



MINISTRY OF TOURISM



TOURIST OPINION SURVEY REPORT 2004

ACKNOWLEDGEMENTS

A survey of this nature could not have been possible without the valuable support and participation of all stakeholders in the tourism industry of the Maldives, private and public sector businesses, government authorities as well as international partners in investment and development.

We wish to thank Maldives Airports Company Limited (MACL), Island Aviation Services (IAS), Maldives Tourism Promotion Board (MTPB), Ministry of Planning and National Development (MPND) Faculty of Hospitality and Tourism Studies (FHTS), Department of Immigration and Emigration, all the operational Airlines during survey period, and tourist guides who have assisted in making foreign language announcements at Male' International Airport in particular.

The tourists themselves are the major stakeholders in such a survey, which attempts to gauge the opinion of tourists in relation to the tourism product and services of the Maldives. Without their cooperation and support this study would not have been possible. We wish to express our wholehearted gratitude to the tourists who have participated in this survey for the thoughtfulness, valuable time and sincere responses that they gave, which are critical to the success of the survey.

The contributions and professional support by the staff of the Ministry of Tourism (MoT), the active role by the team in the Statistics and Research Section of the Ministry of Tourism, especially Ms.Ikleela Ismail (Senior Research Officer), Ms. Mariyam Sharmeela (Assistant Statistical Officer), Ms.Mariyam Ramzee (Assistant Statistical Officer), Mr. Ameen Adil (Statistical Officer (T)) was important in making progress through various stages of these surveys. Ministry of Tourism also wishes to acknowledge with thanks the work carried out by Sehga Soft Pvt Ltd for compilation of this survey project report in co-ordination with the Ministry.

TABLE OF CONTENTS

EXECUTIVE SUMMARY	3
1. GOALS AND OBJECTIVES OF THE SURVEY.....	5
2. METHODOLOGY AND COVERAGE.....	6
3. MAJOR FINDINGS OF THE SURVEY	8
3.1 Nationality	8
3.2 Average Duration of Stay.....	9
3.3 Distribution of Visitors/Respondents by Age groups.....	11
3.4 Frequency of Visits.....	11
3.5 Purpose of Holiday in the Maldives.....	12
3.6 Type of Meal Plan	13
3.7 Country Combined Holiday	15
3.8 Activities Enjoyed in the Maldives.....	16
3.9 Attractiveness of the Maldives as a Destination.....	18
3.10 Rating of Services and Facilities.....	19
3.11 Visit to Malé	20
3.12 Difficulties in Organizing the Holiday.....	24
3.13 Mode of Organising the Holiday.....	24
3.14 Source of Information.....	25
3.15 Tour Operators and Travel Agents in generating markets	25
3.16 Income of Tourists.....	27
3.17 Level of Expenditure	29
3.18 Satisfaction with Holiday in the Maldives.....	30
4. CONCLUSIONS AND RECOMMENDATIONS	31
5. COMPARATIVE ANALYSIS OF TOURIST OPINION SURVEY OF 1999 AND TOURIST OPINION SURVEY OF 2004.....	34
6. ANNEXE	44

EXECUTIVE SUMMARY

The Ministry of Tourism had conducted periodic surveys to determine the opinions and expectation of tourists visiting the Maldives. Based on the results of the previous such survey, Tourist Opinion Survey 1999, this survey of 2004 is carried out to determine key variables as they relate to tourist opinion with regard to the Maldives as a destination, and services and facilities available in the Maldives in relation to expectations.

In this regard 3241 returned questionnaires from a target group of mainly Italian, British and German departing tourists is analyzed in this report and studied separately in a comparative analysis.

The majority of respondents belong to age groups between 26-35 years with 7% more male respondents than females. They were mainly employed in the private sector or self-employed. Majority of the respondents stated lower range incomes while less people stated their income in the mid-range. Higher range of income occurred more than mid-range incomes. About 30% stated that they spent over US\$5000 for an average duration of stay of 8 days holiday in the Maldives.

The main source of information about the Maldives was from friends and relatives followed by Travel Agents and multi-media promotions. Around 10% said that they had difficulty in organizing their holiday to the Maldives due to constraints in room availability, airline seats and lack of information.

The majority booked their holiday through established as well as new tour operators or travel agents. Internet bookings at 7% are greater than the 4% FIT bookings on arrival.

About 18% are repeaters, some repeating more than 4-5 times. They come generally, keen to enjoy the natural environment, on full-board or all-inclusive accommodation, with about 30% combining their holiday with another country.

While most respondents stated leisure and marine related activities as the purpose of visit, significantly 30% stated honeymoon as specific purpose of visit. Spa and Health activities in the Maldives are a new trend that is also on the increase.

The majority of respondents rated their place of stay in the Maldives as excellent and also said that the services in the Airport were good. Services and facilities in Malé, the commercial and cultural Capital were also rated high.

However, less than 30% of the tourist surveyed, mainly younger people, had visited the capital, Malé, out of who about a third or about 6% of total respondents said that they were not satisfied due to harassment by hawkers, lack of time and congestion in the city.

Most of the respondents were very satisfied with their visit to the Maldives, felt it was good Value for Money and said they would come back. Over 95% of the respondents said that they would recommend the Maldives to others.

Comparative analysis of the 2004 and 1999 survey data show that most demographic and product related variables are parallel to and confirmed by other national and international statistics and research.

Nevertheless, based on the expressed opinions of the tourists surveyed, even if such criticisms were far and few, key areas are identified and in conclusion specific recommendations are made at the end of the comparative analysis.

The general conclusion is that in the opinion of tourists, the Maldives remains a very desirable place that meets or exceeds expectations of the overwhelming majority.

1. GOALS AND OBJECTIVES OF THE SURVEY

The Ministry of Tourism has conducted periodic surveys to enable policy makers identify current and emerging issues as they relate to the services and facilities provided for tourists visiting the Maldives which is now positioned as a premium destination under the Second Tourism Master Plan of the Maldives. The last major survey of this kind which has been analysed is the August 1999 survey. This survey of October 2004 is designed to identify any deviations from the baseline established in 1999.

Although, the current survey questionnaire, methodology and coverage are different from the previous survey, limiting comparative analysis in some areas, a comparative analysis will also be included in this survey report separately, to the extent relevant and focusing on critical issues. Major events such as 9/11, the SARS epidemic, economic downturn in Europe, and the second Gulf War have all occurred between these two surveys. The comparative analysis will attempt to discern any major shifts in any of the key variables that emerge out of both the surveys. Between 1999 and 2004 there has been an increase in both bed capacity and a healthy flow of tourists into the Maldives, even during periods of major crisis emphasizing the well-planned enduring nature of sustainable tourism in the Maldives. The comparative analysis will focus on the facts as they emerge from the opinion of tourists themselves.

The primary goal of this survey report is to understand characteristics, preferences and expectations of the tourists, in order to enhance the tourism product of the Maldives.

- To determine the demographic, economic, social, and geographic data of tourists leaving the Maldives at the time of the survey.
- To ascertain the opinion of tourists about their place of stay in the Maldives, services and facilities, mode of organizing travel to Maldives and sources of information on the Maldives for tourists.
- To determine pattern of visit, perceptions of value for money, holiday preferences and interests.

2. METHODOLOGY AND COVERAGE

A total of 5000 questionnaires were envisaged targeting about 50% of the total departures during the week of the survey, 6 – 12 October 2004. The target groups for the survey were selected by nationality proportionate to their respective market dominance. Questionnaires were handed out at Male' International Airport during the survey week;

Table 1: Distribution of Respondents by Major Markets

Country of Origin	Arrivals 6-12th October 2003	Respondents % Share '03(Oct)	Target Sample % Share / 100"(5000)
EUROPE	7,743	73.2	3,659
UK	1,663	15.7	786
Italy	2,102	19.9	993
Germany	1,422	13.4	672
Switzerland	827	7.8	391
France	380	3.6	180
Spain	250	2.4	118
Russia	246	2.3	116
Other Europe	853	8.1	403
ASIA	2,374	22.4	1,122
Japan	1,033	9.8	488
China	313	3.0	148
Korea	352	3.3	166
Other Asia	676	6.3	320
AFRICA	129	1.2	61
AMERICAS	106	1.0	50
OCEANIA	230	2.2	109
Week Total	10,582	100.0	5,000

The questionnaires were prepared in different languages in the proportions shown below. However whenever it was possible English was the preferred language.

Table 2: Number of Questionnaires by Language

Language	Number	%
German	785	15.7
French	355	7.1
Italy	1,500	30.0
Japan	490	9.8
English	1,870	37.4
Total	5,000	100.0

Actual responses received by region and by place of stay are shown in the following table:

Table 3: Respondents by Their Place of Stay by Nationality

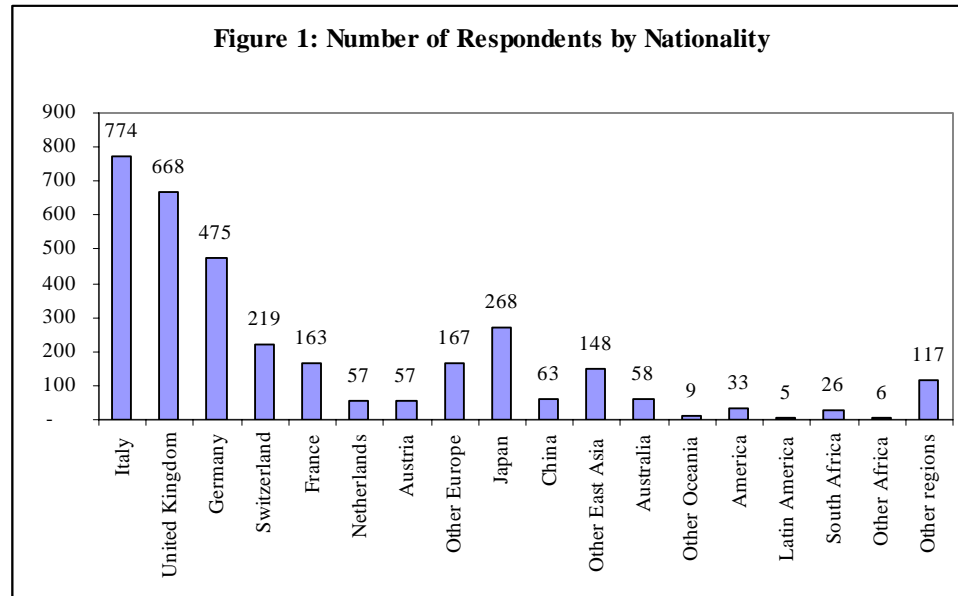
Nationality	Tourist Resort	Hotel	Guest House	Safari Vessel	Not Stated	Total
Europe	2113	374	4	82	7	2580
East and South-East Asia	341	30	4	31	1	407
Not Stated	63	16	1	3	2	85
Oceania	58	3	0	6	0	67
America	29	0	0	4	0	33
Africa	28	1	0	3	0	32
South Asia	11	7	1	0	0	19
Middle East	9	3	0	1	0	13
Latin America	5	0	0	0	0	5
Total	2657	434	10	130	10	3241

A total of 3241 questionnaires were returned of which 2113 were from Europe alone. Most of the tourists stayed in tourist resorts. Tourists who have stayed in Guest Houses and Safari Vessel represent the smallest number of respondents. The majority of the respondents have stayed in Tourist resorts. About 65% of the targeted group responded indicating a higher response than in the previous survey. A sample of the survey questionnaire is attached.

3. MAJOR FINDINGS OF THE SURVEY

3.1 Nationality

This was a period during which Italians and British began to outnumber the traditional majority for the Germans because of declining growth out Germany, probably reflective of the economic stagnation in Germany.



The rate of responses is in relation to the overall market behaviour with some exceptions for the smaller markets. During the period of the survey 73.2% of tourists had arrived from Europe. Asia accounted for only 22% of arrivals during the period of the survey. Had the survey been conducted during the first quarter of the year, it is possible that more East Asian respondents would have been captured. While in the past there was more South Africans arriving to the Maldives than Americans, the number of American respondents at 33 outnumbered the 32 South African respondents. It is also worth noting that 58 Australians have responded reflecting the bigger share of the market for Oceania in comparison to Africa and Americas. With the predominance of Europeans in overwhelming proportions, regional analysis is at best limited in this survey. The distribution by nationality, by sex and age are similar to that of the previous 1999 survey.

