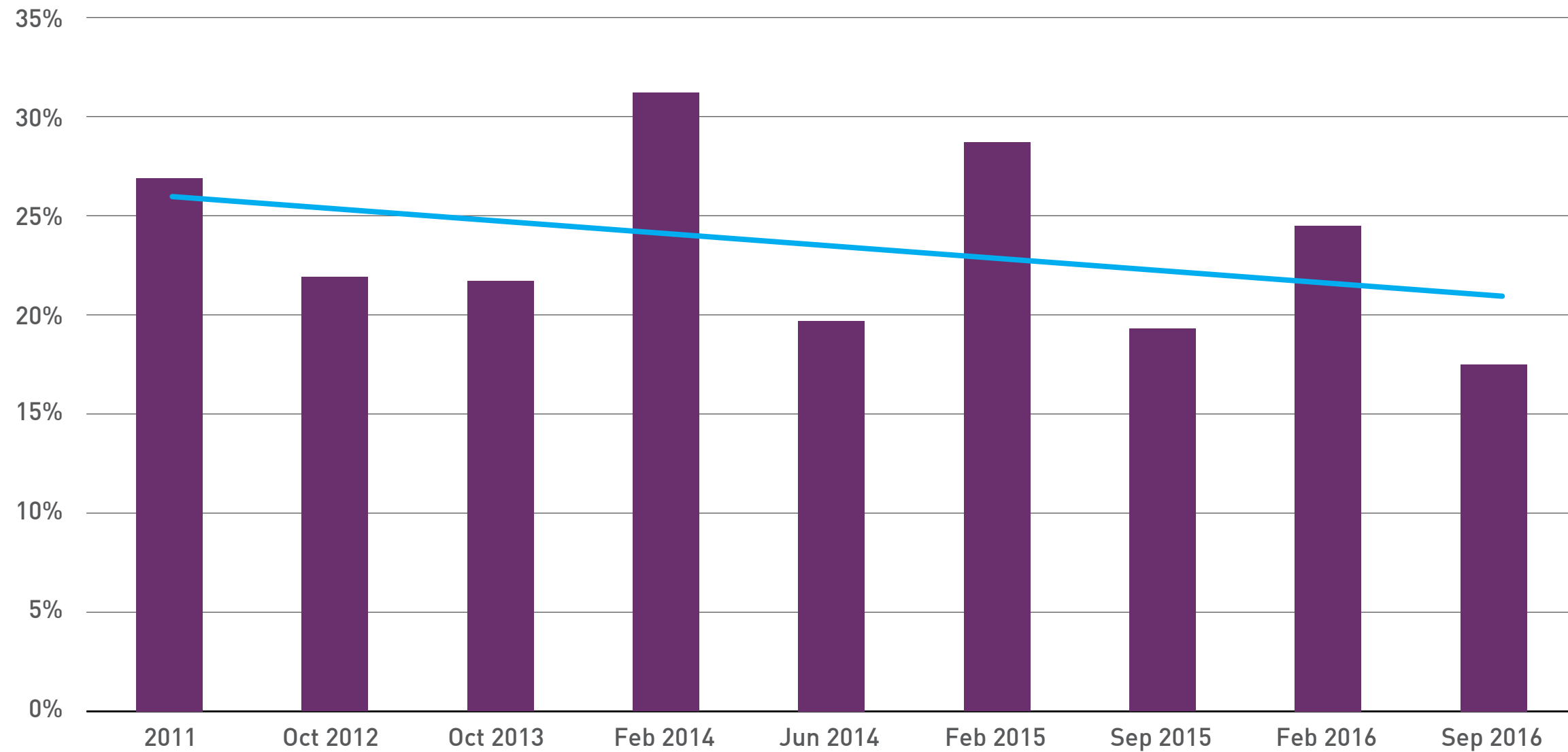


Figure 22. Number of visits to the maldives by visitors



**Figure 23.** 5 year trend of repeat visitors to Maldives

Repeat visitors to the Maldives are highest from Europe. Of them, German (77%) and British (69%) have visited the Maldives more than once. Furthermore, Russian (36%), Italian (17%) and French (35%) have visited the Maldives repeatedly. There is also a significant amount of 34% repeat visitors from China.

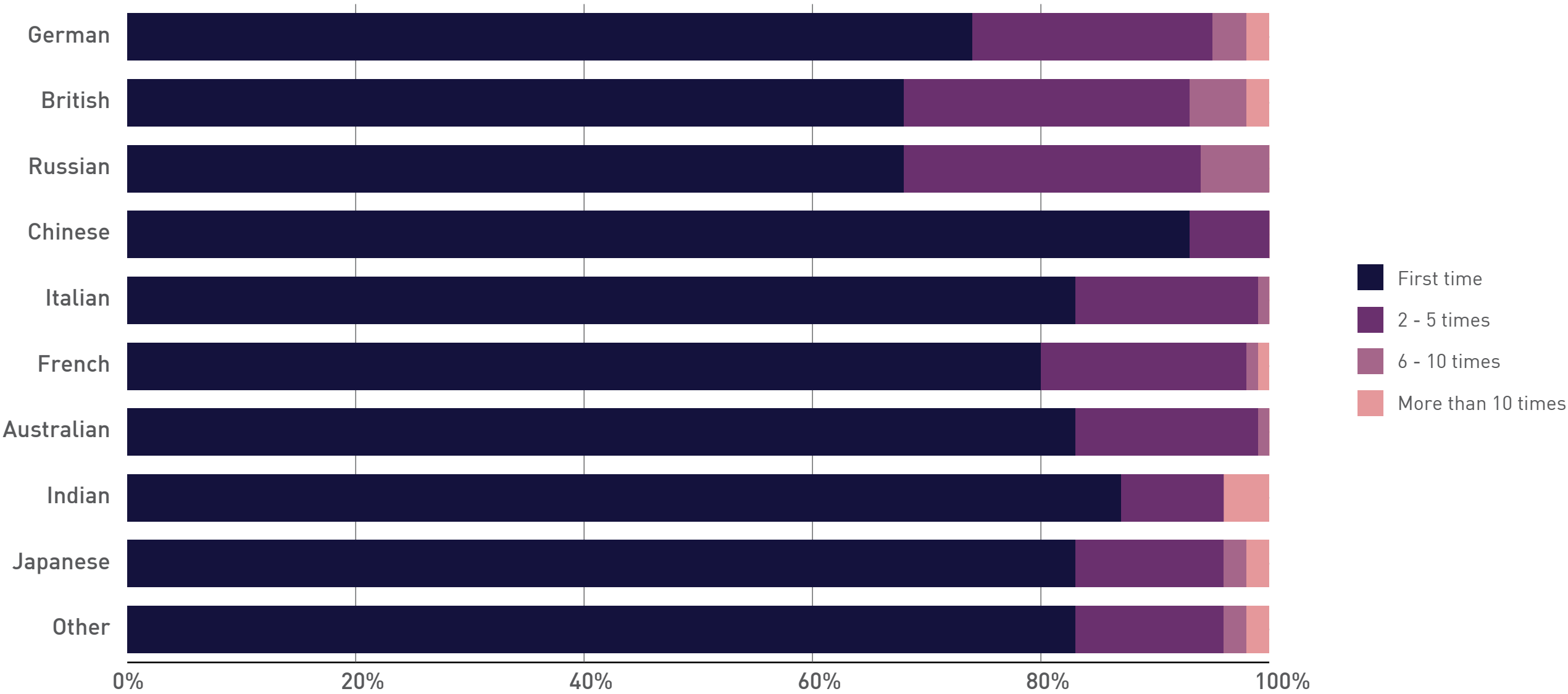


Figure 24. First time visitors and repeat visitors by nationality



# Length of Stay

More than half of international visitors to the Maldives (58%) stay for 4-7 nights, while 18% stay for 8-11 nights and 12% stay for 1 to 3 nights.

Indian visitors stay for shortest holiday duration in the Maldives. Of the visitors from India, 63% stayed for 1 to 3 nights while 38% stayed for 4 to 7 nights. Similarly, Chinese visitors also stay for a shorter period with 94% of the visitors staying for 4 to 7 days. European visitors stay the longest with majority of German, French, British and Russian visitors staying for 4 to 7 nights or more in the Maldives.

Looking at the 5-year trend of length of stay of visitors, average duration of stay has been declining. With the increase in number of Asian visitors, there has been a decline in number of days visitors stay in Maldives.

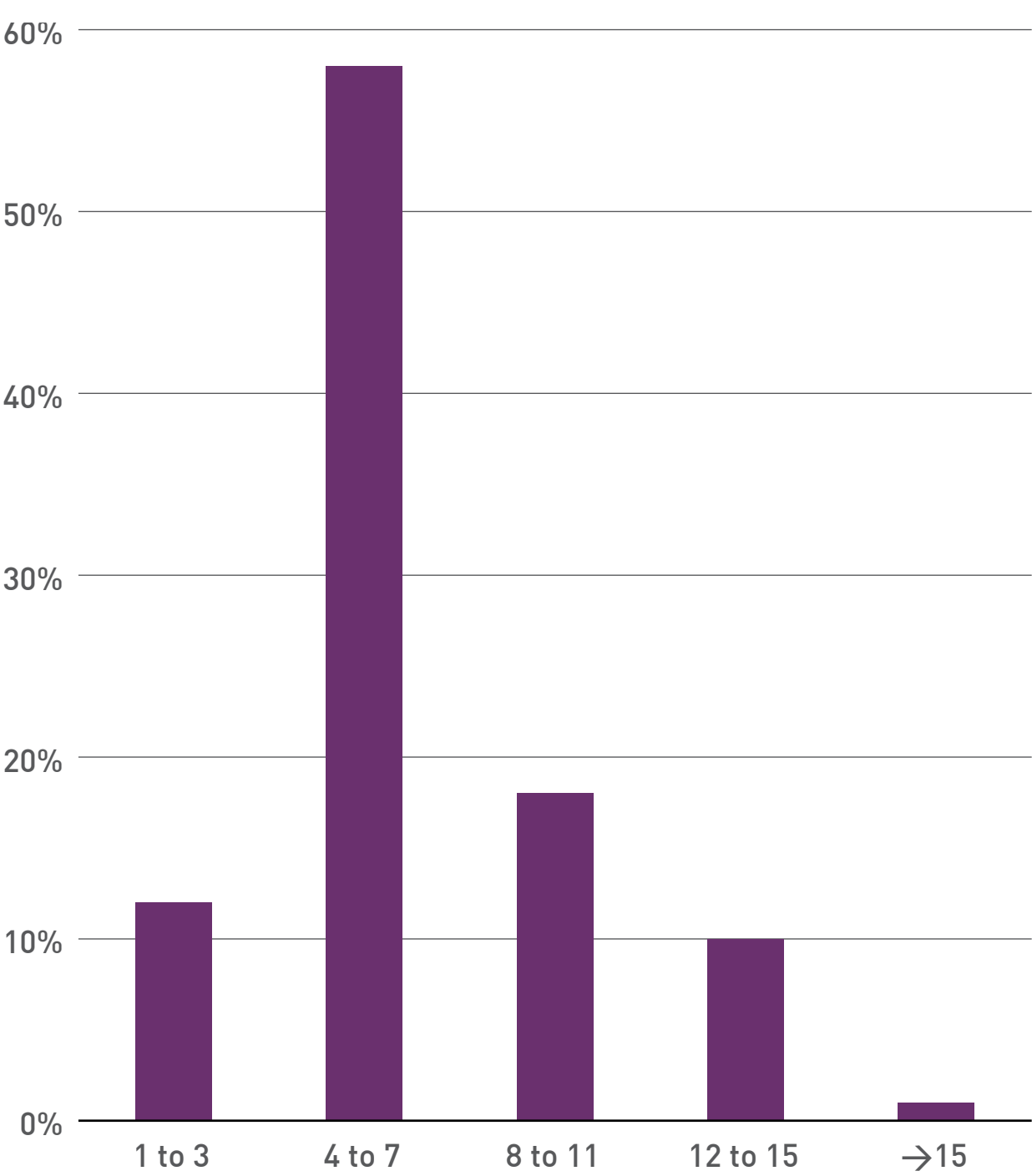
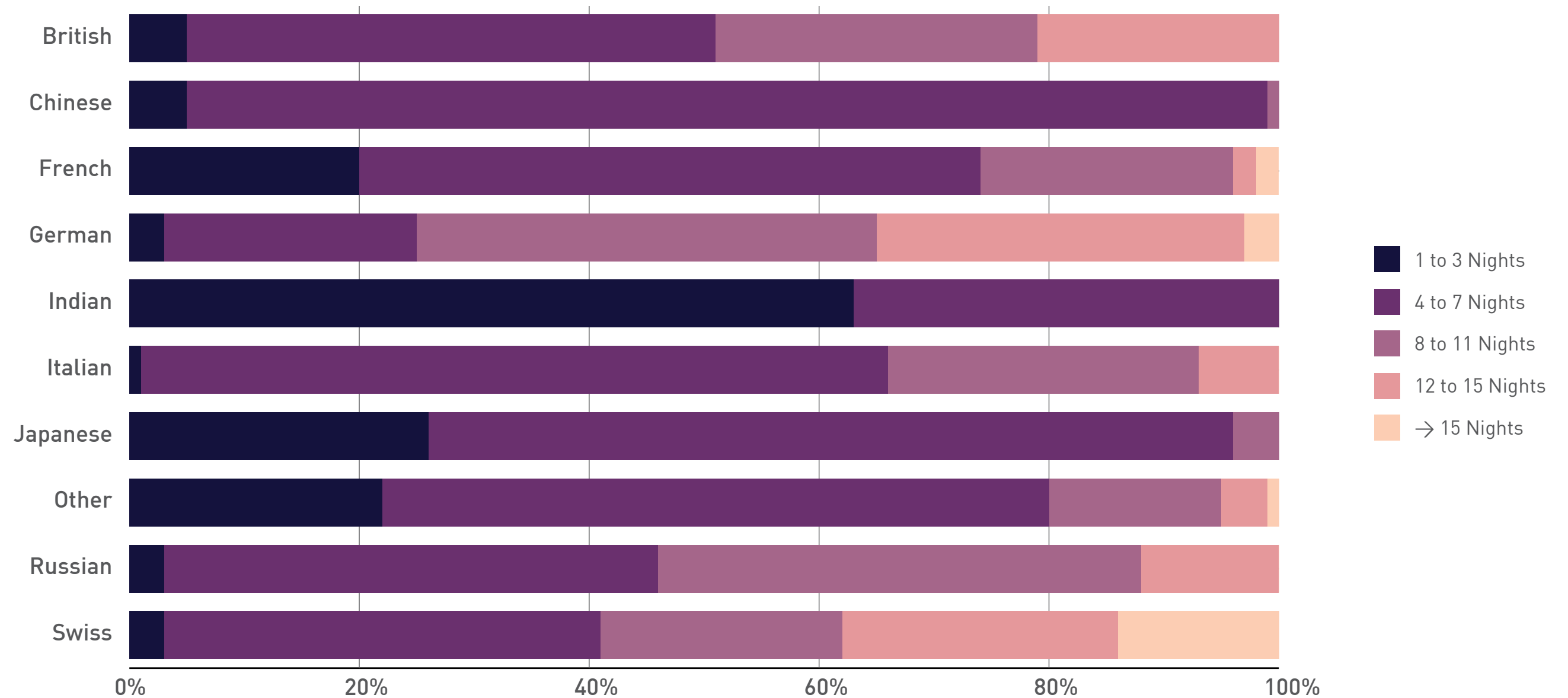


Figure 25. Number of nights spent in the Maldives



**Figure 26.** Number of nights spent in the Maldives by nationality

# Travel Companion

94% of the people who visited Maldives in September 2016 travelled with partner, family or friends. About 67% travelled with partner while 20% travelled as a family unit and 7% visited with friends. About 5% of visitors to the Maldives travel alone and 1% travelled with work associates.

