

MALDIVES VISITOR SURVEY

February 2017



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INTRODUCTION

This is the report of the Maldives Visitor Survey (MVS) conducted in February 2017 by the Ministry of Tourism, Government of the Maldives. This is the 14th report in the MVS series conducted biannually since 2013. MVS surveys were also undertaken in 2012, 2011, 2008, 2004, and 1999.

MVS presents the profile of international visitors to the Maldives and their opinions about holiday experience in the Maldives. The February 2017 survey captures the views of the international visitors to the Maldives during peak tourist season of 2017.

The survey was carried out as an exit survey and was conducted at the International Departure Terminal of the Velana International Airport. The survey was conducted between 08 February and 16 February 2017.

SUMMARY OF KEY FINDINGS

Exceptional and unique natural beauty of the Maldives is the overwhelming motivation for international visitors to the Maldives. The white sandy beaches (19%), and the coral reef marine biodiversity (16%) are the main attractions of the Maldives.

Rest and relaxation (51%) and honeymoon (25%) are the two main purposes of visit to the Maldives followed by diving and snorkelling (11%). In the peak tourist season, more visitors come for rest and relaxation while during the off-peak season the main purpose of visit is honeymoon.

Internet (29%) and word of mouth (24%) are the two highest used sources of information by visitors to discover about the Maldives. Travel agents (12%) are also an important source of information for some visitors to the Maldives. About 27% of visitors to the Maldives referred to the user generated content on Trip Advisor for advise. The most popular online travel agent (OTA) used by visitors to the Maldives is Booking.com (22.5%). For airline reservations, 43% of visitors used a travel agent while for accommodation, 46% used an OTA.

Repeat visitors constituted 26% of the international visitors to the Maldives during the peak season. More than 60% of visitors from Switzerland are repeat visitors while more than 40% of visitors from Italy and Germany are repeat visitors.

Of the international visitors who travelled to the Maldives in the peak season of 2017, 30% had booked their holiday 1-2 months in advance while 25% had booked their holiday about 3-5 months in advance. Of the international visitors, 54% travelled with their partners to the Maldives while 32% traveled with family.

SUMMARY OF KEY FINDINGS

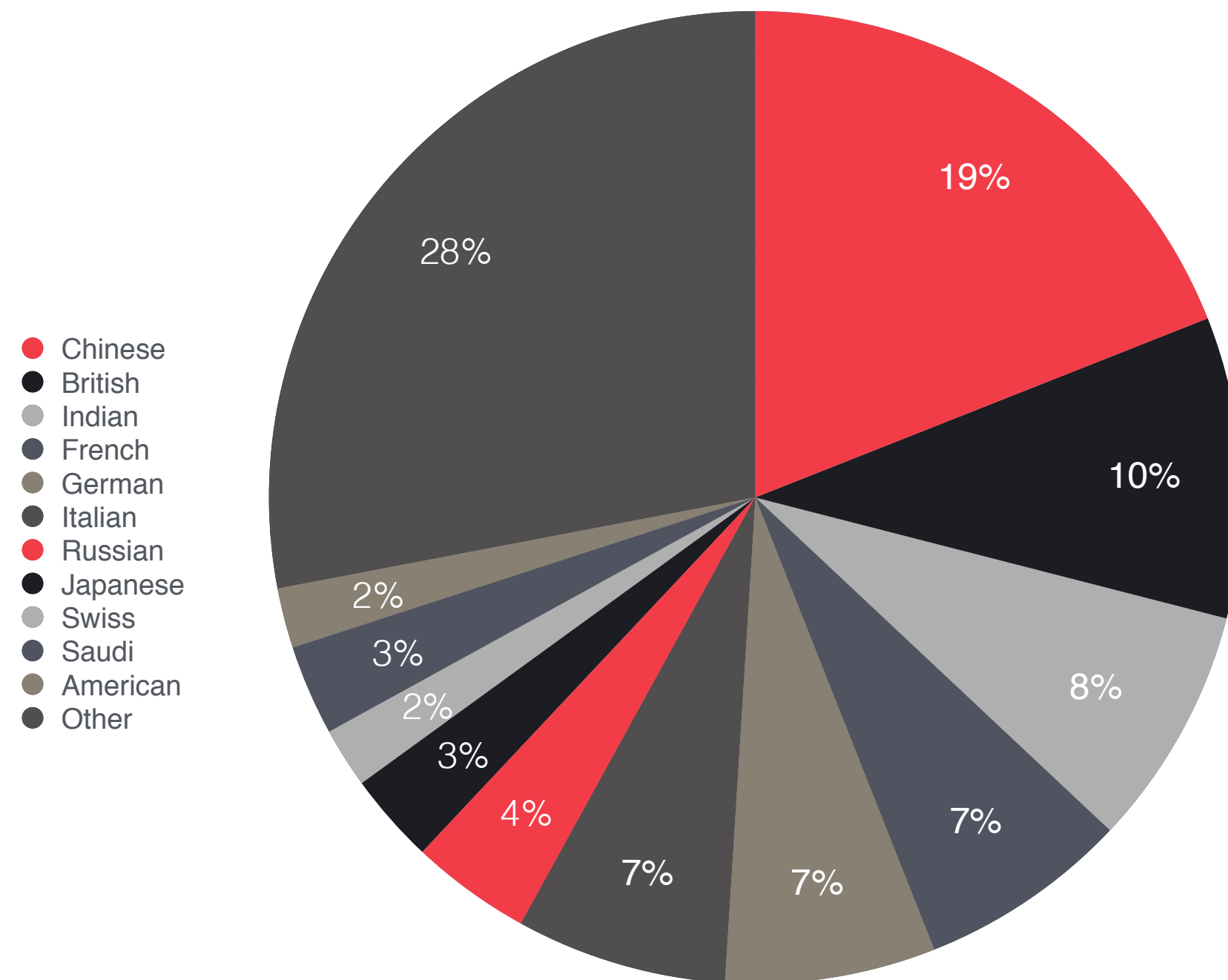
Waiting time at Velana International Airport was less than half an hour for more than 45% of visitors. For about 75% of visitors journey time from airport to their place of stay is less than an hour.

Speedboat (49%) is the most popular mode of hotel transfer, followed by sea plane (30%). About 15% of visitors had to take a domestic flight to reach their place of stay. The services and safety levels of the hotel transfer was ranked as either excellent or very good by 85% of visitors, while more than 75% ranked the comfort level of hotel transfer was ranked as 'excellent' or 'very good' by more than 75% of visitors.

Of the international visitors, 75% stayed in a tourist resort island, while 22% stayed in guesthouses and hotels. Analysis of nationalities by place of stay show that 30% of Russians and Americans and 28% of Italians stayed in guesthouses or hotels. More than 85% of visitors ranked the quality of the room, services, public areas, cleanliness and management as either 'excellent' or 'very good'.

Of the international visitors to the Maldives, 36% chose the all inclusive meal option, 22% full board, 22% half board and 18% bed and breakfast. More than 82% of visitors ranked the dining experience in the Maldives as either 'excellent' or 'very good'.

The highest ranked activities in the Maldives are snorkelling, diving, and sight seeing. More than 80% of respondents ranked these activities as either 'excellent' or 'very good'. Whale shark watching in Ari Atoll and Biosphere Reserve in Baa Atoll are the two most popular places visited in the Maldives.



RESPONDENT NATIONALITIES

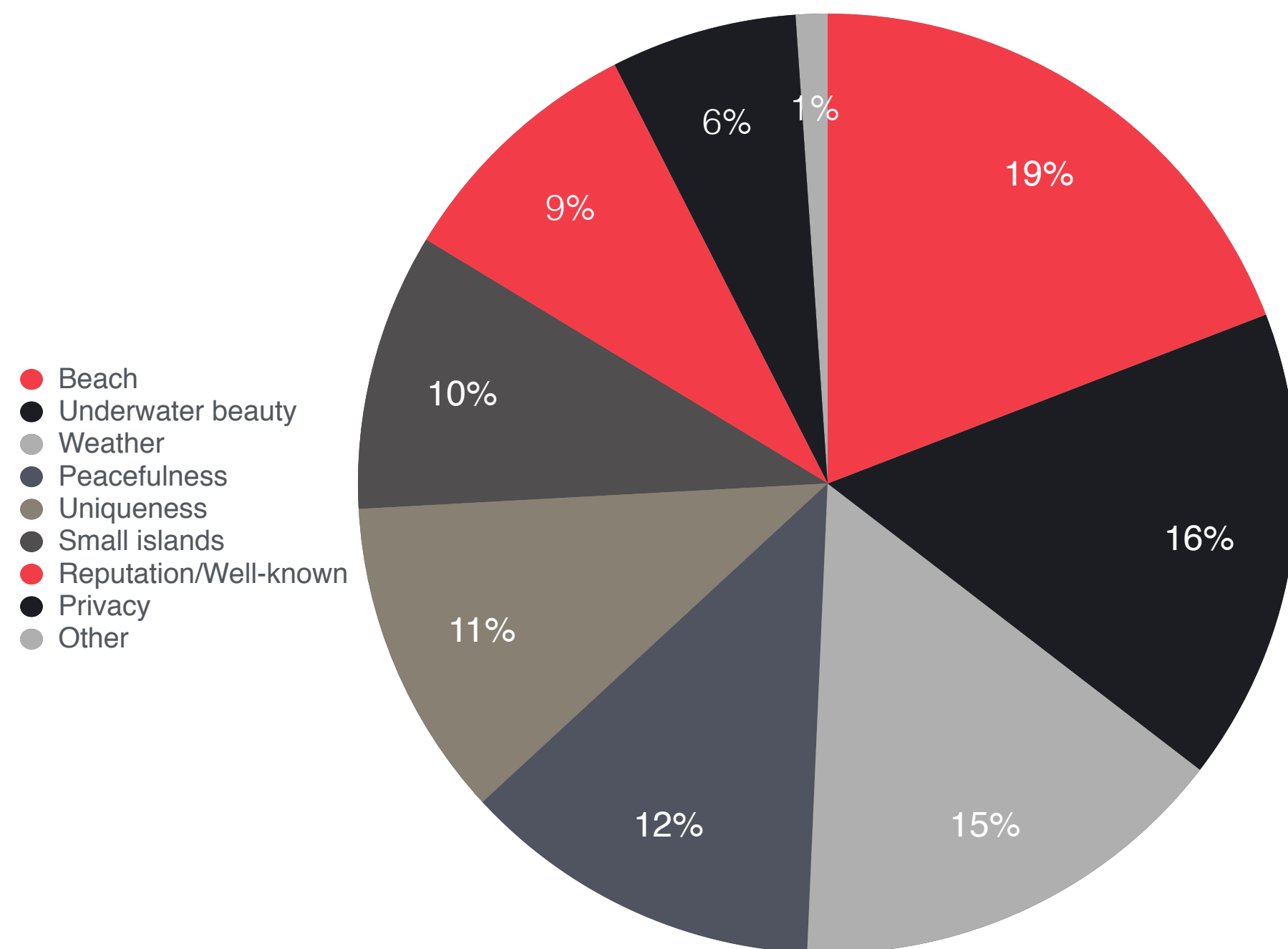
NATIONALITY TARGETS WERE SELECTED BASED ON PAST TOP 10 INBOUND MARKETS TO MALDIVES

The top 10 inbound markets to the Maldives were used as the key targets for the survey. For the past 5 years China has been the leading inbound market to the Maldives. Chinese visitors averaged 27.6% of the total arrivals over the last 5 years. Although South Korea is among the top 10 nationalities, it was not possible to get minimum required amount of Korean forms for analysis. This survey also analysed responses of visitors from Saudi Arabia and United States of America - two emerging markets to the Maldives.



MOTIVATION & REASON TO VISIT

MOTIVATION TO VISIT



VISITORS CHOOSE THE MALDIVES FOR HER NATURAL BEAUTY

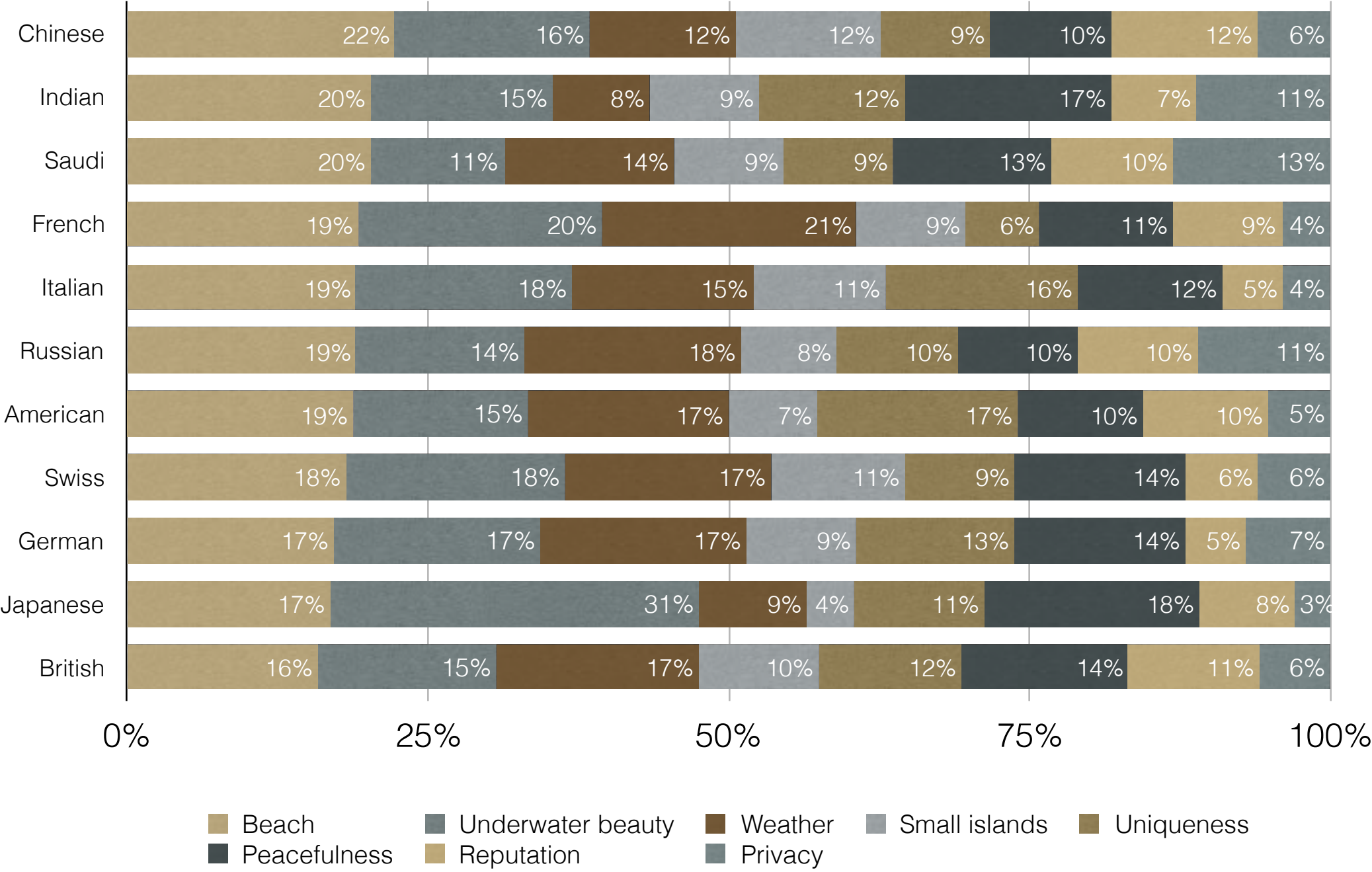
Beach (19%), underwater beauty (16%) and weather (15%) are the top three factors that make international visitors choose the Maldives.

Peacefulness, reputation and privacy are also important motivators that make the Maldives attractive for international visitors.

MOTIVATORS BY NATIONALITY

MOTIVATORS VARY ACROSS NATIONALITIES

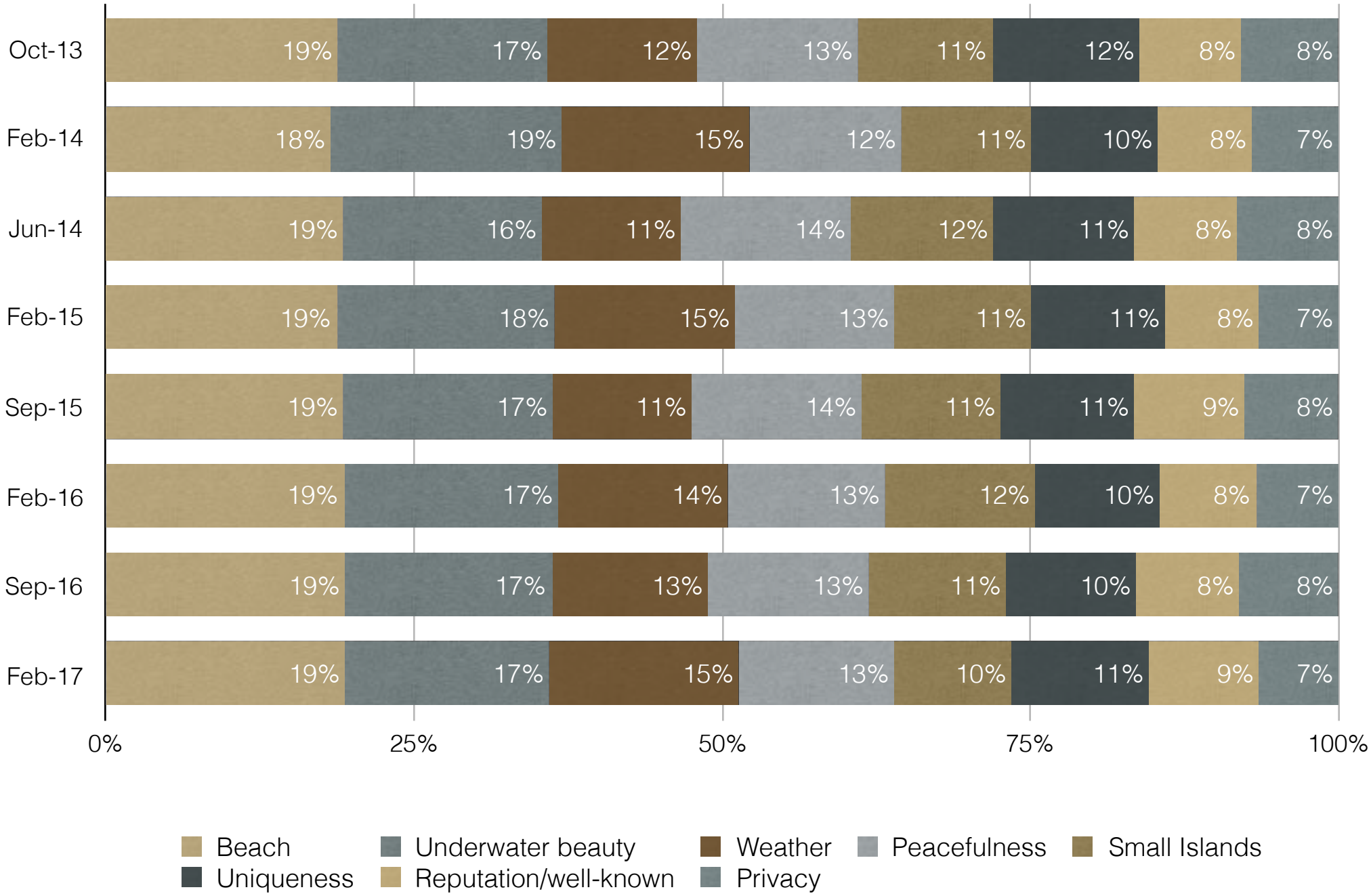
Quality of beach is the top motivator for majority of Chinese (22%), Indian (20%) and Saudi (20%) visitors who travelled to the Maldives in February 2017. For Japanese visitors, beauty of the reef (31%) is the main motivating factor while for the French visitors, it is good weather (21%). Privacy is an important motivator for Saudi (13%), Russian (11%) and Indian (11%) visitors.



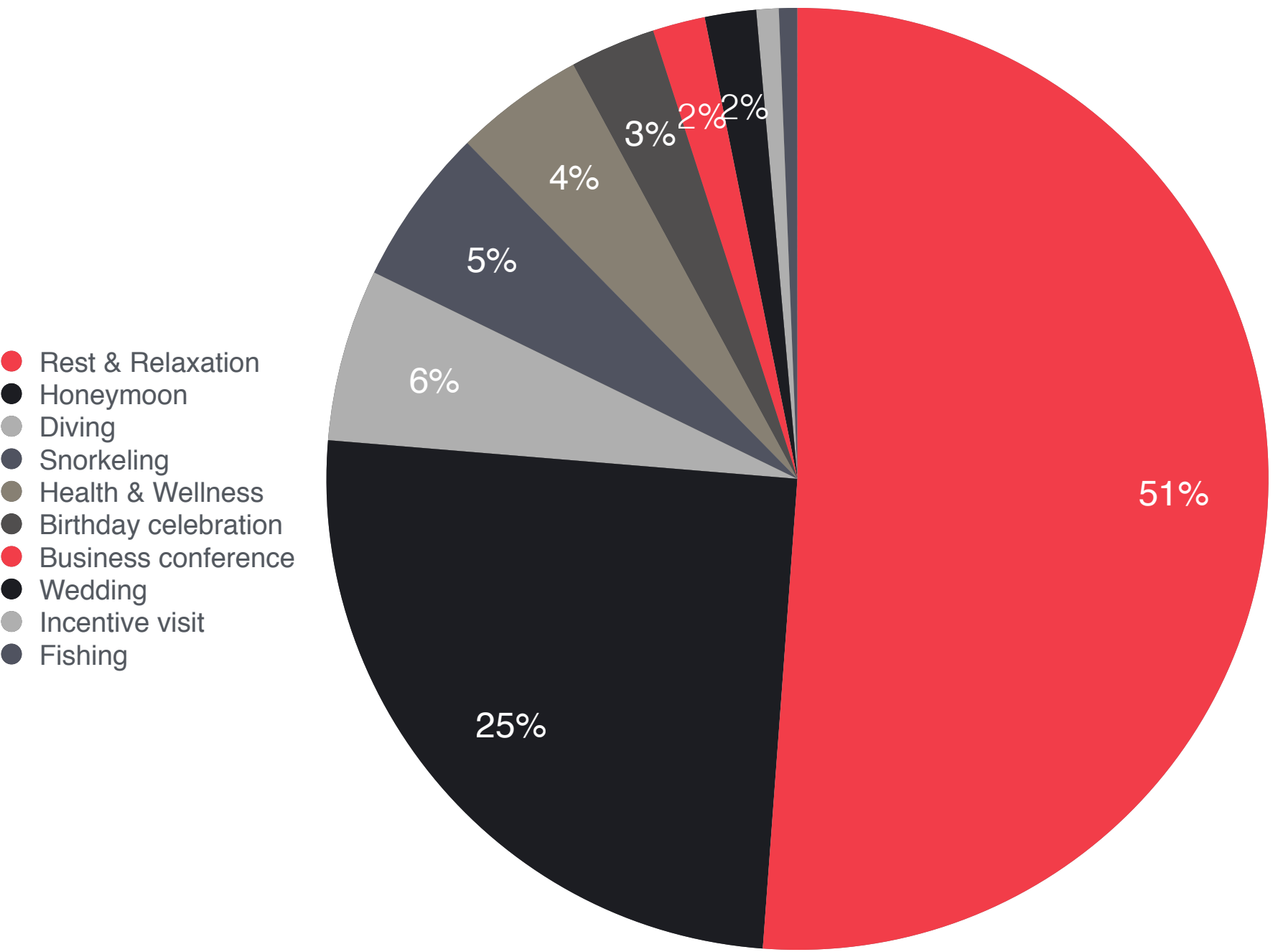
MOTIVATOR TRENDS

BEACH AND REEF CONTINUE TO BE LEAD MOTIVATORS

Trend analysis from October 2013 to February 2017 surveys show that the beauty of white crystalline beaches and rich coral reefs of Maldives have remained constant as the top two motivations to visit the Maldives.