3.2 Average Duration of Stay

The survey questionnaire gave a range of responses somewhat different from the previous survey of 1999. What is clearly discernible is that the average duration of stay remains close to 8 which is the national average.

Table 4: Distribution of Respondents by Duration of Stay

Duration of Stay	No. of Respondents	Percent
1 - 3 days	100	3.1
4 - 7 days	1,502	46.3
8 or more days	1,628	50.3
Not Stated	11	0.3
Total	3,241	100.0

A very small 3.1% of tourists registered an average of 1-3 days. These appear to be business tourists. Over 50% stated 8 or more days indicating that they are more leisure tourists who stayed in resorts. Just over 46.3% stated their duration of stay between 4-7 days indicating that they are more likely to be Asians who have stayed in resorts closer to Malé International Airport.

Table 5: Respondents by Duration Stay and Region of Origin

Region	Number of Days						Total
	1 - 3	4 - 7	8 - 30	31 - 60	61 - 90	Not Stated	
Africa	0	15	17	0	0	0	32
North America	4	12	17	0	0	0	33
Latin America	0	2	3	0	0	0	5
Oceania	1	33	32			1	67
East Asia	34	323	49	0	0	1	407
Europe	43	1047	1476	3	2	9	2580
Middle East	1	11	0	0	1	0	13
South Asia	9	8	1	0	0	0	18
Not Stated	8	51	25	0	2	0	85
Total	100	1502	1620	3	5	11	3240

In terms of regional behavior in relation to duration of stay, it is clear from the table above that Europeans generally have a longer period of stay. This is partly due to the fact that Europeans are normally able to get longer leave from work compared to Japanese and Chinese and also probably due to a greater interest in long diving holidays.

Irrespective of the average, national statistics show that a lot of Europeans stay in the Maldives for 2 weeks.

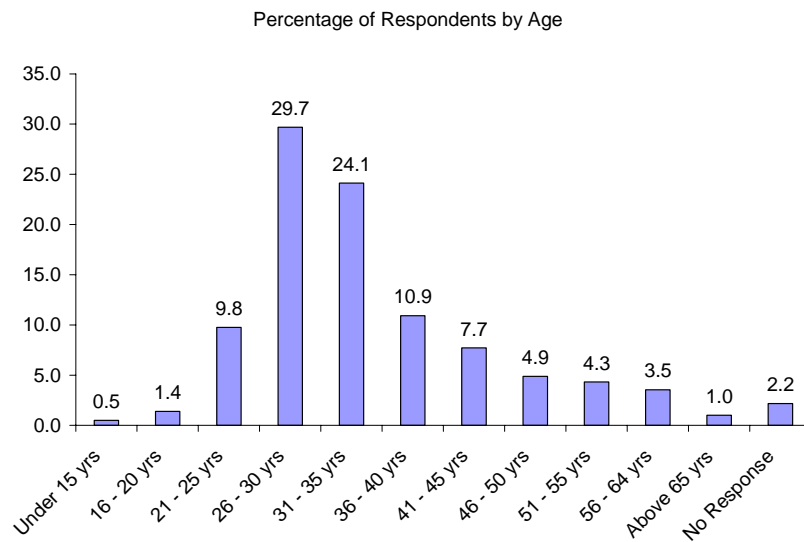
Table 6: Duration of Stay by Age Group

Age group	Number of Days						Total
	1 - 3	4 - 7	8 - 30	31 - 60	61 - 90	Not Stated	
Under 15 yrs	1	9	5			1	16
16 - 20 yrs		22	23				45
21 - 25 yrs	8	157	149			2	316
26 - 30 yrs	27	481	449		2	3	962
31 - 35 yrs	17	368	393		2	2	782
36 - 40 yrs	8	152	194				354
41 - 45 yrs	13	88	148			1	250
46 - 50 yrs	8	77	71		1	1	158
51 - 55 yrs	3	57	78	1		1	140
56 - 64 yrs	6	43	66				115
Above 65 yrs		6	25	2			33
Not Stated	9	42	19				70
Total	100	1502	1620	3	5	11	3241

This table indicates that younger respondents have stayed in the Maldives longer than older age groups.

The diving segment of holiday makers who usually stay longer also tend to be younger. Interestingly there were 2 respondents of over 65 years who stayed between 31-60 days.

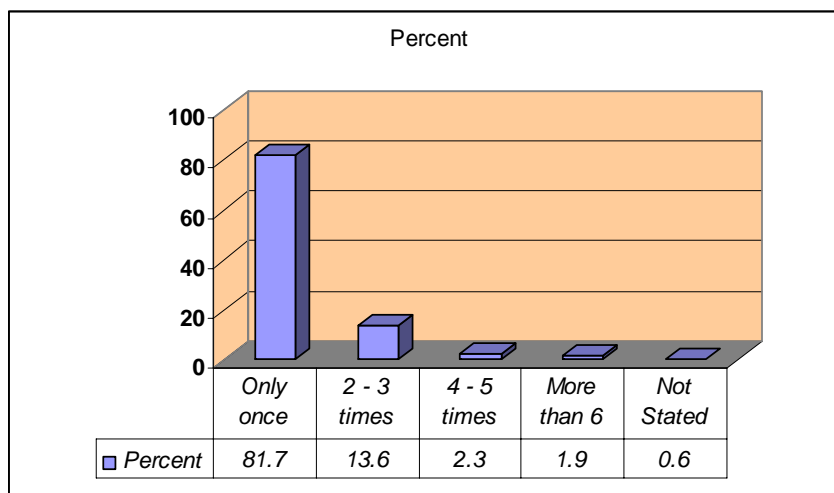
3.3 Distribution of Visitors/Respondents by Age groups



The distribution of visitors by age groups does not appear to have shifted dramatically since the 1999 survey. The vast majority are in the age groups between 26-35 years.

There were 7% less females than males among the respondents. The age distribution remained the same between genders.

3.4 Frequency of Visits



By far the majority were in the Maldives for the first time. The number of respondents who have visited Maldives 2-3 time is 14% while another 4% in two

categories stated that they have been to the Maldives even more frequently. Comparing

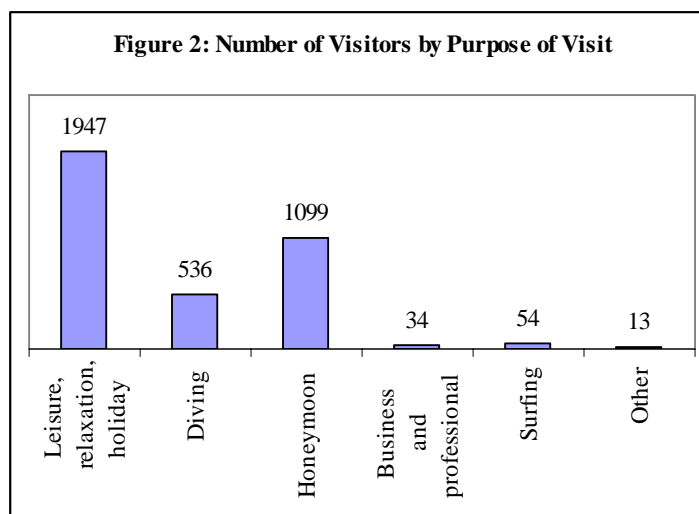
with the results of previous surveys, it appears that the percentage of repeat visitors have dropped marginally indicating that newer segments of markets are being tapped successfully.

Table 7: Frequency of Visits by Age Group

Age group	Number of Times Visited				Total
	Once	2 - 3	4 or more	Not Stated	
Under 15 yrs	7	7	1	1	16
15 - 19 yrs	29	14	2		45
20 - 24 yrs	293	18	2	3	316
25 - 29 yrs	877	69	10	6	962
30 - 34 yrs	657	100	23	2	782
35 - 39 yrs	268	66	20		354
40 - 44 yrs	163	63	21	3	250
45 - 49 yrs	110	32	16		158
50 - 54 yrs	94	35	9	2	140
55 - 64 yrs	74	20	20	1	115
Above 65 yrs	14	9	10		33
Not Stated	61	7	0	2	70
Total	2647	440	134	20	3241

The repeater pattern also shows that older people have patronized the Maldives time and again confirming the timeless beauty and attraction of the Maldives for most visitors.

3.5 Purpose of Holiday in the Maldives



The majority of the respondents 53% (1947 respondents above) said that their purpose of the holiday in the Maldives is for leisure, relaxation and holiday. A significant 30% or 1099 of the respondents stated honeymoon as the specific purpose of their visit, while only 15% stated Diving as the main purpose of the visit.

Compared to the survey of 1999, both the Honeymoon and Diving segments have increased from 11.7% and 9.1% in the previous survey to 15% and 30% in this survey, respectively.

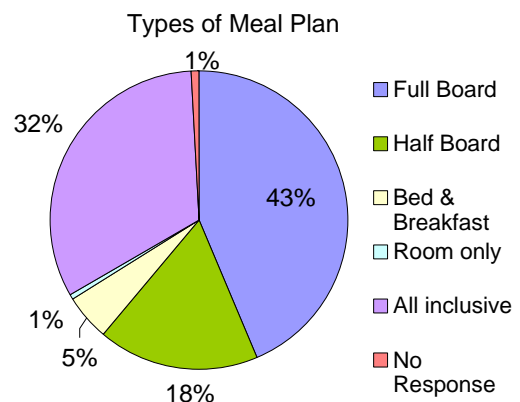
It is interesting that some respondents have come to the Maldives for their Anniversary. A significant number of visitors have also stated ‘surfing’ as their main purpose of visiting the Maldives. A visible number of visitors have also reported that ‘Business and professional’ as their purpose for visiting the country. This segment has always been lower in the Maldives compared to many other popular tourist destinations. The increasing interest in the Maldives as a honeymoon destination indicates the success of the tourism industry of the Maldives in positioning itself as a premium destination.

The overwhelming interest in the natural environment and environment related activities confirm the success of sustainable tourism in the Maldives.

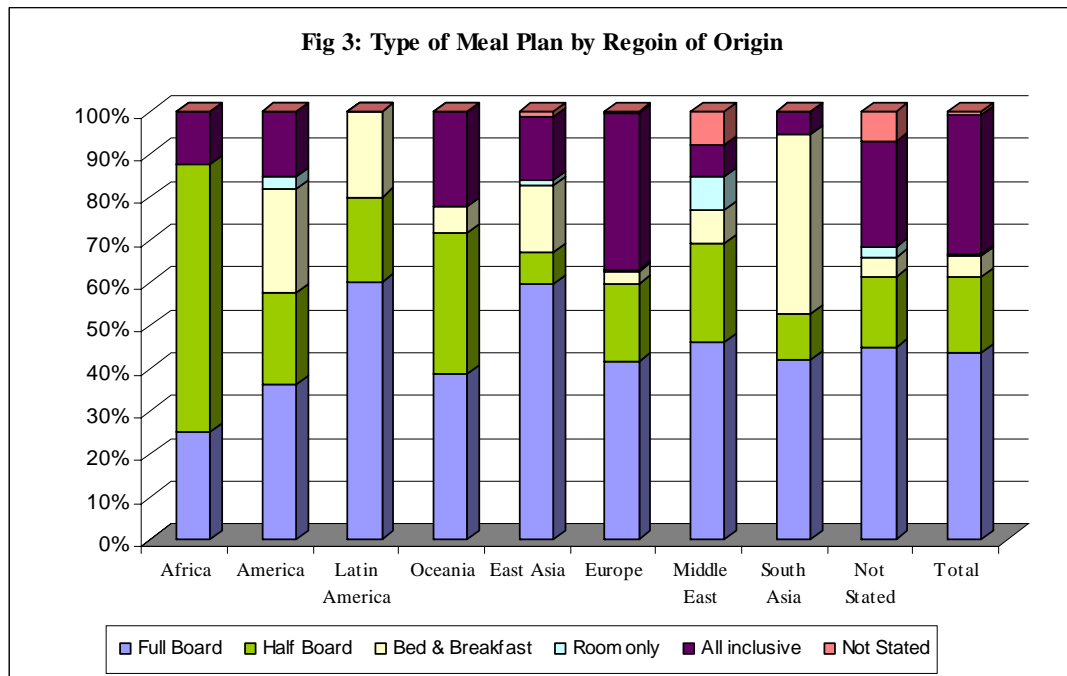
3.6

Type of Meal Plan

Asked about what type of meal plan that the tourist were on, most respondents said they were on full board which is consistent with previous surveys. However the number of clients who responded to have being on all-inclusive appear to be greater than previously thought. While the number of resorts offering a variety of all-inclusive packages has increased, this might be partly the result of some respondents meaning to be on full board stating they were on an all inclusive package. The survey did not ask what class of resort the tourists stayed in



but generally full-board accommodation is taken by economy tourists and Bed and Breakfast meal plan is generally taken by up-market tourists.