There are no significant changes to travel companion in the last five years. More than half of the visitors to Maldives travelled with their partner. However, percentage of visitors who travelled with partner is lower during peak season in 2015 and 2016 while percentage of people who travelled with family is lower during off-peak season in 2015 and 2016.

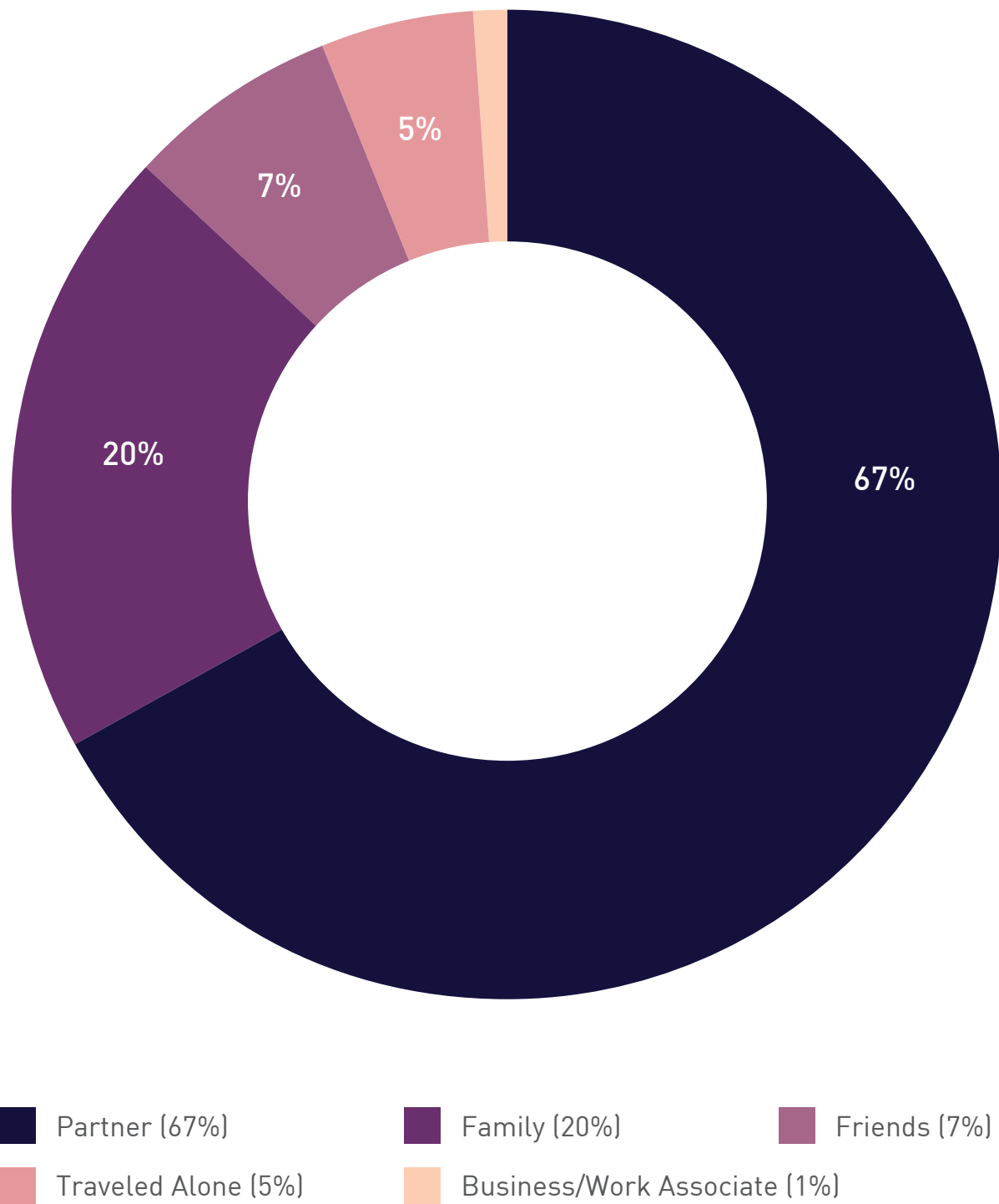
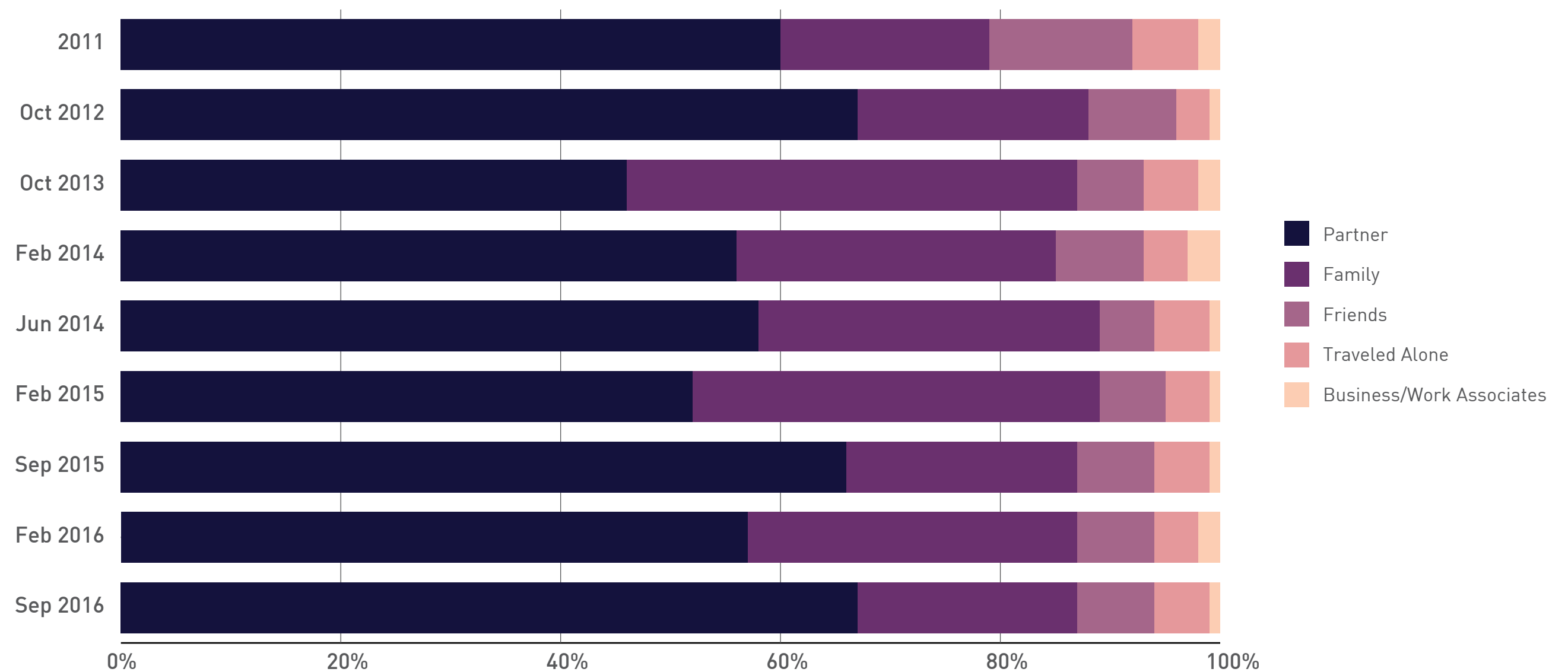


Figure 27. Visitors by type of travel companion



**Figure 28.** 5 year trend of visitors by type of travel companion





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# SATISFACTION AND VISITOR EXPERIENCE

## Transport Experience

### MODE OF TRANSPORT

Speedboat transfer is the most popular mode of transport from the Ibrahim Nasir International Airport to the place of stay. Almost half of the visitors travelled by speedboat to their place of stay while 35% travelled by seaplanes and 13% took domestic flights. About 4% of the respondents travelled on public ferries from the airport to the place of stay.

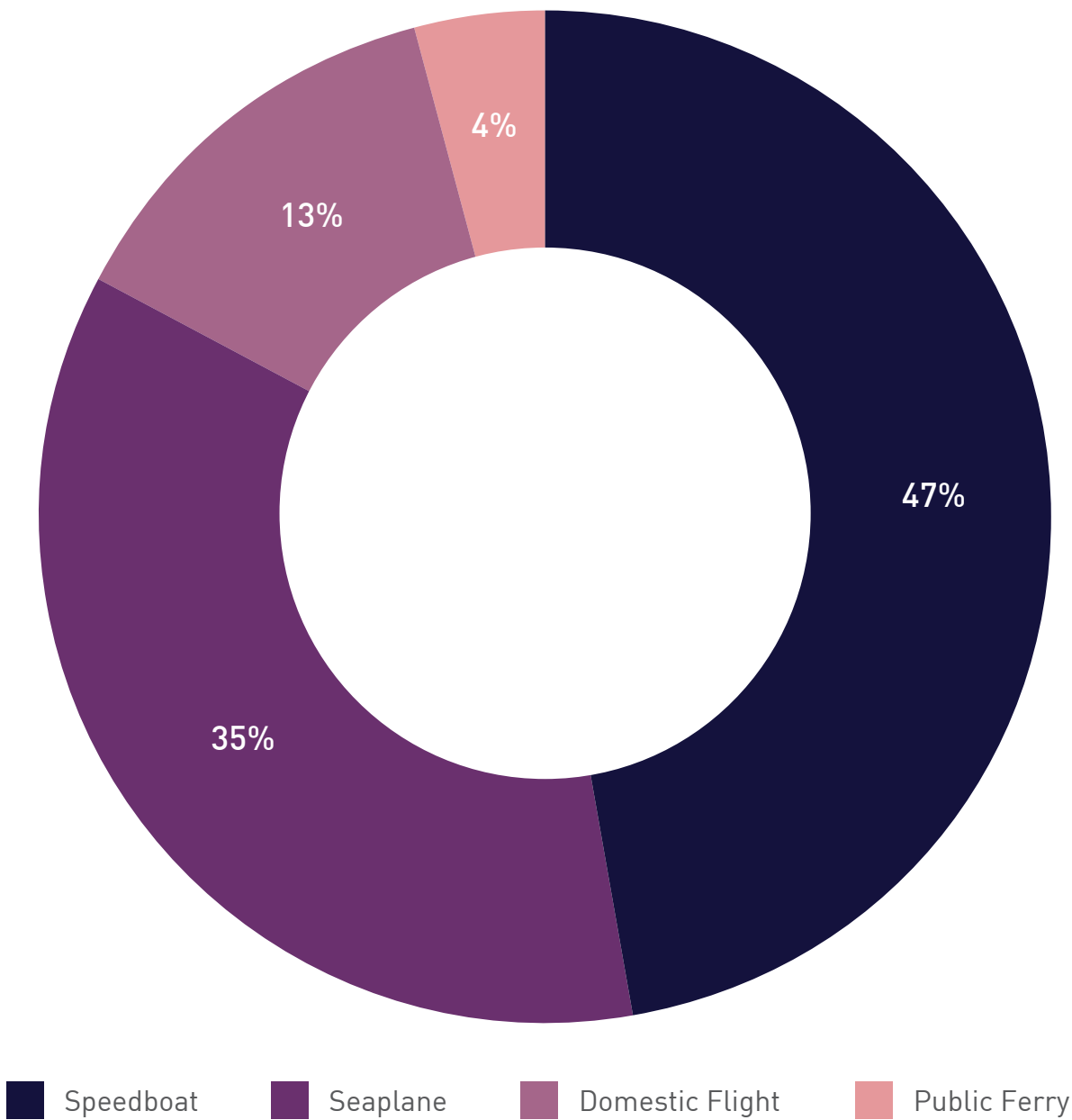


Figure 29. Transport modes to the place of stay

# WAITING TIME AT AIRPORT

One out of five visitors stated they had to wait at the Velana International Airport (VIA) for 15 to 29 minute before getting transport to the place of stay. About 23% of the visitors stayed at the airport for less than 15 minutes while 24% stated they had to wait between half an hour to one hour at the airport and 19% of the visitors stated they had to wait between 1 to 2 hours in the airport.

According to the September 2016 survey results, waiting time at the airport was highest for visitors travelling to their place of stay via domestic flights. Waiting time at airport was more than an hour for 55% of those travelling by domestic flight, while 35% stated that waiting time was 1 to 2 hours, 20% said they had to wait more than 3 hours. Waiting time at the airport is lowest for visitors travelling from speed boat or taking public ferry service. 83% of visitors travelling by speed boat stated that the waiting time in the airport is less than an hour while waiting time was less than an hour for 90% of the visitors using public transport.