PURPOSE OF VISIT



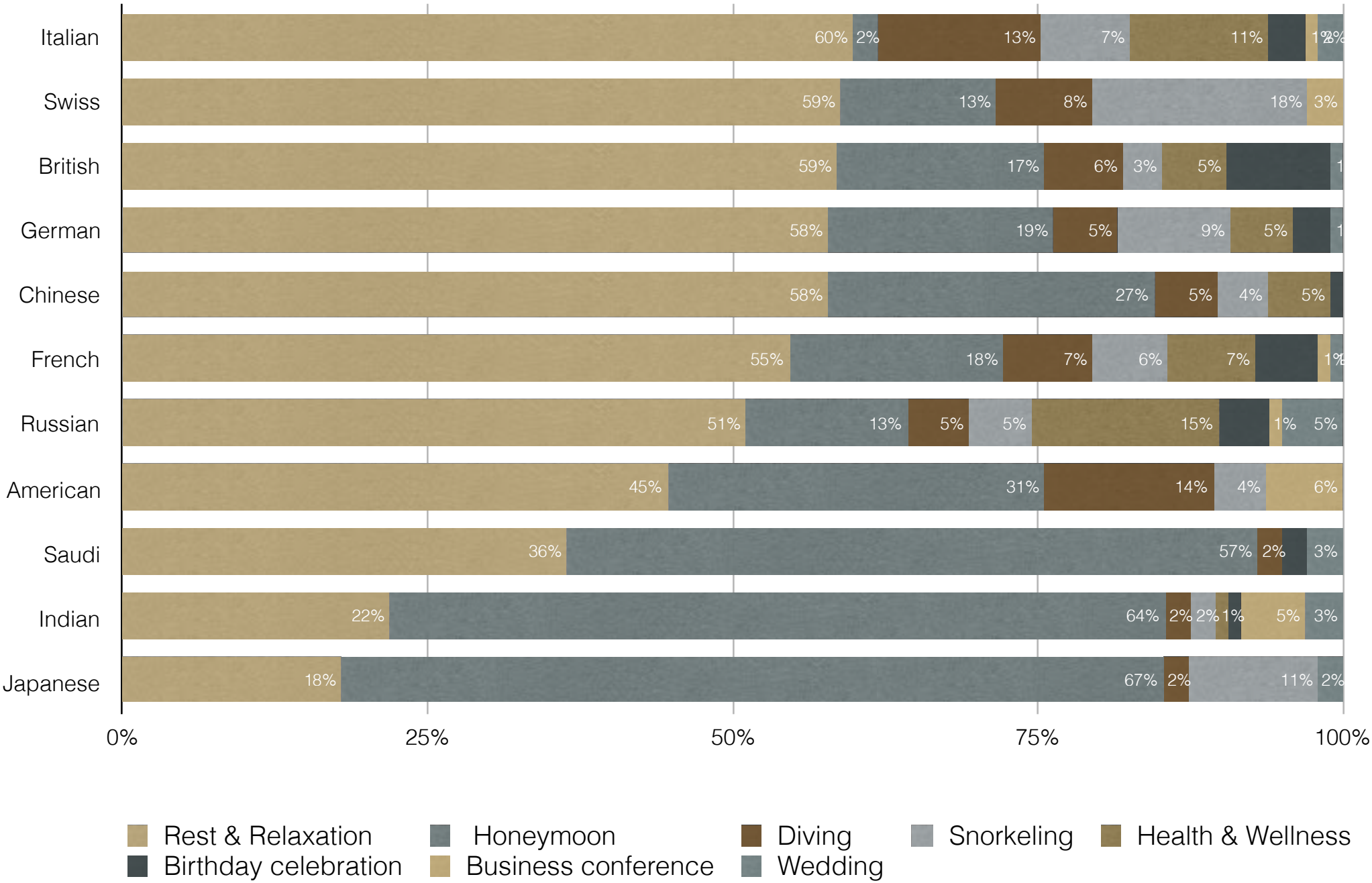
REST AND RELAXATION IS MAIN PURPOSE OF VISIT

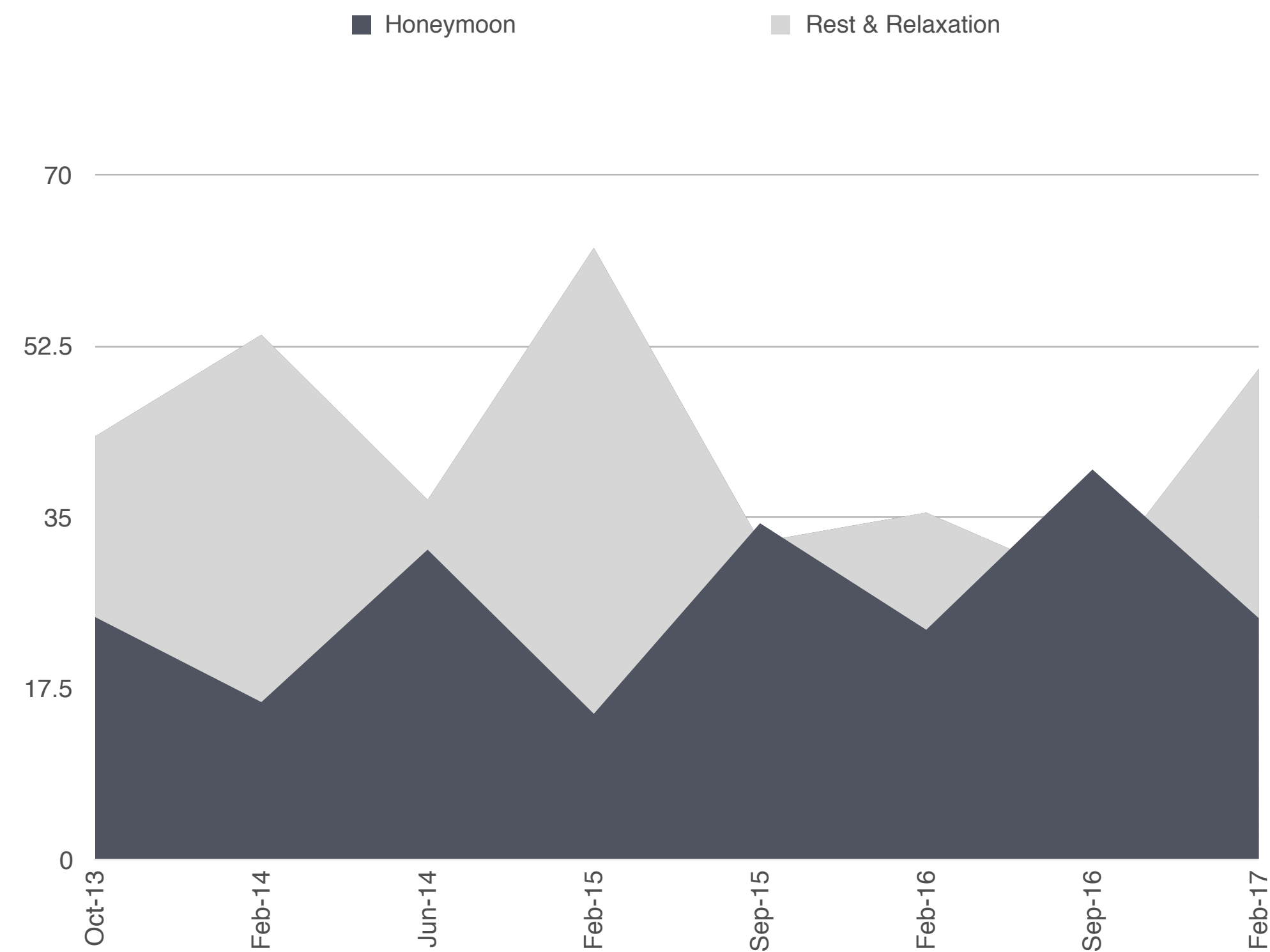
One out of every two international visitors travelled to the Maldives for rest and relaxation in February 2007 . One out of four travellers visited Maldives for their honeymoon in the same period while one out of ten visitors travelled to the Maldives for diving and or snorkelling.

PURPOSE OF VISIT BY NATIONALITY

HONEYMOON IS MAIN REASON FOR JAPANESE, INDIAN & SAUDI

Rest and relaxation is main purpose of visit to the Maldives for Italian (60%), Swiss (59%), British (59%), German (58%), Chinese (58%), and French (55%) visitors in February 2017. In contrast, honeymoon is the main purpose of visit for 64% of Japanese, 61% of Indian and 56% Saudi visitors who came to the Maldives in the same period. About 13% of Italian and American visitors stated diving as their main purpose of visit. It is noteworthy that of the Italian visitors to the Maldives in February 2017, only 2% visited for their honeymoon.





PURPOSE OF VISIT TRENDS

REST & RELAXATION AND HONEYMOON REMAIN TWO MAIN PURPOSES

Results of MVS over the last four years show that rest and relaxation and honeymoon are the two main reasons why visitors travel to visit the Maldives. Seasonal trends analysis shows that rest and relaxation is the main purpose for visitors to the Maldives during peak season while honeymoon is the main reason for visitors traveling during the off-peak season.

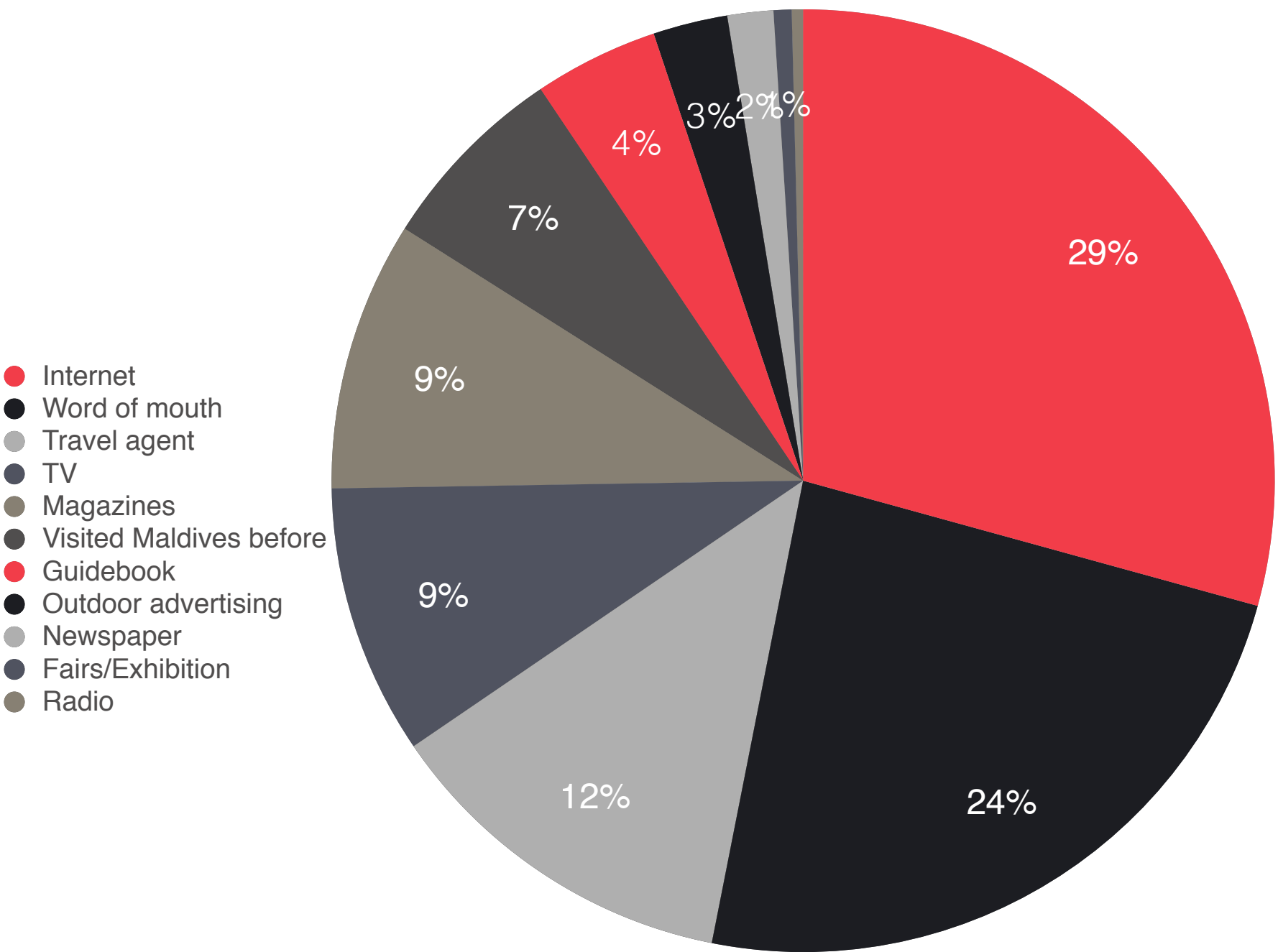


TRIP PLANNING

SOURCES OF INFORMATION

INTERNET IS MAIN SOURCE OF INFORMATION

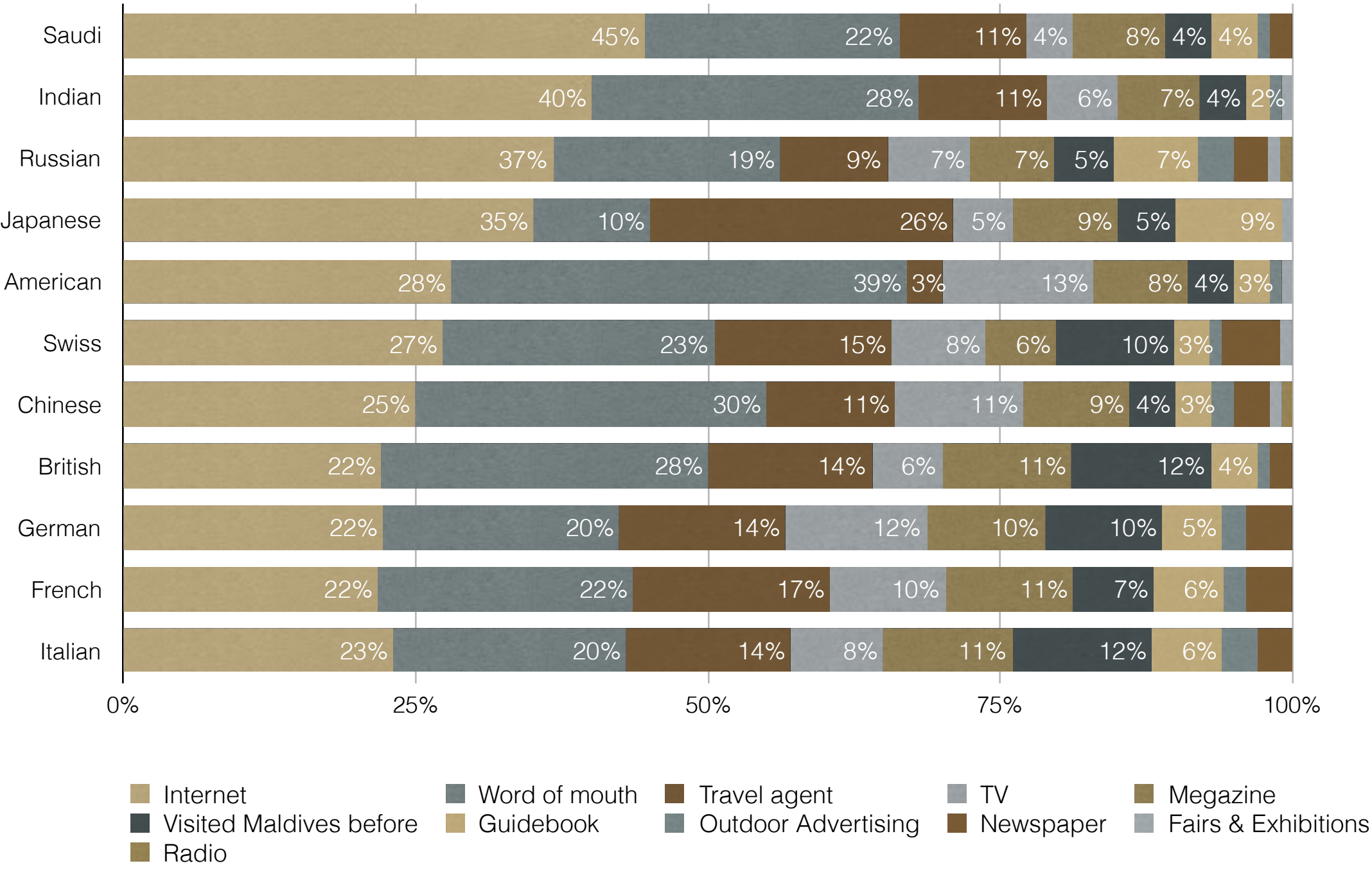
Internet (29%) is the most common channel visitors used to discover about the Maldives in February 2017 while word of mouth (24%) is the second most important source. Travel agents (12%), magazines (9%) and television (9%) are also key sources of information used by international visitors to discover about the Maldives.



INFORMATION BY NATIONALITY

INTERNET AN IMPORTANT SOURCE FOR ALL NATIONALITIES

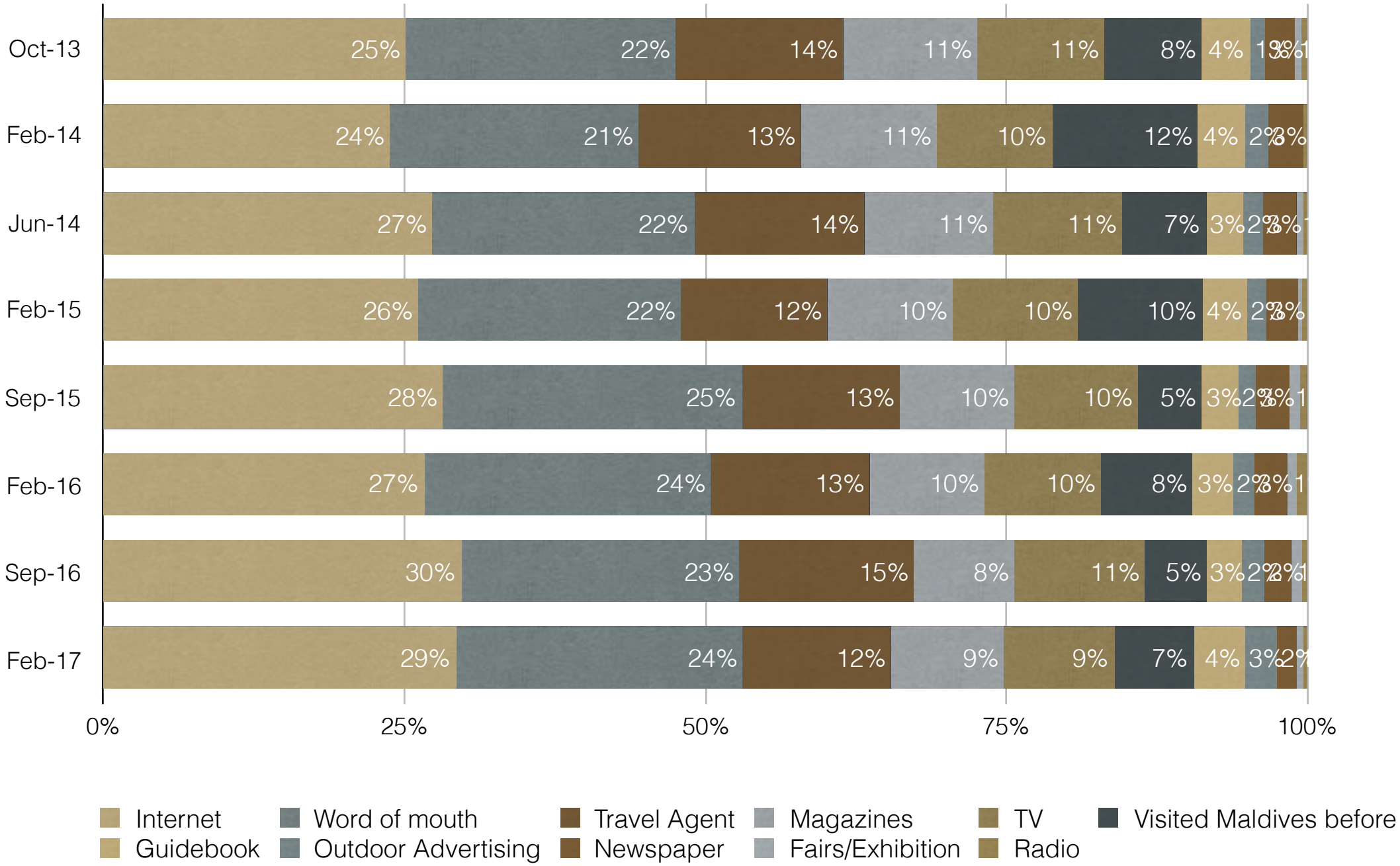
Internet is main source of information used by visitors from most nationalities to discover about the Maldives. Internet is particularly significant for Saudi (45%) Indian (40%) and Russian (37%) visitors. Word of mouth is most important source for visitors from America (39%), China (30%) and Britain (28%). Travel agents are used for information on Maldives by 26% of Japanese, French (17%), Swiss (15%), German (14%), British (14%) and Italian (14%) visitors. Magazines are a useful source of information for one out of every ten visitors from Britain, France, Italy and Germany. TV is used by 13% American, 12% German and 11% Chinese visitors as the source of information.



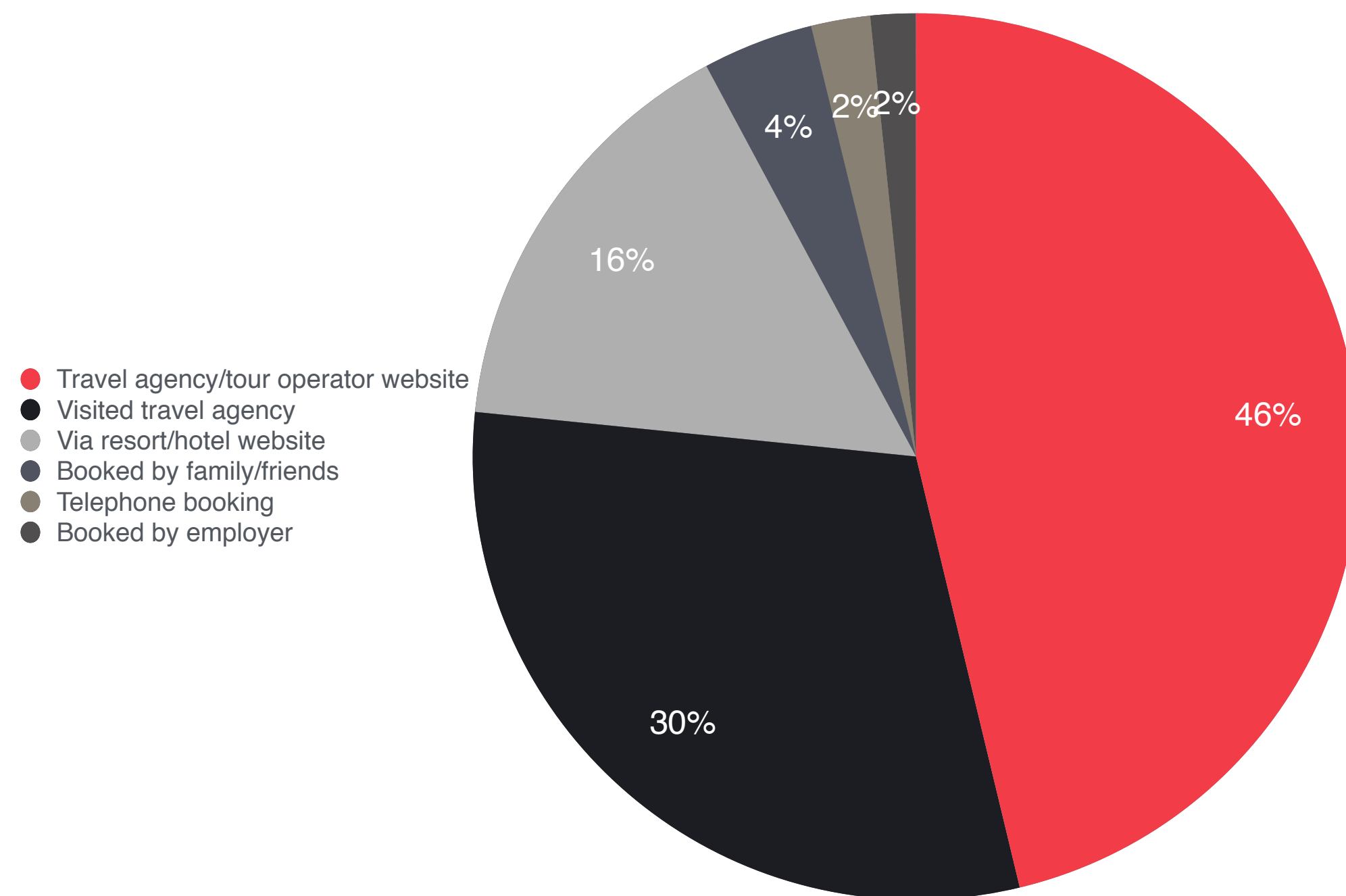
INFORMATION SOURCE TRENDS

INTERNET IS GROWING IN SIGNIFICANCE

Trend analysis from past MVS surveys show that the channels through which international visitors discover about the Maldives has been fairly consistent across the survey period. It is also noted that Internet as a source of information to discover Maldives is growing in significance with a five percentage point increase from 24% to 29%.



ACCOMMODATION RESERVATION



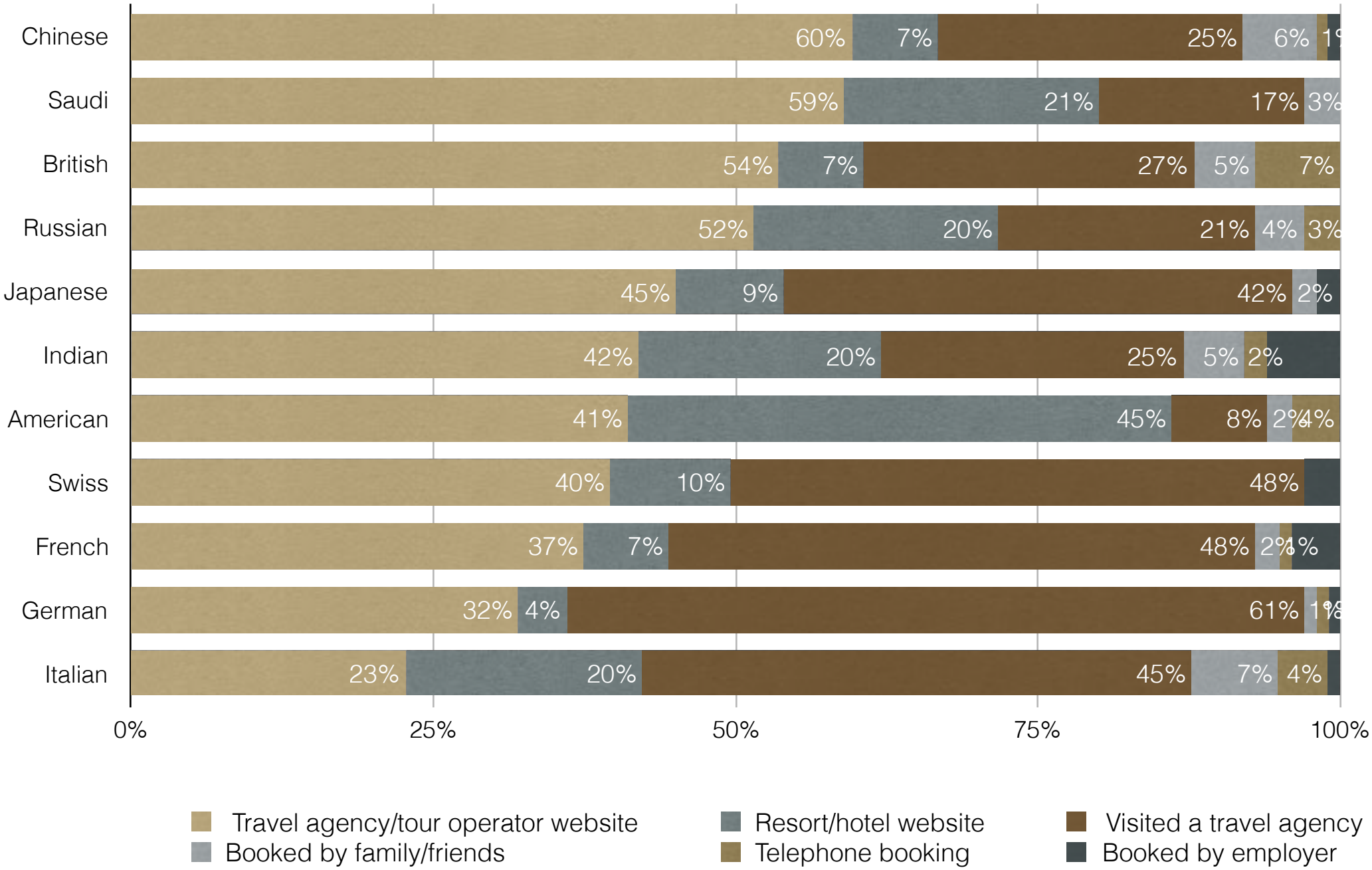
MOST VISITORS BOOK ACCOMMODATION VIA OTAs

The most popular method used by international visitors to book their accommodation in the Maldives is Online Travel Agents (46%). About 16% of visitors booked online via the tourist resort or hotel website. In contrast, 30% of tourists physically visited a travel agency to book their accommodation.