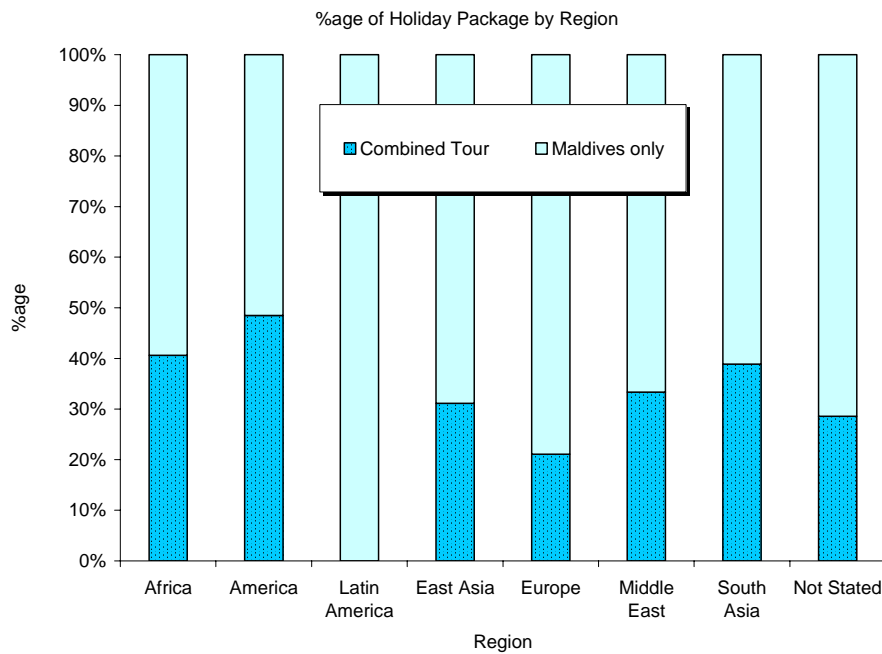
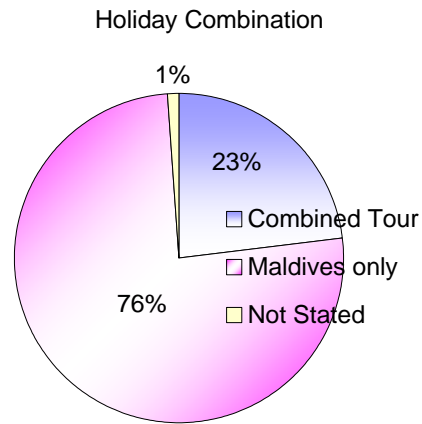
It appears that from Figure 3 that the majority of Europeans visited Maldives on all-inclusive and full-board packages.

Most Africans have opted for Half-Board while East Asians are predominantly on Full Board packages. Room only and Bed and Breakfast are the least preferred options by most nationalities, except Americans who appear to have preferred Bed and Breakfast over half Board.

Room only is taken by some guests in very luxurious resorts as well by business tourists who stay for a very short duration of stay. The meal plan may be an indication of distribution of the class of tourists responding to the survey.

3.7 Country Combined Holiday

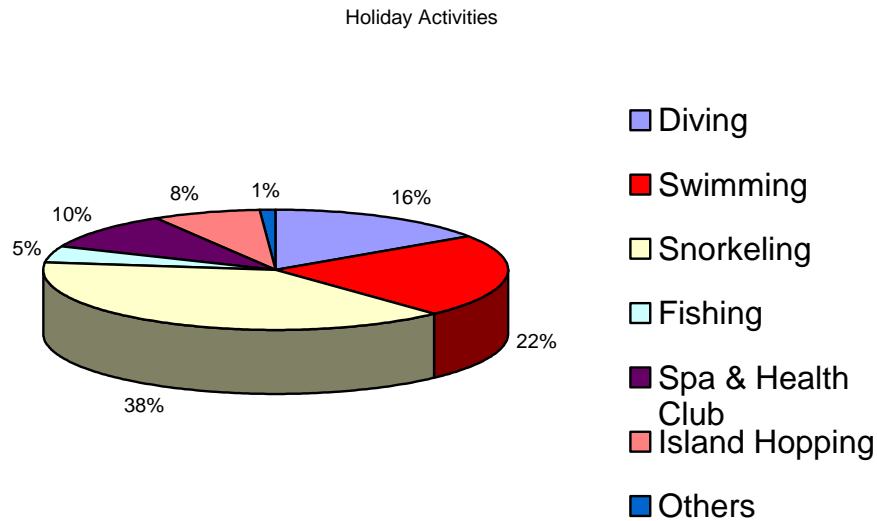
The majority of respondents came on their holiday to Maldives as the sole destination. However 23% of the visitors combined their visit to the Maldives with another destination. The trend observed is that the Maldives only segment is increasing, although in the early stages of tourism in the Maldives, combining Maldives with other destinations, particularly with Sri Lanka was the norm.



A breakdown of country combination preference by region shows that except for tourists from America, the majority of visitors from all other regions have preferred the Maldives only holiday. This is less clear-cut for Americans where the proportions are more or less equal for both types of packages.

Most significantly, Europe which is the most important generating market for the Maldives show a strong preference for the Maldives only holiday package.

3.8 Activities Enjoyed in the Maldives



A separate question was asked from the respondents about what activities they undertook and enjoyed in the Maldives, distinct from the original purpose of the visit.

Snorkeling, Swimming and Diving are the activities undertaken by most tourists surveyed during their stay in the Maldives. About 38% of the respondents said that they enjoyed snorkeling during their holiday in the Maldives.

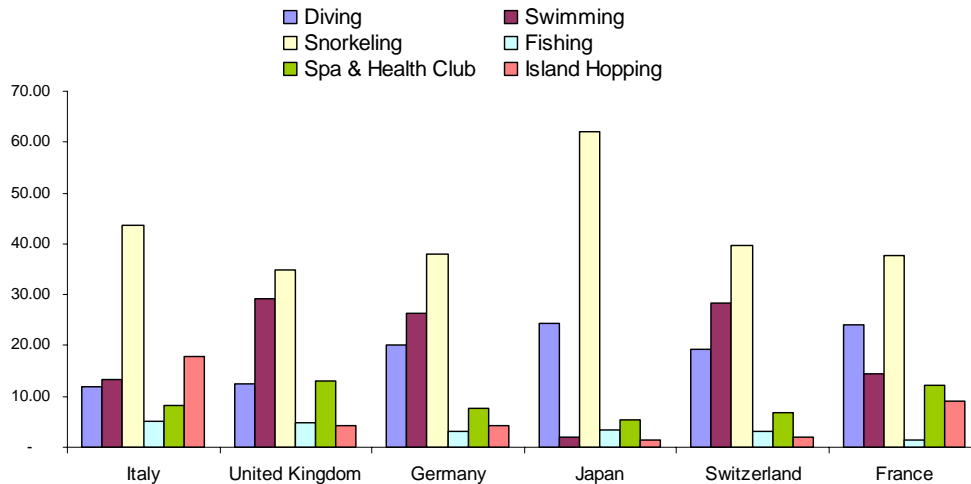
The second largest segment of response to this question, 22% stated swimming as the activity that they enjoyed most, followed by 16% favoring diving.

Similar to the results of the survey of 1999, these are the three main activities enjoyed. Island Hopping was enjoyed by 8% of the respondents and fishing was enjoyed primarily by 5% of the respondents. The popularity of these activities among visitors to the Maldives indicate, markets favouring the natural marine environment holds the most promise for the Maldivian tourism industry.

Combined together, over 70% enjoyed activities that are directly related to the marine environment. As a trend Spa and Health activities in the Maldives is on the increase.

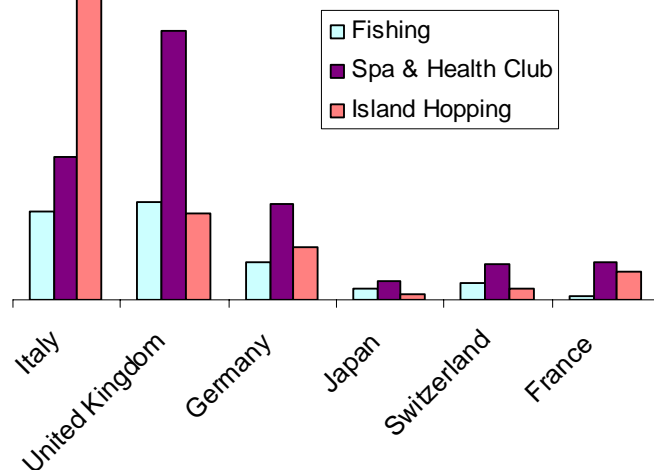
About 10% of the respondents stated Spa and Health Club as the main activity that they enjoyed in the Maldives. More women preferred to enjoy this activity than men.

Relative Preference by Major Nationalities for Main Activities



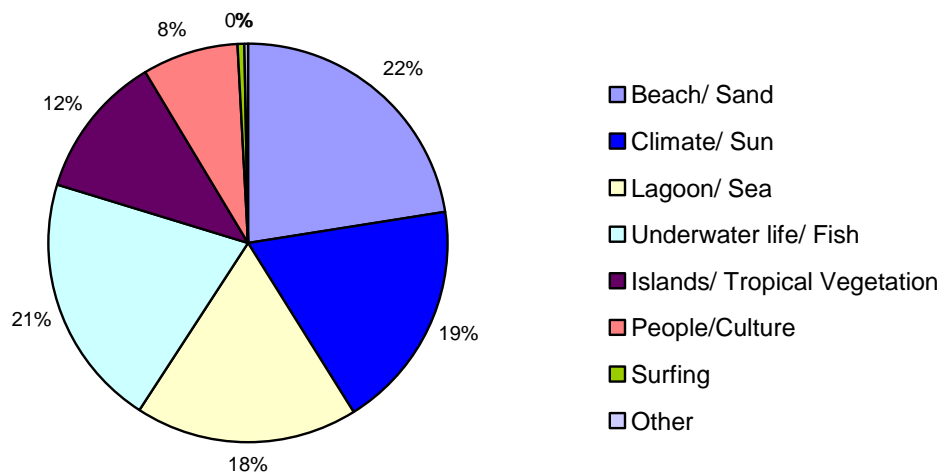
Looking at the main activities enjoyed by the respondents by major markets, the salient feature is the great interest taken in Snorkeling, Swimming and Diving.

Outside the three main activities enjoyed which are Snorkeling, Swimming and Diving it appears that Italians, by and large, take a relatively greater interest in Island Hopping. The other activity besides major activities enjoyed by most respondents of all nationalities is Spa and Health Club. The Swiss appear to take the least interest in Island Hopping.



3.9 Attractiveness of the Maldives as a Destination

The survey target group was asked what they thought were the main attractions in the Maldives, after having enjoyed their holiday.



The main perceived attractions all relate to the natural environment, mainly the marine environment.

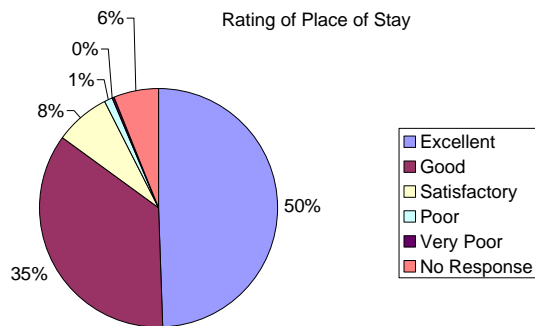
While 15% of respondents came to the Maldives for Diving as the main purpose and 16% enjoyed mainly diving, 18% had a very positive impression of the lagoon and the sea, 21% found underwater life and fish as a lasting impression.

Among Australians, surfing as an attraction was more salient than with any other nationality among the respondents, although it still is a very small percentage compared to other attractions.