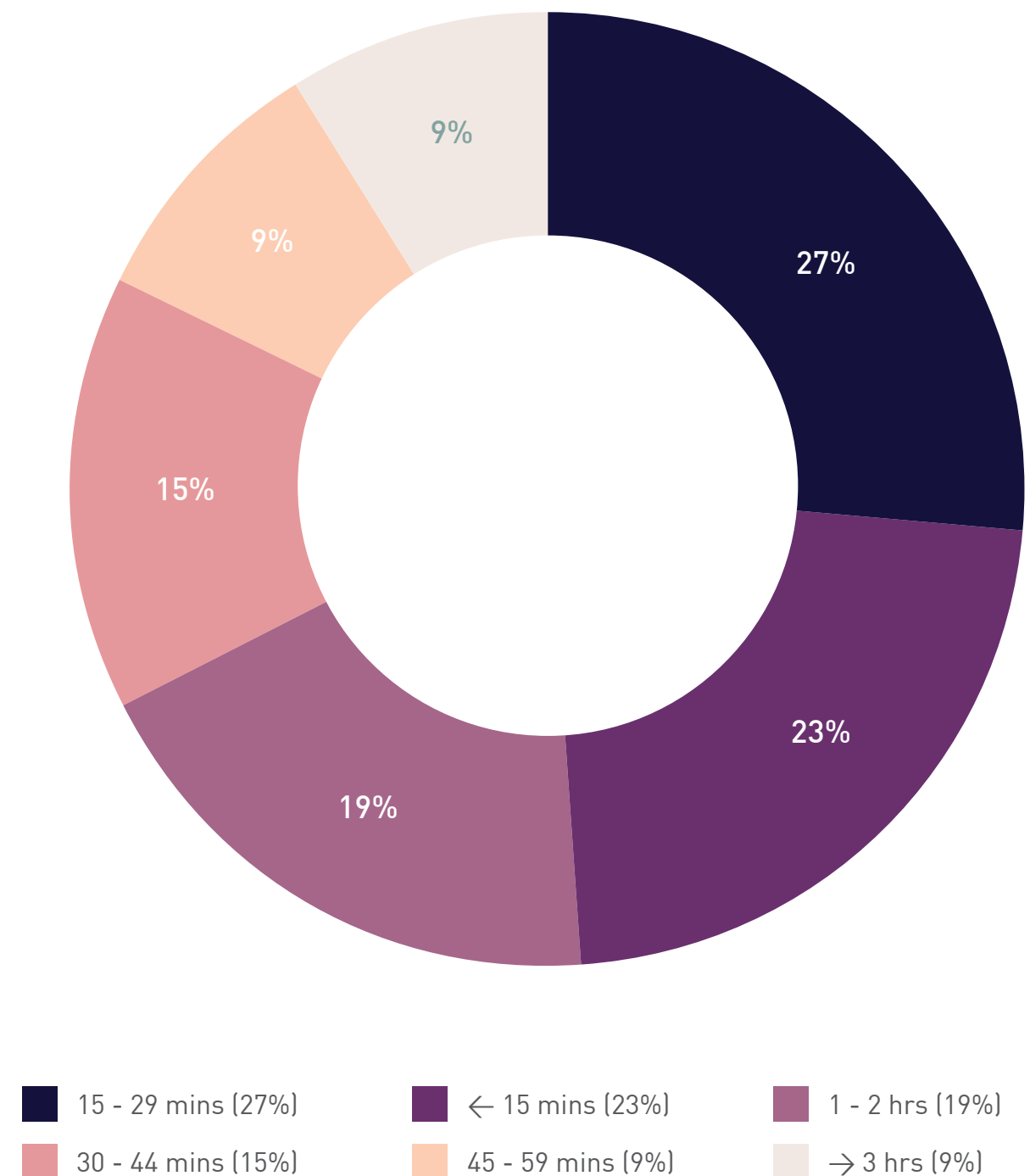
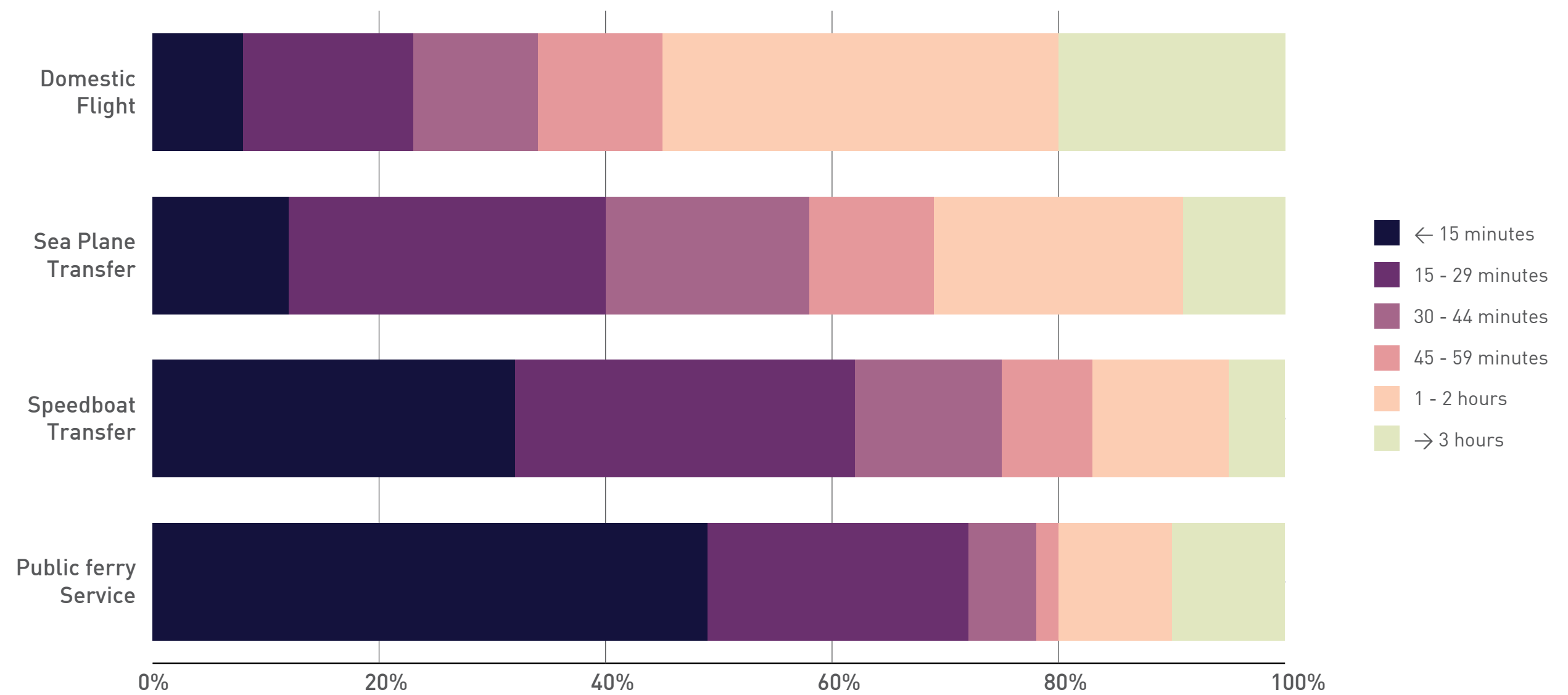


Figure 30. Waiting time at airport for hotel transfer



**Figure 31.** Waiting time at airport by method of transport

# TIME TO REACH PLACE OF STAY

According to the survey results, 76% of visitors took less than an hour to reach their place of stay from the Velana International Airport (VIA). One out of three visitors stated that it took less than 30 minutes to reach their place of stay from the airport while for one out of four international visitors, it took more than an hour to reach their place of stay.

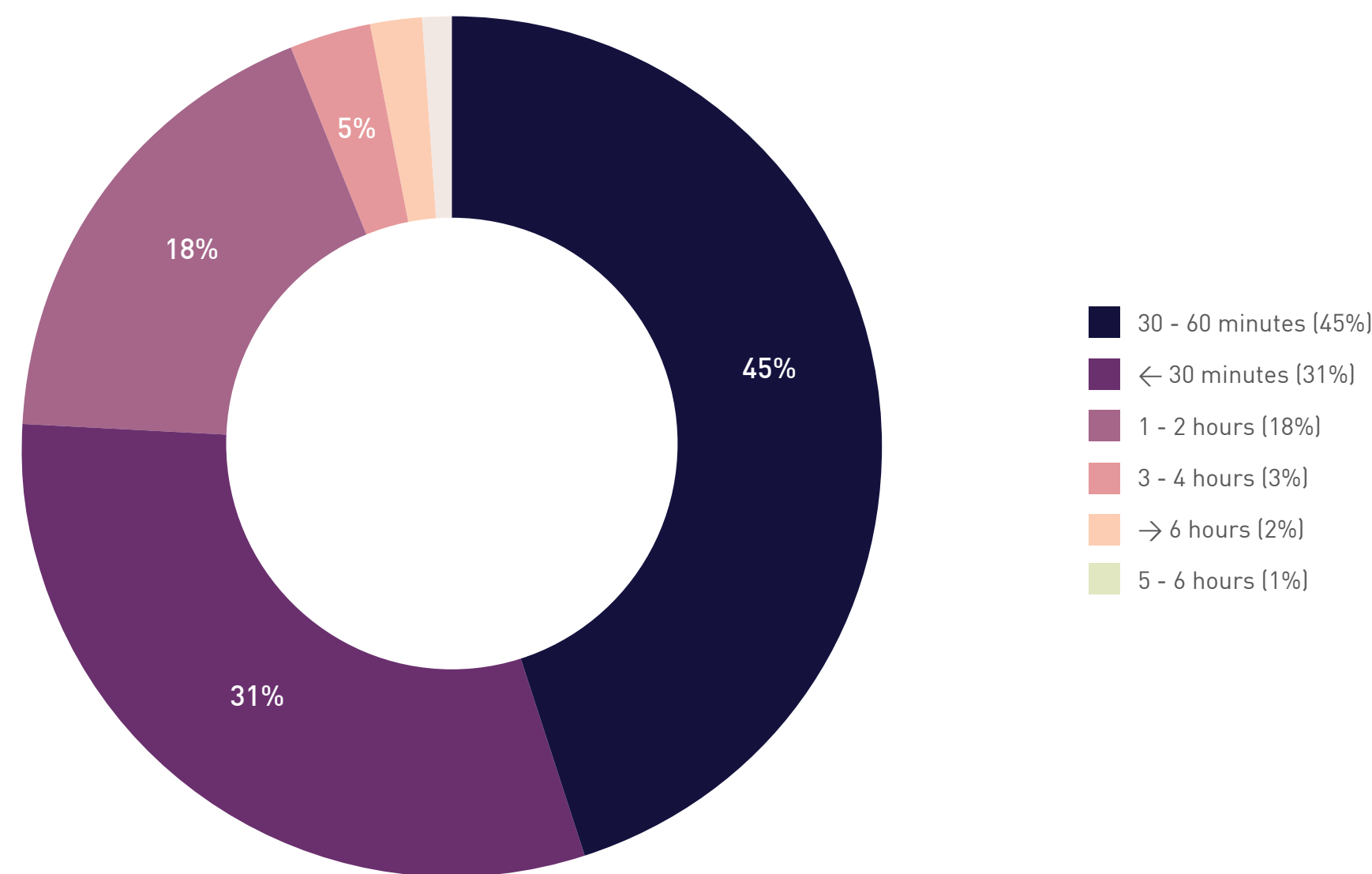


Figure 32. Time taken to reach place of stay



# QUALITY OF TRANSPORT

Quality of transport service is ranked by 86% of visitors as excellent or very good. Safety of transport was ranked excellent or very good by 83% of visitors to the Maldives. The information briefing given during transport needs further improvement. One out of three visitors stated that information briefing during transport was average or poor.

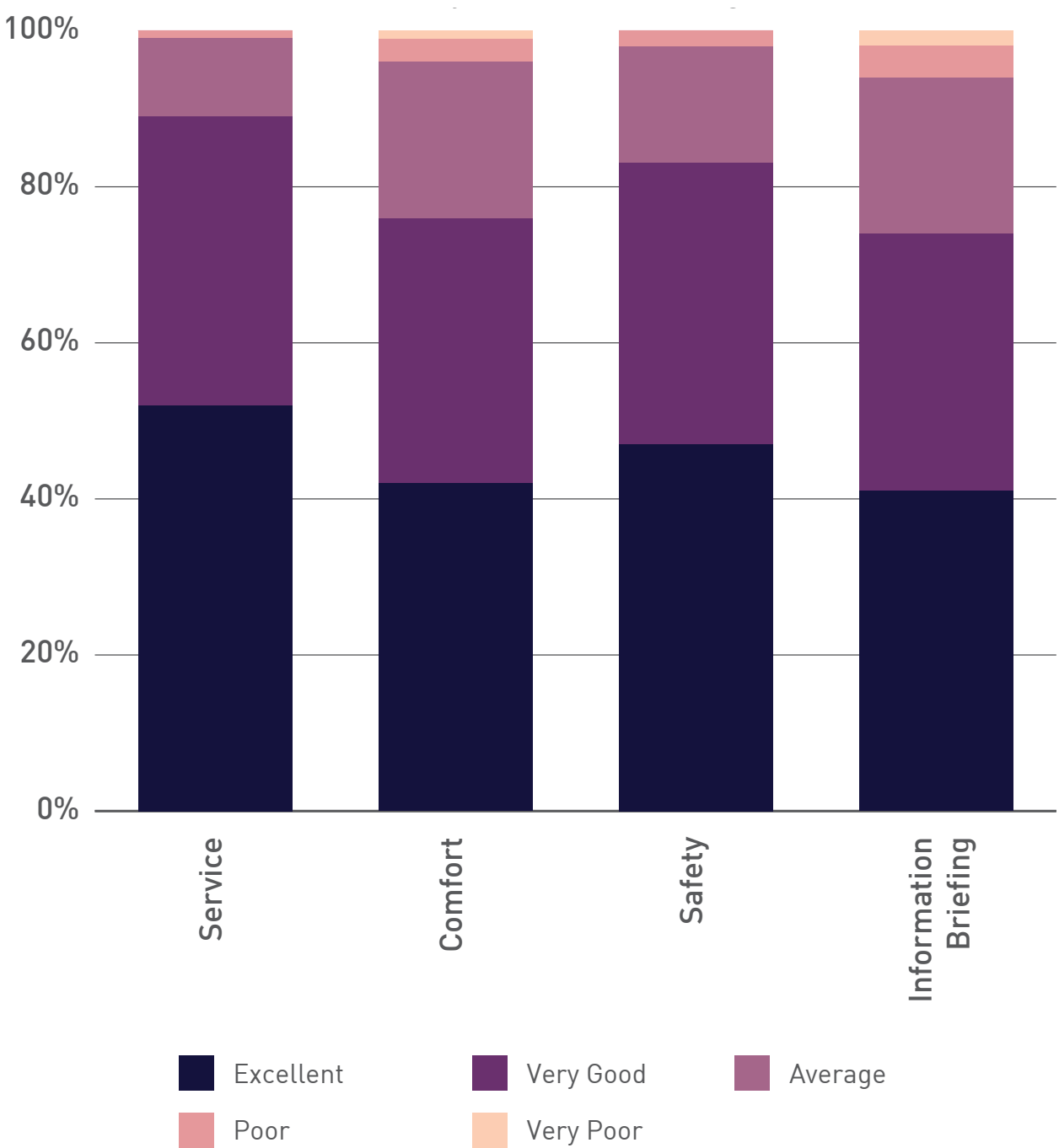


Figure 33. Rating on quality of transport services to hotel

# PRICE PERCEPTION OF TRANSPORT

About 71% of those who travelled by domestic flight, 61% of those who travelled by speedboat and 57% of those who travelled by seaplanes found the hotel transfer prices ‘value for money’ in September 2016.