ACCOMMODATION RESERVATION BY NATIONALITY

EUROPEAN VISITORS PREFER VISIT TO TRAVEL AGENCY

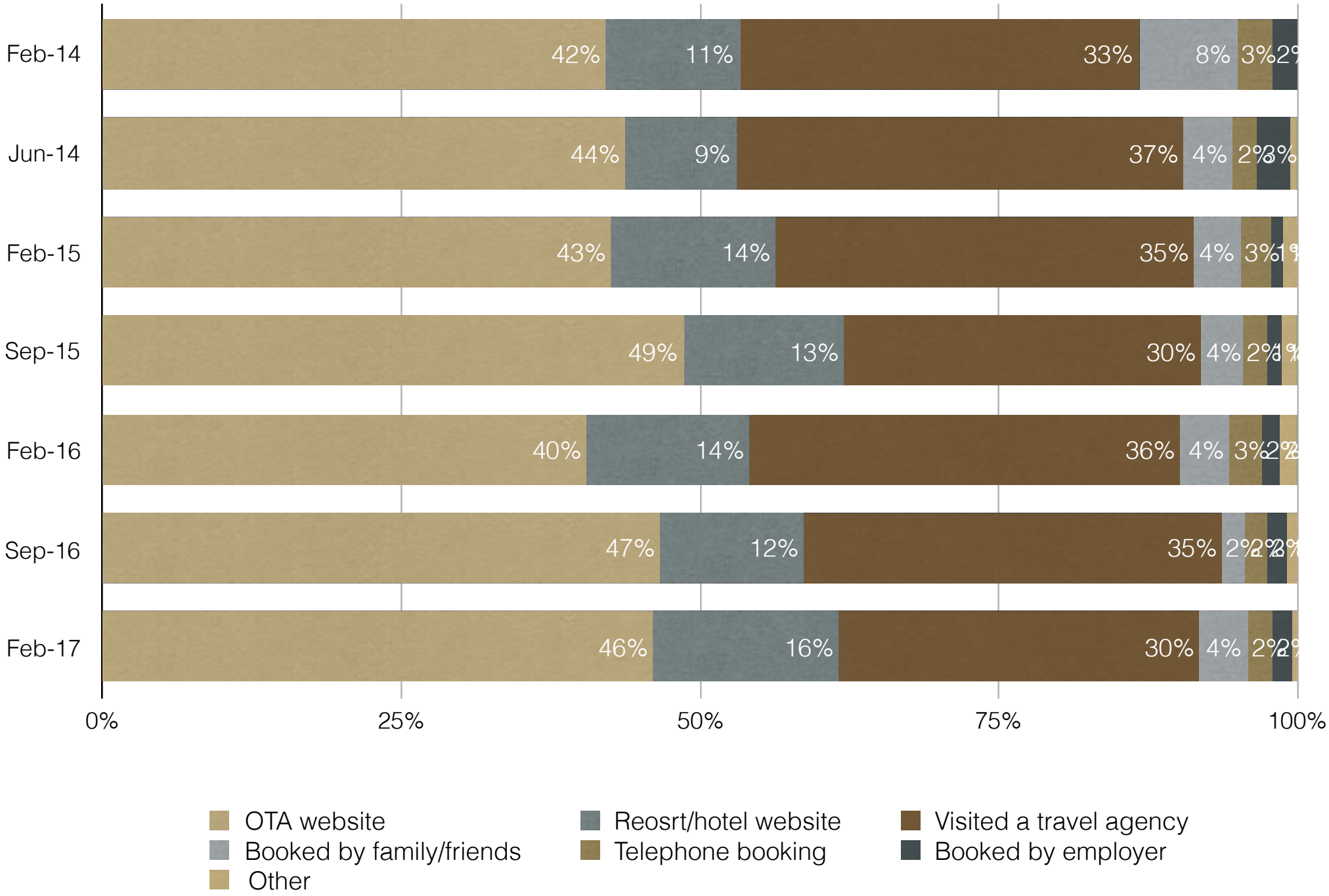
Of the international visitors to the Maldives in February 2017, visitors from Europe appear to visit travel agencies to book their accommodation more than visitors from other regions. About 61% of Germans, 48% of Swiss, 48% of French, and 45% of Italians indicated that they visited a travel agency to book their accommodation in the Maldives. Similarly, about 42% of visitors from Japan visited a travel agency to book accommodation.



ACCOMMODATION RESERVATION TRENDS

OTA AND RESORT WEBSITE BOOKINGS ARE INCREASING

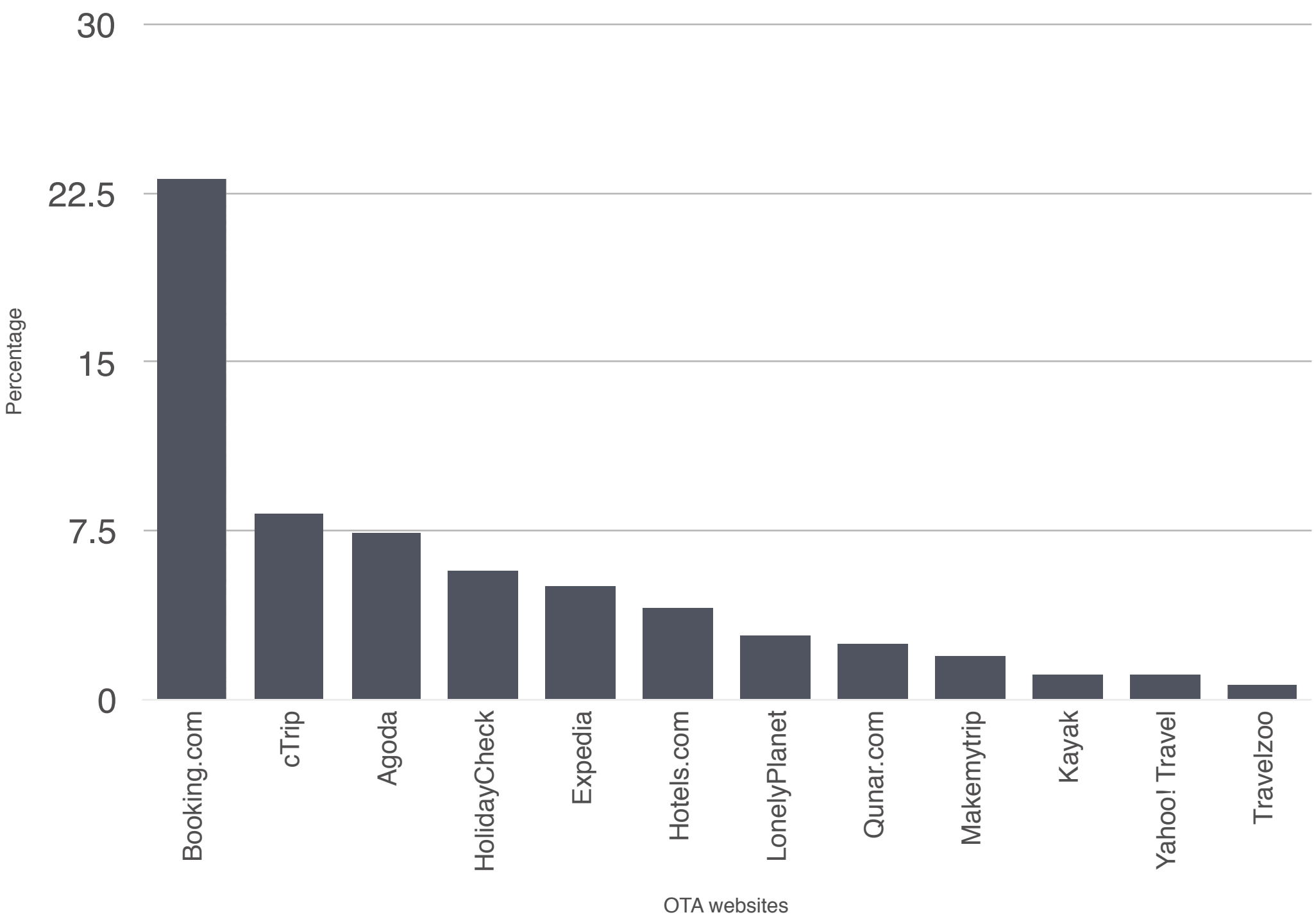
Number of visitors who use Online Travel Agents (OTAs) to book their stay in the Maldives has increased by four percentage points since February 2014. The proportion of visitors who book directly with hotel/resort websites is also growing. In contrast, visits to a travel agency to book stay in the Maldives show a declining trend.



OTA USED TO BOOK

BOOKING.COM IS THE MOST POPULAR OTA

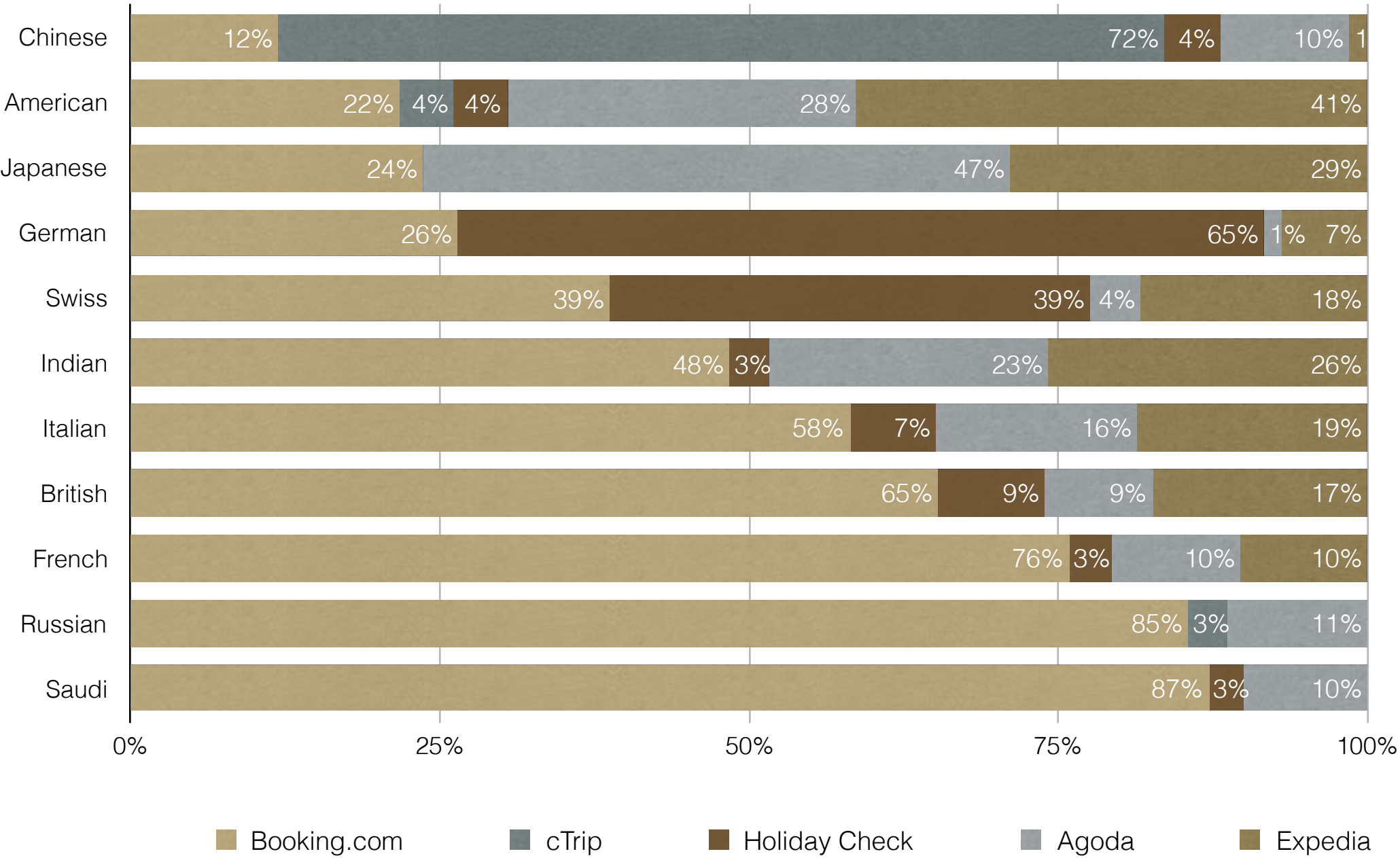
The top five OTAs used by visitors to the Maldives are [booking.com](#), cTrip, Agoda, HolidayCheck and Expedia. More than one out of every five visitors referred to [booking.com](#) to book their trip to the Maldives.



OTA WEBSITES BY NATIONALITY

PREFERRED OTA VARIES ACROSS NATIONALITIES

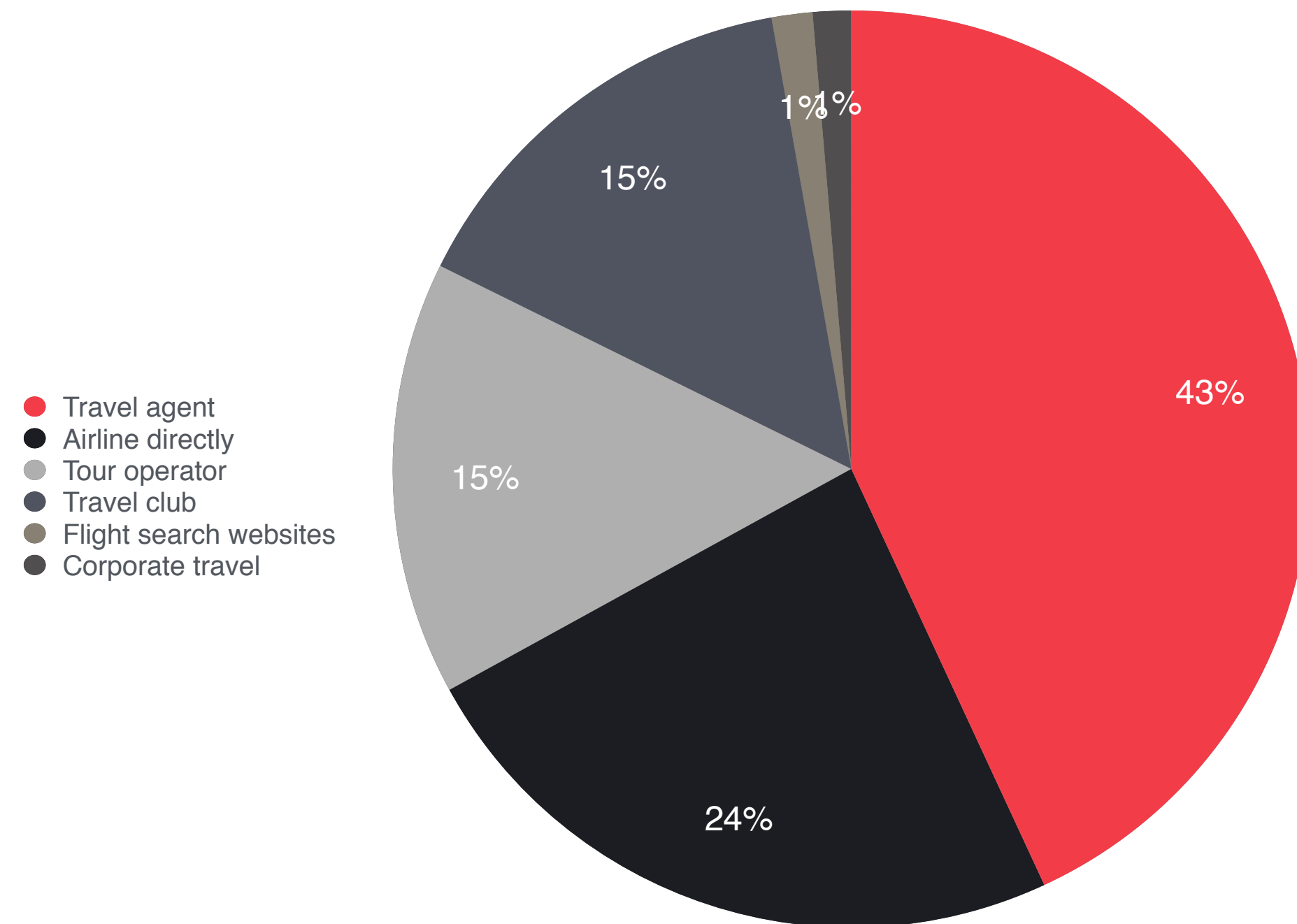
Booking.com is used by 87% of Saudi, 85% of Russian, and 76% of French visitors to the Maldives. About 65% of German visitors and 39% of Swiss visitors used HolidayCheck. cTrip is used by 48% of Chinese visitors. Agoda is the most popular OTA for Japanese visitors (47%) while Expedia is the most popular OTA for American visitors (41%).



AIRLINE RESERVATION

MOST VISITORS BOOK FLIGHTS THROUGH TRAVEL AGENTS

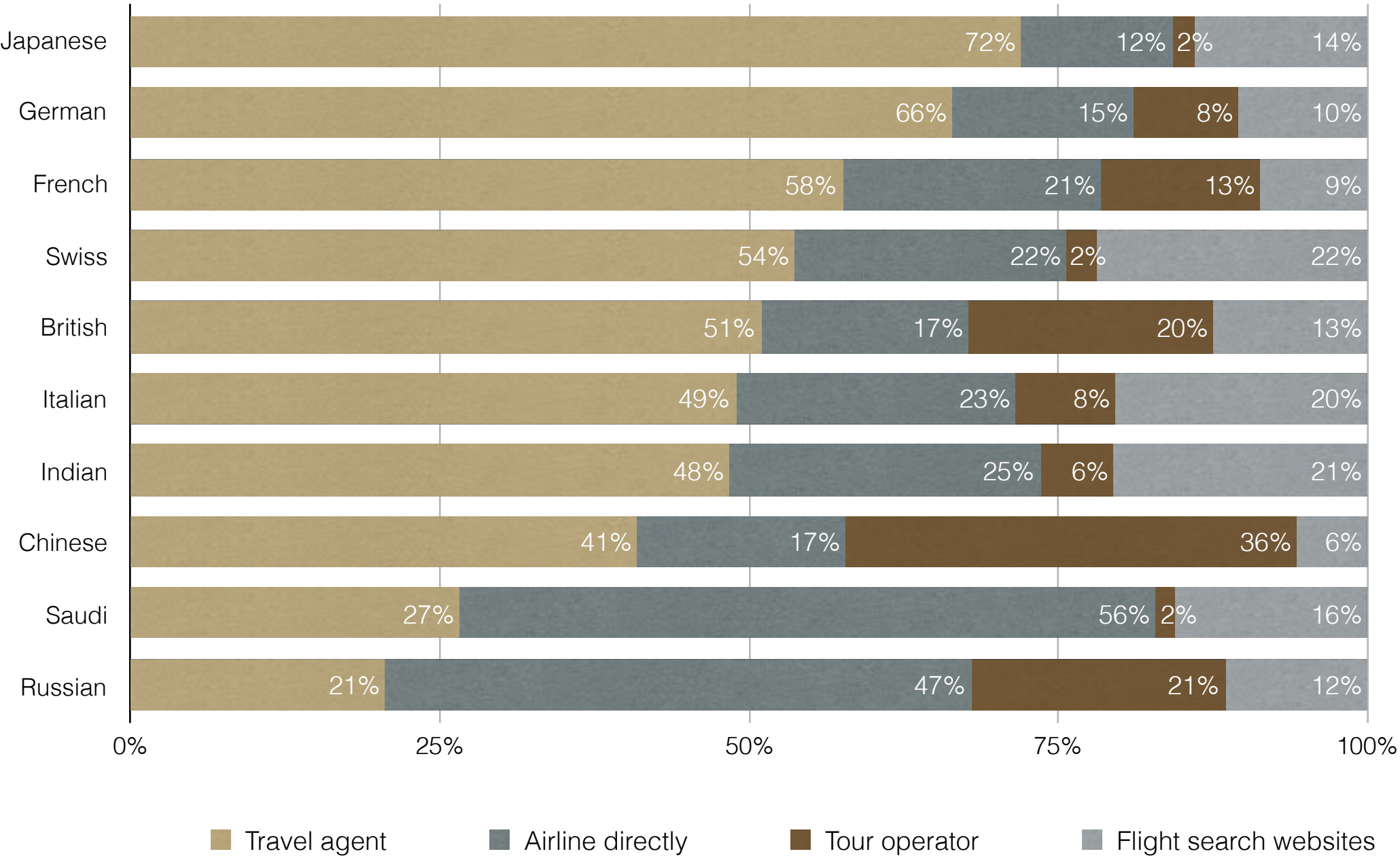
Of the international visitors to the Maldives, 43% booked their flights to the Maldives via travel agents while 24% of visitors booked their flights directly through airlines. Tour operators were used by 15% of visitors to book flights while 15% relied on travel clubs to make airline reservations to Maldives.

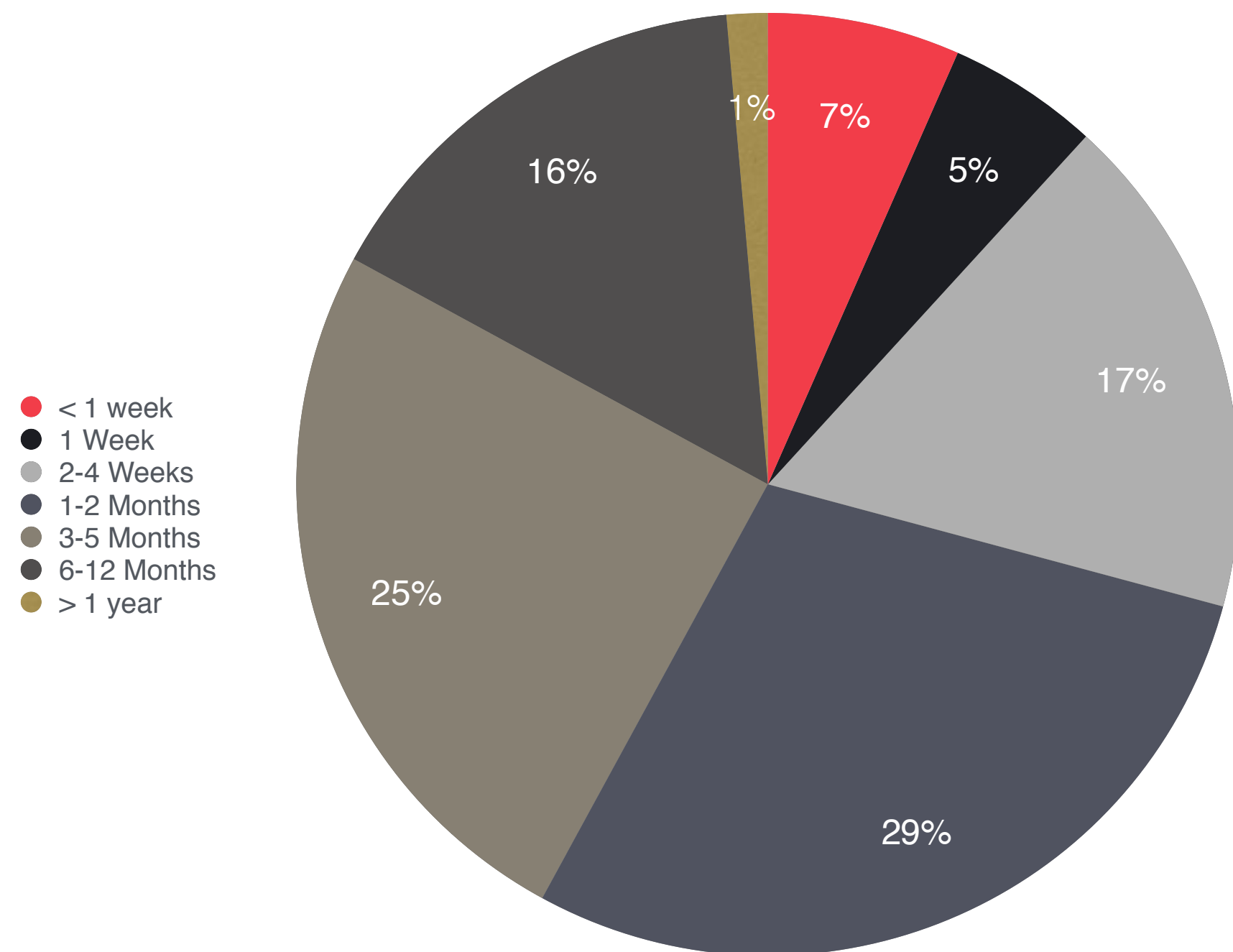


AIRLINE RESERVATION BY NATIONALITY

AIRLINE BOOKING IS MOST COMMON VIA TRAVEL AGENT

Most common avenue chosen for airline reservation is via a travel agent among all nationalities except for Saudis (56%) and Russians (47%) who preferred to book their flights directly from the airline. Airline booking was done through travel agents by 69% of Japanese, 64% German, and 54% French. Airline reservation by tour operator is common among Chinese (35%), Russian (20%) and British (19%) visitors compared to other nationalities.