With 12% stating Islands and Tropical Vegetation as the main attraction, it appears that preserving the island and tropical vegetation and creating ways and means to capitalize on these resources would bring an additional flavour and more diversification to the tourism industry of the Maldives.

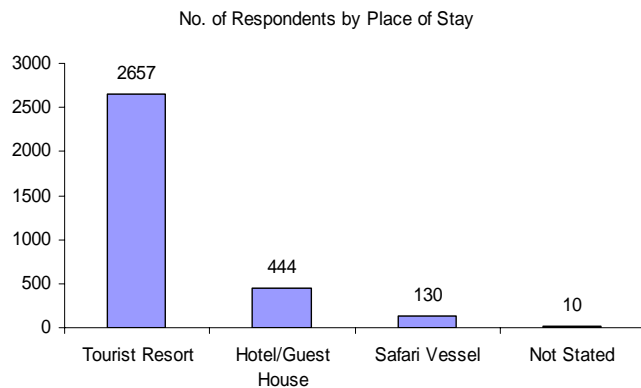
Interest in People and Culture that was reported by 3.3% in the 1999 survey has increased to 8% in the survey of 2004, indicating that Maldives would benefit by investing in and promoting cultural tourism products.

3.10 Rating of Services and Facilities



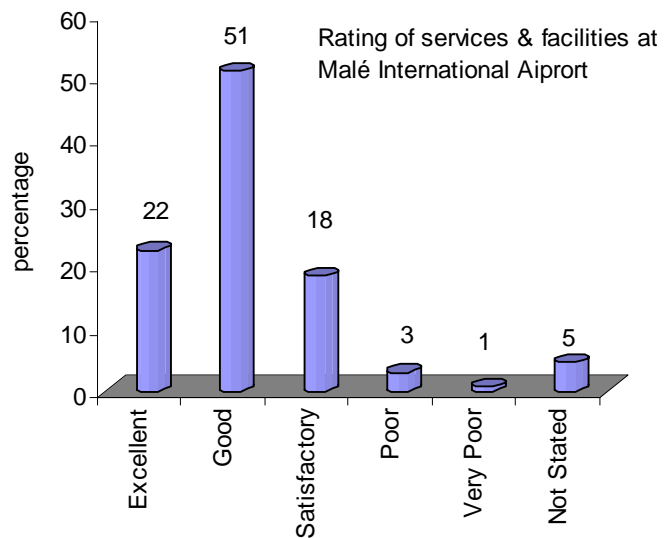
The majority of respondents at 50% said that they thought the services and facilities in their place was excellent, while 35% said that it was good. This is a confirmation of the high quality of the tourism product of the Maldives. Only 1% rated their place of stay as poor while a negligible percentage said that their place of stay was very poor.

This might be the result of their expectations not being met by the product that they experienced. It has been often observed that some boutique class resorts that create a very natural environment with minimal visible signs of modern amenities and structure do not satisfy some travelers who look for the more obvious signs of modern luxury and architecture in their holiday environment. On the other hand if the back to nature tourist happens to book a more modern built-up resort that meets regular city hotel standards, irrespective of how extremely good the services are, such tourists are less likely to be satisfied.



In some resorts entertainment is also kept to a minimal. In others, entertainment goes on throughout the day and throughout the week. Both possibilities can be a disappointment for a proportion of visitors. Food and Beverage preferences in some resorts also may not go well with all tourists from all over the world. Although it is a negligible percentage that rated services and facilities as very poor, it could be a variety of reasons including possible major disappointments and simply a result of expectations not matching the product.

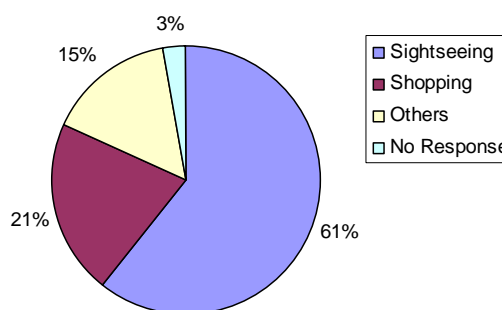
Majority of respondents 51% said that the services in the Airport were also good. Excellent response came from 22% of respondents, while 18% that the services and facilities at the airport were satisfactory. A very small percentage rated the airport poorly.



The Services and Facilities in Male International Airport are rated highly both by newcomers and repeaters. From very basic facilities with limited capacity the airport has continuously upgraded and expanded to now include comprehensive facilities that survey respondents would have seen or experienced.

3.11 Visit to Malé

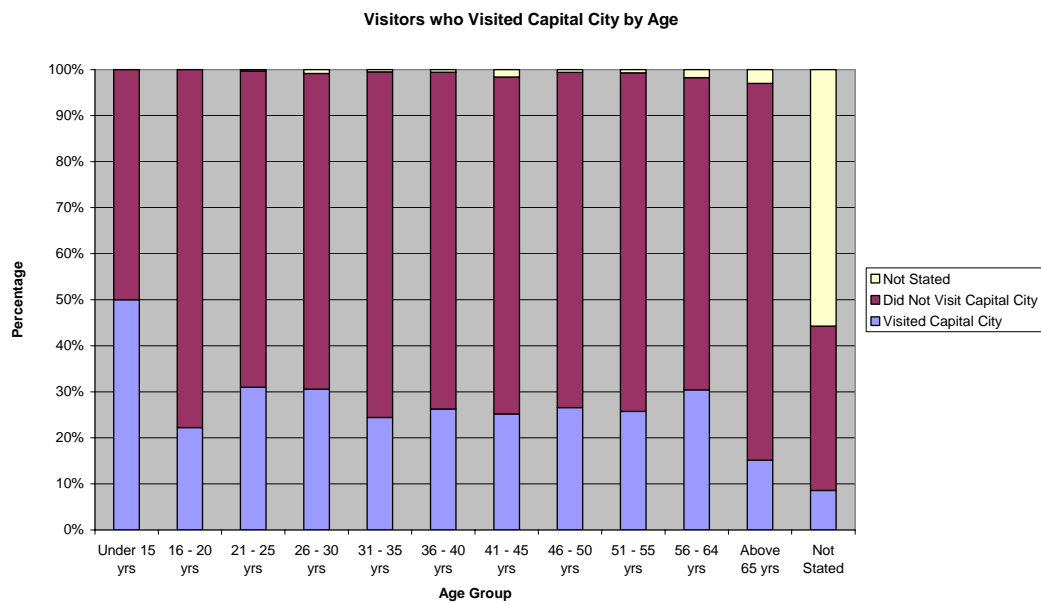
Over 27% of the tourist surveyed, 884 respondents had visited the capital. Of the respondents 2301 or 71% stated specifically that they had not visited Malé,



while 56 respondents or about 1.7% did not respond to the question.

Specific reasons to visit Malé include, (a) To know culture and people, (c) Overnight stay, (d) In transit, (e) Relax, (f) Meet local friends, (g) Surfing, (h) Hospital (i) Submarine trip, (j) Diving, (k) Shopping, (L) Food, (m) Waiting for family, (n) Waiting for flight, (o) Work, (p) Business, (q) Tour Operating, (r) Resort over booked, (s) To kill time, (t) Holiday and (u) Surfing. Those who indicated their reason to visit Male’ as work are probably professionals who stayed in nearby resorts but whose primary purpose of visiting the Maldives was short-term consultancy or mission in Male’.

It appears that younger tourist have visited Malé more than the older tourists. This is probably a result skewed by children accompanying parents on excursions.

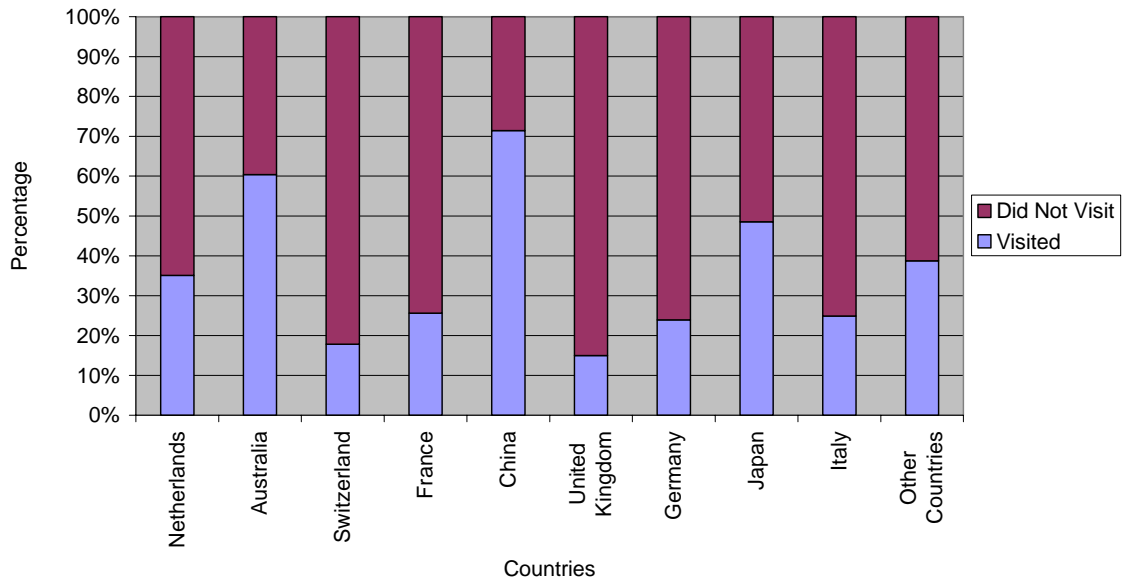


It is more salient that the age group 56-64 years seems to take a greater interest than people in the 30s and 40s age brackets that make up most tourists.

This is likely to be the result of a greater interest in the cultural product by older people as is the norm everywhere.

When visitors to Malé are analyzed by Nationality, it appears that Chinese visit Malé more than Europeans who are the majority of tourist coming to the Maldives.

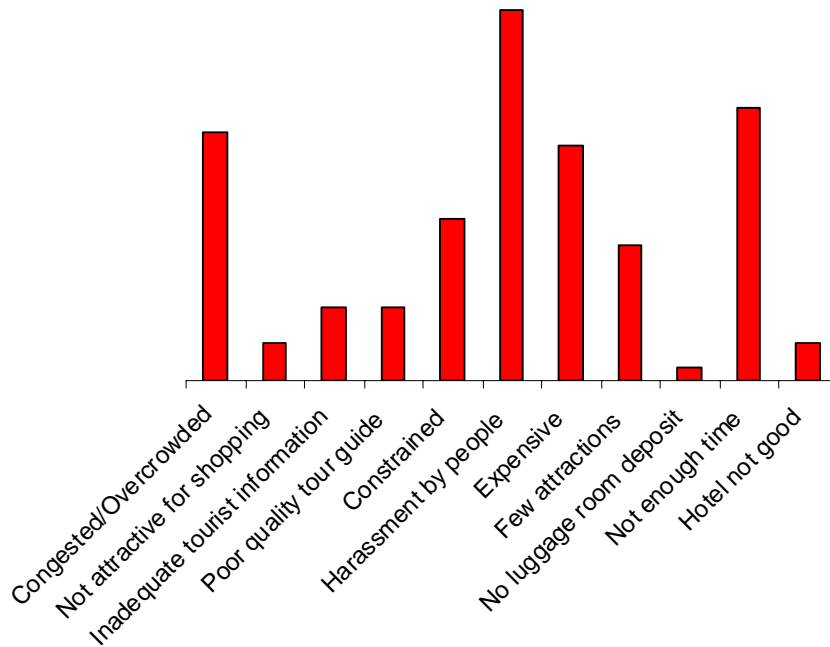
Visitors who Visited Male' by Major Tourist Markets



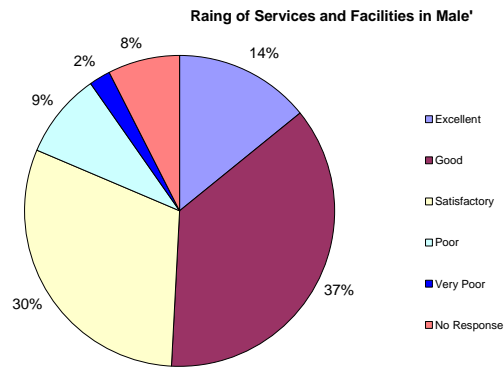
Besides Chinese, Japanese and Australian tourists, the Dutch appear to take a greater interest in Malé. This is because Dutch usually take a greater interest in the cultural product of the destinations that they travel to. Italians also take interest in visiting Malé traditionally for shopping.