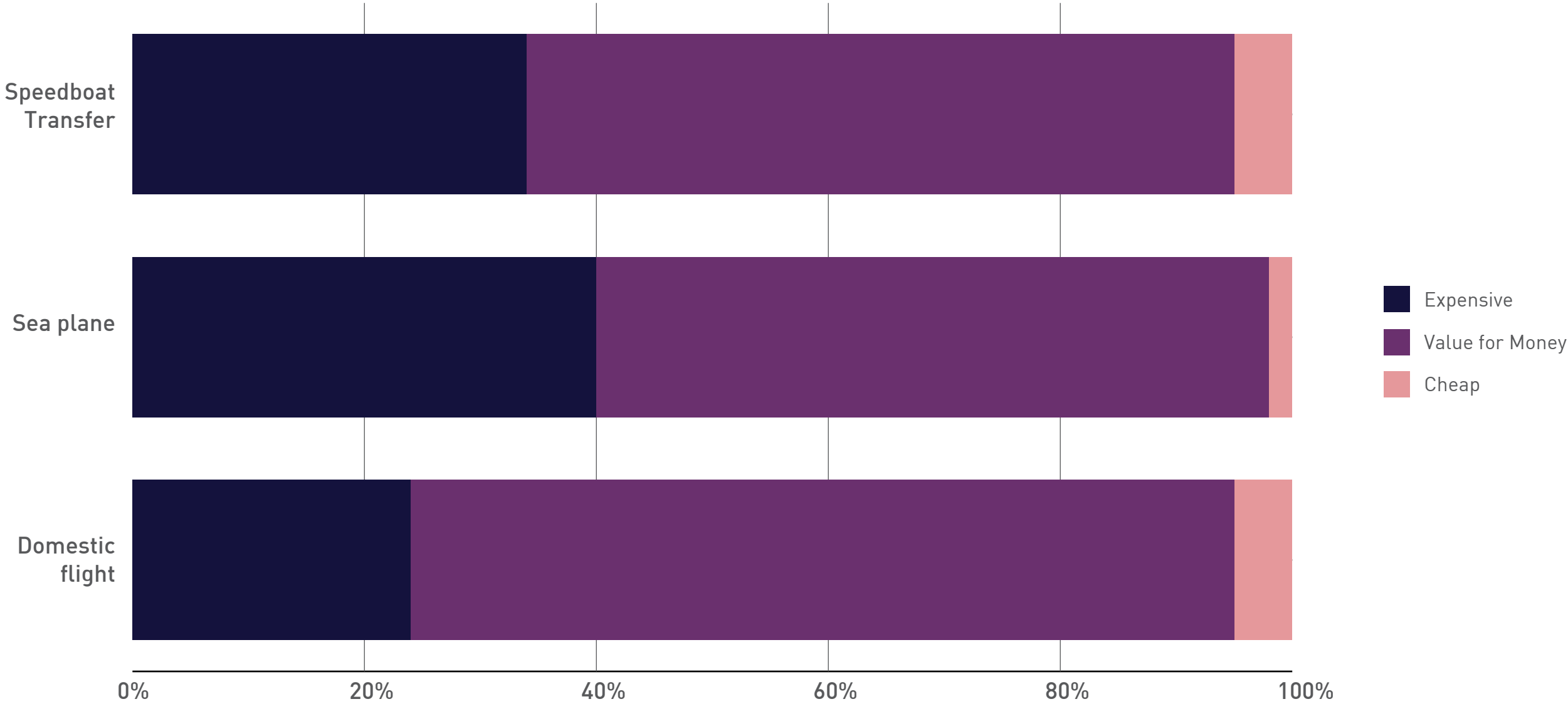


Figure 34. Price perception of hotel transfer

# Accommodation Experience

## PLACE OF STAY

Of the international visitors to the Maldives in the September 2016 survey period, 84% stayed in resorts, while 6% stayed in hotels, 6% in guesthouses and 3% stayed on boat or safari vessels.

Over 80% of tourist who visit Maldives stay have stayed in resorts for the past 5 years. The main noteworthy changes in the past five years is the increase in popularity of guest houses. The percentage of visitors who stayed in guest houses has increased from 1% to 6% from 2011 to 2016 while visitors who stay in hotels have declined.

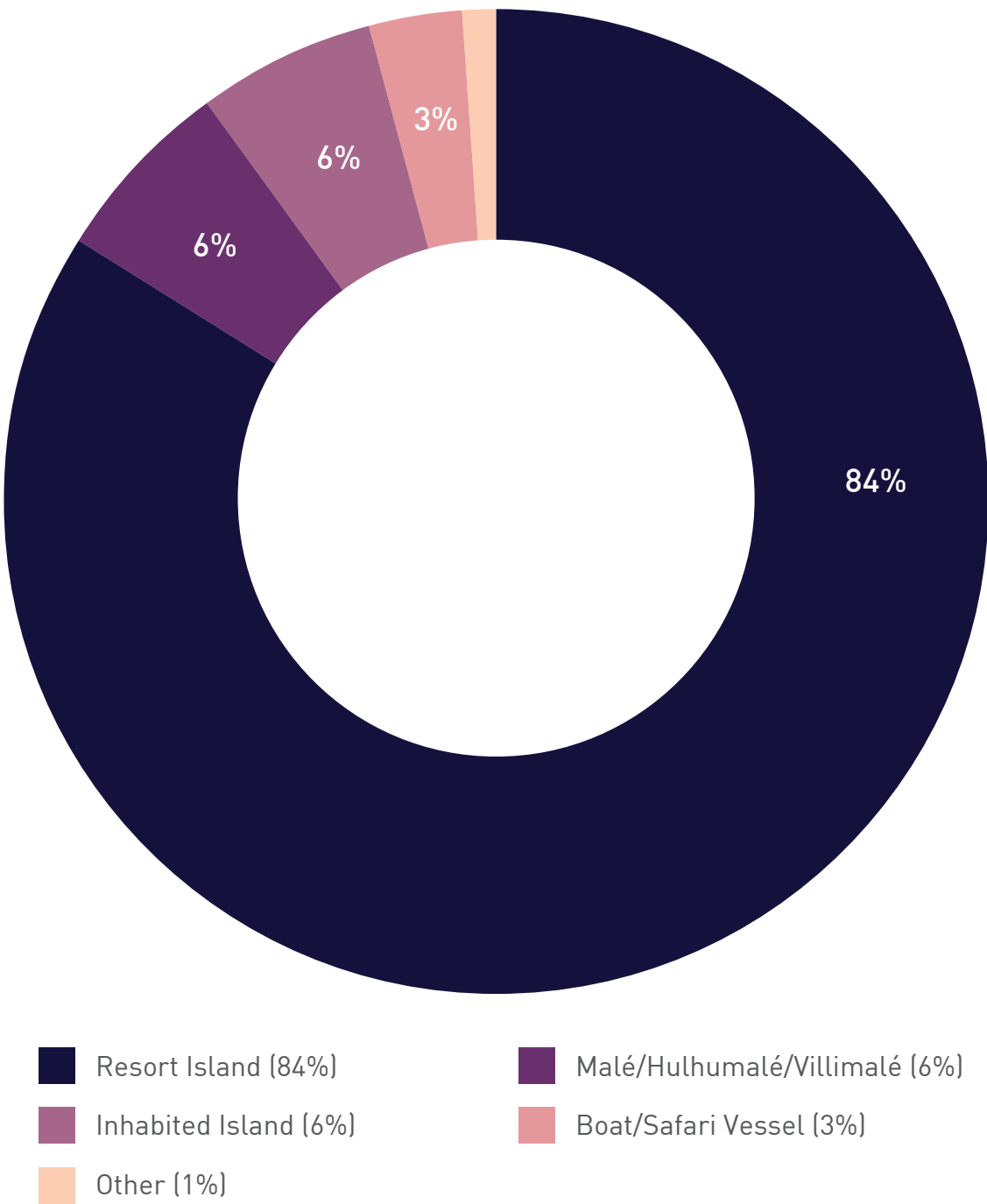


Figure 35. Type of accommodation selected by international visitors

# QUALITY OF SERVICES

The quality at place of stay is perceived to be either ‘excellent’ or ‘very good’ for room, cleanliness, and public areas. The guest service quality and management quality is also perceived to be ‘excellent’ or ‘very good’. However, visitors rank in-room entertainment poorly. More than 30% of visitors ranked in-room entertainment as average, while 10% stated it as poor or very poor.

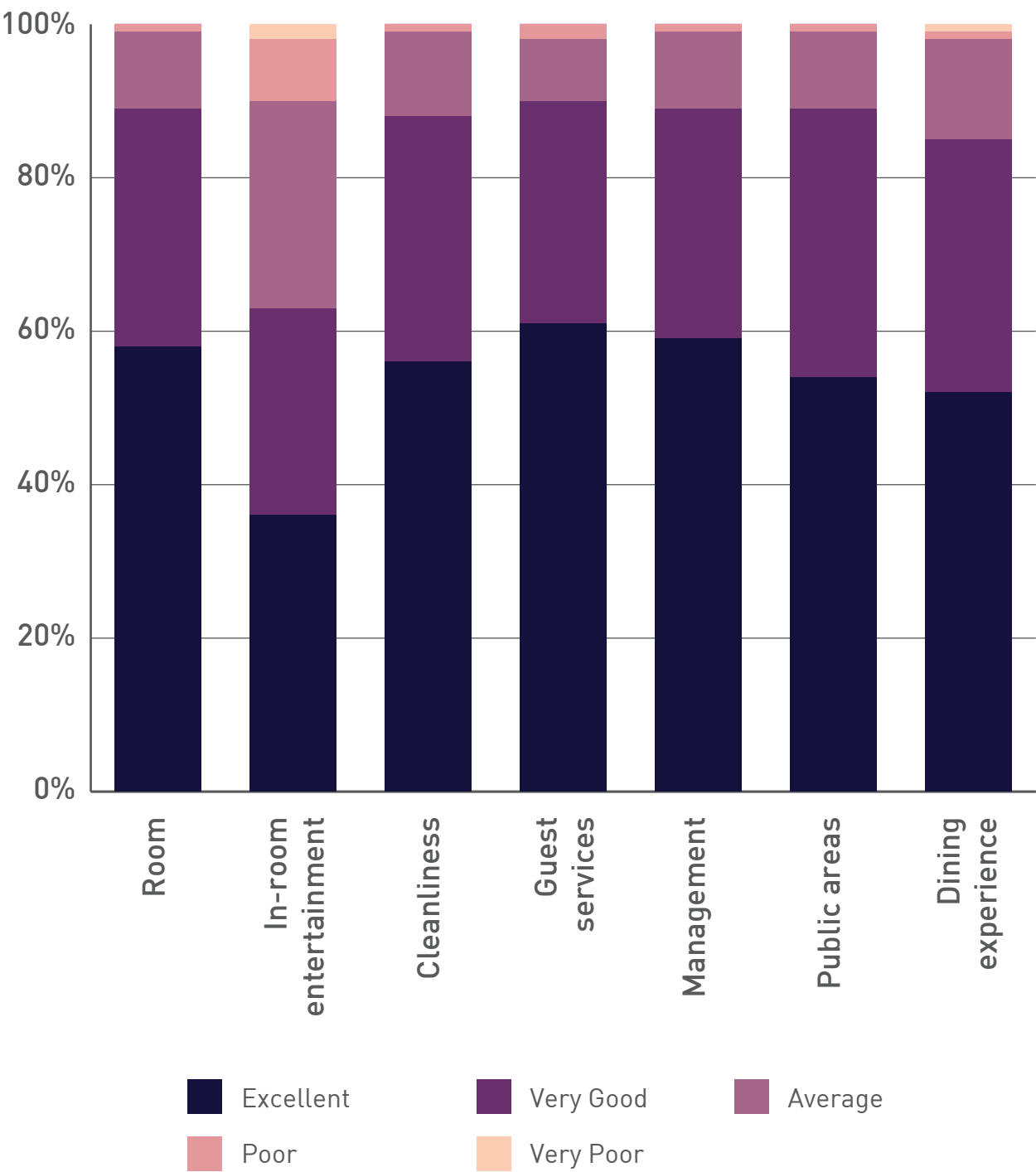


Figure 36. Services at place of stay

## PRICE PERCEPTION OF COMMUNICATION

Almost half of the international visitors to Maldives considered the price of Internet service in Maldives to be value for money while 16% International visitors to the Maldives perceived price of Internet services as 'cheap' while 30% considered Internet to be expensive. Likewise, half of the visitors considered telephone prices as value for money while 42% stated that it was expensive.