BOOKING PERIOD

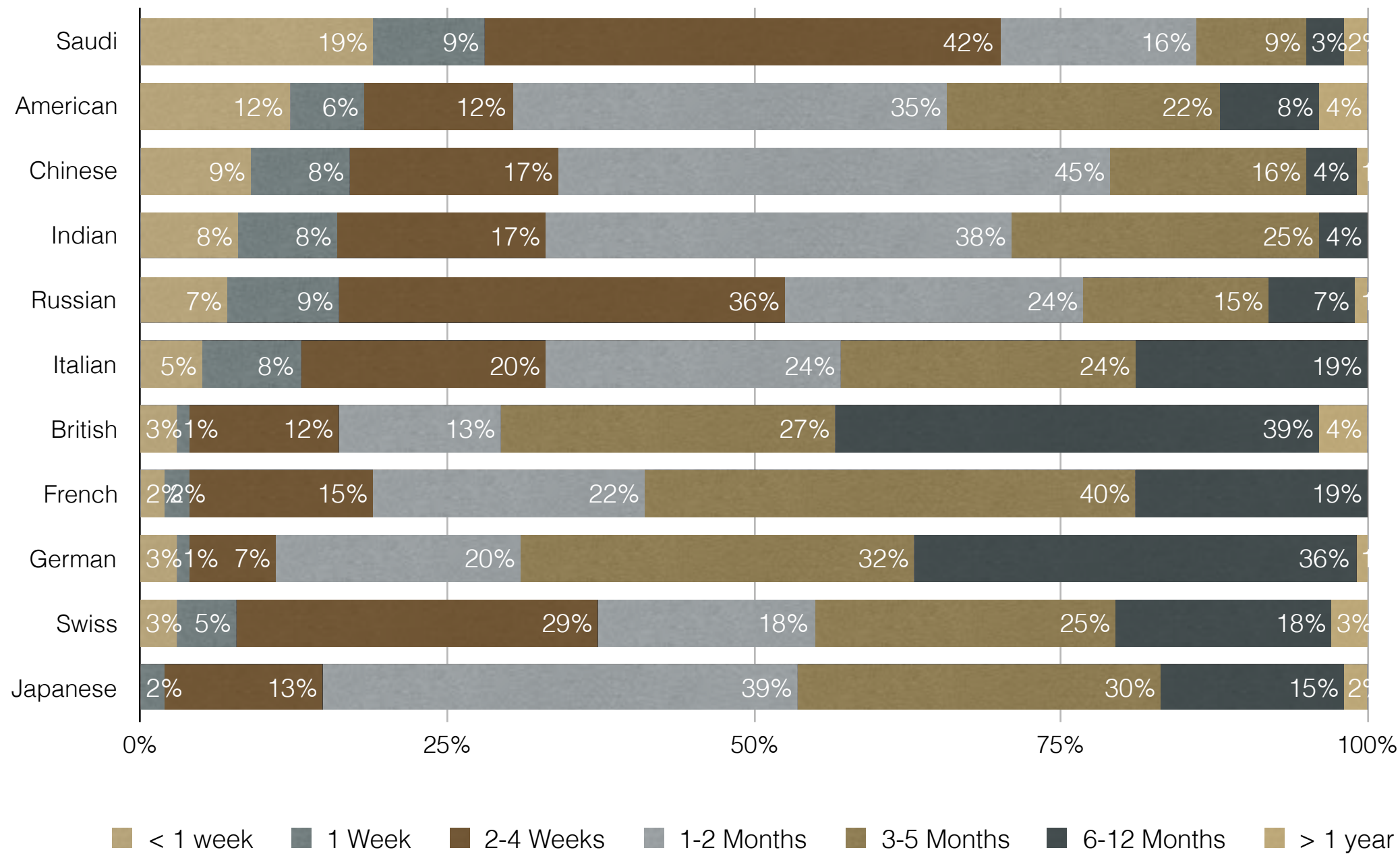
MAJORITY BOOK HOLIDAY 1-5 MONTHS PRIOR TO TRAVEL

Of the international visitors who visited the Maldives in February 2017, 29% had booked their holiday 1-2 months in advance while 25% had booked their holiday about 3-5 months in advance. It is noteworthy that 12% of the international visitors to the Maldives in the peak season of 2017 had booked their holiday just a week prior to travel.

BOOKING PERIOD BY NATIONALITY

BRITISH, GERMAN AND FRENCH BOOK THE EARLIEST

Except for Russian and Swiss visitors in February 2017, most visitors from European nationalities booked their travel 03 to 12 months in advance. About 36% of Russians and 30% of Swiss booked their travel 2-4 weeks in advance. Of the visitors from Britain, 43% booked their travel more than 6 months in advance. Similarly, 38% of Germans booked their travel 6 months or earlier. It is noteworthy that from the Asian market, 45% Chinese, 39% Japanese and 38% Indians booked their holiday 1-2 months prior to travel. More than 40% of Saudi visitors booked their holiday 2-4 weeks prior to travel.



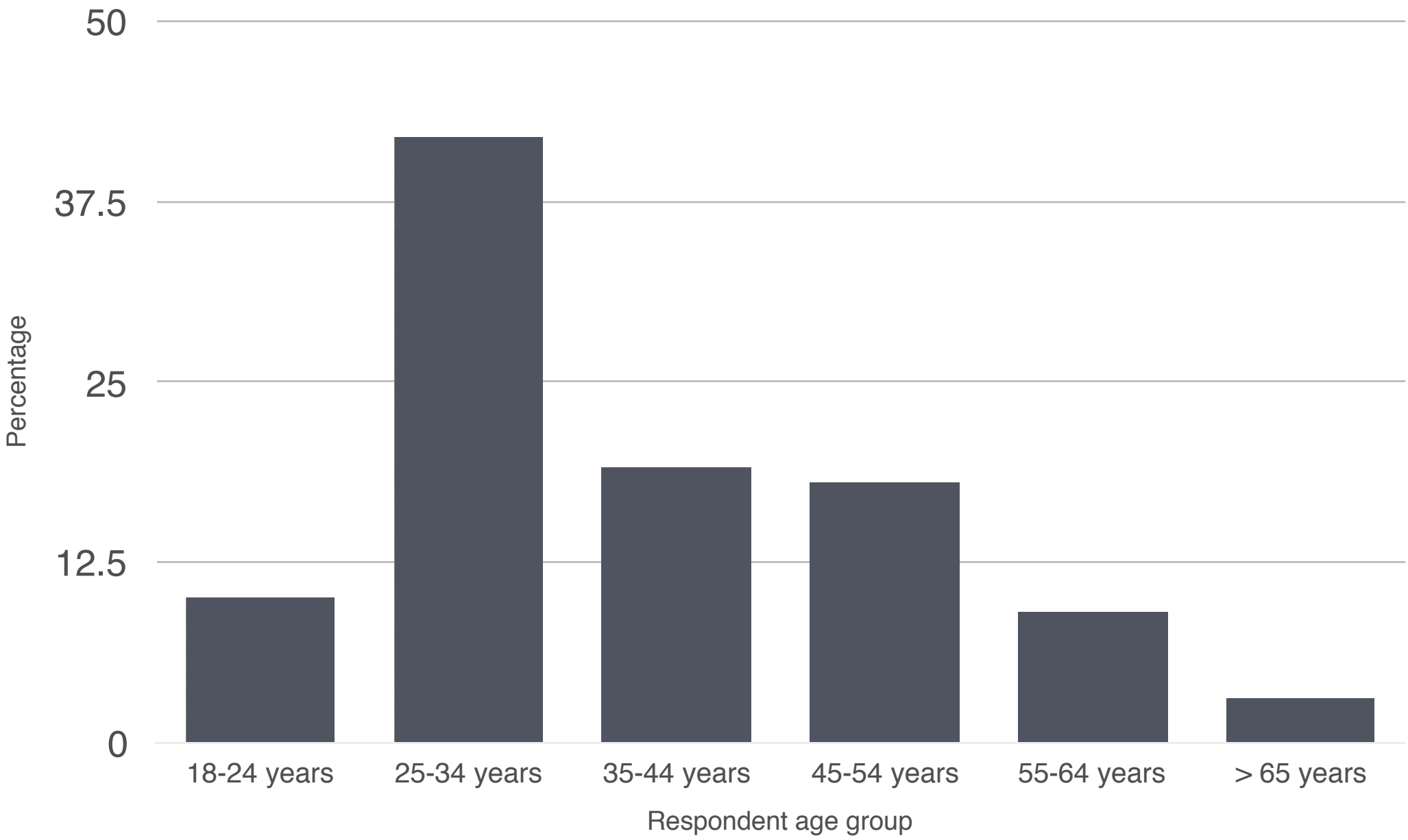


VISITOR
PROFILE

AGE GROUP

25-34 AGE GROUP IS HIGHEST FOR FEBRUARY 2017

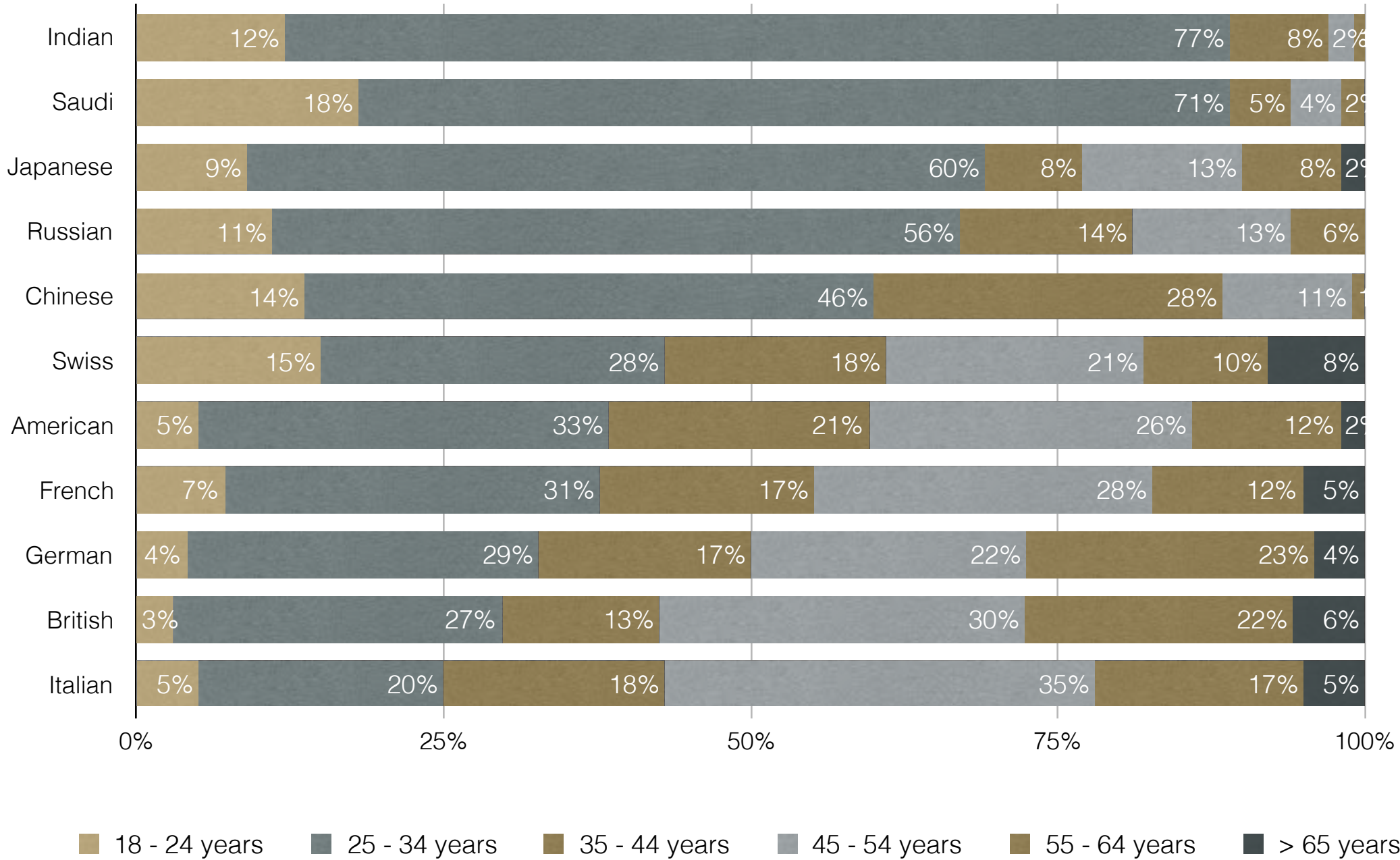
The highest number of visitors to the Maldives during the February 2017 were in age group of 25 to 34 years.



AGE GROUP BY NATIONALITY

VISITORS FROM ASIA ARE YOUNGER COMPARED TO EUROPE

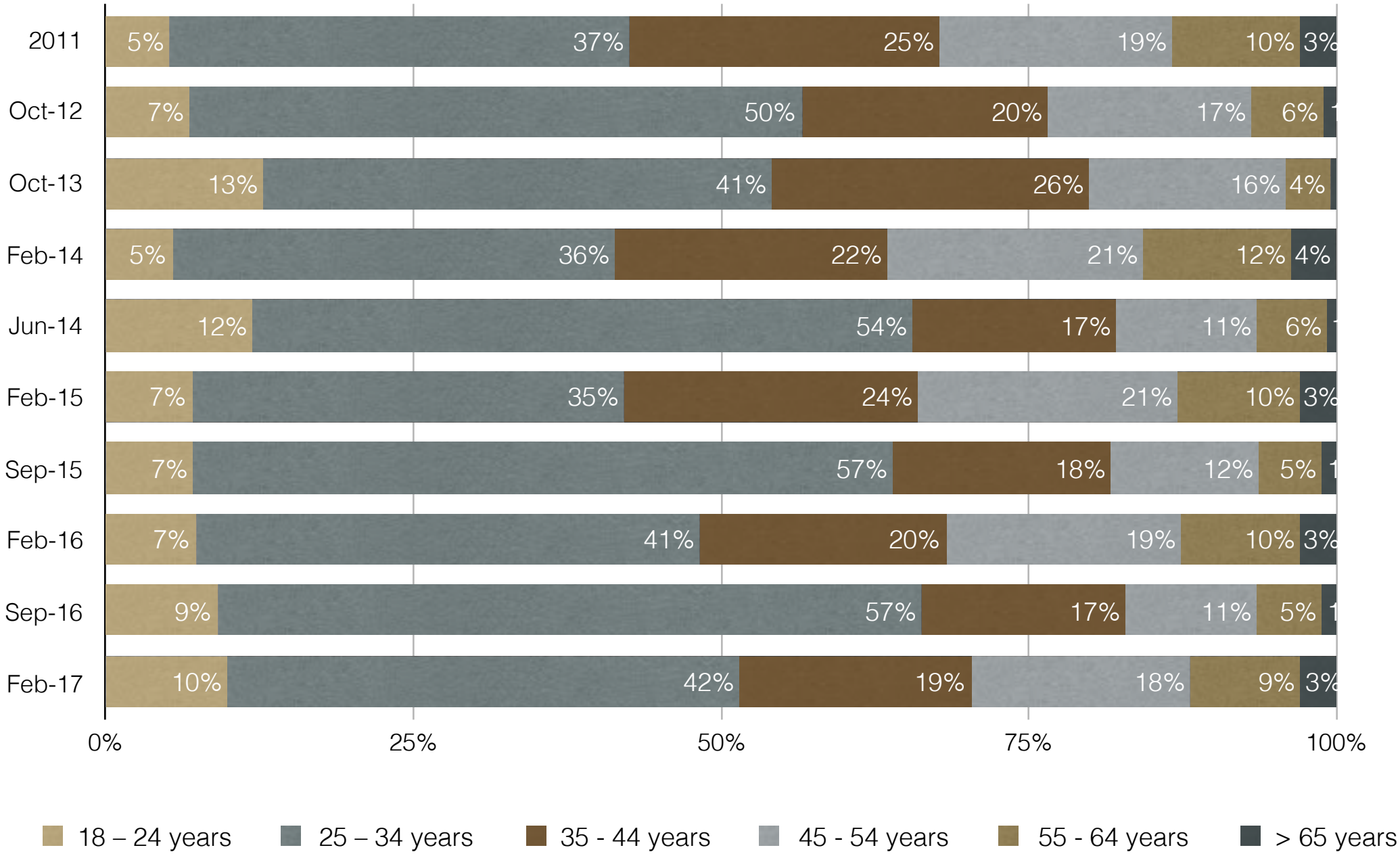
According to the February 2017 survey, visitors to Maldives from Asia are younger compared to visitors from Europe. Reported age of visitors from Asia shows that 77% Indian, 71% Saudi, 60% Japanese and 44% Japanese visitors belong to the age group 25-34 years. In contrast, 30% of British visitors are in the age group 45-54 years while 22% belong to 55-64 years age group. Almost 50% of visitors from Germany, France and Italy are over 45 years. However, about 60% of Russian visitors are below 34 years.

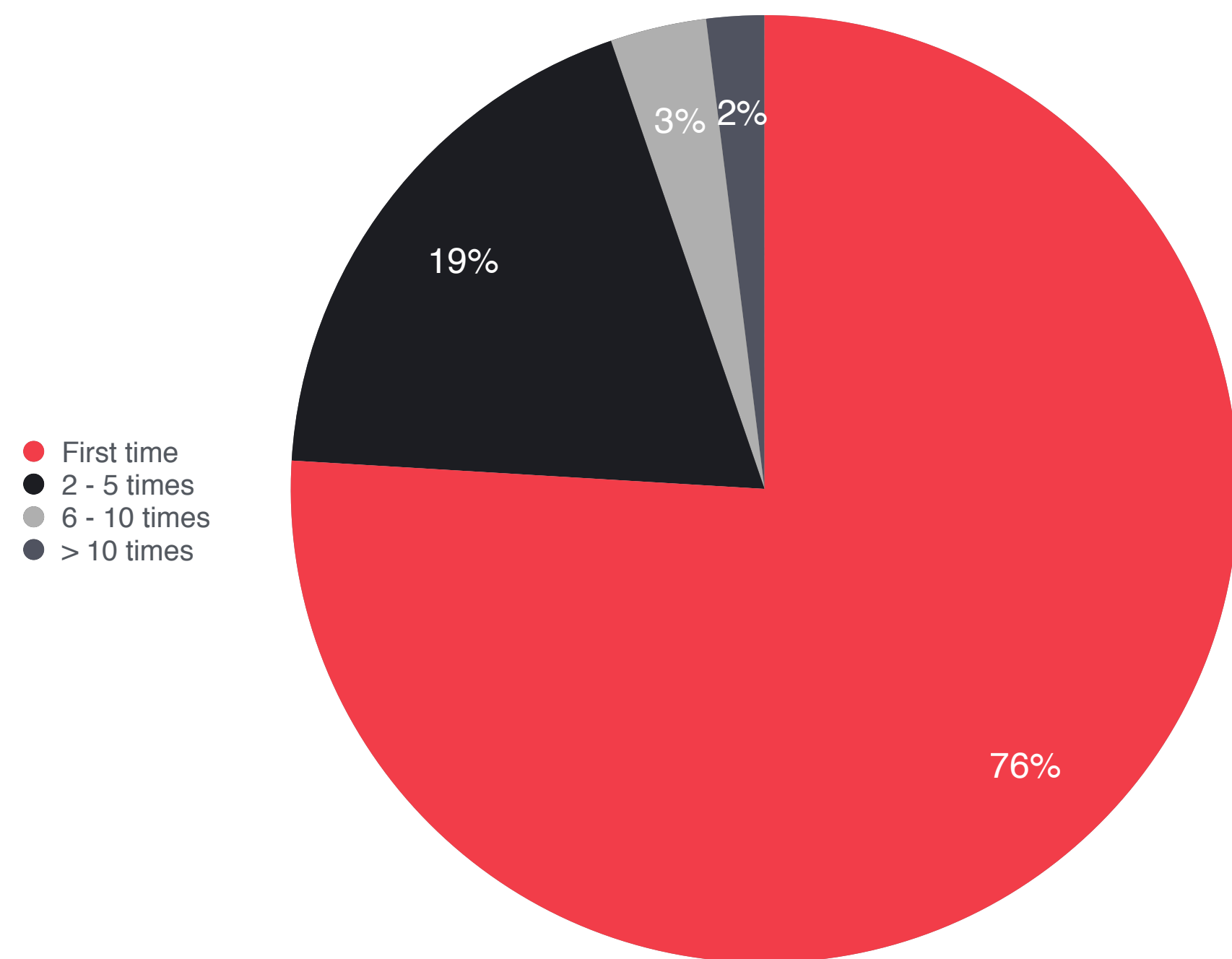


AGE GROUP TRENDS

MATURE TRAVELLERS VISIT MORE DURING THE PEAK SEASON

Number of visitors over the age of 35 years and above is higher during the peak tourist season in the Maldives, while visitors below the age of 35 years are more during the off peak season in the Maldives.





REPEAT VISITORS

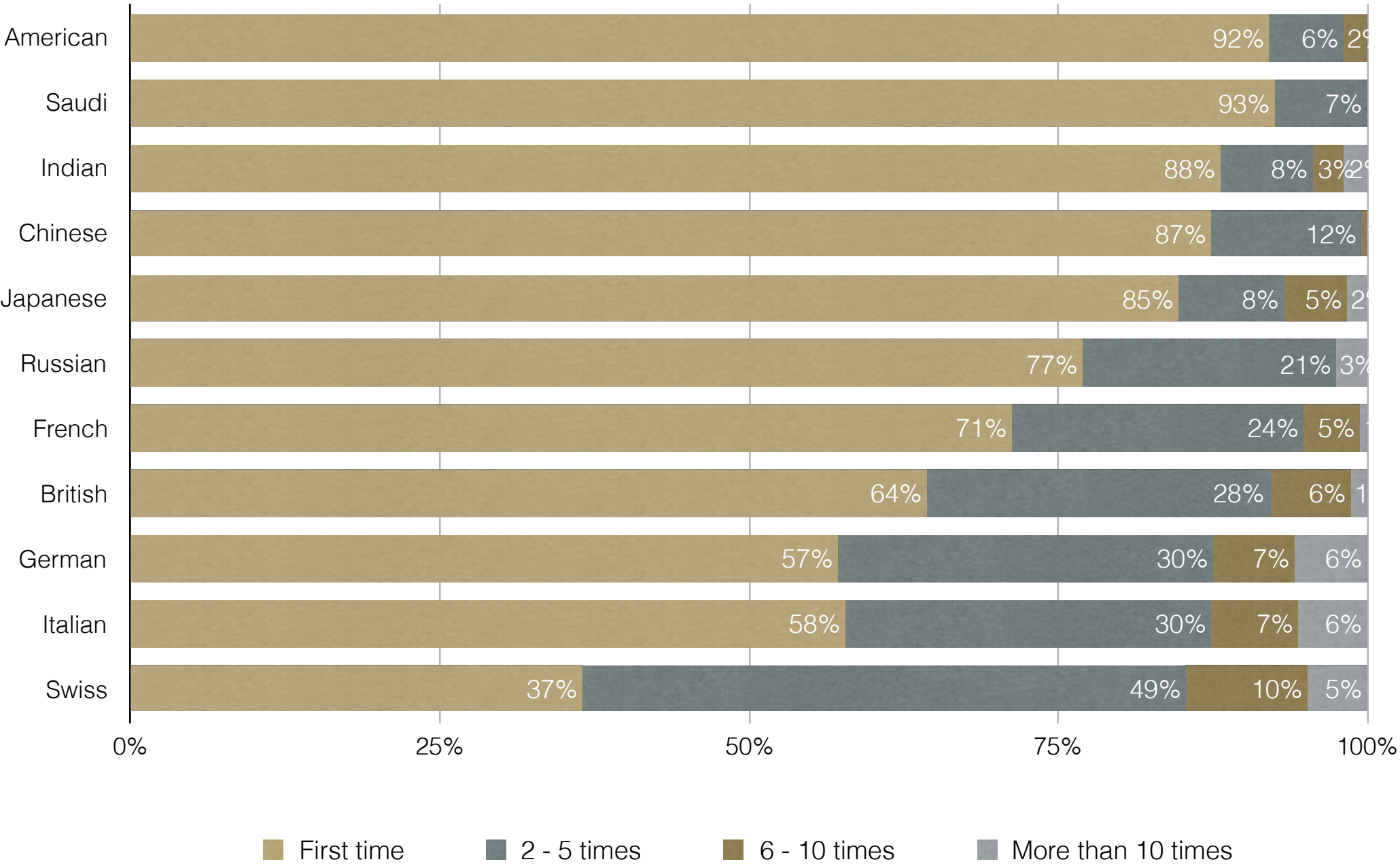
ONE OUT OF EVERY FOUR VISITORS IS A REPEAT VISITOR

Repeat visitors constituted 24% of the international visitors to the Maldives during the peak season of 2017. Of the international visitors, 19% had visited Maldives more than 2 to 5 times, while 3% had visited 6 to 10 times and 2% had visited more than 10 times.

REPEAT VISITORS BY NATIONALITY

REPEAT VISITORS ARE HIGHEST FROM SWITZERLAND

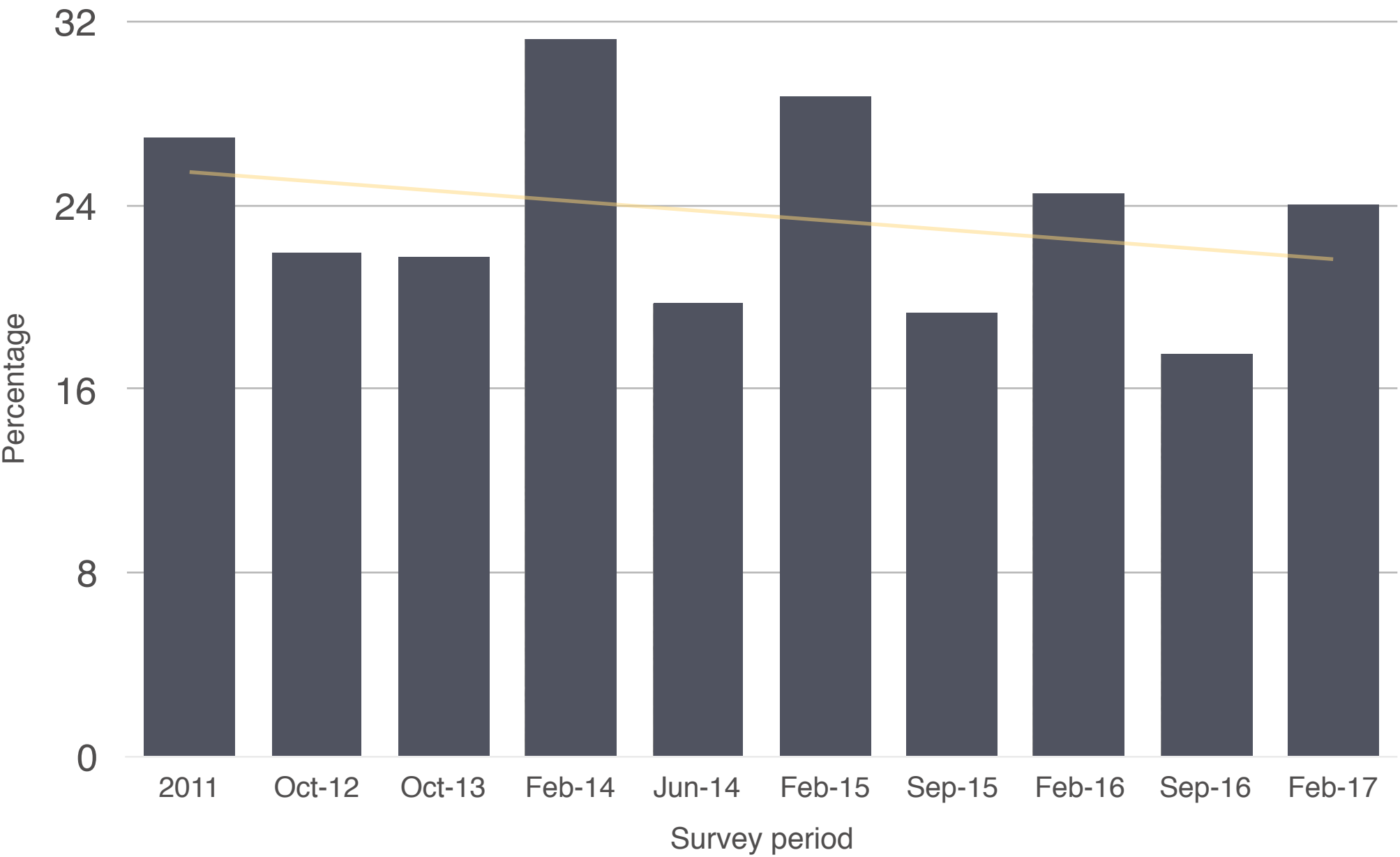
Analysis of survey results show that repeat visitors are highest from Europe. It is noteworthy that 63% of visitors from Switzerland in February 2017 were repeat visitors. Similarly about 40% of visitors from Italy and Germany had visited the Maldives before. Of the visitors from Britain 36% are repeat visitors and 29% of French are repeat visitors as well.