Of the 27% of respondents who have visited Malé, about a third or about 6% of total respondents said that they were not satisfied with their visit to the Capital Island.

Main reasons stated by the small 6% percent of tourists who are not satisfied with their visit to the capital island of Malé are summarized in the chart.

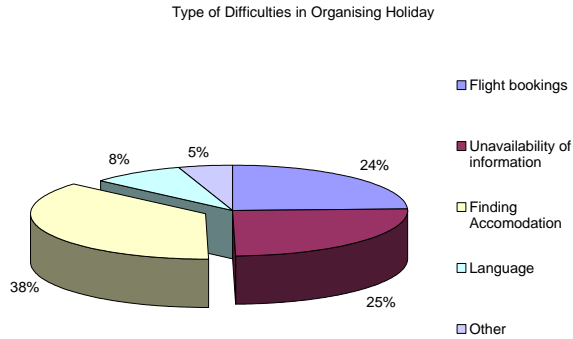


The perceived harassment appears to be the result of tourist shop hawkers pushing the visitors too far. It is also worth noting that one of main reasons stated for no satisfaction with a visit to Malé is “Not enough time” while constraints in a small island where facilities, shopping and entertainment are not as developed to meet the standards of a modern city. Harassment stands out because that would be the most imperative reason for unhappiness which is probably caused by bargaining salesmen in the tourist shopping area. In spite of the small scale of the problem it requires immediate attention and action.



The services and facilities in Malé were however rated mainly as excellent, good and satisfactory by the respondents as a result of continuous improvements in the Capital Island.

3.12 Difficulties in Organizing the Holiday



Nine percent (299 respondents) of tourists surveyed said that they had difficulty in organizing their holiday. Out of 299, nearly 40% have said that finding accommodation in the Maldives was difficult, while a quarter of these respondents said that there were also difficulties in flight bookings.

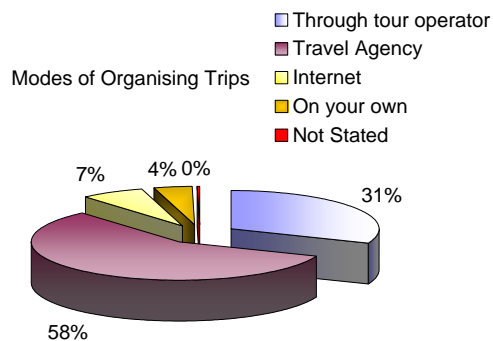
Some of respondents who stated having difficulty in booking a holiday in the Maldives also said there was a lack of information. Language and other difficulties were also stated by a few out of the 299 respondents who said they had difficulty in organizing their holiday in the Maldives. Notwithstanding the increased efforts in distribution of the tourism product, three major constraints have remained largely unchanged.

In earlier surveys the percentage of respondents who pointed to a lack of information were greater indicating success in reaching out to the markets while lack of access and supply constraints remain in relation to increasing demand.

3.13 Mode of Organising the Holiday

A greater proportion of respondents stated that their trip was organized through a Tour Operator or Travel Agency.

Significantly 7% of respondents said that they organized their trip to the Maldives through the Internet.



Free Independent Travelers (FIT)

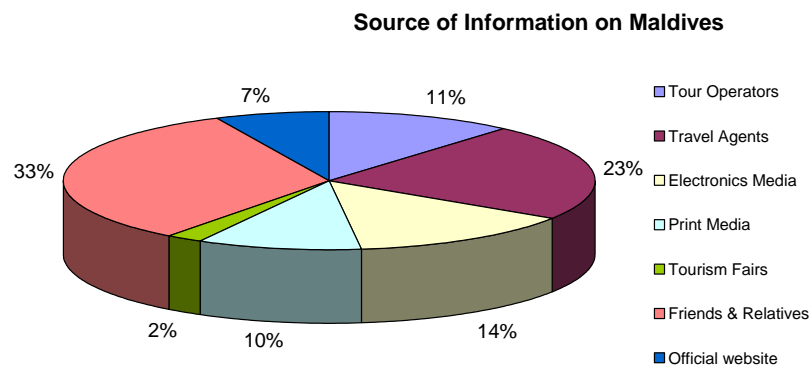
who organized their holiday on their own amounts to 4% of arrivals. The greatest

number of people surveyed 58% booked their holiday through a travel agent while another 31% state that they booked through a tour operator.

3.14 Source of Information

The source of information appear to be dominated by “Friends and Relatives” with 33% indicating a favorable overall impression of the Maldives.

The number of people getting to know about the Maldives through the electronic media has increased to 14% according to this survey.



The official website of the Maldives Tourism Promotion Board is attributed 7% and 2% state that they got to know about the Maldives through tourism fairs. The reason for the low percentage of visitors reporting tourism fairs as their mode of information on Maldives may be that such fairs are targeted to the travel industry and held in few countries. Travel fairs are visited by very few people from the general public. The fact that specific mention of ‘official website’ as opposed to the internet in general could also have hindered people reporting this particular medium as several tourist resorts maintain their own websites.

Tour Operators and Travel Agents are attributed 11% and 23% respectively as being the primary source of information on the Maldives.

3.15 Tour Operators and Travel Agents in generating markets

Some of the major tour operators that served the survey group include;

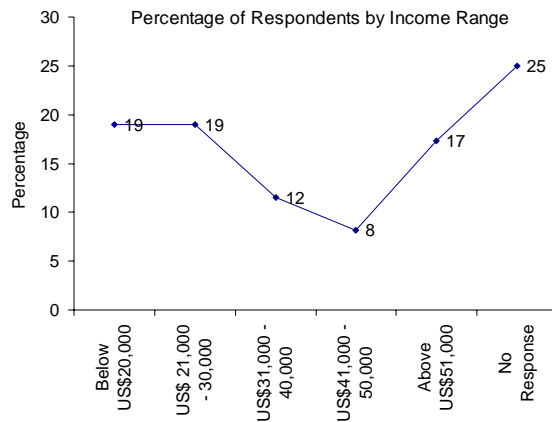
- Kouni (Travel Connection)
- Thomas Cook
- Neckerman
- Hotel Plan
- Touristic Union International
- ITS
- Valture
- Francorosso
- Hayes & Jarvis
- Club Med
- Jahn Reisen
- Meier's Weltreisen
- L'tur
- JTB
- Air Tour
- Reliance
- First Choice
- ST World
- Ventaglio
- Sporting Vacanze
- Tjaere Bourg
- Veratour
- Thomson
- Teorema
- Cosmos Distant Dreams
- Blu Vacanze
- HIS
- Manta Reisen
- Best Tour
- Jet Tours
- Going Places
- Trade Winds
- Tropic Tours
- Lunn Poly
- Maxi Travel Land
- Alpi Tours
- Columbus
- Helvetic Tour
- Dertour
- Cresta/Cresta Holidays/My Travel

The full list of tour operators reported in the survey is attached in the annex.

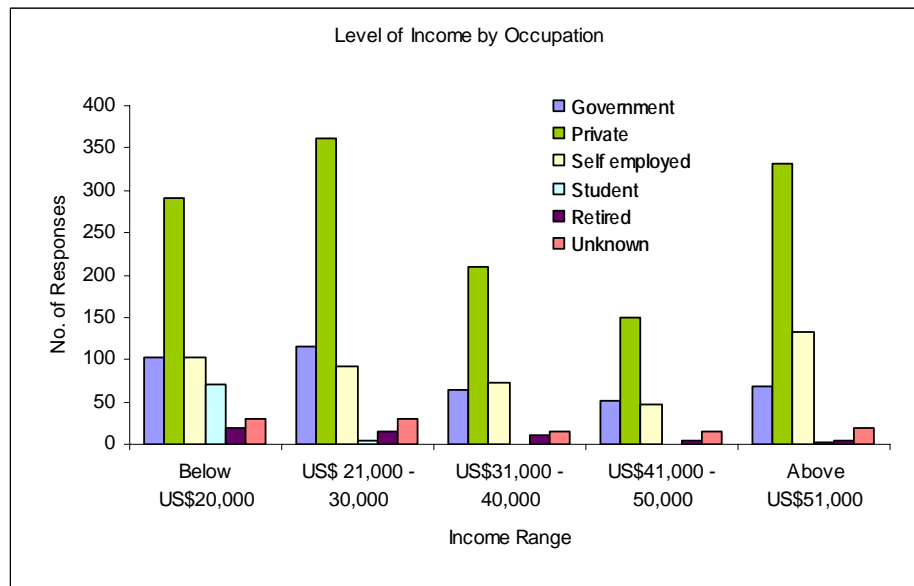
3.16 Income of Tourists

The response to annual income after tax indicated the earning capacity of tourists surveyed. It is significant that 25% of respondents refused to state their annual income.

High income earners in the income brackets of US\$41-50 thousand and above US\$51 thousand make up 8% and 17% respectively or a total of 25% high income earners.



Lower income earners make up 19% in the under US\$20 thousand category as well as another 19% in the US\$21-30 thousand per annum income bracket. Hence a total of 38% of tourists surveyed belong to the relatively lower income categories.



Students are the lowest earners while Private and Self-Employed are the highest earners. Interestingly in a similar pattern to 1999 survey results people with an income of over US\$50 thousand are far greater than those between US\$41 – 50 thousand income brackets.

Annual Income by Age Group

In looking at the spread of disposable income among age groups used in the survey it appears the dominant age groups between 26-35 years are also among the highest earners.

Table 8: Reported Annual Income by Age Group of Visitor

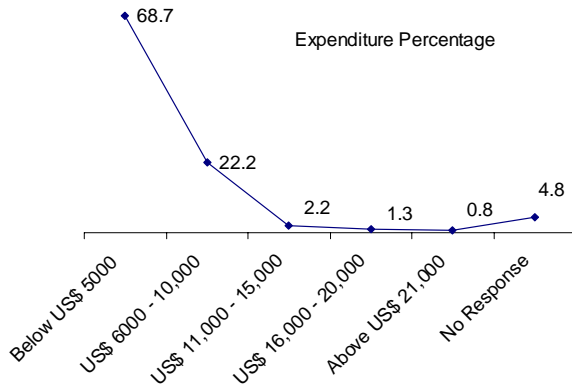
Age group	Reported Income Category						Total	Percentage
	Below US\$20,000	US\$ 21,000 - 30,000	US\$31,000 - 40,000	US\$41,000 - 50,000	Above US\$51,000	No Response		
Under 15 yrs	5		1	1	2	7	16	0.5
16 - 20 yrs	26	3		1	3	12	45	1.4
21 - 25 yrs	105	59	32	14	21	85	316	9.8
26 - 30 yrs	249	213	112	76	108	204	962	29.7
31 - 35 yrs	117	165	108	73	158	161	782	24.1
36 - 40 yrs	41	57	41	35	91	89	354	10.9
41 - 45 yrs	27	49	26	20	65	63	250	7.7
46 - 50 yrs	18	19	16	20	46	39	158	4.9
51 - 55 yrs	17	20	19	21	32	31	140	4.3
56 - 64 yrs	10	24	10	5	28	38	115	3.5
Above 65 yrs		5	6		4	18	33	1.0
No Response	2	1	2	1	2	62	70	2.2
Total	617	615	373	267	560	809	3241	100.0
Percentage	19.0	19.0	11.5	8.2	17.3	25.0	100.0	

The number of non-responses from among the prevalent age group is also significant. This may be the result of many people being reluctant to reveal their actual income. Therefore it is safe to assume that there would be a reasonable margin of error. What is however encouraging in terms of the validity of the data is the similarity of the results to that of the 1999 survey. While the previous survey report did make some distinctions in the income of respondents by region and nationality, considering that the overwhelming majority of respondents are from Europe and Japan, there does not appear to be a statistical significance in that respect. However, it should be cautioned here that there was overlap in the income groupings specified in the 1999 survey questionnaire which might have led to errors in the recording of reported income.

Similarly, there is little if any discernible variance that can be determined in income in relation to the stated occupation of respondents. A direct comparison cannot be done with the 1999 survey because the responses are quite different.

Based on the findings of this and previous surveys, it is quite clear that the Maldives is affordable and accessible to the majority of tourists from traditional generating markets in spite of the reputation of being an expensive destination.