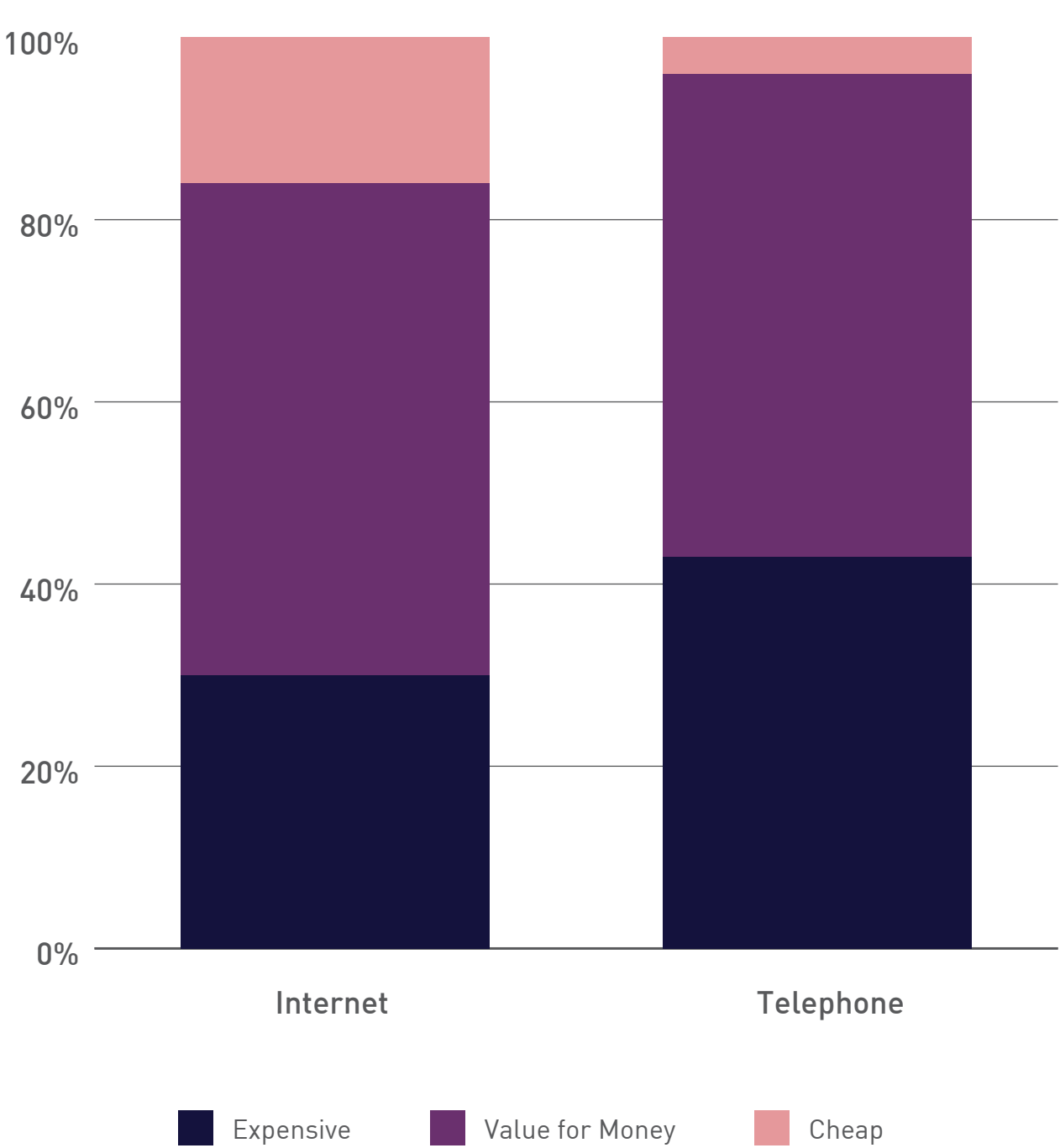


Figure 37. Perception of prices for communication



# Dining Experience

## MEAL PLAN

The most popular meal plan for international visitors during their holiday stay in the Maldives is ‘all inclusive’ (41%), while 23% opt for full board and 22% choose half board meal options. 13% of visitors choose bed and breakfast while 1% choose room only meal plan.

In the past five years, there has been no significant changes in the meal plan chosen by visitors. Even though there are slight variations, there has been no major changes to preferences in meal plans.

Comparison of meal plan choices across nationalities show that 77% of the British choose ‘all-inclusive’ meal plan and 70% Italians, 47% German and 44% French opt for the same meal plans. Russian visitors have similar preference to all type of meals plans except for room only with a slightly higher preference to ‘all-inclusive’. There is not significant different difference between percentage of Russian visitor who choose all-inclusive, full board, half board and bed and breakfast while 2% people opt for room only. Likewise, Indian visitors

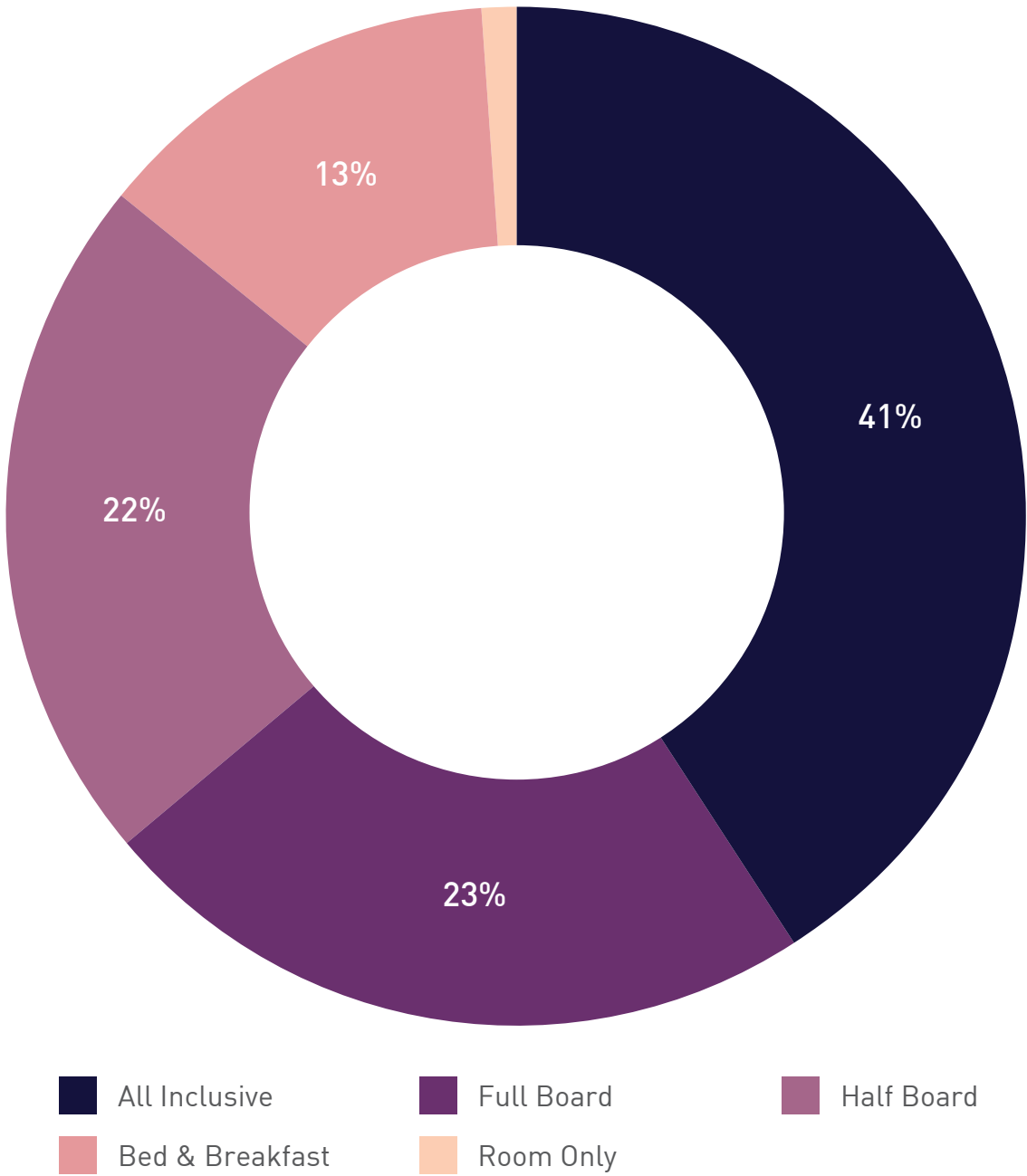


Figure 38. Type of meal plan chosen by international visitors

have similar preference as Russian visitors but a slightly higher preference to bed and breakfast. Most of the Chinese visitors (44%) also opt for ‘half board’ meals followed by ‘all-inclusive’ (26%) option.

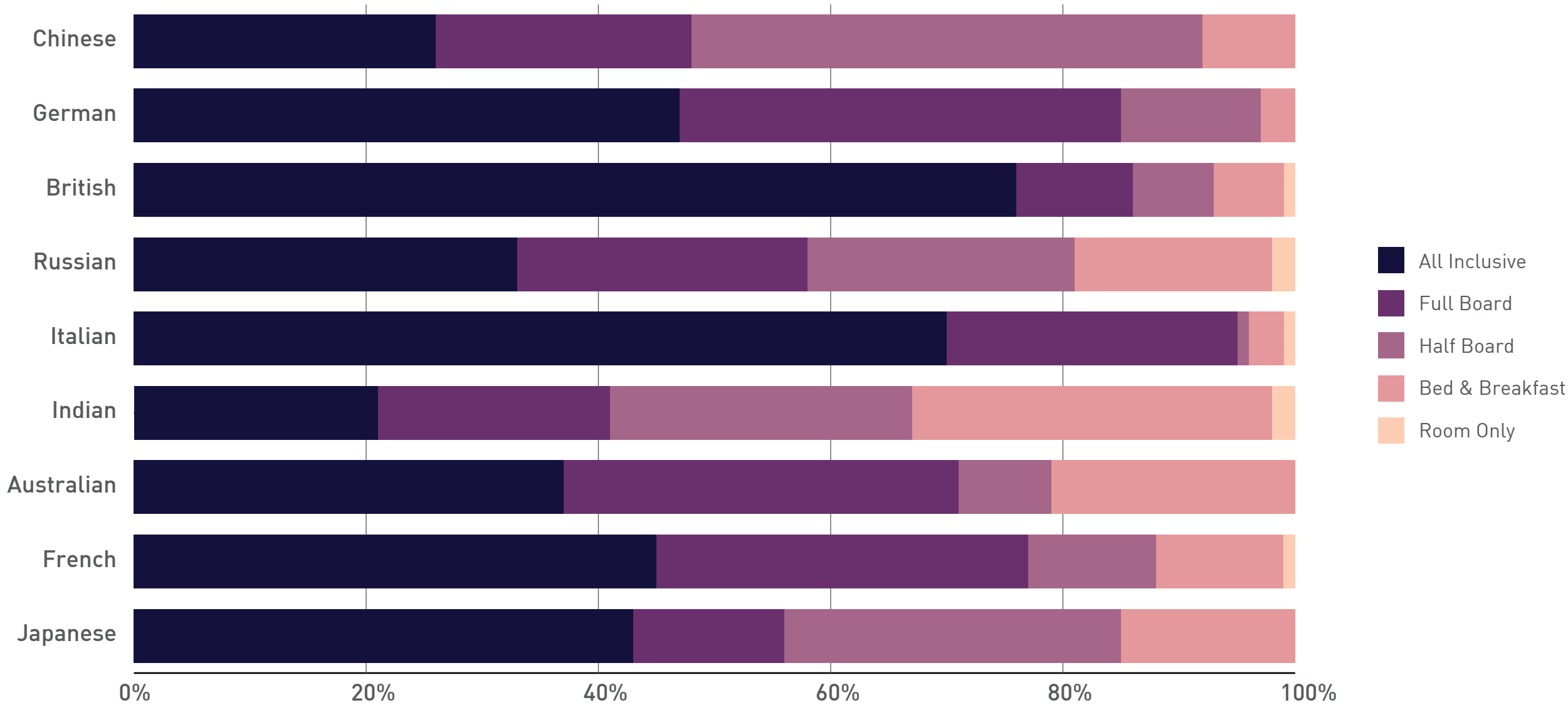


Figure 39. Meal plan preferences by nationality

# QUALITY OF DINING

Of the international visitors to the Maldives, 52% rank the dining experience at place of stay as ‘excellent’ while 33% rank the experience ‘very good’. About 13% of the visitors rank dining experience as ‘average’.

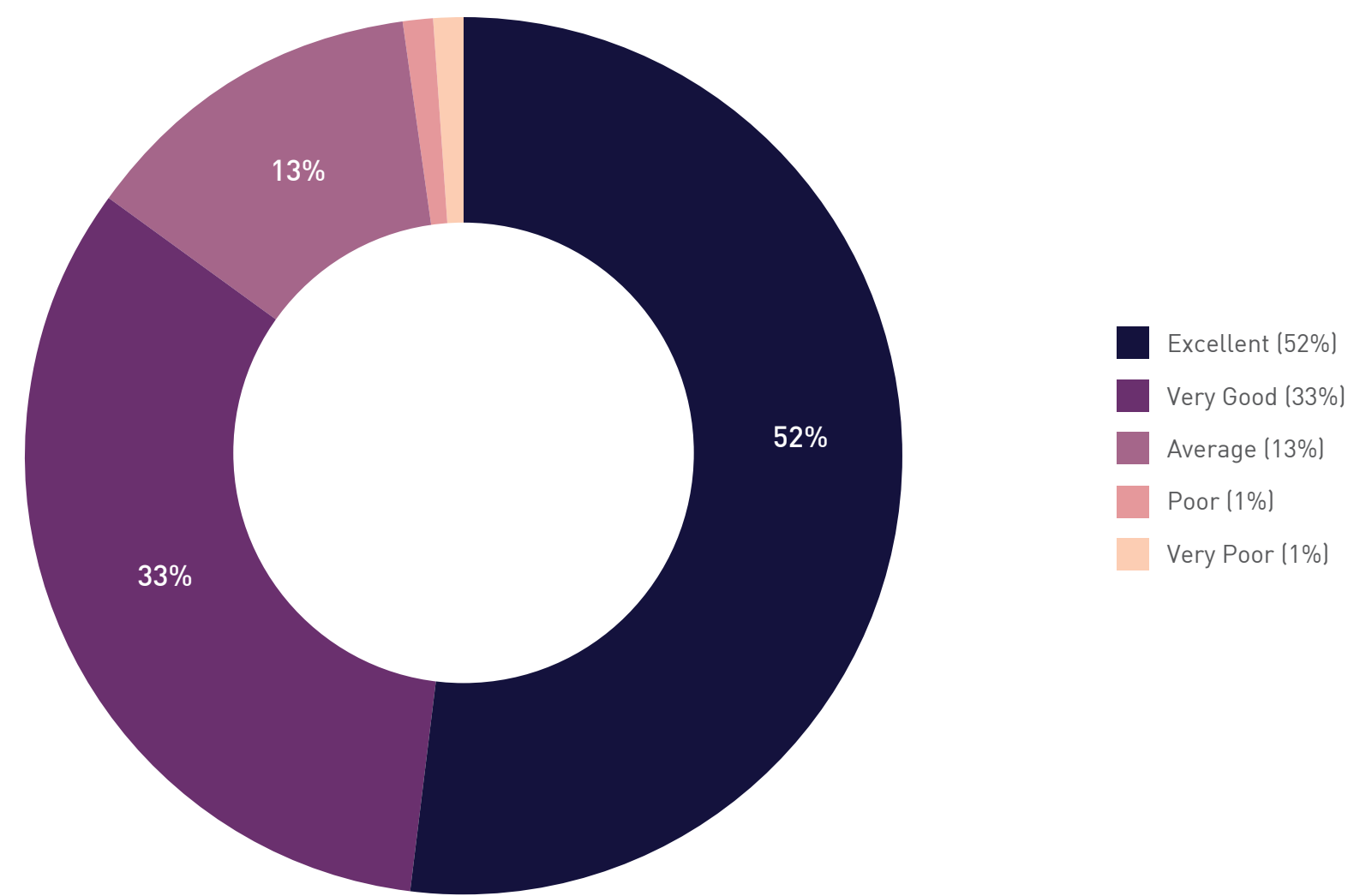


Figure 40. Dining experience at place of stay

# PRICE PERCEPTION OF FOOD AND BEVERAGES

On food prices in the Maldives, 59% of the international visitors perceive food as ‘value for money’. On the prices charged for beverages, 51% of visitors perceive alcohol as ‘expensive’, while 44% perceive soft drinks as ‘expensive’. The number of visitors who consider prices charged for water to be ‘expensive’ has declined significantly during the last five years. Yet, 35% of visitors perceive water to be ‘expensive’ in the Maldives in September 2016.