REPEAT VISITOR TRENDS

REPEAT VISITS ARE ON A DOWNWARD TREND

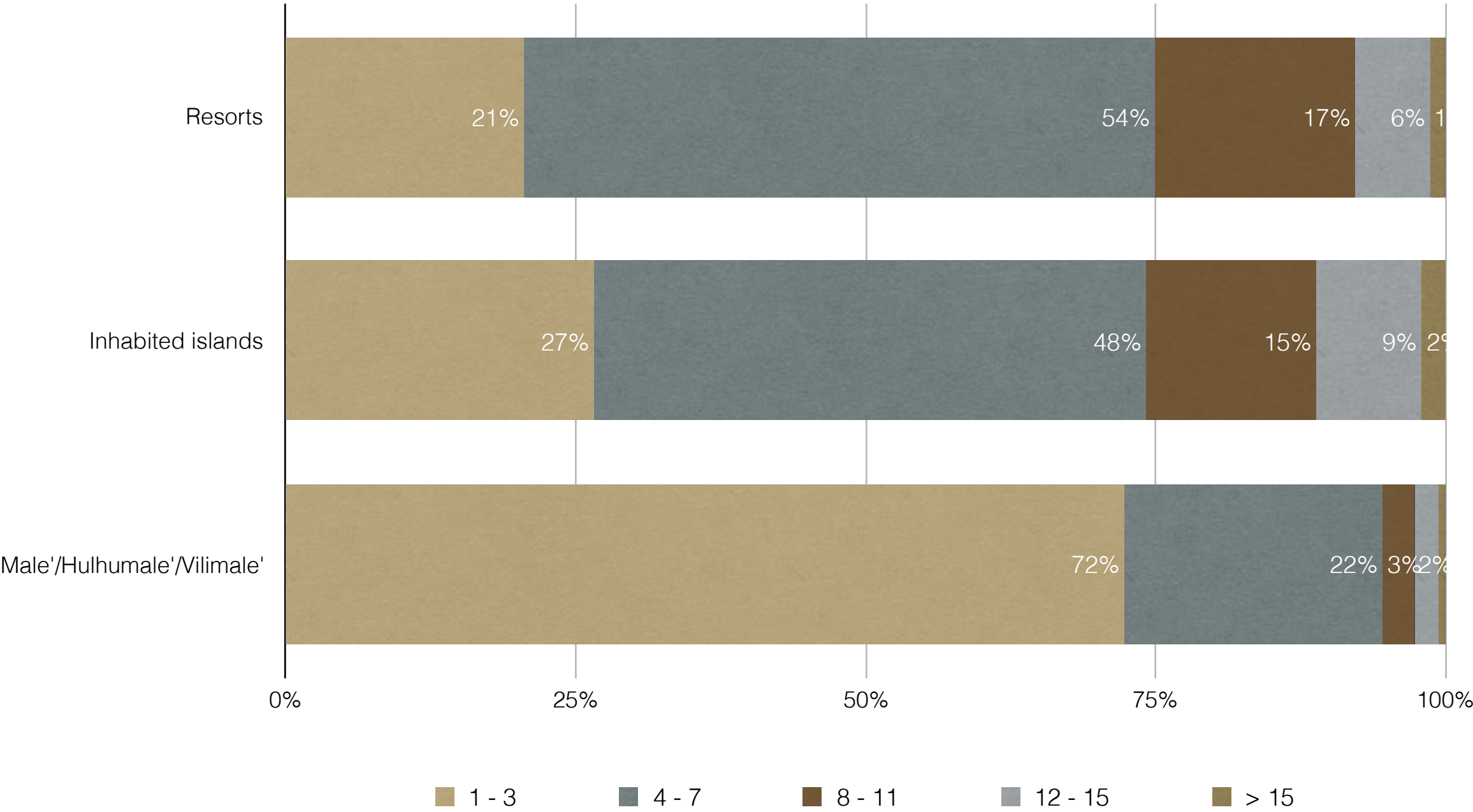
The repeat visitor analysis shows a declining trend. This is perhaps due to the dominance of the Asian market in the last few years.



LENGTH OF STAY IN MALDIVES

NUMBER OF NIGHTS FOR RESORTS AND GUEST HOUSE STAYS SHOW SIMILAR TRENDS

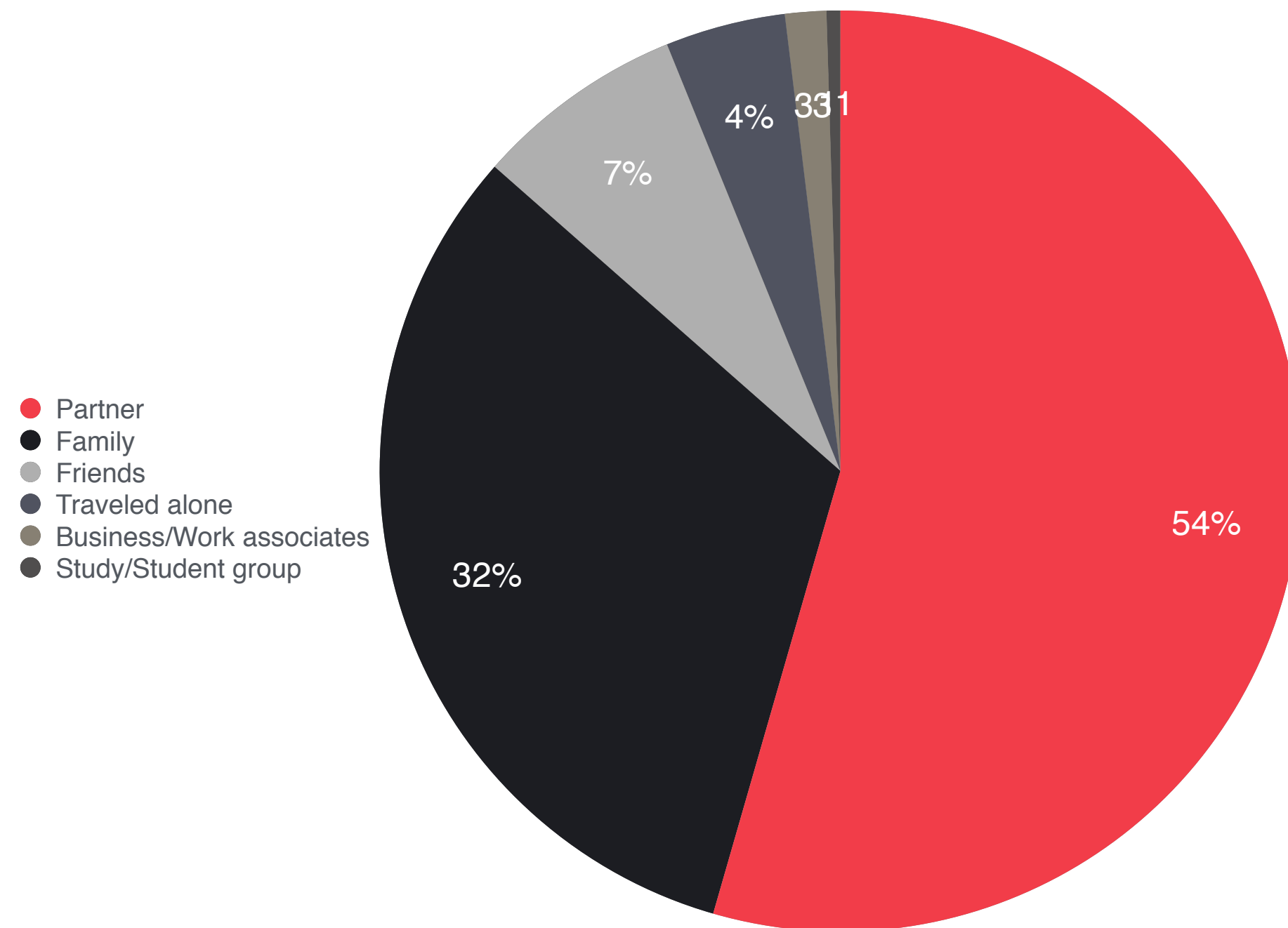
More than half of international visitors to the Maldives (58%) stay for 4-7 nights, while 18% stay for 8-11 nights and 12% stay for 1 to 3 nights. Average nights spent in Maldives by visitors who stay in guesthouses is lower compared to visitors who stay in resort islands. Among visitors who stayed in resorts, German visitors sated the longest with an average duration of stay of nine nights



TRAVEL COMPANION

FOUR OUT OF EVERY FIVE VISITORS TRAVELLED WITH PARTNER OR FAMILY

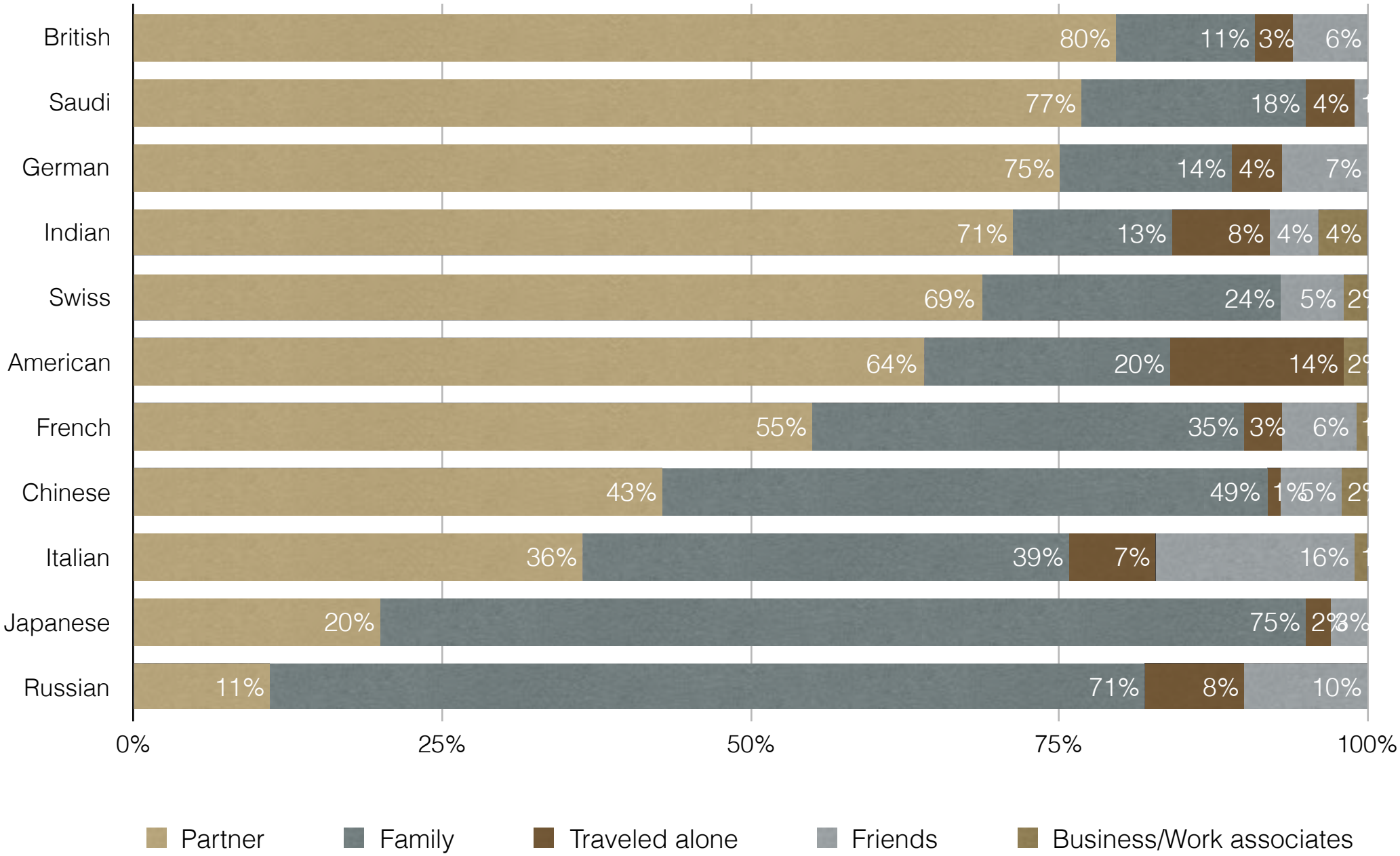
Of the the international visitors, 54% travelled with their partners to the Maldives while 32% traveled with family. 7% said they travelled to the Maldives with their friends while 4% travelled with business or work associates.



TRAVEL COMPANION BY NATIONALITY

HIGH NUMBER OF JAPANESE AND RUSSIANS TRAVELLED WITH FAMILY

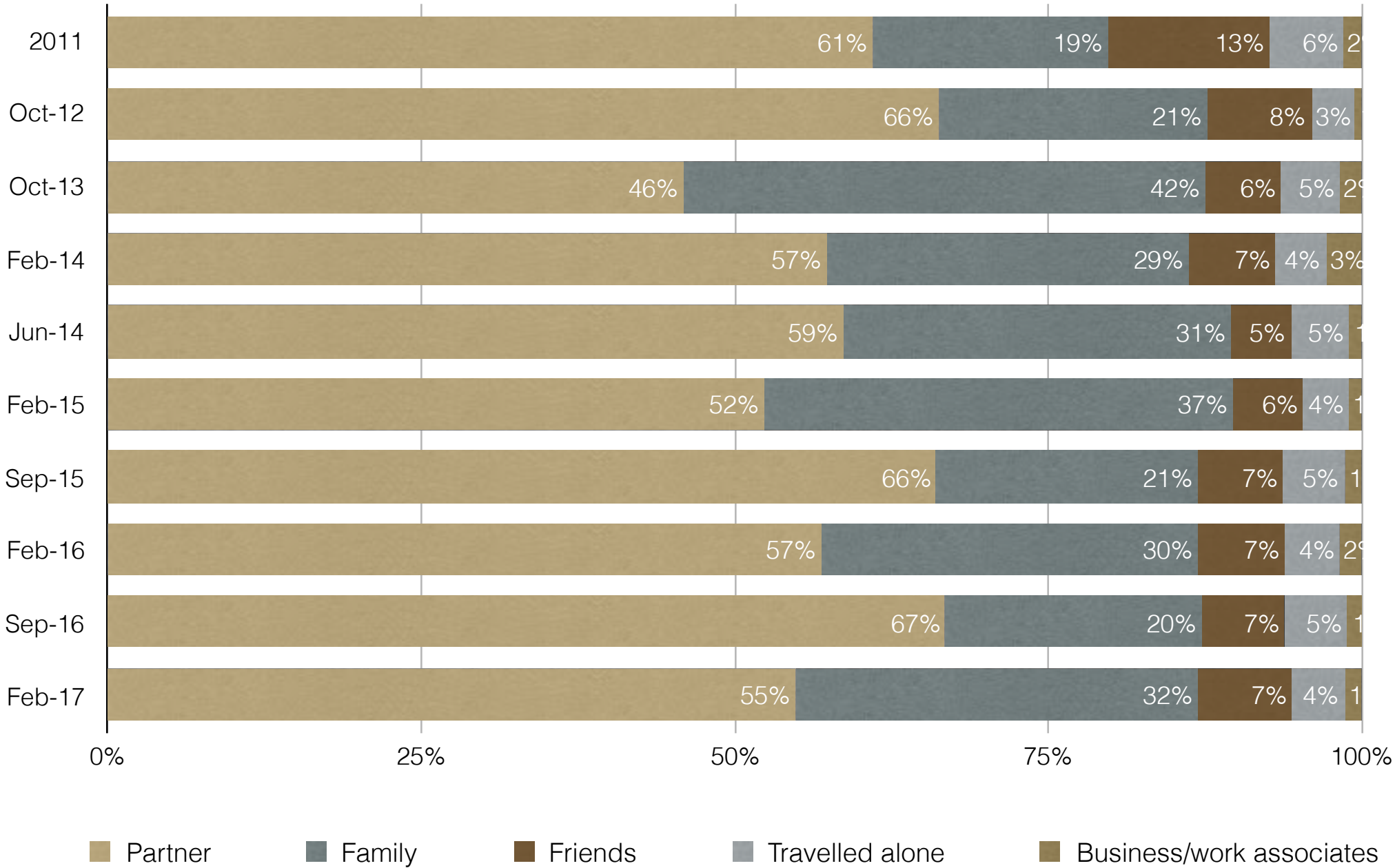
Except for Japanese and Russian visitors, majority of visitors from all nationalities travelled with their partner. About 75% of Japanese and 71% of Russian visitors travelled to Maldives with their families. Among all nationalities, American visitors travelled alone the most (14%)



TRAVEL COMPANION TRENDS

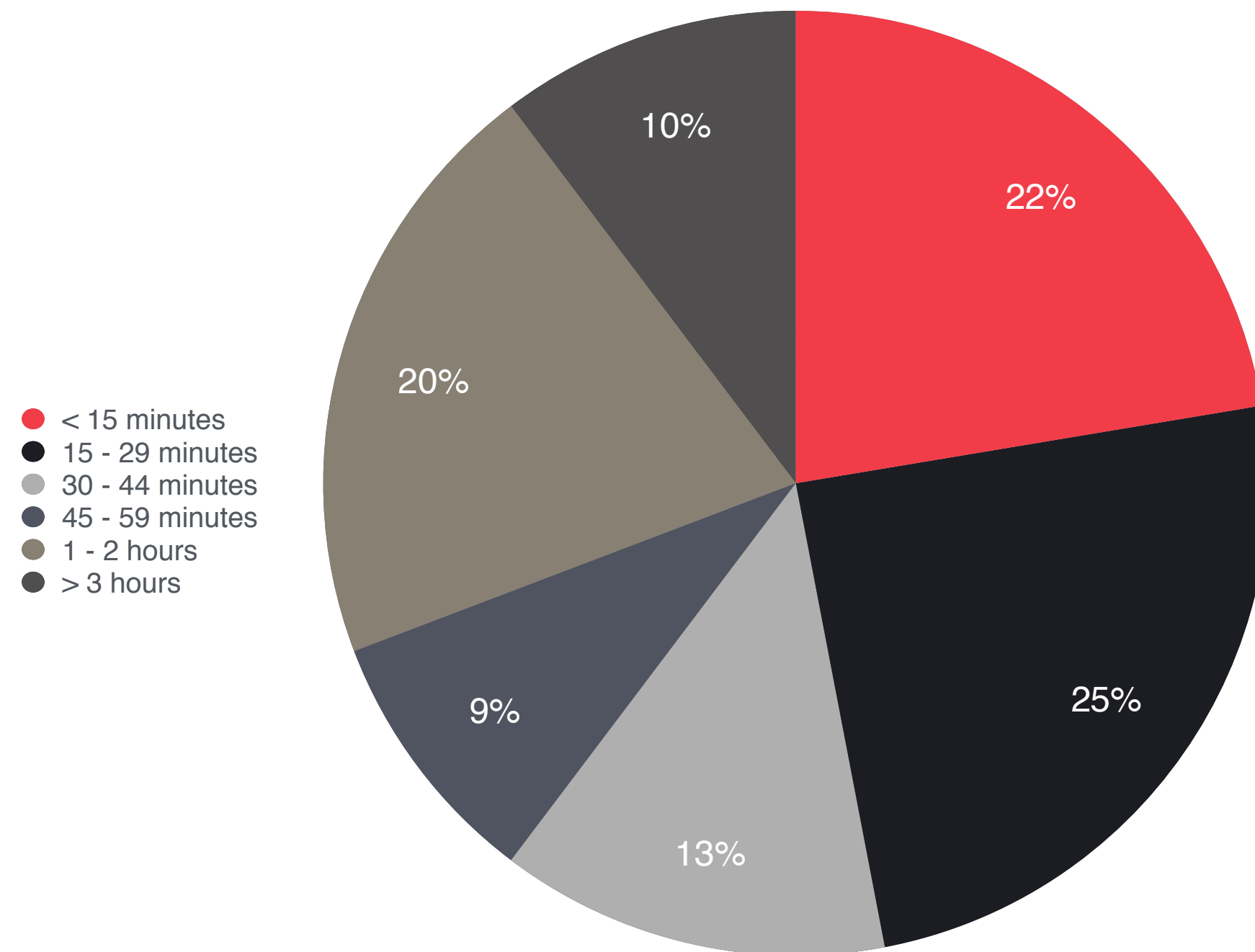
TRAVEL WITH FAMILY IS HIGHER DURING PEAK SEASON

MVS trends show that more people travel with their family during the peak season compared to the off peak season. The peak tourist season falls incidentally with the school holiday season period around the world.





VISITOR EXPERIENCE



WAITING TIME AT AIRPORT

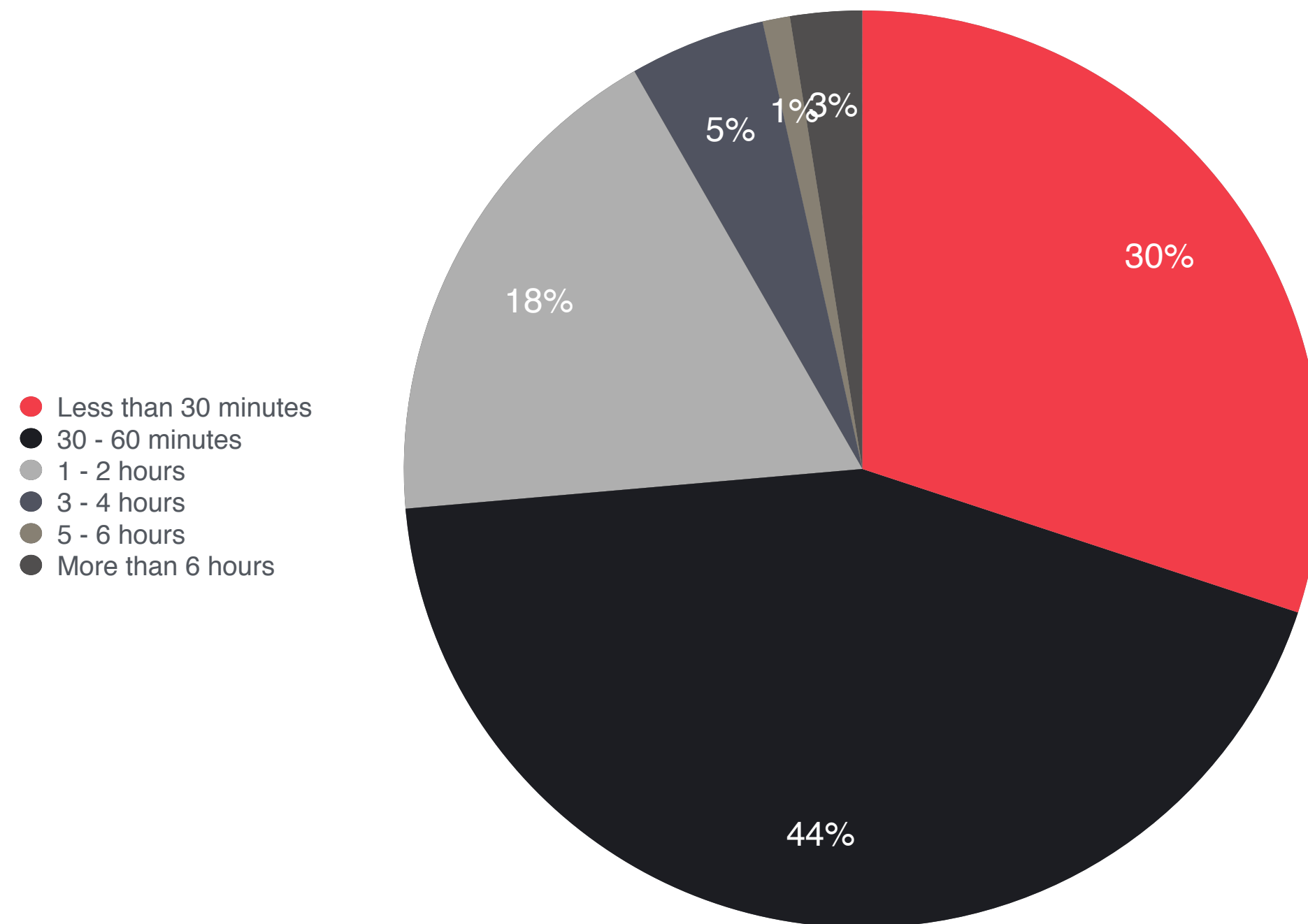
47% WAITED FOR LESS THAN 30 MINUTES AT AIRPORT

While 47% of visitors had to stay for less than half an hour, 30% of the visitors had to stay for more than one hour at the airport before their hotel transfer.