3.17 Level of Expenditure

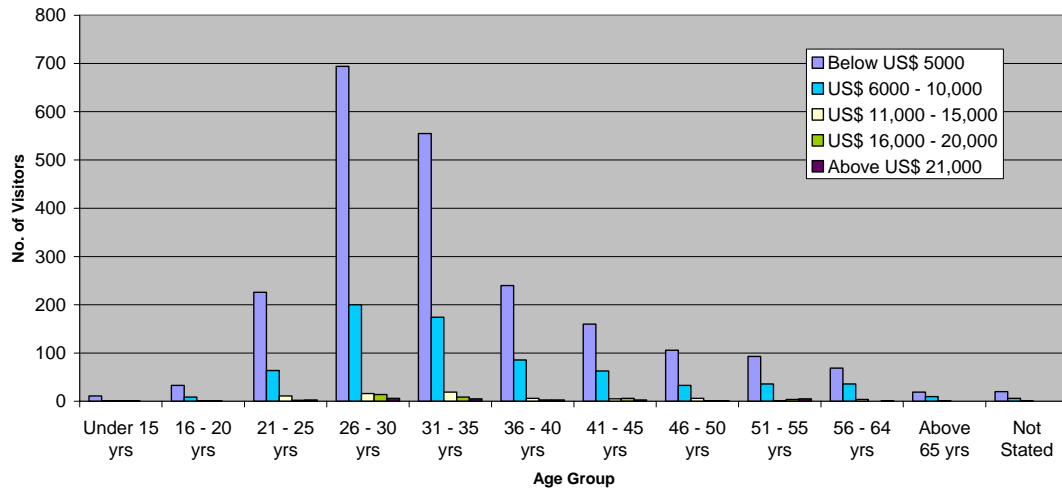


The majority of respondents, nearly 69% stated that they spent under US\$5000 for their holiday in the Maldives.

It is probable that majority who stated as such would have spent an average of around US\$300 per day during an average 8 days stay, inclusive of flight.

More significantly over 26% state that they have spent over US\$6-10 thousand for an average of 8 days stay in the Maldives. This is an average of not less than US\$750 per day.

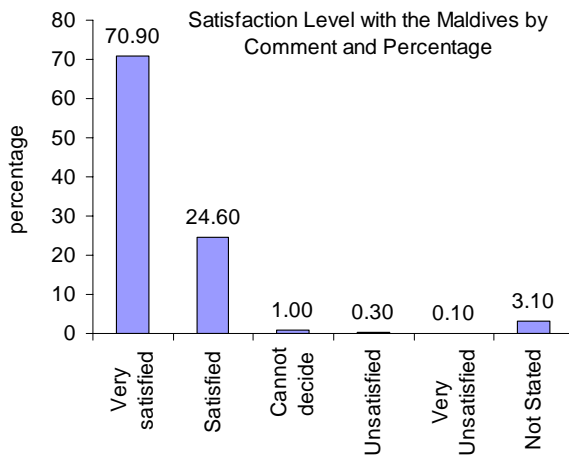
Expenditure by Age



About 4% indicate to be on a very high expenditure bracket of about and over US\$1400 per day assuming an average 8 days as duration of stay, reflective of the success of the Maldives in positioning to the wealthiest segments of the market.

There is a limitation in analyzing the expenditure level in relation to other variables because the minimum range given was US\$5000 while many packages from Europe are sold under US\$3000 with flight.

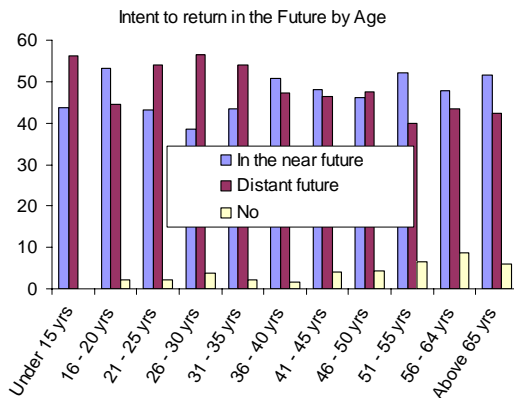
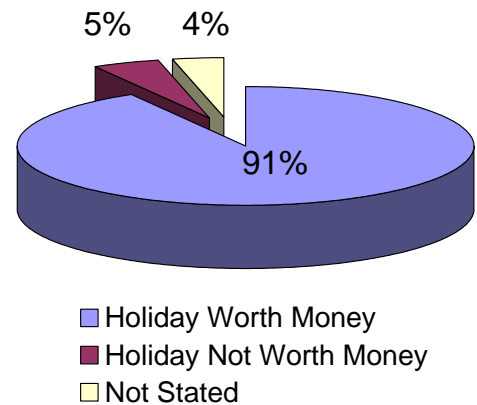
3.18 Satisfaction with Holiday in the Maldives



An overwhelming majority of respondents (70.9%) are very satisfied with their visit to the Maldives; however 24.6% stated that they were satisfied. Only a negligible percentage stated that they were not satisfied.

Over 90% stated in response to a separate question that they felt it was good value for money. Only 5% gave a negative response. Just 4% did not give an answer.

Worthiness of Holiday



Asked about intent to return 52% stated that they would return in the distant future while 43% stated that they would return in

near future. Only 3% stated that they would not return.

Over 95% of the respondents said that they would also recommend the Maldives as a tourist destination to others.

4. CONCLUSIONS AND RECOMMENDATIONS

The demographic characteristics of tourists have not shifted dramatically since 1999.

However, repeaters have dropped to 18% although in the final analysis this is not the result of a repeaters giving up the Maldives but rather a result of increasing numbers of new visitors. This is a healthy indicator because according to tourism marketing strategies, a growth in repeaters would eventually lead to the stagnation of the destination.

Recommendation: This shift should not be allowed to be interpreted negatively and a new policy to encourage new and emerging segments of the market rather than repeater clients should be encouraged for the long-term sustainability of the destination.

It is also observed that the honeymooners are taking a greater interest in the Maldives. Few respondents said that they have come to the Maldives on their Anniversary. It is curious that no one mentioned Wedding as the reason to be in the Maldives although it is widely known there are non-legal wedding packages that are now being sold by resorts.

Recommendation: In view of the success in the honeymoon segment and emerging interests for Anniversaries in the Maldives, more encouragement at policy and marketing levels should be provided to tap the huge Wedding market, and if not at least a campaign be launched to encourage couples to spend their Anniversaries in the Maldives.

Curiously a significant proportion of respondents said that they were on all-inclusive packages. This increasing popularity of the Maldives in the all-inclusive market is not advertised extensively. It appears that the Maldives may now be able to compete with and outdo the Caribbean as the primary all-inclusive destination

Recommendation: That a fresh marketing campaign targeting the all-inclusive segments of the international tourism market be launched.

Tourists who combined the Maldives with another destination amounted to 30% of the respondents. It was 31% in the 1999 survey. This is not a statistically significant change.

Recommendation: Given the problems of access to the Maldives and given the limited though outstanding tourism product of the Maldives, every effort should be made to encourage more country combinations through collaborative marketing efforts in Asia and the Middle East.

Spa and Health activities in the Maldives seem to have caught the imagination of tourists who did not expect much of this service in the Maldives.

Recommendation: Increase emphasis on this product that would further strengthen the image of the Maldives as a premium destination.

The vast majority perceives the Maldives as very attractive and applauds the services and facilities in the destination.

Recommendation: Implement measures to not allow any complacency in maintaining product standards and environmental management in resorts.

Of the 30% of tourists surveyed who have visited Malé, about a third in both 1999 and 2004 surveys had very negative views especially with regard to harassment by hawkers.

Recommendation: The modus operandi of Malé excursion, commissions for both foreign and local Tour Guides and other measures that intimidate tourists who visit Malé should be reviewed together with all stakeholders in a Workshop and new standards should be implemented for the benefit of everybody. Tourists should be shown who to ask for help and how to solve any problem that they face without fear of intimidation.

As in all successful destinations world wide, Word of Mouth is confirmed here to be the best marketing tool. This does not mean that other means of marketing are in-effective but underscores the vital importance of Word of Mouth.

Recommendation: Government and the Industry should implement a marketing mix that emphasizes on enhancing the Word of Mouth, and such measures may include complimentary memorabilia and/or pin-ups or vouchers that the visitor may give away as a gift voucher to someone else but not to the benefit of oneself, whereby more people get engaged in Word of Mouth.

The supply of beds in the Maldives continues to be a problem for people who try to book a holiday in the Maldives, while airplane seats are also difficult to obtain during most times of the year because the beds and seats are pre-allocated officially up to the allowed over-booking limit, and are controlled by big tour operators.

Recommendation: The Maldives should consider giving up on overbooking as a marketing strategy which might have been useful in the past but is now an impediment to gain better rates.

5. COMPARATIVE ANALYSIS OF TOURIST OPINION SURVEY OF 1999 AND TOURIST OPINION SURVEY OF 2004

Introduction

The Goals and Objectives of the 1999 Tourist Opinion Survey conducted from 24 - 30 August 1999 and the 2004 Tourist Opinion Survey conducted from 6-12 October 2004 are similar, although there are some new aspects covered in the 2004 questionnaire and slight variations in the formatting of questions on the same topics in the two surveys. There is also a subtle difference in the period of the survey because, in the Maldives, hotel rates and occupancy levels are generally lower in October than in August. With these observations, it is pertinent to make a brief assessment of the relevance and scope of this comparative analysis. The 2004 Survey had six questions less than the Survey of 1999. They relate to;

- Traveling companions (TOS 1999 Q.9)
- Airline details (TOS 1999 Q.15 & 16)
- Payment mode for the package (TOS 1999 Q.18)
- Breakdown of categories of services in rating (TOS 1999 Q.22)
- Transfer mode (TOS 1999 Q.29)

By virtue of the design of the 2004 questionnaire, much of the above information can be gleaned from the different questions except with regard to the airline and transfer information which is totally missing in the 2004 survey. There were also different scales and methodology used in assessing income and expenditure, and age. Television as a medium of publicity was not specifically included in the 2004 survey, while it was covered under the electronic media. A specific question was included in the 2004 survey to find out how popular the official website www.visitmaldives.com was as a medium of information and publicity on the Maldives. Health & Spa interest was also gauged for the first time in the 2004 Survey. New baselines are being established, while factors of air access and specific ratings have been left out in the 2004 survey.

Therefore, while most of the questions in the two surveys are comparable, this analysis will be limited to the extent that there is comparable data available from both the 2004 and 1999 surveys.

Scope and Coverage

Both surveys targeted about 5000 passengers defined as tourists departing from Male' International Airport . The August 1999 survey report states that it was intended to survey 54% of the departing tourists during the survey period by distributing a total of 5000 questionnaires. Only 3734 questionnaires were distributed of which 55% were returned giving a sample size of 22% of the departing tourists during the period. The October 2004 survey also targeted 5000 respondents of which 3241 questionnaires or a 65% response was obtained. The response for both surveys came mainly from tourist resort guests. While the conclusions of both the surveys concur almost on all issues, there were variations in preferences and perceptions that were driven partly by the design of the questionnaire and by the fact that target groups successfully tapped for the survey were not similar in some respects. Moreover, the effect of seasonality is also likely to be a significant factor in determining the outcomes of the two surveys.

Nationality

Number of Respondents by major nationalities by year of survey

Nationality	1999	2004	Difference
Italy	497	774	277
Germany	298	475	177
United Kingdom	233	668	435
France	113	163	50
Spain	54	24	-30
Switzerland	53	219	166
Netherlands	29	57	28
Austria	25	57	32
Japan	485	268	-217
Australia	36	58	22
Other	214	478	288
TOTAL	2037	3241	1204

A salient feature in the 2004 survey is there were far fewer Japanese respondents and slightly less Spanish respondents probably due to specific seasonality patterns; summer holidays and Obong holidays as they occur, as pointed out in the 1999 report. More Japanese opinions are included in the 1999 survey than in the 2004 All in all there were more respondents in 2004 in comparison to the 1999 survey; notably so for British,

Italian, German and Swiss tourists. In terms of response by major regions, the comparative percentage of responses is as follows:

Percentage of Respondents by Region, 1999 and 2004

Duration of Stay by Region	1999 % respondents	2004 % respondents
Africa	0.2	1.0
North America	2.3	1.0
Latin America	0.9	0.2
East Asia	26.8	14.6
Europe	65.9	79.6

In both surveys the majority of the responses were from Europeans and East Asians. The market share by major nationalities and regions had not changed significantly between 1999 and 2004.