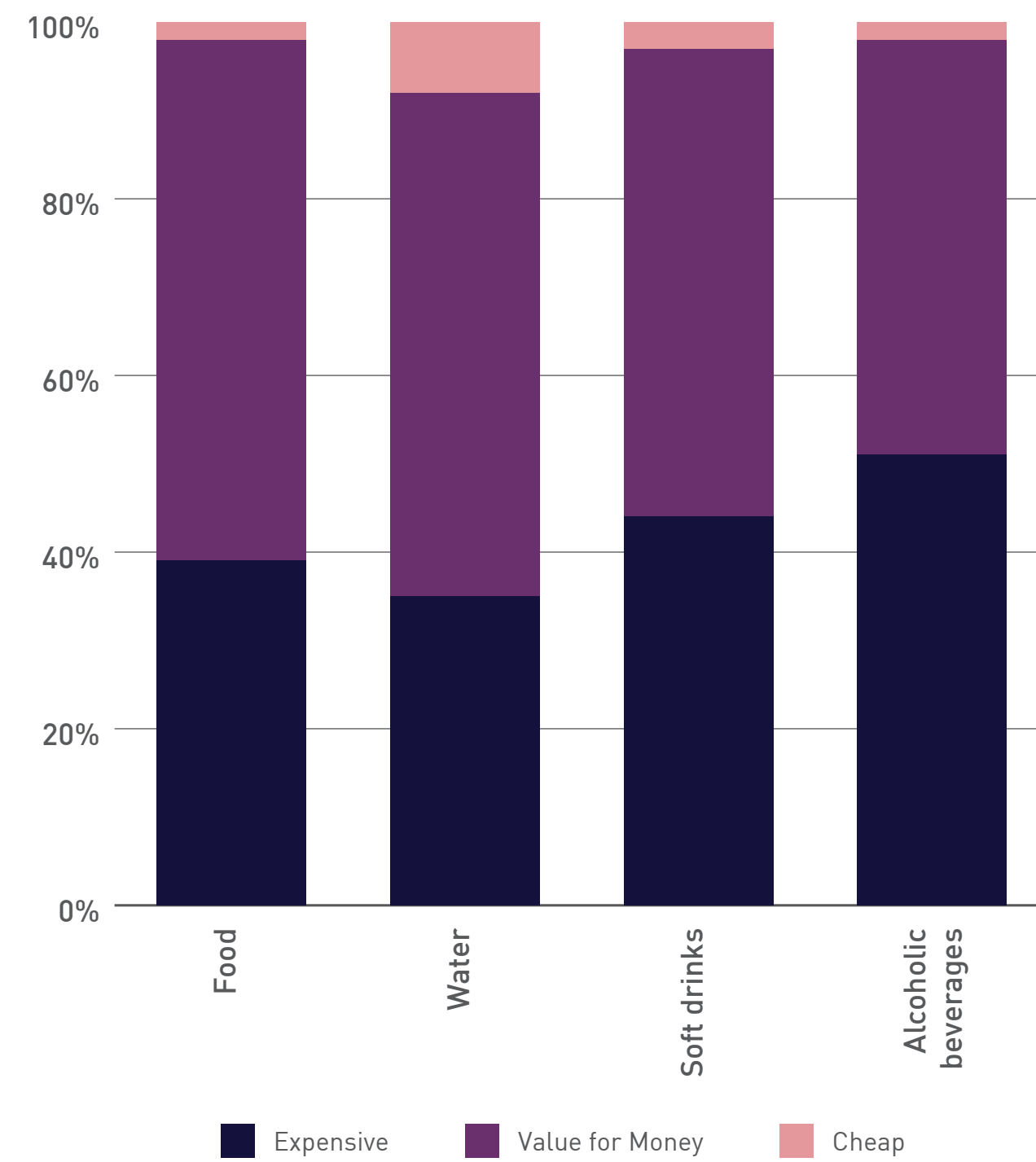


Figure 41. Perception of food and beverage prices

# COMPARISON OF FOOD QUALITY

When the international visitors who have travelled to a destination similar to the Maldives were asked to compare food quality, 40% ranked food quality in the Maldives higher than in similar destinations. The food quality is ranked lower by 20% while 40% perceive food quality in the Maldives same as other similar destinations.

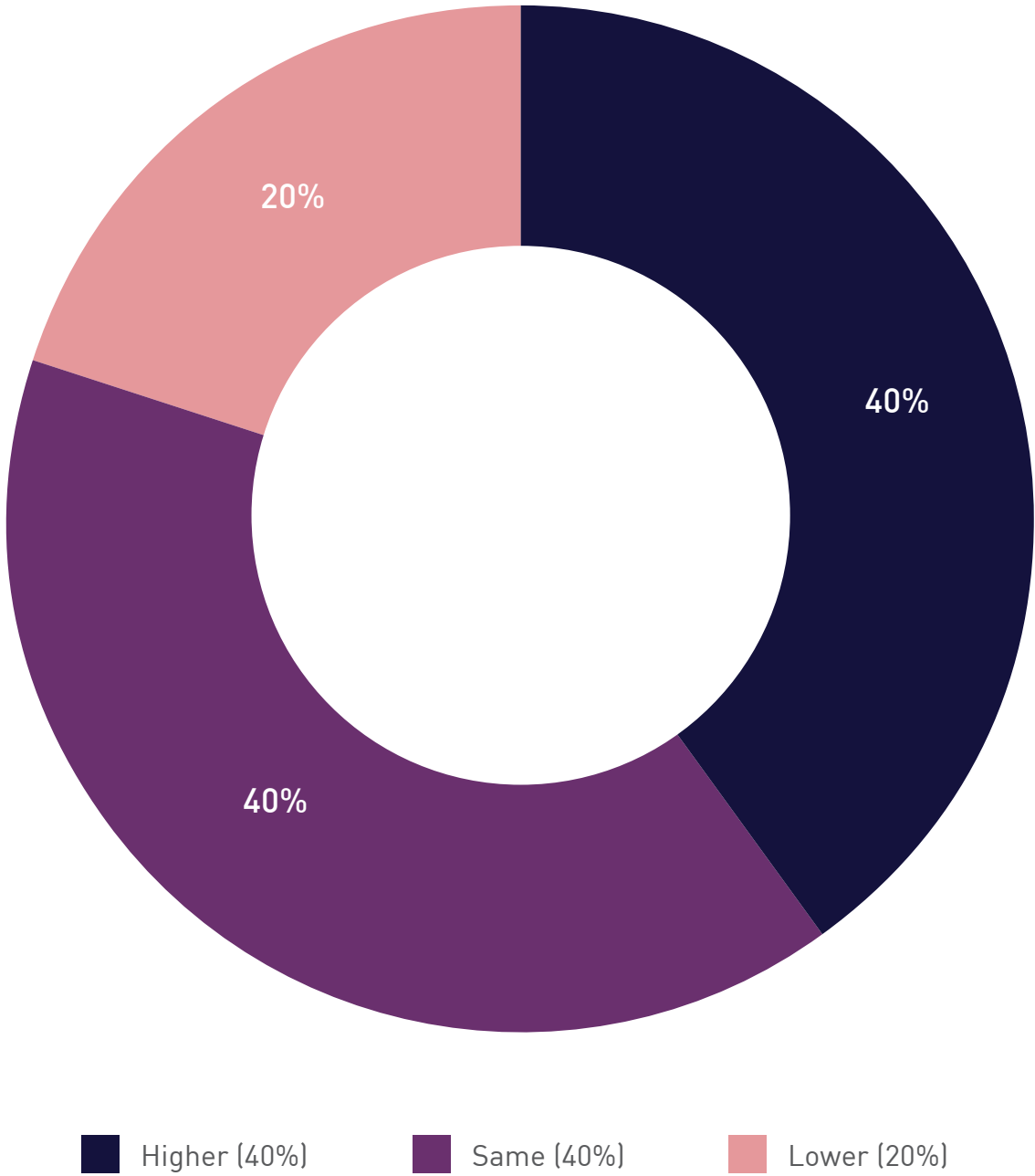


Figure 42. Food quality comparison with similar destinations



# Activities and Attractions

## ACTIVITIES MOST ENJOYED

About 90% of the international visitors rate the snorkeling experience in the Maldives as either ‘excellent’ or ‘very good’. Likewise, 87% of the visitors rate diving and sightseeing in the Maldives as either ‘excellent’ or ‘very good’. Surfing (83%), dolphin watching (83%), water sports (80%), spa (83%) and picnic (79%) are also rated highly by visitors as ‘excellent’ or ‘very good’.

International visitors to Maldives rate shopping as the poorest activity. In September 2016 survey, 33% of visitors rate shopping as ‘average’, 15% as ‘poor’ while 6% rate shopping to be ‘very poor’. Other activities which have the scope for improvement are night fishing and local island visit which were rated average or poor or very poor by 25% and 24% of visitors respectively.

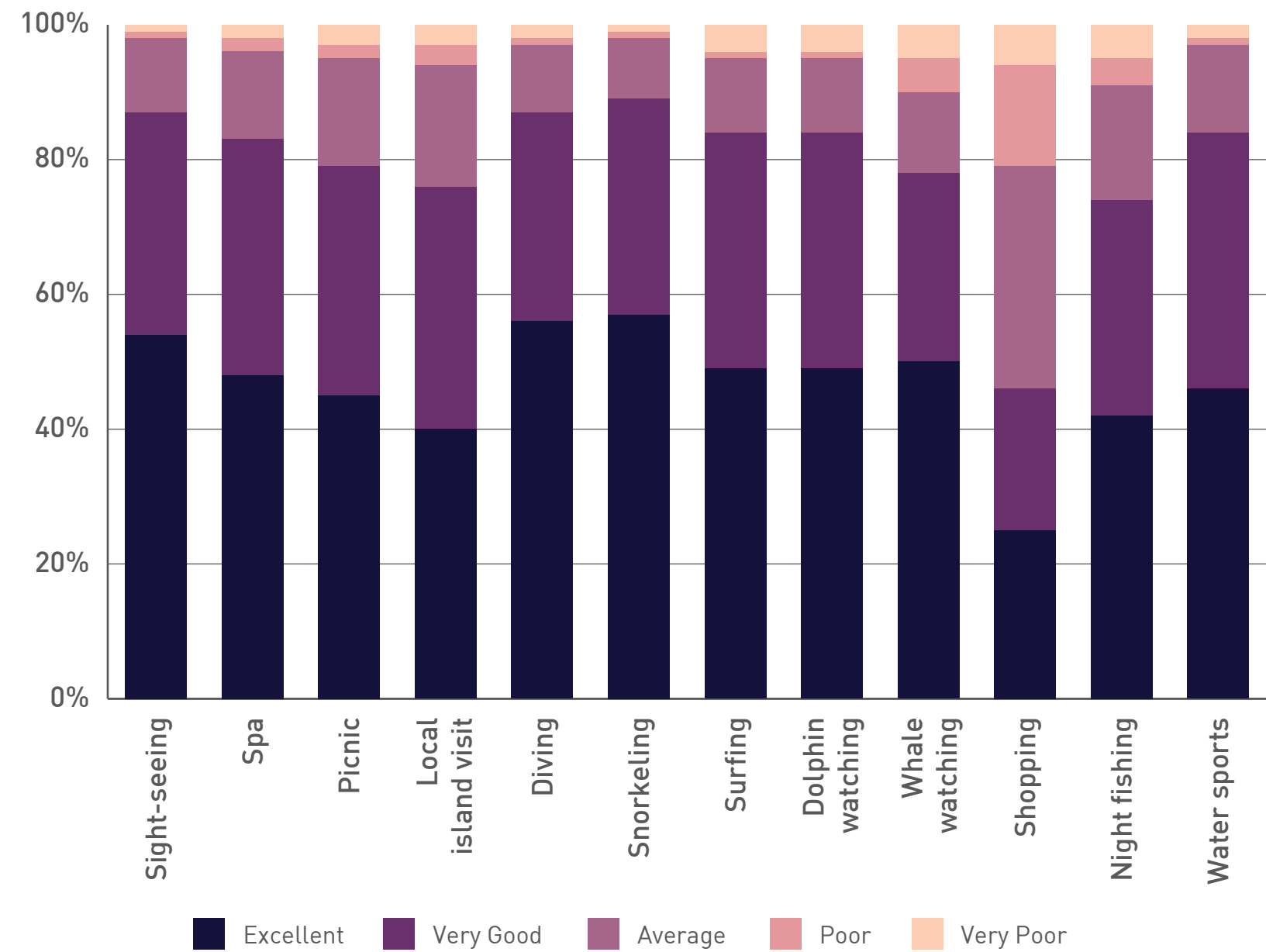
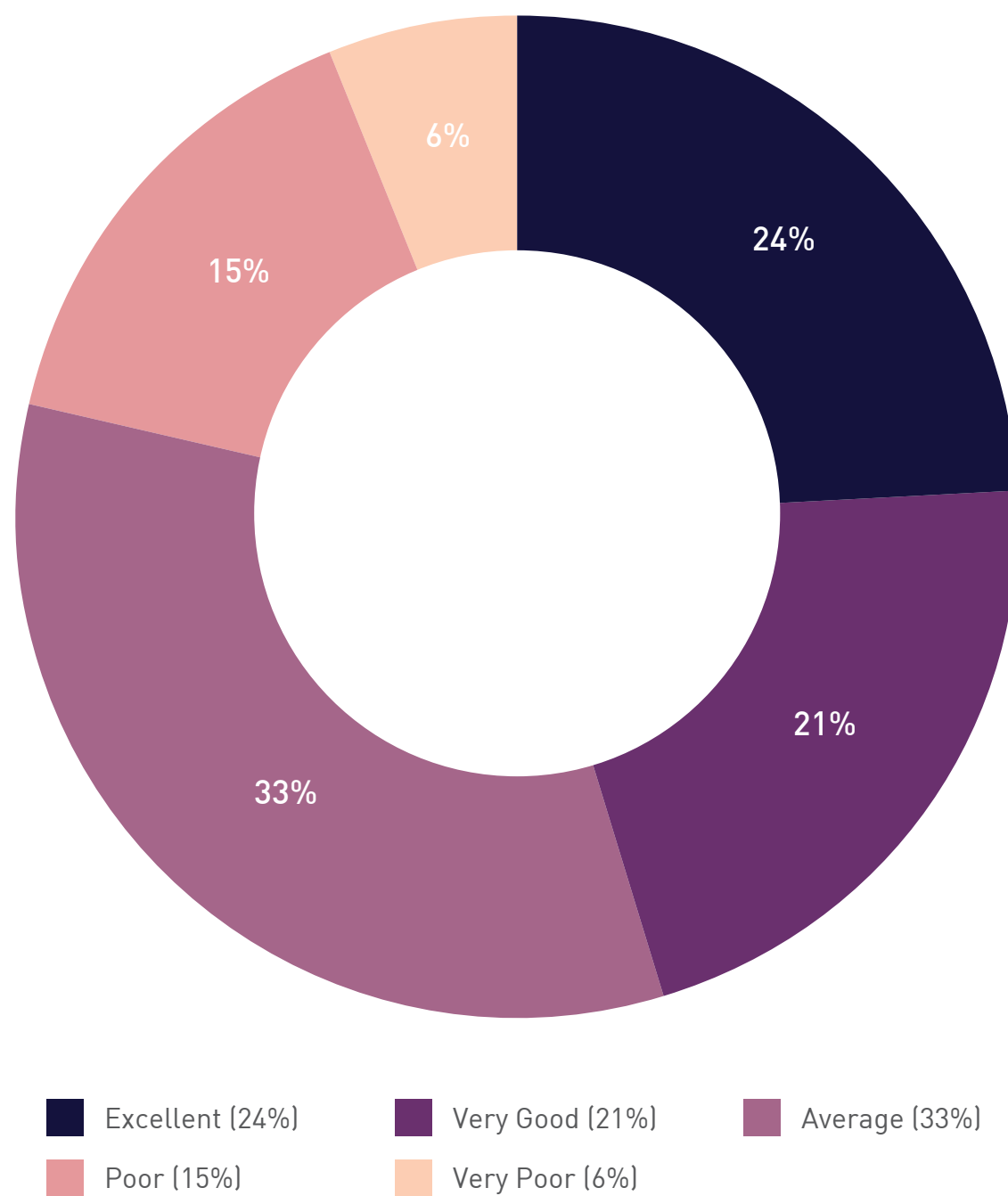