TIME FROM AIRPORT TO PLACE OF STAY

THREE OUT OF FOUR REACH PLACE OF STAY WITHIN AN HOUR

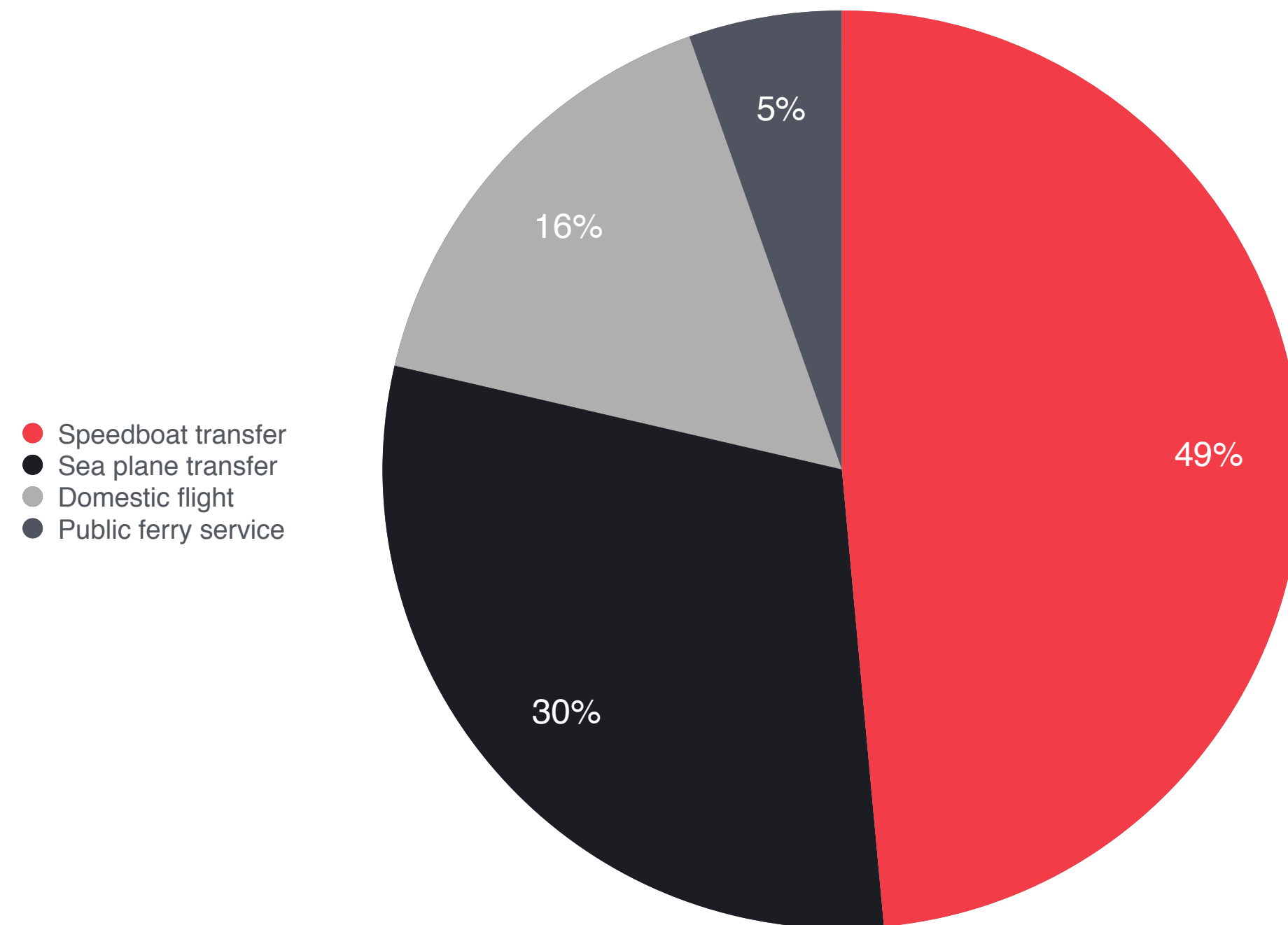
While 75% of visitors reached within one hour their place of stay from Velana International Airport, for 18% it took 1-2 hours, for 5% it took 3-4 hours and for 4% of visitors it took 5 hours or more to reach their place of stay.



TRANSPORT FROM AIRPORT TO HOTEL

ONE OUT OF EVERY TWO VISITORS TOOK SPEEDBOAT TRANSFERS

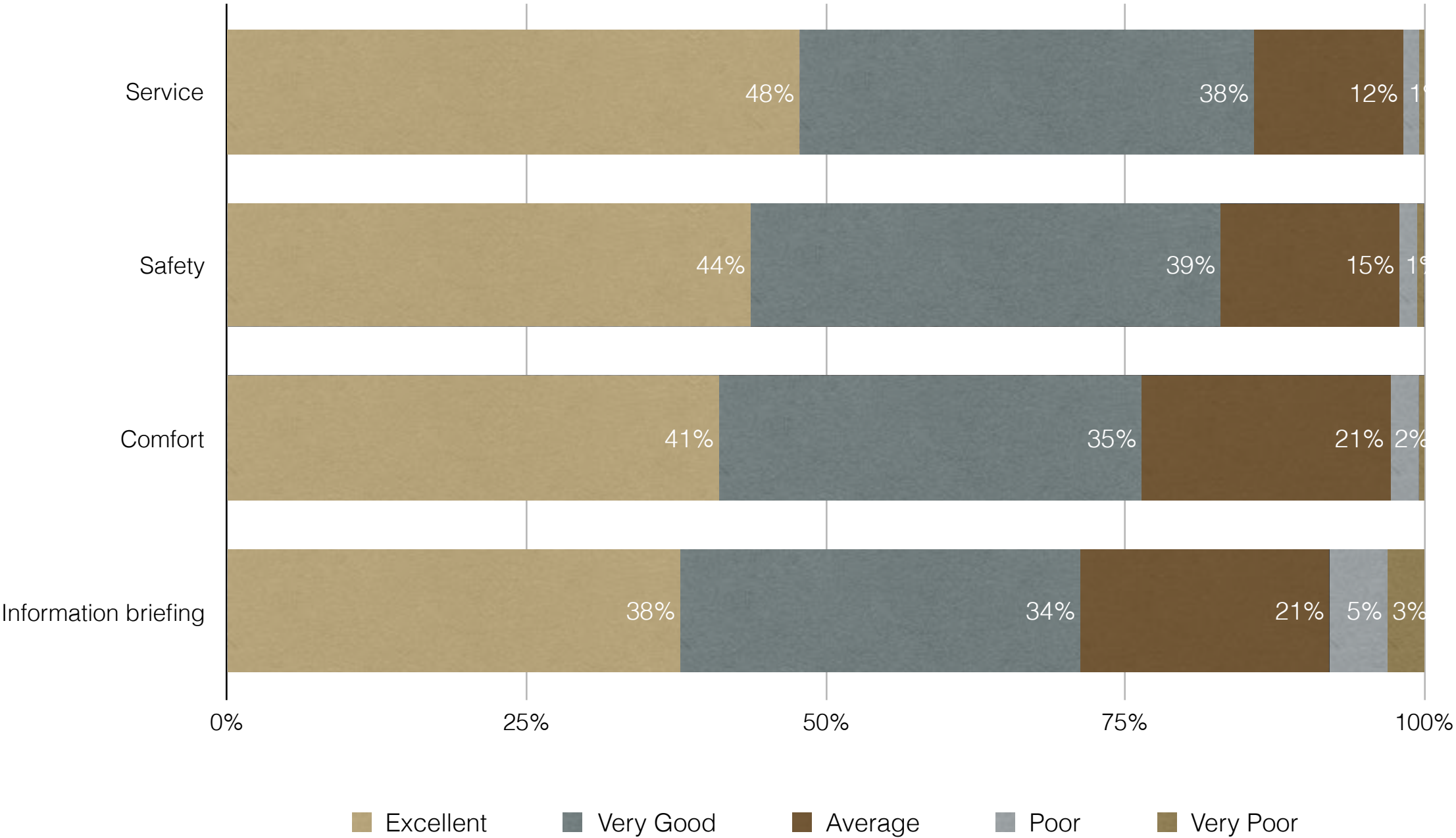
About 49% of the visitors to the Maldives in February 2017 reached their place of stay via speedboat transfers from the airport. Of the visitors, 30% travelled by seaplane and 16% by domestic flights while 5% took the public ferries to reach their place of stay.



QUALITY OF HOTEL TRANSFER

INFORMATION BRIEFING NEEDS IMPROVEMENT

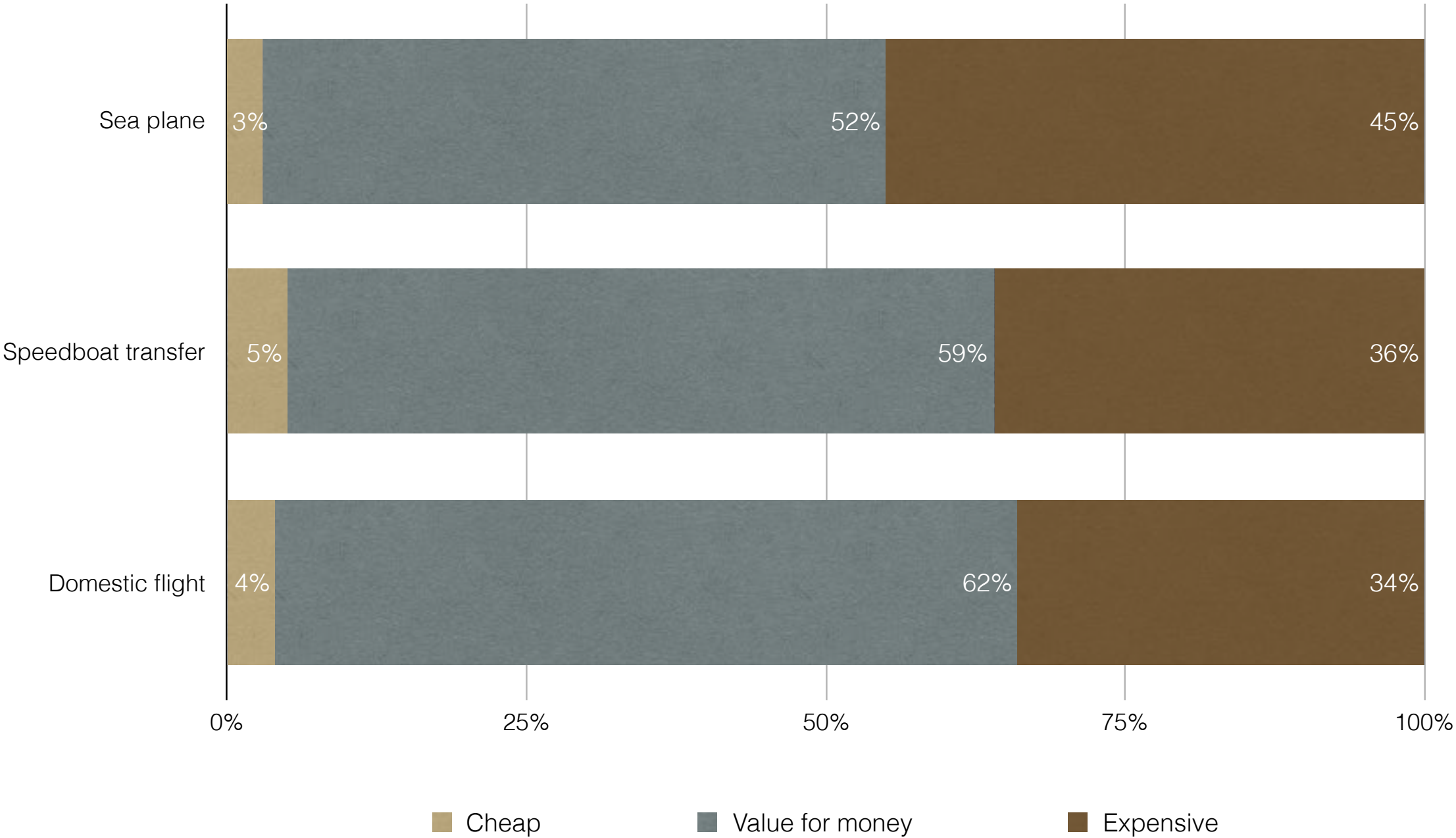
Quality aspects of hotel transfer were ranked excellent or good by most visitors. Information briefing is the weakest when compared with other quality of hotel indicators.



PRICES CHARGED FOR TRANSPORT

DOMESTIC FLIGHTS WERE CONSIDERED MOST VALUE FOR MONEY

Of those visitors who travelled on domestic flights, 62% considered the prices charged value for money while 59% of travellers considered speedboats prices as value for money. Sea planes ticket prices were considered value for money by 52% of visitors.



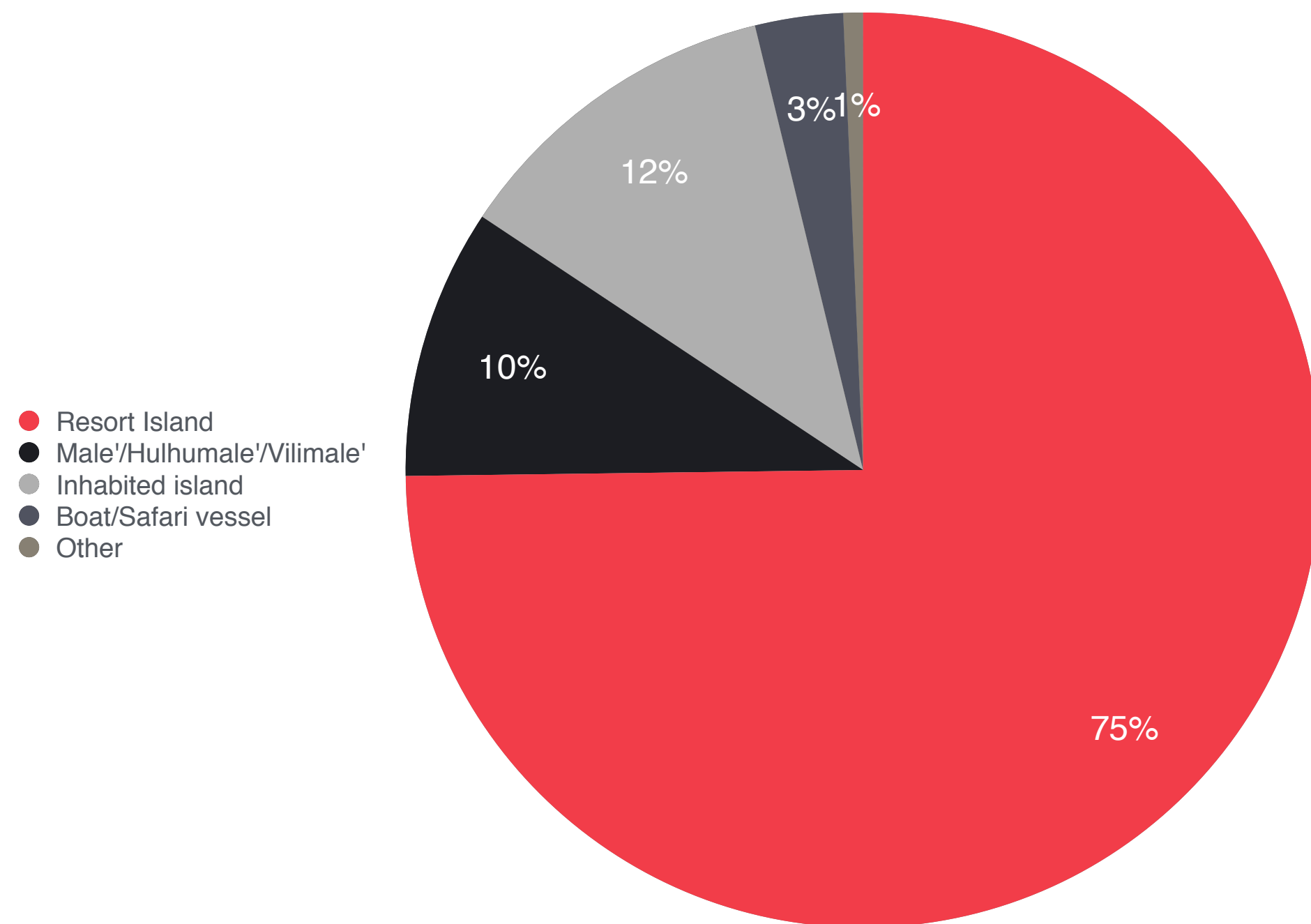
A wide-angle photograph of a tropical beach. In the foreground, a wide, sandy beach curves from the left towards the center. The water is exceptionally clear, showing a gradient from light turquoise near the shore to a deeper blue further out. On the right side, a white overwater bungalow with multiple tiered, pyramid-shaped roofs sits on wooden stilts. A long wooden pier extends from the bungalow towards the right edge of the frame. The sky is a solid, deep blue, indicating a clear day.

STAY
IN THE
MALDIVES

PLACE OF STAY

THREE OUT OF EVERY FOUR VISITORS STAYED IN RESORTS

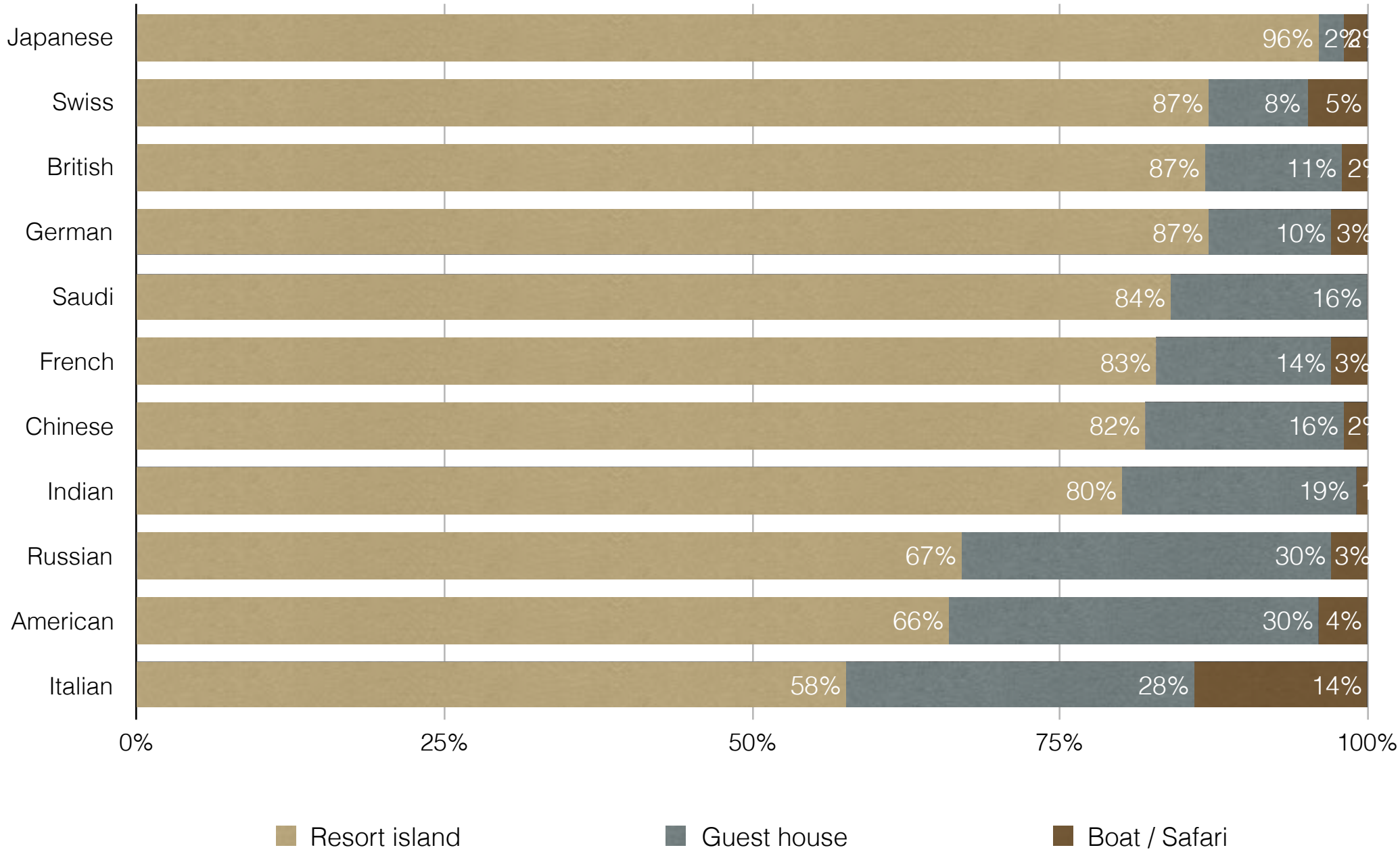
About 75% of the visitors to the Maldives stayed in tourist resort islands. Visitors who stayed in hotels and guest houses in inhabited islands of the Maldives accounted for about 22% of the international visitors in the 2017 peak survey period.



PLACE OF STAY BY NATIONALITY

ITALIANS DOMINATE SAFARI BOAT MARKET

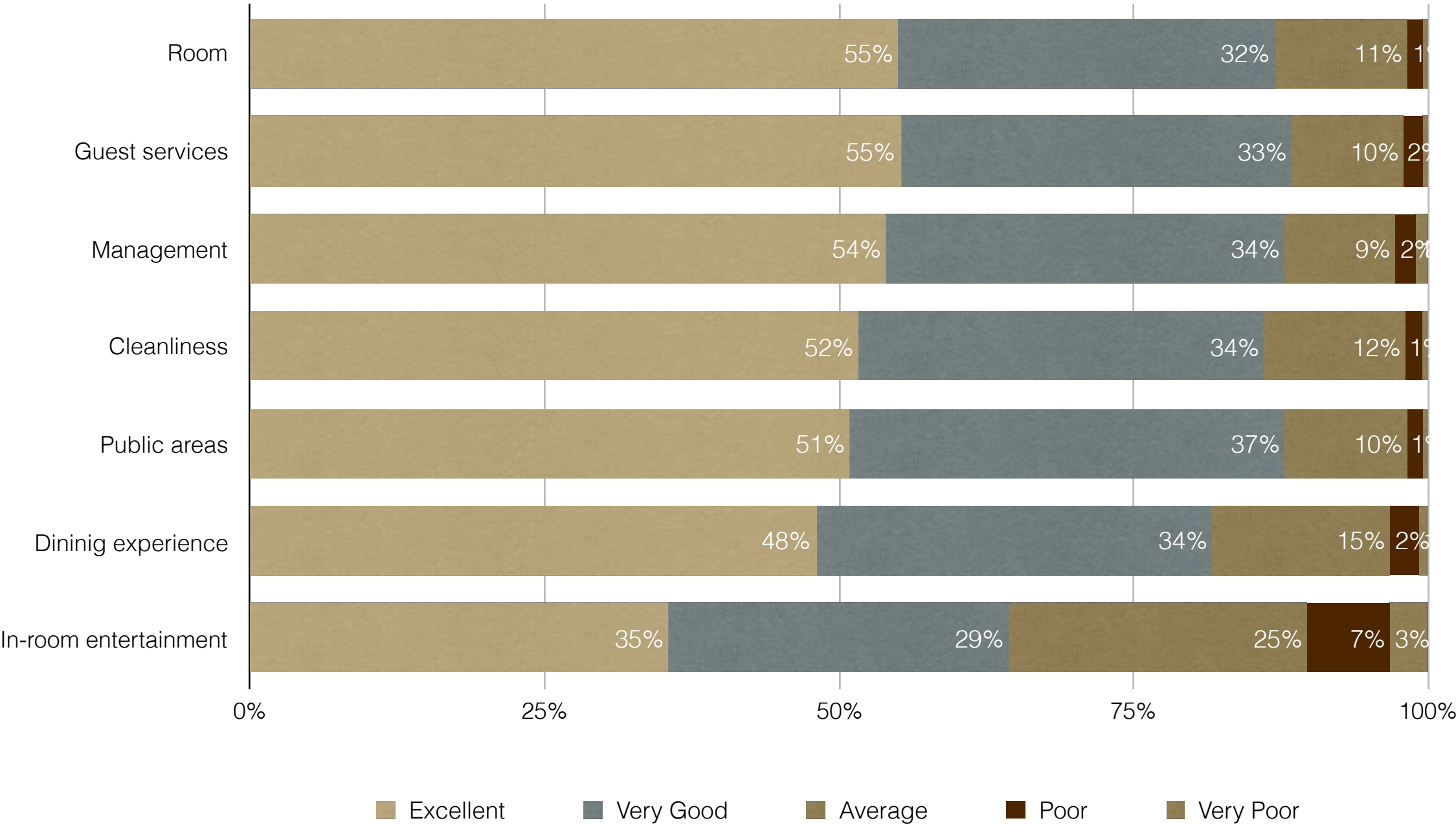
Place of stay preferences by different nationalities shows that 96% of the Japanese, 87% of the Swiss, British, and Germans stayed in resorts in February 2017. Guesthouses appear particularly popular among Russian (30%), American (30%) and Italian (28%) visitors. About 14% of Italians stayed in a boat or safari in February 2017.



RATINGS OF PLACE OF STAY

RATINGS IS POOREST FOR IN-ROOM ENTERTAINMENT

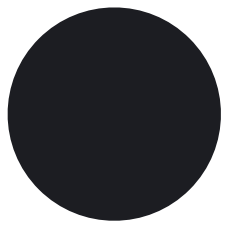
The lowest rating in place of stay is for in-room entertainment. The importance, preferences and expectations for in room entertainment by visitors need to be further explored.



MEAL PLAN

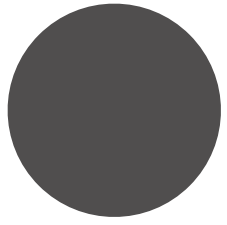
ALL INCLUSIVE IS MOST POPULAR MEAL PLAN

Of the different meal plan options offered in the Maldives, ‘all inclusive’ was preferred by 36% of visitors followed by ‘full board’ (22%) and ‘half board’ (22%). Room only is the least preferred with 2% of visitors choosing the option.