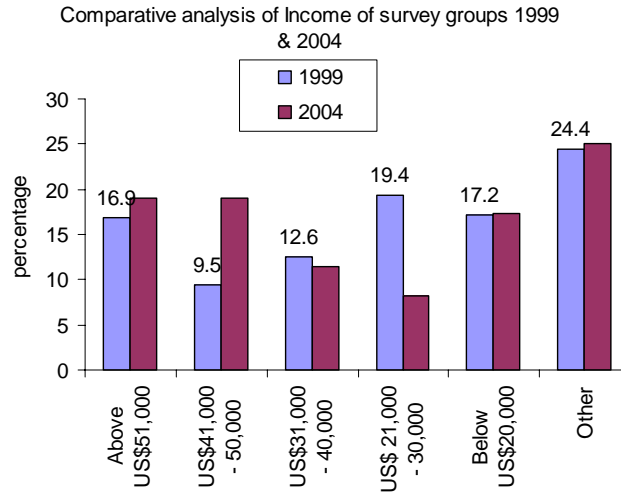
Age Group and Gender

While the broad age groupings used in the two surveys were different in both surveys the majority of the respondents were in the age group 25-40 years. There were about 7% more male respondents in the 2004 survey although the percentage difference between respondents in the 1999 survey was marginally smaller. The differences between the two surveys in this regard are not significant.

Average Duration of Stay

The average duration of stay of the tourists was determined in 1999 by a different scale to the 2004 survey. However, the average duration of stay in both surveys was about 8 days. East Asians occurred most in the 4-7 days average duration of stay band in the 2004 survey while most in the 8-30 days were Europeans.

Disposable Income



Although the 1999 survey was conducted in a peak month, it appears that there were lower income earners in the range USD\$21-30 thousand range compared to 2004. It shows that there are wealthier tourists who responded in 2004. Perhaps it is a reflection of the growing popularity of Maldives as a high-end market.

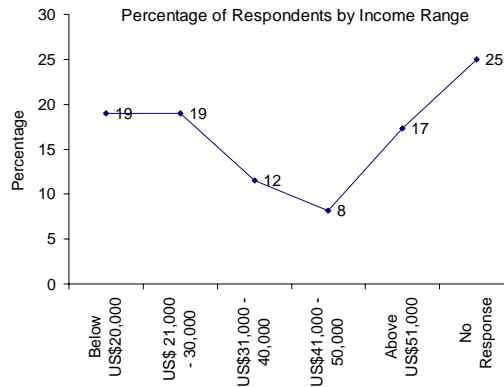
Profession

In the 1999 survey the number of people surveyed by their profession is as follows.

Professional composition of respondents, 1999

Occupational Category	Respondents
Professionals	981
Skilled Workers	223
Students	145
Clerical Worker	138
House Wife	58
Technicians	36
Retired	13
Unskilled Workers	4
Not Stated	439
TOTAL	2037

However, the 2004 survey could not obtain comparable data because of questionnaire design. The results of 2004 in relation to profession and income were as follows:



The results of the two surveys in this regard are very different. However, in-depth analysis reveal that students are the lowest earners and the median age range earned most in both surveys. Expenditure patters show a direct relationship between profession and level of income.

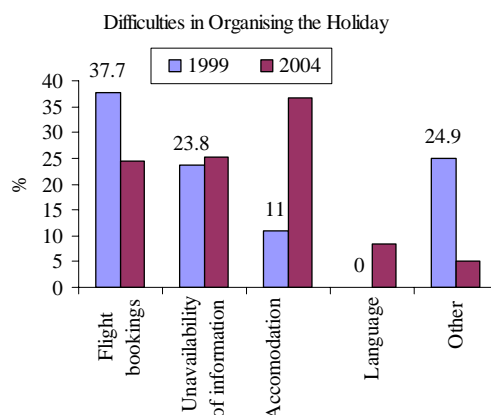
Frequency of Visits

According the 1999 survey, 36% of European visitors to the Maldives had visited Maldives for the first time, 37% had visited 2-5 times, 14% had visited 6-10 times, and just 3% visited more than ten times”. In the current survey of 2004, the majority were in the Maldives for the first time. The number of respondents who have visited Maldives 2-3 time is 14% while another 4% in two categories stated that they have been to the Maldives even more frequently. Because the range adopted in the two survey questionnaires are so different it was impossible to make a direct comparison.

Pattern of Visits

The pattern of visit covered in the 1999 survey cannot be dealt with in this analysis because the question of weather the respondent was traveling with family, alone or with a partner is not included in the 2004 questionnaire even in an indirect way. Since the honeymoon segment in the 2004 is higher, and given other characteristics, most of the respondents could be “traveling with partner” as confirmed in the previous survey.

Difficulties in Organizing the Holiday



A very small percentage of respondents in both surveys said they had difficulty in organizing the holiday. In 1999, about 14% pointed out to some difficulty in this regard while in 2004 only 9% expressed difficulty. Among such respondents, the difficulties pointed out are shown in the figure. It can be seen very clearly that in 2004, people who had difficulty in obtaining accommodation in the Maldives were significantly higher than that shown in the results of the 1999 survey. Improved marketing and the effects of seasonality in the demand for accommodation are likely to have contributed to the difference in results.

Mode of Booking the Holiday

Holiday booking mode, 1999 and 2004

Mode of Booking	1999	2004
Tour Operator	18.9	31.0
Travel Agency	68.2	58.0
FIT	11.0	4.0
Internet/other	1.9	7.0

In both the 1999 and 2004, majority booked through a Travel Agent. In 2004, Travel Agency bookings were relatively down by 10.2% while Tour Operator component was about 12% higher. In the 1999 survey, the Internet as medium to make a booking was not included in the questionnaire. For the purpose of rough comparison internet bookings in 2004 and other unstated bookings are put in the same row of the table above. The 2004 survey will establish a baseline for internet bookings to be gauged in a subsequent survey of the future. Major Tour Operators that appear from both the surveys are given below.

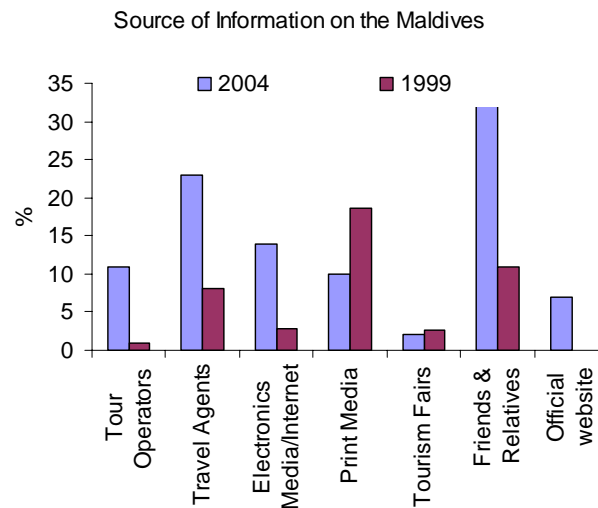
Major Tour Operators by Survey	
1999	2004
Kuoni	Kouni Thomas Cook
Neckerman	Neckerman
Hotel Plan	Hotel Plan
TUI	TUI ITS Valture Francorosso
Hays & Jarvis	Hayes & Jarvis Club Med Jahn Reisen
Miers Weltreisen	Meier's Weltreisen
Island Collection	L'tur
Aventure Nel Mondo	JTB

It is possible that some major operators did not get picked up in both surveys at least partly because the month of the survey was different.

Country Combination

There was no discernable variance between the two surveys in the country combination holidays

Source of Information



The highest percentage of respondents said in 1999 that it was the print media that was the main source of information on the Maldives. In 1999 television was specified in the survey but in 2004 it was left out and assumed to be lumped into electronic media.

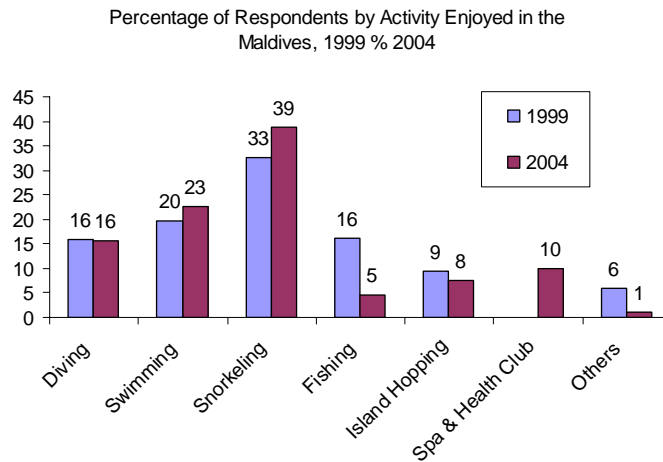
In a dramatic shift in 2004 the highest percentage attributes Friends & Relatives as the main source of information.

Meal Plan

No. of Respondents by Meal Plan		
Type of Meal Plan	1999	2004
Full Board	57.9	43.6
Half Board	20.4	17.5
Bed & Breakfast	12.7	4.9
Room only	1.1	0.7
All inclusive	-	32.5
n/a	7.9	0.7

In both surveys, the majority were on full-board or half board while the room only component was very small. The all-inclusive response was not built into the questionnaire in 1999 and could not be therefore evaluated in relation to 2004.

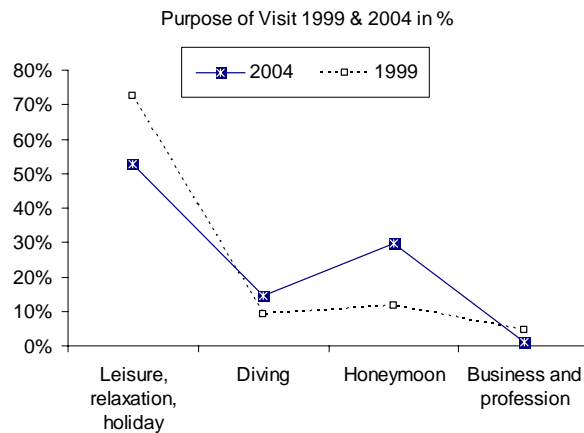
Activities Enjoyed



The general pattern of activities enjoyed by tourists in both surveys is quite similar. The question on Spa and Health Club was not there in the 1999 survey.

In both surveys activities expected, undertaken and enjoyed relate to the natural environment and the beauty of the Maldives.

Purpose of Visit



In comparing the Purpose of Visit in August 1999 and October 2004, there is a significant increase in the proportion of honeymooners visiting the Maldives in 2004.

Quality, Satisfaction and Perceptions of Value for Money

In 1999, 31.8% said that their holiday in the Maldives was better than expected, 5.5% said it was up to expectation and 8.8% said it was below expectation.

While the questions posed in this regard were structured differently in 2004, the overall results show that the vast majority of the respondents were satisfied with the quality of the tourism product of the Maldives, and services and facilities available in the country. The majority would also recommend the Maldives to others and intend to come back. However, in responding to questions regarding a Visit to Malé, in both surveys tourists appear to have been harassed by hawkers.

Purpose of Visit to Malé				
Purpose	Respondents	1999	2004	
Sightseeing	541	60.6	61	
Shopping	190	18.5	21	
Others	137	19.9	18	

Issues and Recommendations

There were issues in the format, design and content of the 1999 and 2004 survey questionnaires which prevented detailed comparison of several important variables in the two sets of data. In the 2004 Survey there were major omissions as they relate to transfer, air travel details and specific questions as they relate to the opinion of tourists with regard to product details. Therefore, it is recommended;

- That weaknesses and strengths of both the surveys be studied in the implementation of a future survey.
- To ensure consistency in the data collected from one survey to the other so that comparisons can be made with variables from the earlier data making it possible to conduct time-series and trend analyses of the data, in relation to various socio-economic and political aspects at the national as well as global level. Development of the survey questionnaires and the sample selected in terms of size, composition of different nationalities and timing need to be consistent with previous surveys.