Figure 43. Activities most enjoyed by international visitors



**Figure 44.** Shopping experience in the Maldives

PERCEPTION OF PRICE OF ACTIVITIES

The price charged for spa treatments is considered ‘expensive’ by 56% of visitors. However, most of the other activities offered are perceived as ‘value for money’. About 56% of the visitors perceive sports activities to be ‘value for money’ and 54% of visitors considered diving as ‘value for money’.

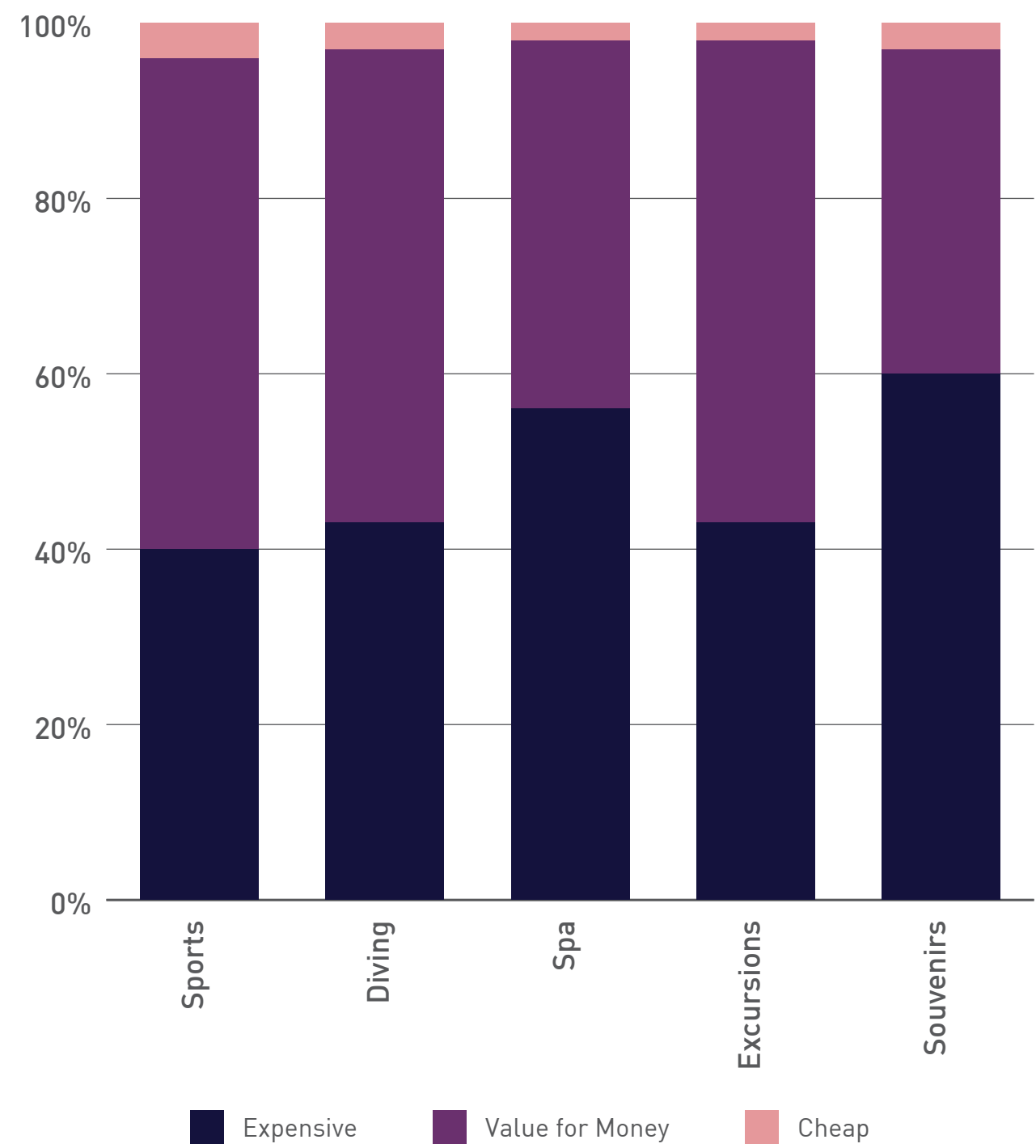


Figure 45. Perception of prices for activities

PLACES VISITED

One fourth of the respondents in February 2016 stated they visited a local island during their stay in the Maldives. Likewise, 19% visited the capital city Male’, while 6% visited a picnic island, 3% visited Ari Atoll for whale shark watching and 1% visited the Baa Atoll Biosphere Reserve.

INCOME LEVELS

Of the international visitors to Maldives, 30% earn an annual income approximately between USD10,000 and USD50,000 while 27% of the visitors earn approximately between USD50,000 and USD100,000. There are 14% of visitors who earn more than USD200,000.

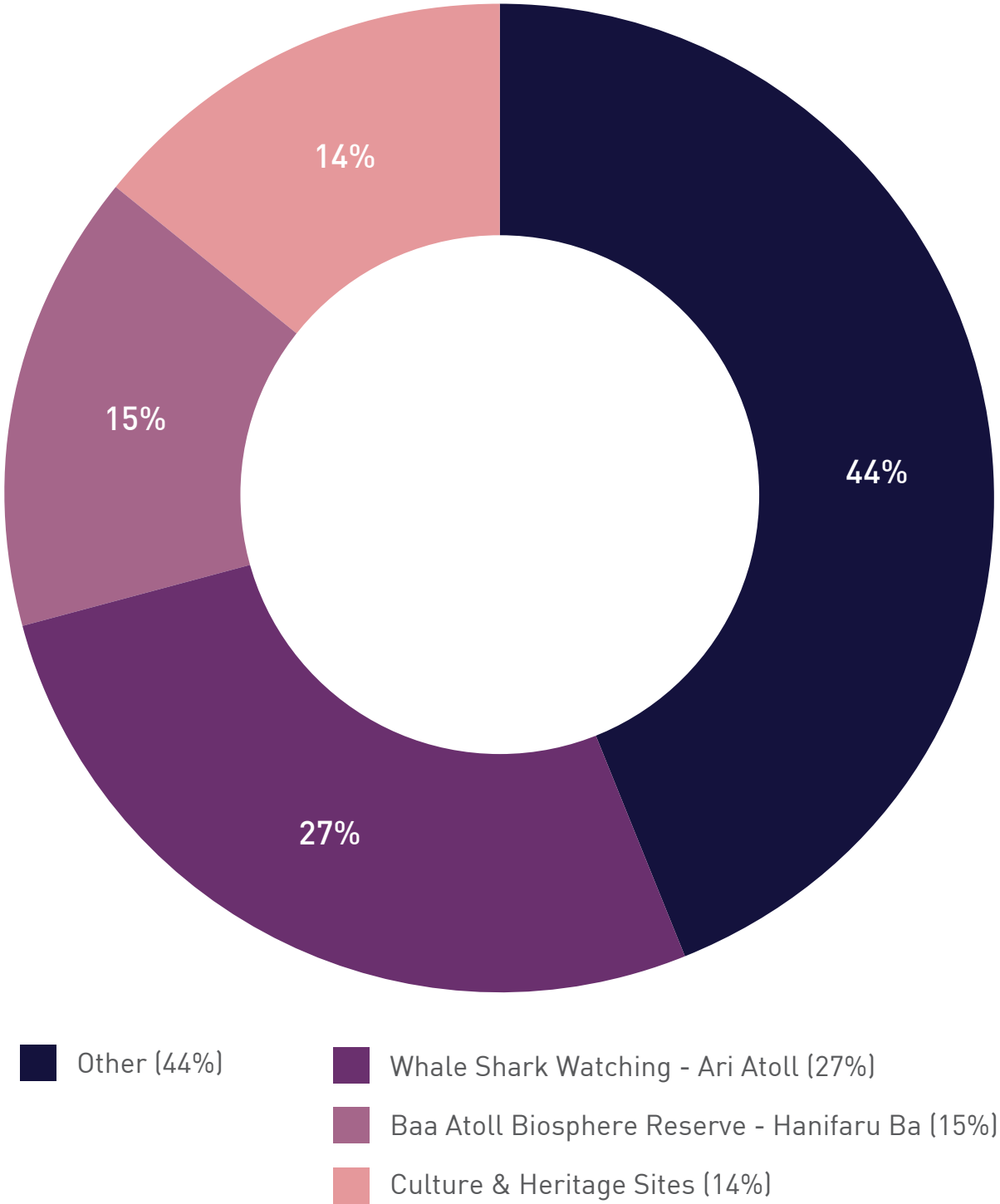


Figure 46. Places Visited





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# OVERALL VISITOR SATISFACTION

## Comparisons with Similar Destinations

One out of every three visitors to Maldives in September 2016, had visited a similar destination to the Maldives. Similar destinations travelled by the visitors include Mauritius, Thailand, Seychelles and Pacific Island Nations. International visitors rank the beaches (62%), quality of hotels and resorts (60%) and underwater beauty (59%) of the Maldives higher in comparison to other similar destinations. Friendliness of staff, safety and privacy are also rated either higher or same as other destinations. ‘Value for money’ is rated ‘same’ by 39% of visitors and 27% perceived it as lower than other similar destinations.

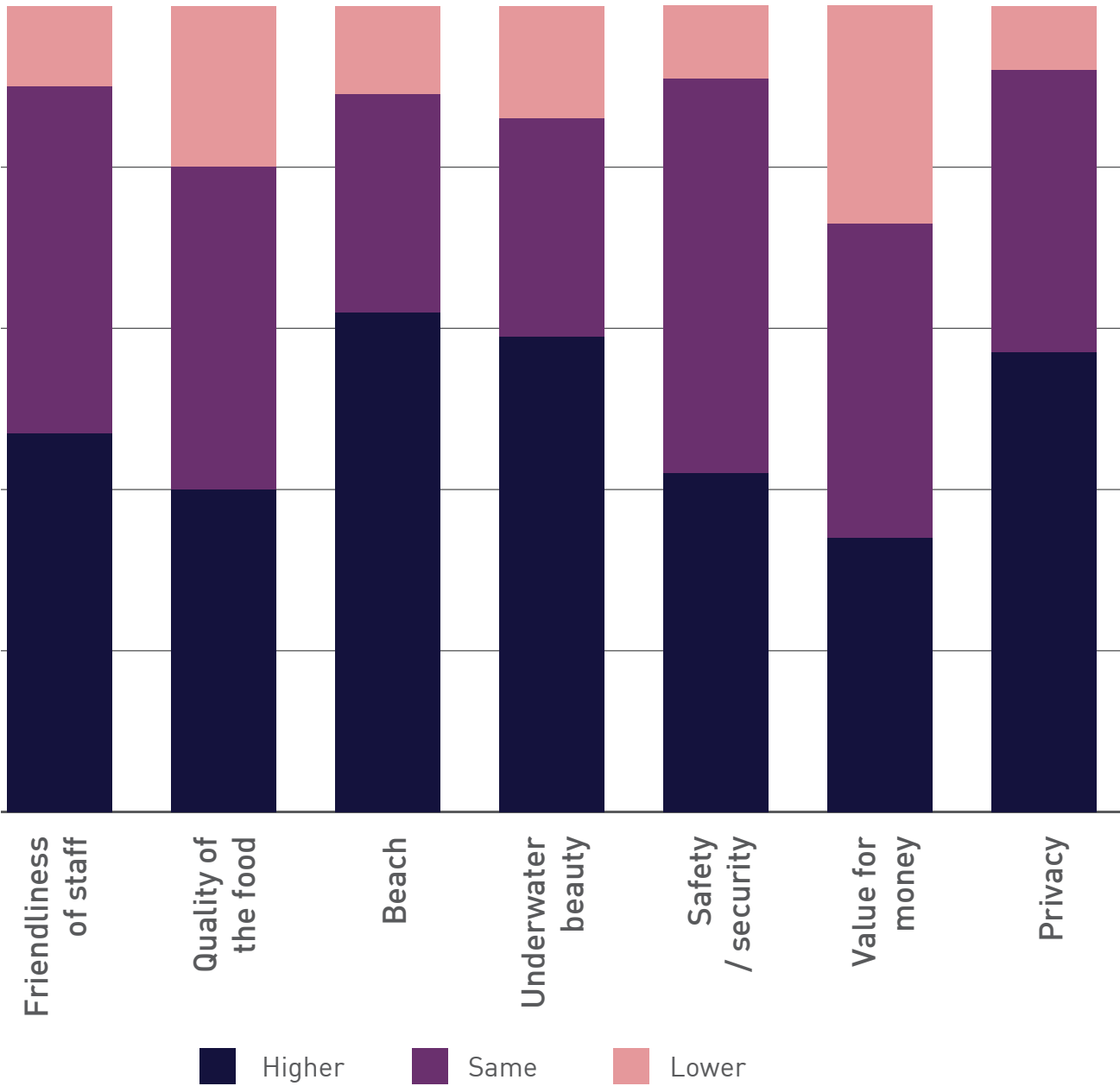


Figure 47. Rating of the Maldives compared to similar destinations

## PACKAGE

Of the international visitors to Maldives in September 2016, 59% of the visitors stated that their holiday was a part of package. The most popular inclusions in the package are accommodation (27%), food and beverage (23%), air fare (21%) and domestic travel (12%).