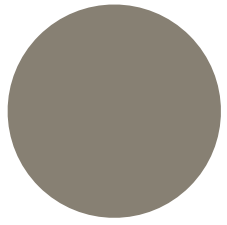
36% ALL INCLUSIVE

All inclusive meals are the most popular meal option



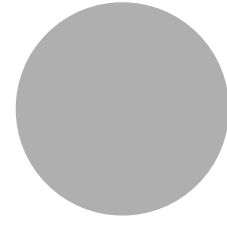
22% FULL BOARD

Full board meal option includes three meals a day



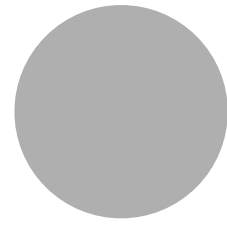
22% HALF BOARD

Half board meal includes breakfast and one meal



18% BED AND BREAKFAST

Bed and breakfast is not a very popular meal option for many visitors to the



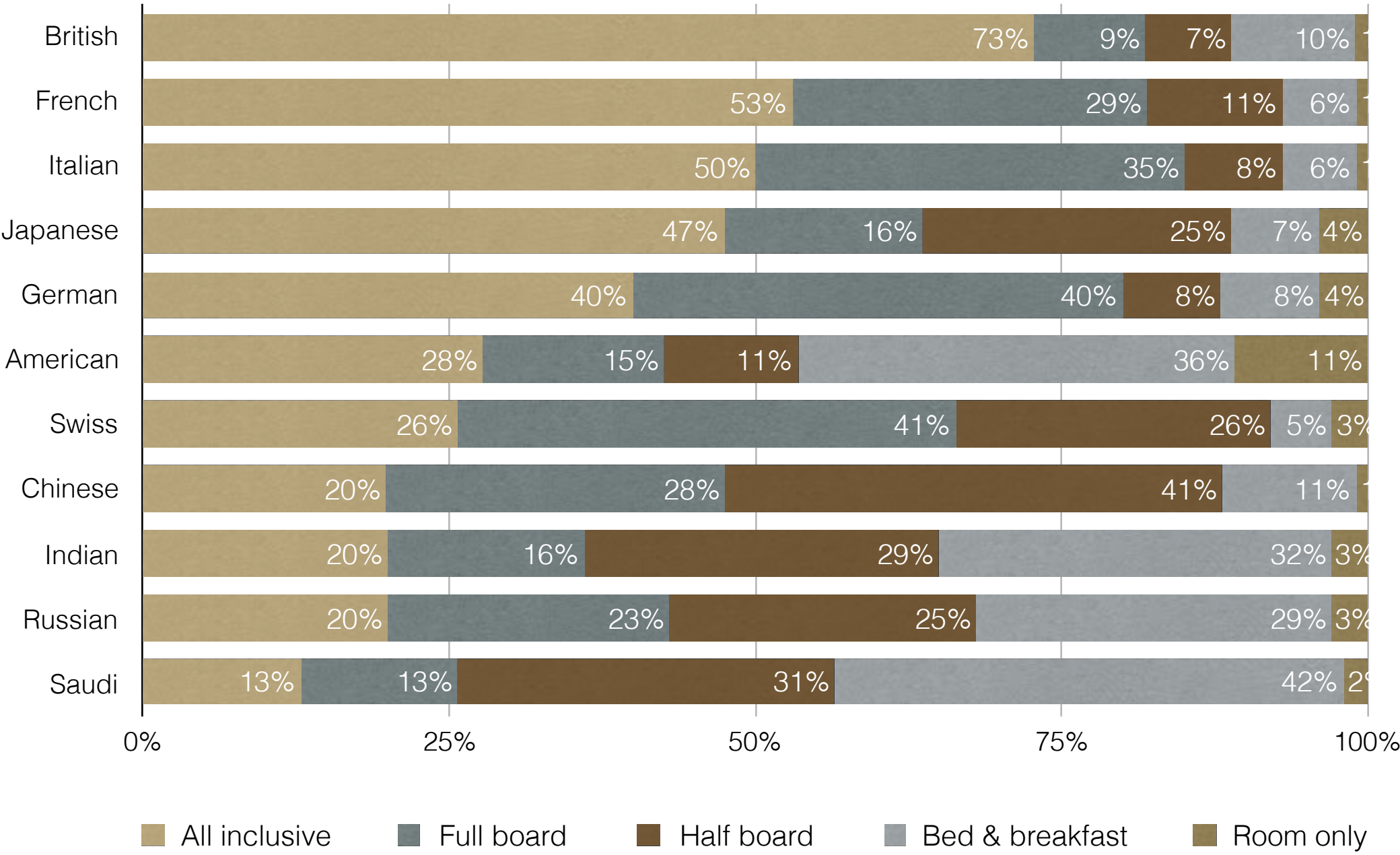
2% ROOM ONLY

Room only is preferred by a small minority of the visitors

MEAL PLAN BY NATIONALITY

MEAL PLAN PREFERENCE VARIES ACROSS NATIONALITIES

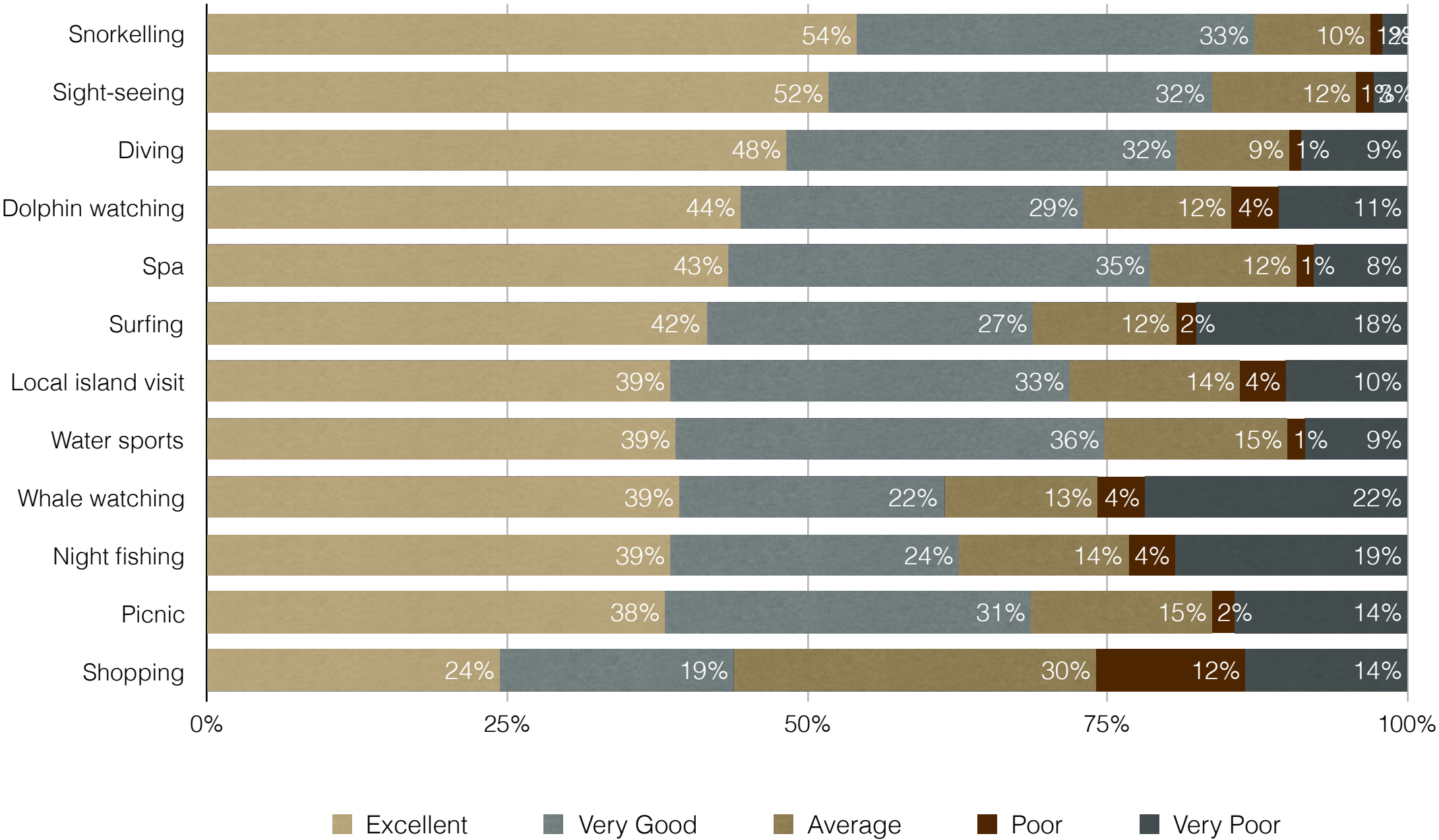
Meal plan preference is significantly different among different nationalities. Most common choice of meal plan for Chinese visitors is half board preferred by 41% of visitors. Of the British 72%, 53% French, 50% Italian and 47% Japanese opted for all-inclusive meal plan. Bed and breakfast meal plan was preferred by 42% of visitors from Saudi Arabia (42%), America (36%), India (32%) and Russia (29%).



ACTIVITY RATINGS

SNORKELLING, SIGHT-SEEING, AND DIVING RANKED HIGHEST

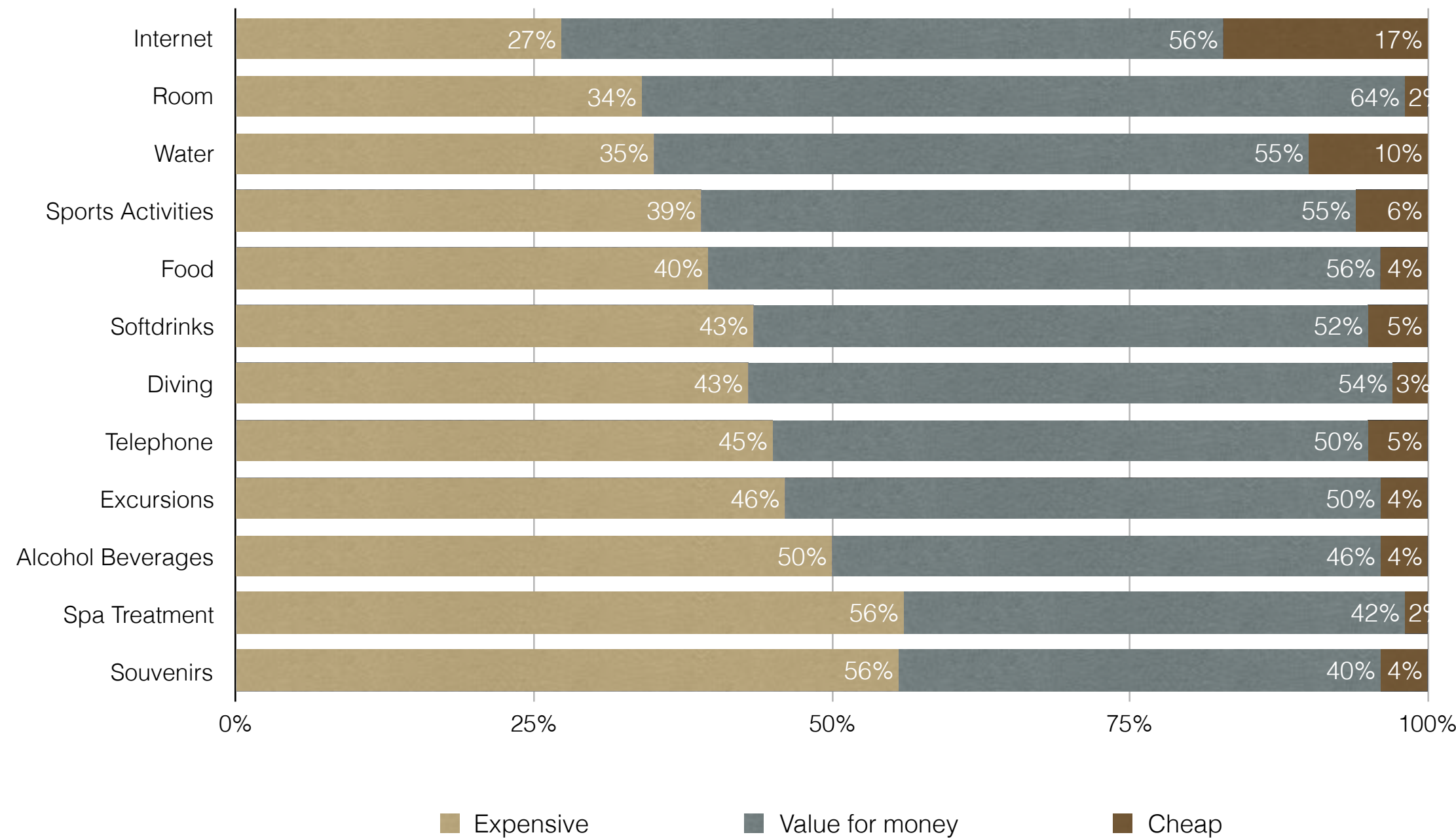
Amongst the outdoor activities, snorkelling (54%), sightseeing (52%) and diving (48%) are the most liked activities. In contrast, shopping experience was ranked lowest by the international visitors.



ACTIVITY PRICES

SPA TREATMENT AND SOUVENIRS CONSIDERED EXPENSIVE

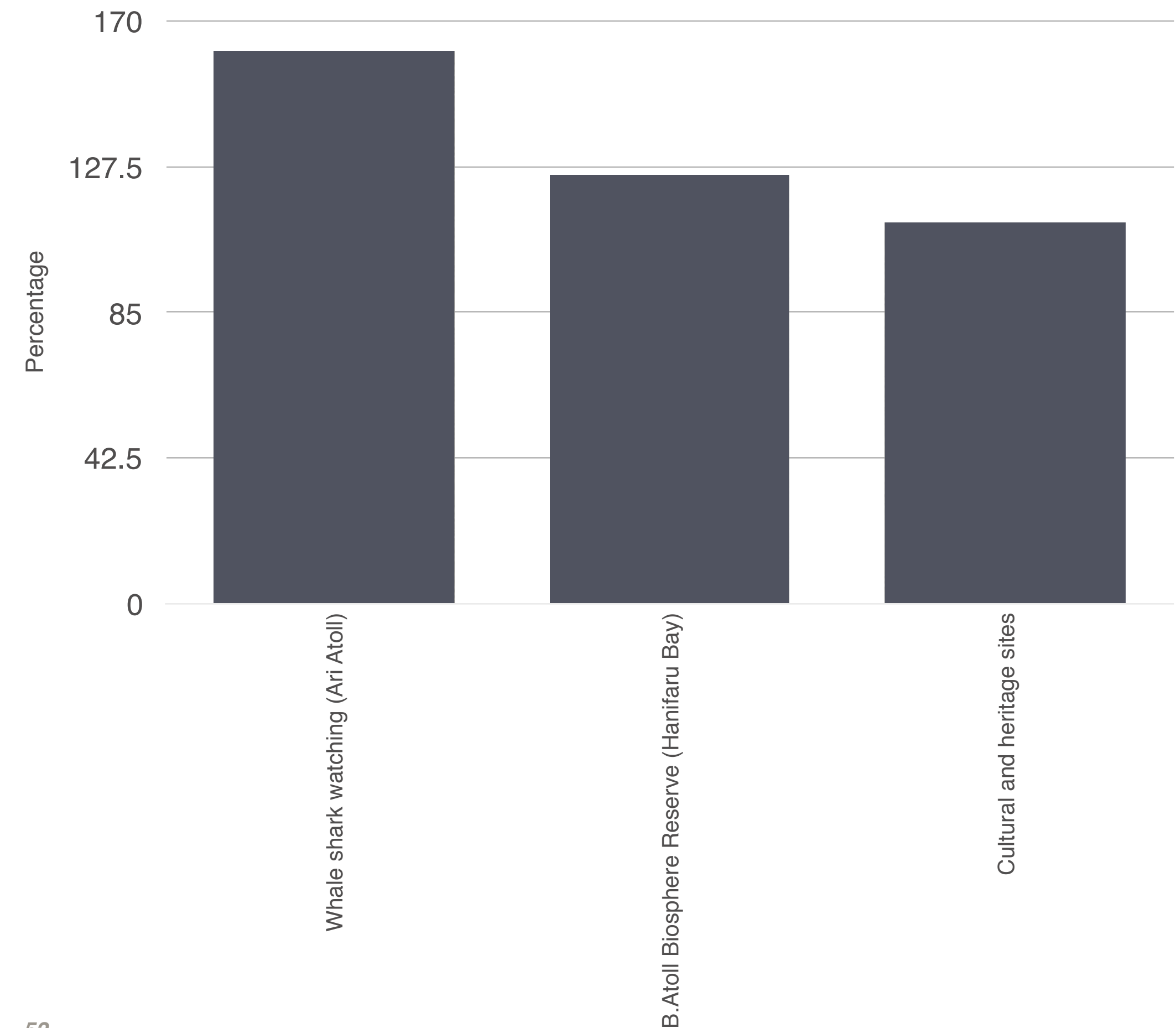
Souvenirs and spa treatment are considered expensive by more than 50% of visitors who provided their perception of prices charged for these two activities. In contrast 73% of visitors perceive that prices charged for internet are value for money or cheap.



PLACES VISITED

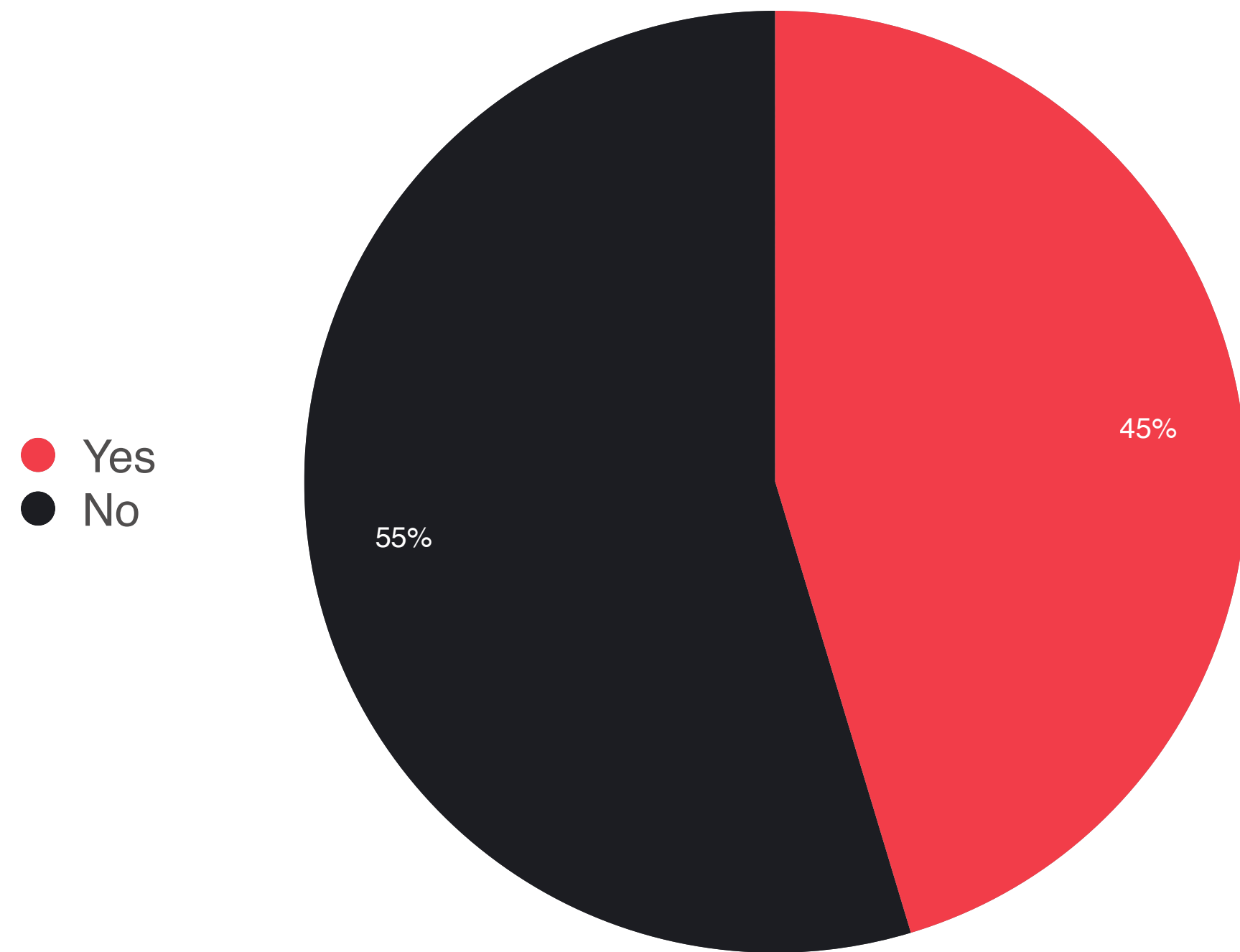
WHALE SHARKS AND BIOSPHERE RESERVE MOST POPULAR

One out of every four visitors to the Maldives during the peak season of 2017 visited the whale shark point in Ari Atoll while about one out of every five visited Baa Atoll Biosphere Reserve. Furthermore, about 16% visited cultural and heritage sights in Male’ and inhabited islands during their stay in the Maldives.





TRIP EXPENDITURE



TRAVEL PACKAGE

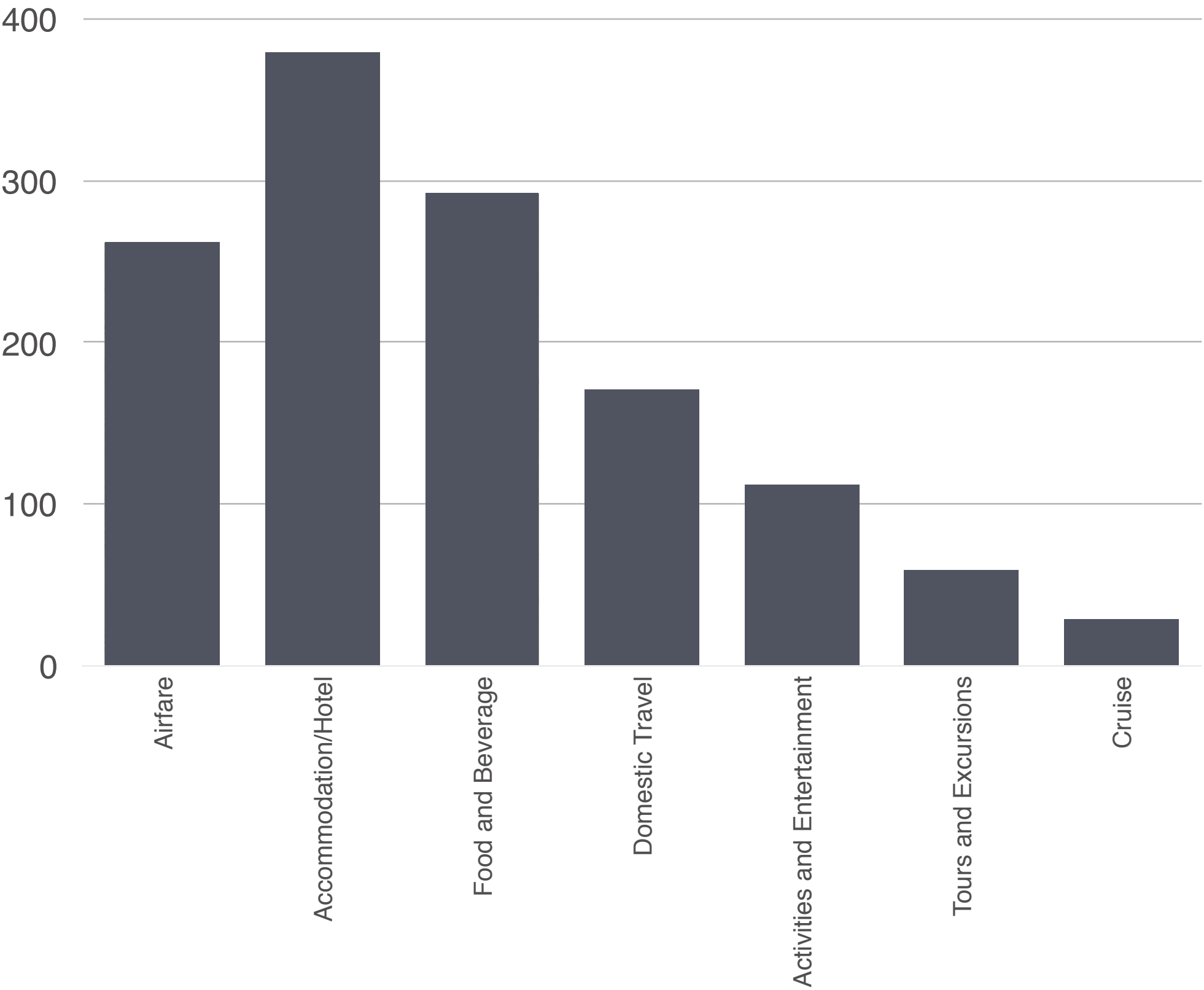
ALMOST HALF OF VISITORS TRAVELLED ON A TRAVEL PACKAGE

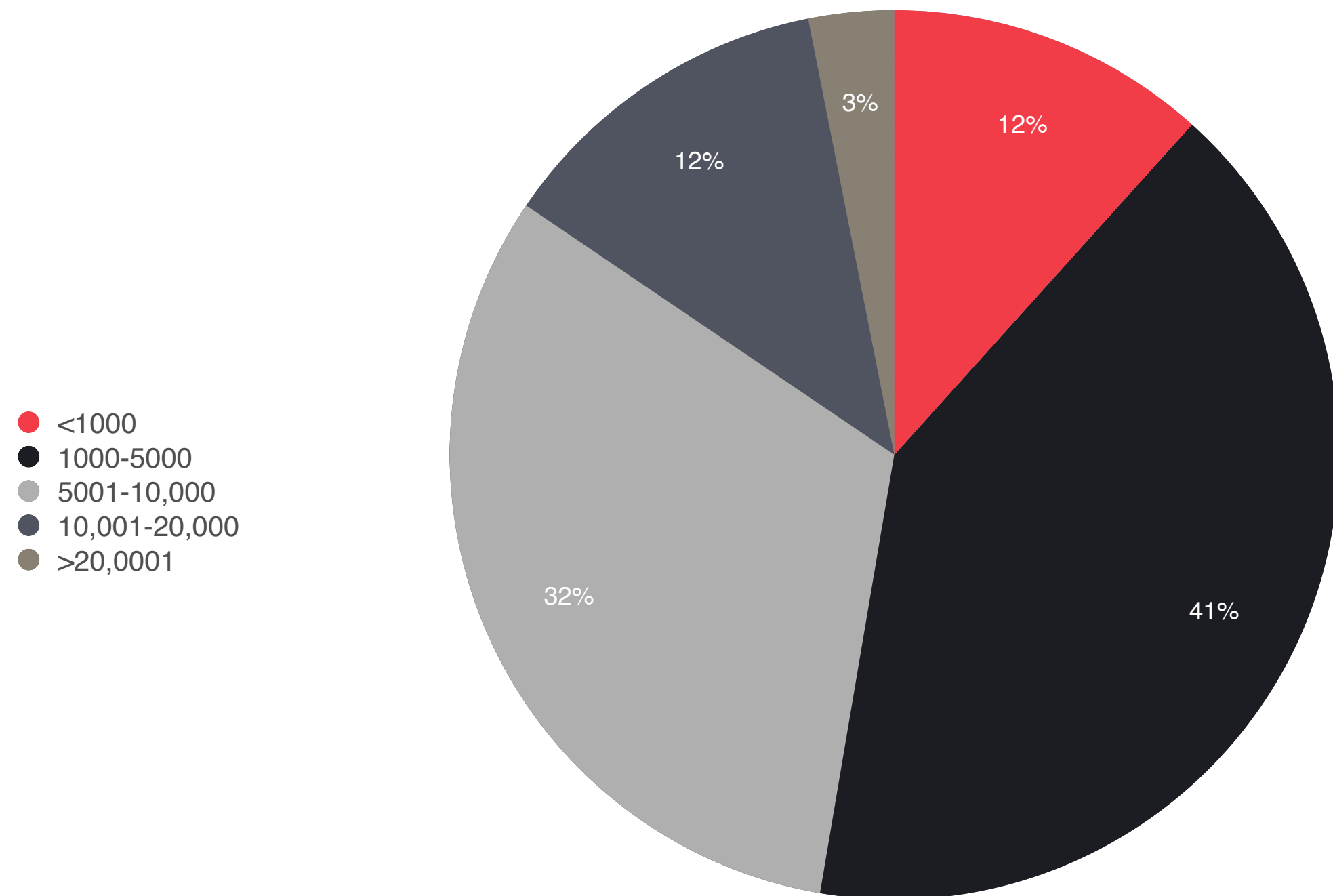
The package varies for different visitors depending on their choice of package. Most visitors (75%) who paid for a package tour, paid for 2 people tour packages.

ITEMS INCLUDED IN TRAVEL PACKAGE

TRAVEL PACKAGES VARY ACCORDING TO NEED OF VISITORS

Travel packages include different items based on the needs of the visitors. But most all inclusive travel packages consisted of Airfare, Accommodation, Food and Beverage, Domestic Travel, Activities and Entertainment. Tours and Excursions and Cruises.





