



MINISTRY OF TOURISM, ARTS AND CULTURE
REPUBLIC OF MALDIVES

88-MB/MIS/2011/12

4 January 2011

DESTINATION AUDIT MALDIVES

Dear Sir/Madam

Tourism in the Maldives is undergoing significant change in response to internal and external forces that impact on market competitiveness and product development. The global financial crisis has had a significant impact on bookings from our traditional markets and the competitive environment for emerging markets is a major concern to the tourism industry of the Maldives. Current internal industry statistics indicate that the immediate future bookings for Maldives have stagnated and the net yield to the industry is also under pressure.

This destination audit will form the basis for new product development and marketing strategies for Maldives as a destination. Conducting the audit is crucial at this time because there appear to be some misconceptions amongst the Maldivian public and a view that the future of the Maldives tourism industry remains healthy and competitive with other island destinations. Such a position may be based on statistics which show increases in total numbers of arrivals. The concern is that although there are increases in numbers from mainly non-traditional, emerging markets, there has also been changes in net-yield, profitability and price structures that present challenges to maintaining a competitive and cohesive image of Maldives as a destination.

This destination audit is to be based on findings from stakeholder surveys conducted and shall serve as a report of the status of the Maldives tourism industry. A large part of the audit will focus on stakeholder opinions of the various competitive factors of the destination – those relating to core resources, pricing, destination management and industry related & supporting factors.

An overarching objective of the audit is to determine the destination's vision, goals and objectives. This will be done with a view to establishing a confirmed opinion of what the destination's image should be, according to stakeholders. We will be doing some desk research in finding out what the existing vision, goals and objectives of the destination are. In particular, what members, as stakeholders, feel with regard to the destination's image will be surveyed.

The five main objectives of the audit is to identify:

1. What are the core competitive features of the Maldives?
2. What are the best images of the Maldives as a competitive destination?
3. What are the key issues and concerns with respect to pricing and value for money?
4. What actions and resources are required by the public and private sector in order to make the Maldives a competitive and profitable tourism destination?
5. Who the Maldives' competitors in traditional and emerging markets are currently and in the future.

Identification of principal competitors and market structures can give us the scope for some useful comparisons between products, pricing and marketing strategies. This information will enable members to make informed choices when making critical decisions about their product development, pricing structures and marketing strategies.

We would be most grateful if you could please take some time to fill out the following survey. Please return it to the Ministry via email as an attachment. Once we have received responses we will be contacting the industry for further clarification and individual input if required.

In the meantime if you have any questions or queries about this exercise, please do not hesitate to email me.

Yours sincerely



Mariyam Zulfa

Minister of Tourism, Arts & Culture

minister@tourism.gov.mv



Respondent details (optional)

This section asks for your details. There is no need to provide names or personal information. The profile information will be used internally to monitor which members are responding and ensure all sectors are covered.

The information gathered through the survey will be dealt with confidentiality and results reported in aggregate form in the report that follows. Where individual opinions are highlighted no names or correspondent organizational details will be reported. By filling this survey you are giving MoTAC your informed consent to use the information provided by you (except personal details) for the purposes of this study.

Organization:

Your designation:

No. of years of your experience in the tourism industry:

What other countries do you have resorts/businesses in?

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Could you please name these resorts/businesses?

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PART (1): CORE COMPETITIVE FEATURES OF THE DESTINATION

1.1 What do you feel are the Maldives' core features in attracting visitors? You may wish to comment on the following features:

Climate:

Beaches:

Tropical Island setting:

Waters and conditions for water-sports:

Under-water resources:

Other:

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1.2 Looking at trends in marketing and promotion within your own organisation, do you feel adequate importance is placed on highlighting the physical features that you feel are Maldives core features?

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PART (2) DESTINATION IMAGE PROMOTION

2.1 What do you believe are the best image(s) for the Maldives as a destination? You may wish to comment on the following:

An upmarket destination:

A value for money destination:

A diver's destination:

A Surfers destination

A honeymooner's destination:

An eco-friendly destination:

A family-friendly destination:

A destination that offers a private, relaxing environment:

A destination for seekers of romance:

Other:

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2.2 What do you think is our core product?

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2.3 What image(s) do you think Maldives is promoting now?

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2.4 What image(s) should Maldives promote in the future?

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PART (3) PRICING AND VALUE FOR MONEY ISSUES

3.1 There is some concern in the market that the Maldives tourism product is over-priced and may not be providing good value for money. Do you think this is so?

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3.2 Do you feel that there are areas that are over-priced (example, prices of activities, internal transport, transfers, food and beverage)?

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3.3 At the same time there is also concern that some industry operators are under-pricing accommodation, i.e. selling 5 star rooms at 4-star prices. In your opinion to what extent, and why, is this happening?

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3.4 Is Maldives as a destination providing value for money products and services?

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3.5 In terms of air-ticket prices to and from traditional markets to Maldives, do you think value for money is offered?

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3.6 In terms of package holidays, do you think the Maldives is providing value for money when compared with competing destinations?

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PART (4): DESTINATION MANAGEMENT

Destination management in general refers to co-operation amongst public and private sector bodies in making the destination competitive. This involves policy-making, joint-promotion and creating opportunities to support and strengthen the industry.

4.1 Regarding image control: do you think there is enough co-operation between private sector and the government? What do you think needs to be done to strengthen this?

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4.2 In terms of resources for marketing what more do we need? (i.e. how much more money, public relations programs government offices network etc).

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4.3 Please specifically highlight what you feel in your experience needs to be done urgently, for example things you have observed other countries to be doing and Maldives as a destination is not.

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4.4 Do you have any suggestions for the government as to what must be done immediately to strengthen Maldives' competitive position?

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4.5 Please tell us what you feel are the policies that must be in place to increase profitability of the tourism industry.

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4.6 Please tell us what you feel are the planning related policies that must be in place to revive the tourism industry.

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PART (5) COMPETITORS

1.1 What destination or destinations would you regard as Maldives' closest competitor?

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1.2 On what basis do you think these competitors are competing against the Maldives?

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5.3 Please feel free to provide us comments on any of the above sections or any other pressing issues you would like to see highlighted in the audit report.

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Please return this survey questionnaire to Ministry of Tourism, Arts & Culture by January 20th 2011 via email planning@tourism.gov.mv or fax to +960 332 2512

Thank you.