## Overall Experience

Of the international visitors to the Maldives in September 2016, 95% stated the holiday met their expectations and 92% stated that they intend to visit again. An overwhelming 98% of the international visitors said they would recommend the Maldives to other holidaymakers.

There have been no changes in the overall experience of visitors to Maldives over the past 5 years. In the past 5 years, over 95% stated that the holiday met their expectations and over 90% said that they intend to visit Maldives again and about 98% has stated that they would recommend Maldives to other holiday makers.





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# CONCLUSIONS

Natural beauty of the Maldives has been consistently identified as the overwhelming motivator for traveling to the Maldives. The unparalleled natural beauty of the coral reef small island ecosystem is the main motivator for tourists who visit for 'Honeymoon' and 'Rest and Relaxation' in the Maldives. The most important and urgent policy action required to sustain tourism industry of the Maldives is to address the risk posed by solid wastes particularly plastic waste that floats on the sea, washes to the beaches or entangles in the coral reefs. Peacefulness and privacy are also important motivators for visiting the Maldives.

There is a clear seasonal difference in purpose of visit to the Maldives. 'Honeymoon' is the main purpose of visit in off-peak season while 'rest and relaxation' is the main purpose of travel during peak season. Seasonal differences can also be seen in age of visitors and frequency of visits. Younger visitors are more frequent during off-peak season while repeat visits are higher during peak season.

Internet is the most important source of information for visitors to the Maldives. The popularity of Internet as a source

of information has increased from 24% in February 2014 to 30% by September 2016. Intensified effort is needed to promote the Maldives via internet and to target mobile devices and social media platforms.

There are distinct differences in the profiles of visitors from Europe and Asia and their trip planning. The visitors from Asia are younger compared to visitors from Europe. Asian visitors book their holiday to the Maldives a few weeks in advance while European visitors book their holiday months in advance. On the other hand, European visitors stay longer while Asian visitors prefer to stay for a shorter period.

Of the services at place of stay, in-room entertainment is an area that needs further improvement. In room entertainment is consistently rated low compared to all other aspects in place of stay. There is a need to obtain an appropriate balance for indoor and outdoor entertainment activities with consideration for weather.

In comparison to similar destination to the Maldives, the beaches, underwater beauty, resorts/hotels, and privacy are rated higher than other similar destinations. It is noted that food quality is

perceived to be lower than similar destinations by 20% of visitors who have visited a similar destination to the Maldives.

Shopping experience in tourist resorts and hotels/guesthouses are perceived to be poor by over 20% of respondents, and souvenirs is perceived expensive by over 60% of the respondents. The trend continues to persist through out surveys undertaken.

Of the visitors to the Maldives in September 2016, 95% stated that the holiday met their expectations. Of the visitors 92% stated that they intend to visit the Maldives again. It is remarkable that 98% of visitors stated that they would recommend the Maldives to others. It is noteworthy that the overall satisfaction of visitors to Maldives has been overwhelmingly positive and consistent over the past 5 years.







# METHODOLOGY

The questionnaire for the Maldives Visitor Survey undertaken in September 2016 is based on the questionnaire for the survey conducted in February 2016. The questionnaire consisted of four sections and 28 questions in total. An additional section was incorporated into the English questionnaire to pilot study the visitor expenditure in the Maldives. The questionnaire was prepared and printed in eight different languages. They are English, Italian, German, French, Japanese, Chinese, Arabic and Russian languages.

The sample for the survey was selected based on 5-year averages of the top ten inbound markets to the Maldives between the years 2011 and 2015. The sample was calculated using the tourist arrival data from the Ministry of Tourism. Based on the top ten nationalities, the minimum targeted distribution was 1,800.

A half-day training session was held for the enumerators prior to the commencement of the survey.

The survey was conducted for a period of 14 days between 24 September 2016 and 7 October 2016 at Ibrahim Nasir International Airport (INIA).

Questionnaires were distributed to the international visitors by the enumerators after immigration clearance and collected at departure gates after immigration and security clearance.

The English questionnaires were distributed both in the form of iPads, via the use of a survey software and a paper questionnaire.

By the end of the survey period, the number of questionnaires collected was 2194 and 2170 of these questionnaires were deemed fit for data analysis.

The survey data was recorded into a predefined online data entry template. The data entry platforms had inbuilt validation and error detection. Once data entry started, regular discussions were held with the data collection team to provide feedback on data quality, incomplete questionnaires, and issues and anomalies that arise.

Once all the survey data was entered and checked, all the files were combined and single dataset generated on SPSS and MS Excel. The SPSS statistical software was used for data analysis.

MALDIVES VISITOR SURVEY 2016

ES: .....  
EC: .....  
EE: .....



i) Nationality ..... Place of Residence: ii) City ..... iii) Country .....

iv) Departing Airline ..... Gender v) ☐ Male vi) ☐ Female

SECTION A

1. How many times have you visited the Maldives? (Please tick (✓) one box)

a. ☐ First Time b. ☐ 2-5 times c. ☐ 6-10 times d. ☐ more than 10 times

2. With whom did you travel? (Please tick (✓) one box)

a. ☐ Travelled alone b. ☐ Partner c. ☐ Family d. ☐ Friends  
e. ☐ Business/work associates f. ☐ Study/student group

3. How many people are in your travel group, including yourself?

a. ☐ Adults ..... b. ☐ Children (below 18 years) .....

4. How did you learn about the Maldives? (Please tick (✓) all relevant boxes)

a. ☐ Word of Mouth b. ☐ Internet c. ☐ Travel Agent d. ☐ Magazines  
e. ☐ TV f. ☐ Guidebook g. ☐ Outdoor advertising h. ☐ Newspaper  
i. ☐ Fairs/Exhibitions j. ☐ Radio k. ☐ Visited Maldives before

5. What motivated you to choose Maldives? (Please tick (✓) all relevant boxes)

a. ☐ Beach b. ☐ Weather c. ☐ Underwater beauty d. ☐ Reputation/well-known  
e. ☐ Uniqueness f. ☐ Peacefulness g. ☐ Privacy h. ☐ Small islands  
i. ☐ Other, please specify .....

6. What is the main purpose of your visit? (Please tick (✓) one box)

a. ☐ Health & Wellness b. ☐ Honeymoon c. ☐ Wedding d. ☐ Birthday celebration  
e. ☐ Diving f. ☐ Snorkeling g. ☐ Sailing h. ☐ Surfing  
i. ☐ Fishing j. ☐ Incentive visit k. ☐ Business conference l. ☐ Rest & relaxation  
m. ☐ Other, please specify .....

7. How were your airline reservations for this trip made?

a. ☐ Airline directly b. ☐ Flight search websites c. ☐ Travel agent  
d. ☐ Travel club e. ☐ Tour operator f. ☐ Company's corporate travel  
g. ☐ Other, please specify .....

8. How were your accommodation reservations for this trip made? (Please tick (✓) one box)

a. ☐ Via internet on travel agency/tour operator website b. ☐ Via Internet on resort/hotel website  
c. ☐ Visited a travel agency to book d. ☐ Booked by family/friends  
e. ☐ Telephone booking f. ☐ Booked by employer g. ☐ Other, please specify .....

9. Did you use any of the following websites to plan/organize your trip to the Maldives? (Please tick (✓) all relevant boxes)

a. ☐ HolidayCheck b. ☐ Trip Advisor c. ☐ Yahoo! Travel d. ☐ Expedia  
e. ☐ Agoda f. ☐ Hotels.com g. ☐ cTrip h. ☐ Kayak  
i. ☐ Booking.com j. ☐ Travelzoo k. ☐ Makemytrip l. ☐ Qunar.com  
m. ☐ LonelyPlanet n. ☐ Other, please specify .....

10. When did you book your visit to the Maldives? (Please tick (✓) one box)

a. ☐ Less than a week before travel b. ☐ 1 week  
c. ☐ 2-4 weeks d. ☐ 1-2 months  
e. ☐ 3-5 months f. ☐ 6-12 months g. ☐ Over one year before travel

SECTION B

11. What was the **MAIN method of transport** from the Ibrahim Nasir International Airport to your place of stay?

a. ☐ Domestic flight b. ☐ Sea plane transfer c. ☐ Speedboat transfer d. ☐ Public ferry service

12. How long did you have to **wait at the Ibrahim Nasir International Airport** (to get to your place of stay)?

a. ☐ Less than 15 minutes b. ☐ 15 - 29 minutes c. ☐ 30 - 44minutes  
d. ☐ 45 - 59 minutes e. ☐ 1 - 2 hours f. ☐ 3 hours or more

13. How long did it take for you to **get from Ibrahim Nasir International Airport to your place of stay**?

a. ☐ Less than 30 minutes b. ☐ 30 - 60 minutes  
c. ☐ 1 - 2 hours d. ☐ 3 - 4 hours  
e. ☐ 5 - 6 hours f. ☐ More than 6 hours

14. How would you rate the quality of your hotel transfer? (Please tick (✓) one box)

	Excellent	Very Good	Average	Poor	Very poor	Not Applicable
a. Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Comfort	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Safety	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Information briefing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. Where did you stay during your visit to the Maldives? Please write down the name of the place(s) you stayed and the number of nights.

	Name of Resort/ Hotel	Nights
a. Tourist Resort Island		
b. Male’ City/Hulhumale’/Villimale’		
c. In an inhabited island		
d. Boat/Safari vessel		
e. Other, please specify		

16. What type of meal plan did you use during your stay? (Please tick (✓) one box)

☐ Room only

☐ Bed and breakfast

☐ Half board (breakfast and one meal included)

☐ Full board (three meals included)

☐ All inclusive

17. In general, how did you find the prices charged for the following?

	Expensive	Value for Money	Cheap	Not applicable
a. Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Soft drinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Alcoholic beverages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Sports activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Diving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Spa treatments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Excursions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Souvenirs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m. Speedboat transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
n. Sea plane	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
o. Domestic flight	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. How would you rate the following at your place of stay? (Please tick (✓) one box)

	Excellent	Very Good	Average	Poor	Very poor	Not Applicable
a. Room	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. In-room entertainment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Cleanliness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Guest services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Public areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Dining experience	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. How would you rate the following activities? (Please tick (✓) one box)

	Excellent	Very Good	Average	Poor	Very poor	Not Applicable
a. Sight-seeing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Spa	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Picnic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Local island visit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Diving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Snorkeling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Surfing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Dolphin watching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Whale watching	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Night fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Water sports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. What are the places you visited while in Maldives? (Please tick (✓) all relevant boxes)

- ☐ Baa Atoll Biosphere Reserve (Hanifaru Bay)
- ☐ Whale shark watching (Ari Atoll)
- ☐ Cultural and heritage sites
- ☐ Other (Specify) .....

21. Have you ever visited any destination similar to the Maldives? a. ☐ Yes b. ☐ No (if 'No' go to Q23)

- i) If 'Yes', please state the destination you visited .....
- ii) Compared to that destination, how would you rate the Maldives? (Please tick (✓) one box)

	Lower	Same	Higher		Lower	Same	Higher
a. Resorts and hotels	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	e. Underwater beauty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Friendliness of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	f. Safety/security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Quality of the food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	g. Value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Beach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	h. Privacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SECTION C

22. What is the one word / phrase that comes to your mind to describe the Maldives holiday experience?

.....

23. What did you like most about the Maldives?

.....

24. Did your holiday experience meet your expectations? a. ☐ Yes b. ☐ No

Please explain your reason .....  
.....

25. Do you intend to visit Maldives again? a. ☐ Yes b. ☐ No

Please explain your reason .....  
.....

26. Would you recommend the Maldives as a tourist destination to others? a. ☐ Yes b. ☐ No

Please explain your reason .....  
.....

SECTION D

27. Age Group: (Please tick (✓) one box )

- ☐ Below 18 years
- ☐ 18 – 24 years
- ☐ 25 – 34 years
- ☐ 35 - 44 years
- ☐ 45 - 54 years
- ☐ 55 - 64 years
- ☐ 65 years and over

28. What is the total combined yearly income of all members of your household?

- a) Total annual household income  
.....
- b) Currency  
USD ☐ GBP ☐ EUR ☐ RMB ☐ JPY ☐ RUB ☐ Other (Specify) ☐ .....

SECTION E

29. a) On this trip, what other countries, if any, did you stay at least one night in before arriving in the Maldives?

b) How many nights did you stay in (country)?

a) Countries visited on this trip before Maldives	b) No. of nights

c) ☐ No other countries visited prior to Maldives arrival



30. a) On this trip, what other countries, if any, will you be staying at least one night in after you leave Maldives?  
b) How many nights are you planning to stay in (country)?

a) Countries to be visited on this trip after Maldives	b) No. of nights

c) ☐ No other countries to be visited after Maldives stay

31. Is this trip part of a package?

a. ☐ Yes      b. ☐ No

If Yes, which of the following does your package include? *(Please tick (✓) all that apply)*

- a. ☐ Airfare
- b. ☐ Accommodation/hotel
- c. ☐ Food and beverage
- d. ☐ Domestic travel
- e. ☐ Activities and entertainment
- f. ☐ Tours and excursions
- g. ☐ Cruise

32. a) What is the **TOTAL** spend/expense of your holiday before arrival in the Maldives?

Currency	Amount
a. <input type="checkbox"/> USD	
b. <input type="checkbox"/> Euro	
c. <input type="checkbox"/> Chinese Yuan	
d. <input type="checkbox"/> Sterling Pound	
e. <input type="checkbox"/> Japanese Yen	
f. <input type="checkbox"/> Other (Specify) .....	

b) How many people are covered by this expenditure estimate? Specify total number of people.  
.....

33. Thinking of what was paid while you were in Maldives, did you spend on the following items?

	Currency	Amount
Domestic airfares in Maldives		
Speed boat/ferry tickets		
Accommodation/hotel		
Food and beverages		
Activities, attractions, entertainment		
Gifts and souvenirs		
Other		

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