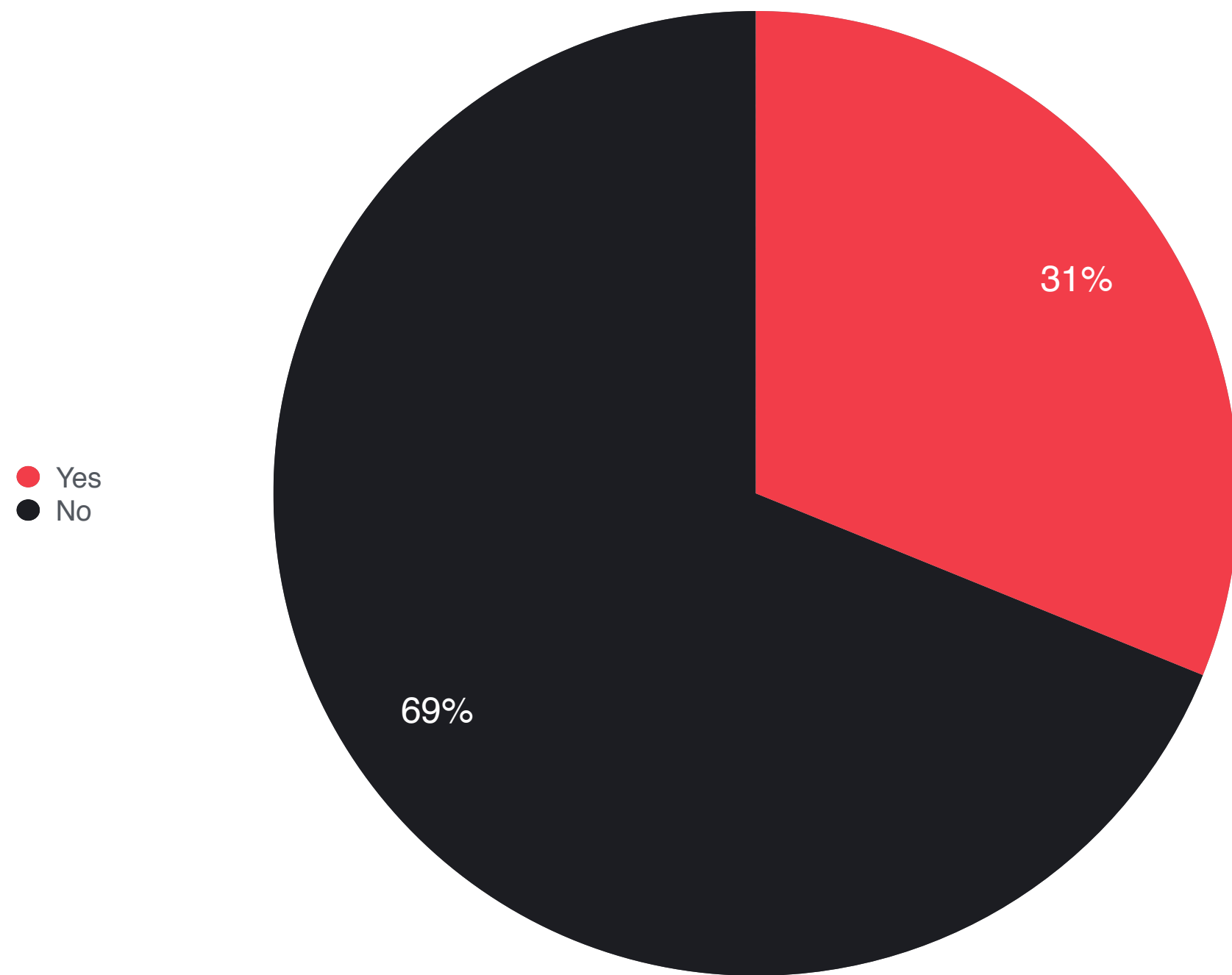
TOTAL HOLIDAY EXPENDITURE

TWO FIFTHS OF THE VISITORS SPENT BETWEEN US\$ 1000 AND US\$ 5000 FOR THEIR HOLIDAY TO THE MALDIVES

About 41% spent between US\$ 1000 and US\$ 5000 for their holiday in the Maldives, while 32% spent between US\$ 5001 and US\$ 10,000.

An aerial photograph taken from a high altitude, looking down at a tropical island. The island is lush with green palm trees and vegetation. A small white boat is visible in the turquoise water to the left of the island. In the distance, another island is visible, featuring a tall, thin lighthouse. The water transitions from a shallow, light blue near the shore to a deeper blue further out. The sky is a clear, deep blue. The wing of an aircraft is visible in the top left corner, indicating the photo was taken from a plane.

VISITOR SATISFACTION



VISITS TO SIMILAR DESTINATION

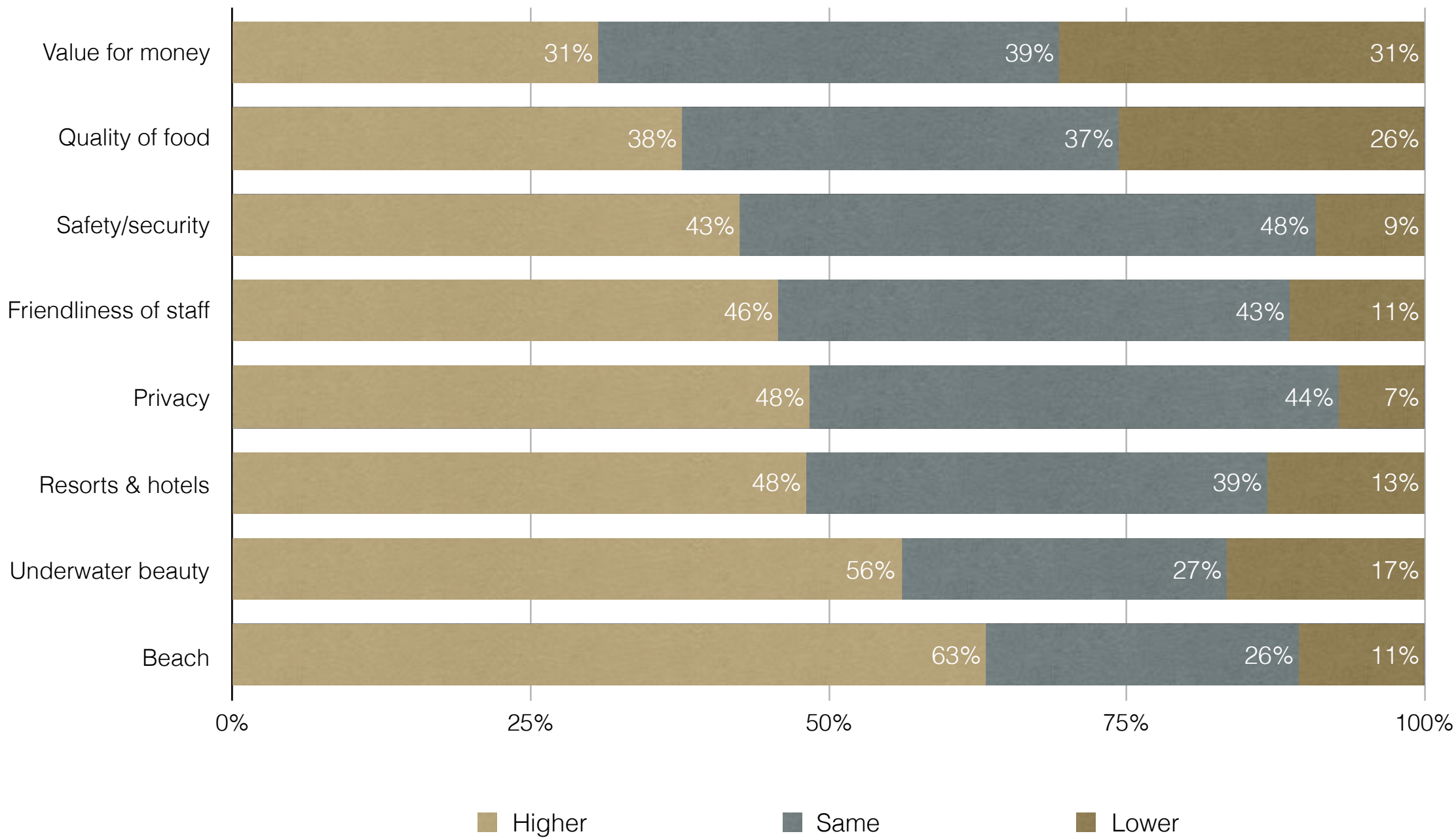
ONE OUT OF EVERY THREE VISITED A SIMILAR DESTINATION

Similar destinations identified by international visitors include Mauritius, Thailand, Seychelles, Bali, Fiji, Dominican Republic, Hawaii, Zanzibar, Australia, and the Caribbean countries.

COMPARISON WITH SIMILAR DESTINATIONS

BEACHES AND UNDERWATER BEAUTY ARE RANKED HIGHER

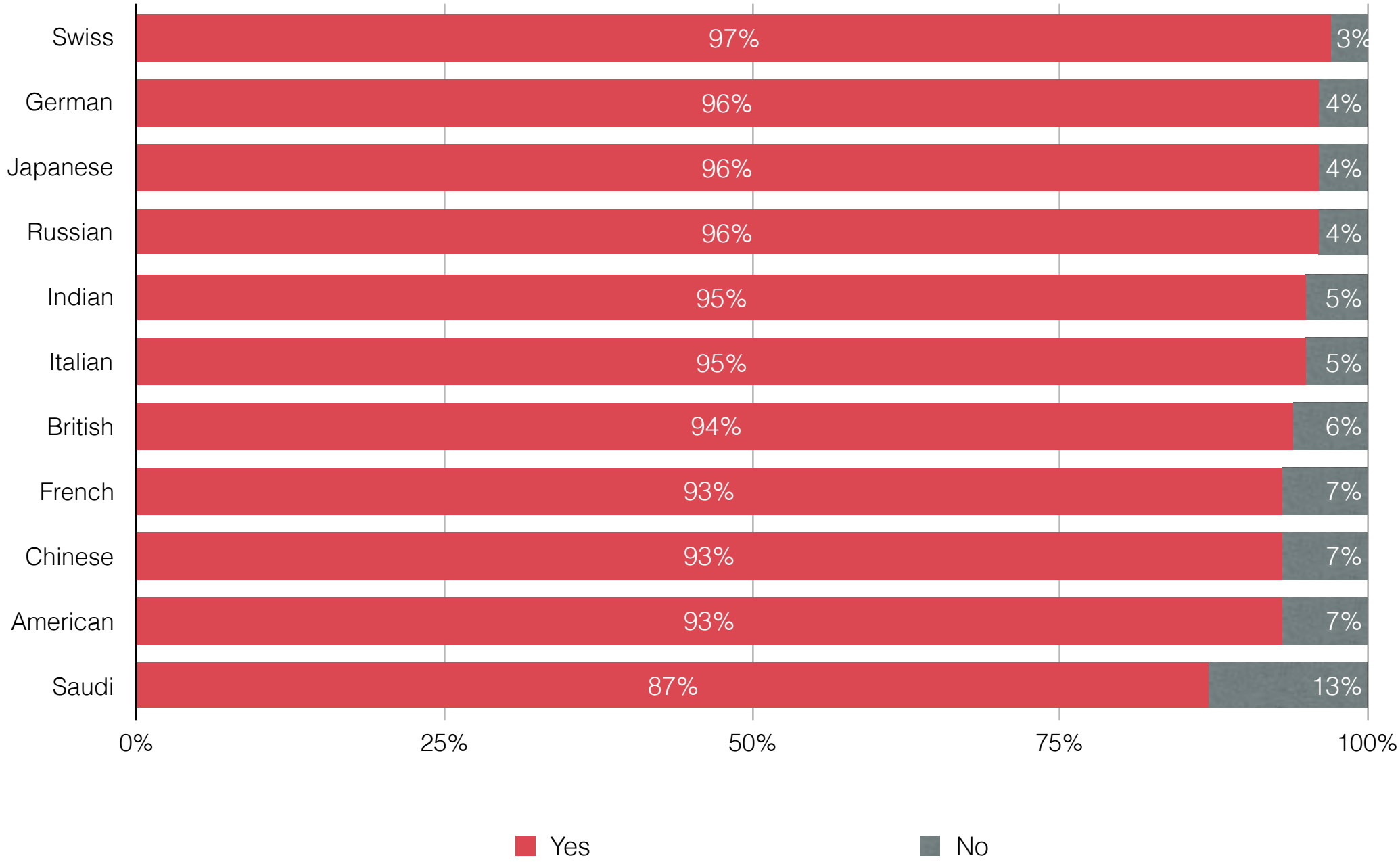
Of those who've visited a similar destination, beaches of Maldives are ranked higher by 63% while 56% ranked underwater beauty higher. More than 90% of those who have visited similar destination ranked the privacy of Maldives higher or the same while 91% ranked safety/security as higher or the same. Value for money and quality of food were ranked the weakest compared to similar destinations.



HOLIDAY EXPECTATION

MALDIVES HOLIDAY MEETS VISITOR EXPECTATION

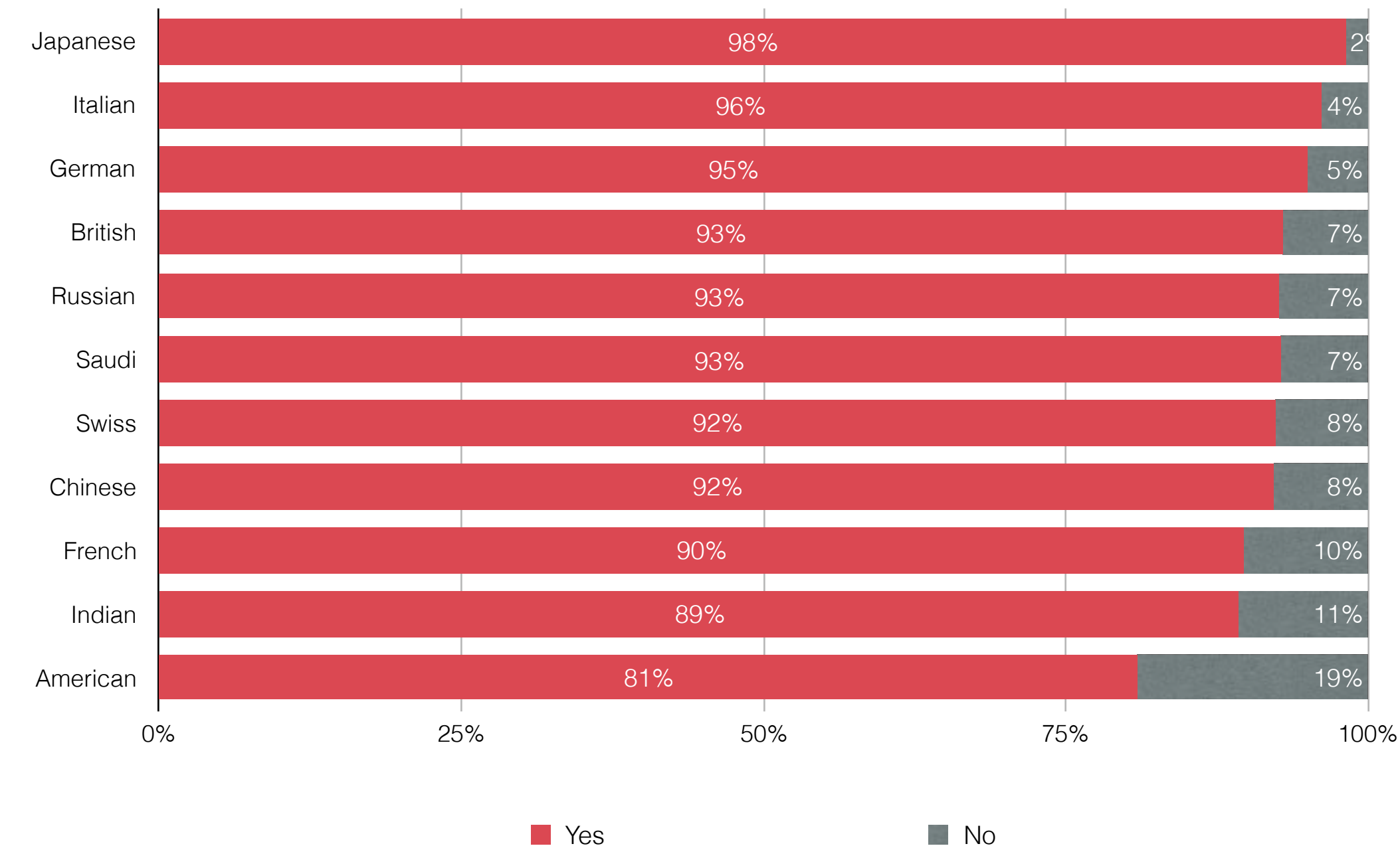
Of the visitors, 94% stated that the holiday met their expectation, More than 95% of Swiss, German, Japanese, Russian, Indian and Italian visitors were pleased about their holiday in the Maldives. Of the visitors from Saudi Arabia, 87% stated that their holiday in the Maldives met expectations.



INTENTION TO VISIT AGAIN

NINE OUT OF EVERY TEN VISITORS INTEND TO VISIT AGAIN

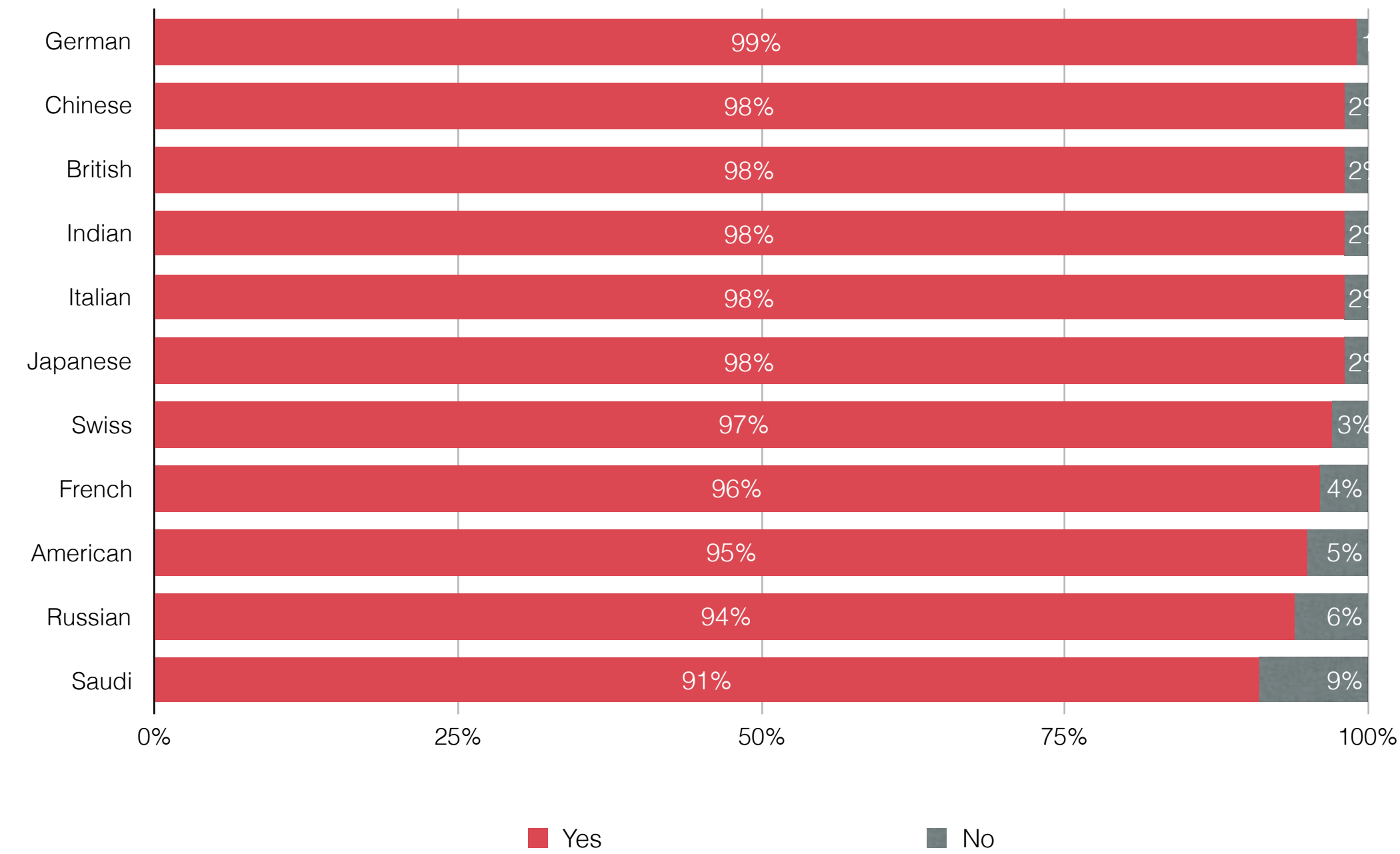
Of the international visitors to the Maldives in February 2017, 92% expressed their intention to visit Maldives again. Intention to re-visit is highest amongst Japanese (98%), Italian (96%) and German (95%) visitors while it was lowest amongst the American (81%) visitors.



RECOMMEND TO OTHERS

98% WOULD RECOMMEND THE MALDIVES

It is noteworthy that 98% of the visitors in February 2017 stated that they would recommend the Maldives to others. This has marketing implication with word of mouth being the second most important source of information on the Maldives.



CONCLUSION

An overwhelming majority of international visitors to the Maldives were motivated to visit by the pristine sandy beaches, underwater beauty and the weather of the Maldives.

‘Rest and relaxation’ was the main purposes of visit to the Maldives during the peak season. ‘Honeymoon’ is the second main purpose of visit. This finding is consistent with the trends in age groups who travel to the Maldives during the two seasons. Proportion of older age group travellers are higher during the peak season while younger visitors are more during the off peak season. The survey findings also reaffirm that Maldives continues to be a popular destination for couples and families.

Internet is the main source of information for visitors to the Maldives. Majority of the visitors to the Maldives booked their holiday accommodation on the Internet through Online Travel Agents (OTAs).

The majority of the international visitors stayed for 4-7 nights in the Maldives. Number of nights stayed in resorts and guesthouses show similar patterns.

One out of every four visitor to the Maldives during the peak season was a repeat visitor. Analysis of repeat visitors to the Maldives over the last five years shows a declining trend.

Three out of every four international visitors to the Maldives stayed in resort islands. Although quality of dining experience at place of stay is ranked highly and majority of visitors ranked food prices in the Maldives as ‘value for money’; visitors suggested diverse food choices to be made available at their place of stay. Suggestions from visitors for improvement include the availability of vegetarian food, assurance of halal food and availability of less expensive choices of wine at their place of stay.

CONCLUSION

The The prices charged for Internet at the place of stay were considered ‘value for money’ or ‘cheap’. Of the services at the place of stay, in-room entertainment needs further improvement.

Snorkeling, sight seeing and diving are rated highest amongst the activities enjoyed by visitors while in the Maldives. In comparison to similar destination to the Maldives, the beaches, underwater beauty, resorts, hotels, and privacy in the Maldives are rated higher than other similar destinations.

Airport services and improvements in transport within Maldives were key areas highlighted by the International visitors for improvement in the Maldives. Upon arrival, at immigration, visitors suggested to be welcomed by friendly and smiling staff. At the terminal building, visitors proposed easy access to free Wi-Fi services (for example: using log in IDs) and availability of free water at the airport (for example: using water fountains). International visitors also suggested the use of better signage and guidance on direction to improve services at the airport.

Speedboat and seaplane transfers were the most common modes of transport to get to the place of stay. Communication and information briefings for the visitors in hotel transfers was identified as an area for significant improvement. Transfer destination and travel time needs clear concise communication with the visitors in languages they understand.

Nine out of ten visitors to the Maldives stated that the holiday met their expectations. The visitors intend to visit Maldives again and would recommend the Maldives to others. Trends analysis shows that overall satisfaction of visitors to Maldives has been overwhelmingly positive in the past 5 years.

METHODOLOGY

The questionnaire for the Maldives Visitor Survey undertaken in February 2017 is based on the questionnaire for the survey conducted in October 2013 with modifications based on survey feedback. The questionnaire consisted of five sections and 33 questions in total. 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 2012 and 2016. The sample was calculated using the tourist arrival data from the Ministry of Tourism. Derivation of sample size is given in Table 1. 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 10 days between 08 February and 16 February 2017 at Velana International Airport (previously known as INIA)

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

By the end of the survey period, the number of questionnaires collected was 2286. Respondents to the survey averaged at 229 per day. All 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.

ANNEX: SURVEY TARGETS VS TOP TEN NATIONALITY PERCENTAGES

| Top 10 nationalities | 5 year Top 10 Nationality average | Feb 2017 survey target |
|----------------------|-----------------------------------|------------------------|
| China | 27.6% | 432 |
| Germany | 8.7% | 200 |
| United Kingdom | 7.9% | 200 |
| Italy | 5.5% | 100 |
| Russia | 5.3% | 100 |
| France | 4.3% | 100 |
| India | 4.0% | 100 |
| Japan | 3.4% | 100 |
| Switzerland | 2.9% | 50 |
| Korea | 2.6%% | 50 |

MALDIVES VISITOR SURVEY 2017

LS:
FC:
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 Velana 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 Velana International Airport (to get to your place of stay)?

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

13. How long did it take for you to get from Velana 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)

- a. ☐ Room only b. ☐ Bed and breakfast c. ☐ Half board (breakfast and one meal included)
d. ☐ Full board (three meals included) e. ☐ 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)

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

21. Have you ever visited any destination similar to the Maldives? a. ☐ Yes b. ☐ No (if 'No' go to Q22)

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

.....

27. What would you like to see improved to make your holiday experience in the Maldives better?

.....

.....

.....

.....

SECTION D

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

- a. ☐ Below 18 years b. ☐ 18 – 24 years c. ☐ 25 – 34 years d. ☐ 35 – 44 years
e. ☐ 45 – 54 years f. ☐ 55 – 64 years g. ☐ 65 years and over

SECTION E

29. 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

30. a) What is the **TOTAL** spend/expenditure of your holiday to the Maldives?

a1) Currency

USD ☐ GBP ☐ EUR ☐ RMB ☐ JPY ☐ RUB ☐ Other (Specify) ☐

a2) Amount (Please tick (a) one box)

- I. ☐ < 1,000 II. ☐ 1,000 - 5,000 III. ☐ 5,001 - 10,000
iv. ☐ 10,001 - 20,000 v. ☐ 20,001 - 30,000 vi. ☐ 30,001 - 40,000
vii. ☐ 40,001 - 50,000 viii. ☐ 50,001 - 60,000 ix. ☐ 60,001 - 70,000
x. ☐ 70,001 - 80,000 xi. ☐ 80,001 - 90,000 xii. ☐ 90,001 - 100,000
xiii. ☐ > 100,000

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

31. 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 | | |

32. 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

33. 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

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