6. ANNEXE

Table A1: Visitors by place of stay

Place of Stay	No. of Visitors	Percent
Tourist Resort	2657	82.0
Hotel/Guest House	444	13.7
Safari Vessel	130	4.0
Not Stated	10	0.3
Total	3241	100.0

Table A2: Visitors by Place of Stay by Region

Nationality/Region	Tourist Resort	Hotel	Guest House	Safari Vessel	Not Stated	Total
Africa	28	1	0	3	0	32
America	29	0	0	4	0	33
Latin America	5	0	0	0	0	5
East Asia	399	33	4	37	1	474
Europe	2113	374	4	82	7	2580
Middle East	9	3	0	1	0	13
South Asia	11	7	1	0	0	19
Not Stated	63	16	1	3	2	85
Total	2657	434	10	130	10	3241

Table A3: Visitors by Place of Stay by Age Group

Age group	Tourist Resort	Hotel/Guest House	Safari Vessel	Not Stated	Total
Under 15 yrs	13	2	1		16
16 - 20 yrs	24	18	3		45
21 - 25 yrs	248	56	9	3	316
26 - 30 yrs	805	135	18	4	962
31 - 35 yrs	667	82	33		782
36 - 40 yrs	291	42	21		354
41 - 45 yrs	198	31	20	1	250
46 - 50 yrs	120	29	9		158
51 - 55 yrs	108	24	8		140
56 - 64 yrs	104	8	3		115
Above 65 yrs	27	4	2		33
Not Stated	52	13	3	2	70
Total	2657	434	130	10	3241

Table A4: Total spent by place of stay

TOTAL SPENT	Tourist Resort	Hotel	Guest House	Safari Vessel	No Response	Total
Below US\$ 5000	1813	295	6	106	6	2226
US\$ 6000 - 10,000	603	97	3	13	2	718
US\$ 11,000 - 15,000	61	8		3		72
US\$ 16,000 - 20,000	37	2		2		41
Above US\$ 21,000	23	3		1		27
No Response	120	29	1	5	2	157
Total	2657	434	10	130	10	3241

Table A5: Visitors by Place of Stay by Gender

PLACE OF STAY	Male	Female	No Response	Total
Tourist Resort	1386	1204	67	2657
Hotel	210	212	12	434
Guest House	4	5	1	10
Safari Vessel	90	37	3	130
No Response	2	6	2	10
Total	1692	1464	85	3241

**Table A6:
Visitors by
Duration of
Stay by
Nationality**

Nationality	1 - 3 days	4 - 7 days	8 - 30 days	31 - 60 days	61 - 90 days	Not Stated	Total
Kenya		1					1
Algeria		1					1
Morocco		3	1				4
South Africa		10	16				26
Africa	0	15	17	0	0	0	32
Canada		3	5				8
United States	4	9	12				25
North America	4	12	17	0	0	0	33
Brazil		2	2				4
Peru			1				1
Latin America	0	2	3	0	0	0	5
China	7	47	9				63
Taiwan		3	1				4
China, Hong Kong		7					7
Japan	22	208	37			1	268
South Korea	2	31					33
Indonesia		1					1
Malaysia		9					9
Philippines		2					2
Singapore	1	7	2				10
Thailand	2	8					10
Australia	1	29	27			1	58
New Zealand		4	5				9
East Asia	35	356	81	0	0	2	474

Czech Republic		1	2				3
Estonia		1					1
Hungary		3					3
Lithuania			1				1
Poland			4				4
Romania			1				1
Russia		1	12				13
Slovakia			1				1
Ukraine		1					1
Denmark	3		3				6
Finland		2	2				4
Ireland		6	3				9
Norway	1	7	3				11
Sweden		1					1
United Kingdom	2	211	451	2		2	668
Croatia			1				1
Greece		13	1				14
Italy	3	464	304			3	774
Malta		5					5
Portugal		10	5		1		16
Slovenia		5					5
Spain	4	16	4				24
Austria		9	48				57
Belgium	1	8	5				14
France	19	62	80			2	163
Germany	5	96	371	1		2	475
Netherlands	1	21	35				57
Switzerland	3	83	132		1		219
Cyprus	1		1				2
Israel		10	5				15
Turkey		11	1				12
Europe	43	1047	1476	3	2	9	2580
Bahrain		1					1
Kuwait		2					2
Lebanon		2			1		3
Saudi Arabia	1	6					7
Middle East	1	11	0	0	1	0	13
Bangladesh		1					1
Sri Lanka	5	2					7
India	3	4					7
Nepal			1				1
Pakistan	1	2					3
South Asia	9	8	1	0	0	0	18
Not Stated	8	51	25			2	85
Total	100	1502	1620	3	5	11	3241

Table A7: Duration of Stay by Age Group

Age group	1 - 3 days	4 - 7 days	8 - 30 days	31 - 60 days	61 - 90 days	Not Stated	Total
Under 15 yrs	1	9	5			1	16
16 - 20 yrs		22	23				45
21 - 25 yrs	8	157	149			2	316
26 - 30 yrs	27	481	449		2	3	962
31 - 35 yrs	17	368	393		2	2	782
36 - 40 yrs	8	152	194				354
41 - 45 yrs	13	88	148			1	250
46 - 50 yrs	8	77	71		1	1	158
51 - 55 yrs	3	57	78	1		1	140
56 - 64 yrs	6	43	66				115
Above 65 yrs		6	25	2			33
Not Stated	9	42	19				70
Total	100	1502	1620	3	5	11	3241

Table A8: Frequency of Visits by Nationality

Nationality	Only once	2 - 3 times	4 - 5 times	More than 6 times	No Response	Total
Kenya	1					1
Algeria	1					1
Morocco	2	1			1	4
South Africa	22	2	1		1	26
Canada	4	4				8
United States	23	1	1			25
Brazil	4					4
Peru	1					1
China	52	8	1	2		63
Taiwan	4					4
China, Hong Kong	6	1				7
Japan	222	34	6	5	1	268
South Korea	31	1		1		33
Indonesia		1				1

Malaysia	7	2				9
Philippines	2					2
Singapore	7	3				10
Thailand	8	2				10
Australia	53	3		1	1	58
New Zealand	9					9
Czech Republic	3					3
Estonia		1				1
Hungary	2	1				3
Lithuania	1					1
Poland	4					4
Romania	1					1
Russia	13					13
Slovakia	1					1
Ukraine	1					1
Denmark	6					6
Finland	4					4
Ireland	9					9
Norway	11					11
Sweden	1					1
United Kingdom	536	102	13	13	4	668
Croatia	1					1
Greece	14					14
Italy	696	60	8	5	5	774
Malta	5					5
Portugal	15	1				16
Slovenia	4	1				5
Spain	22	2				24
Austria	34	16	3	3	1	57
Belgium	13	1				14
France	156	6	1			163
Germany	326	101	24	21	3	475
Netherlands	49	7	1			57
Switzerland	139	59	14	6	1	219
Cyprus	2					2
Israel	12	2			1	15
Turkey	12					12
Bahrain	1					1
Kuwait	2					2
Lebanon	2			1		3
Saudi Arabia	7					7
Bangladesh	1					1
Sri Lanka	2	3		2		7

India	7					7
Nepal	1					1
Pakistan	3					3
Not Stated	69	14	1		1	85
Total	2647	440	74	60	20	3241

Table A9: Frequency of Visits by Age

Age group	Only once	2 - 3 times	4 or more times	Not Stated	Total
Under 15 yrs	7	7	1	1	16
16 - 20 yrs	29	14	2		45
21 - 25 yrs	293	18	2	3	316
26 - 30 yrs	877	69	10	6	962
31 - 35 yrs	657	100	23	2	782
36 - 40 yrs	268	66	20		354
41 - 45 yrs	163	63	21	3	250
46 - 50 yrs	110	32	16		158
51 - 55 yrs	94	35	9	2	140
56 - 64 yrs	74	20	20	1	115
Above 65 yrs	14	9	10		33
Not Stated	61	7	0	2	70
Total	2647	440	134	20	3241

Table A10: Organising Trips by Nationality

Nationality	Through tour operator	Travel Agency	Internet	On your own	Not Stated	Total
Kenya		1				1
Algeria		1				1
Morocco	3	1				4
South Africa	9	17				26
Canada		4	4			8
United States	5	12	4	3	1	25
Brazil		4				4
Peru		1				1
China	8	47	2	6		63
Taiwan		3	1			4
China, Hong Kong	1	4	1	1		7
Japan	5	243	17	2	1	268
South Korea	3	28	1	1		33
Indonesia				1		1

Malaysia		5		4		9
Philippines		2				2
Singapore	2	5		3		10
Thailand	3	5		2		10
Australia	8	43	4	3		58
New Zealand	3	5	1			9
Czech Republic		2	1			3
Estonia			1			1
Hungary		3				3
Lithuania		1				1
Poland	2	2				4
Romania		1				1
Russia	4	8		1		13
Slovakia		1				1
Ukraine		1				1
Denmark		5	1			6
Finland		4				4
Ireland	3	6				9
Norway	2	6		3		11
Sweden		1				1
United Kingdom	237	308	92	28	3	668
Croatia		1				1
Greece	1	13				14
Italy	159	583	14	17	1	774
Malta		5				5
Portugal	4	12				16
Slovenia		5				5
Spain	6	17	1			24
Austria	32	16	4	5		57
Belgium	5	9				14
France	65	85	11	1	1	163
Germany	306	104	41	22	2	475
Netherlands	12	37	5	3		57
Switzerland	91	106	15	6	1	219
Cyprus		2				2
Israel		13		2		15
Turkey	1	10		1		12
Bahrain			1			1
Kuwait	1	1				2
Lebanon		3				3
Saudi Arabia	1	2	3		1	7
Bangladesh		1				1
Sri Lanka	1		1	5		7
India		4	1	1	1	7
Nepal		1				1
Pakistan	1	2				3
Not stated	20	52	3	8	2	85
Total	1004	1864	230	129	14	3241

Table A11: Type of Meal Plan by Nationality and Region

Nationality/Region	Full Board	Half Board	Bed & Breakfast	Room only	All inclusive	No Response	Total
Kenya		1					1
Algeria	1						1
Morocco	2	2					4
South Africa	5	17			4		26
Africa	8	20	0	0	4	0	32
Canada	4		2	1	1		8
United States	8	7	6		4		25
America	12	7	8	1	5	0	33
Brazil	3		1				4
Peru		1					1
Latin America	3	1	1	0	0	0	5
China	39	7	6		8	3	63
Taiwan	4						4
China, Hong Kong	3	1	2	1			7
Japan	171	8	48	3	36	2	268
South Korea	15	7	3		8		33
Indonesia	1						1
Malaysia	4	1	2		2		9
Philippines		2					2
Singapore	3	2	2	1	2		10
Thailand	2	3			4	1	10
Australia	21	20	4		13		58
New Zealand	5	2			2		9
East Asia	268	53	67	5	75	6	474
Czech Republic		2			1		3
Estonia	1						1
Hungary		3					3
Lithuania		1					1
Poland	1				3		4
Romania		1					1
Russia	3	6	2		2		13
Slovakia	1						1
Ukraine					1		1
Denmark		1			5		6
Finland					4		4
Ireland	4	2			3		9
Norway	4	3	1		3		11
Sweden	1						1
United Kingdom	99	137	47	5	375	5	668
Croatia					1		1
Greece	1	10	2		1		14
Italy	449	9	3	3	307	3	774
Malta	1	3	1				5

Portugal	7	2	1		5	1	16
Slovenia	1				4		5
Spain	9	8			7		24
Austria	18	17	2	2	18		57
Belgium	8	1	1		4		14
France	104	29			30		163
Germany	217	129	5	2	120	2	475
Netherlands	21	13		1	22		57
Switzerland	100	85	4		30		219
Cyprus		1	1				2
Israel	11	4					15
Turkey	10	1			1		12
Europe	1071	468	70	13	947	11	2580
Bahrain					1		1
Kuwait	2						2
Lebanon	3						3
Saudi Arabia	1	3	1	1		1	7
Middle East	6	3	1	1	1	1	13
Bangladesh		1					1
Sri Lanka	4		3				7
India	2		4		1		7
Nepal			1				1
Pakistan	2	1					3
South Asia	8	2	8	0	1	0	19
Not Stated	38	14	4	2	21	6	85
	1414	568	159	22	1054	24	3241

Table A12: Type of Meal Plan by Age Group

Age Group	Full Board	Half Board	Bed & Breakfast	Room only	All inclusive	Not Stated	Total
Under 15 yrs	8	5	1		1	1	16
16 - 20 yrs	22	10	1		12		45
21 - 25 yrs	133	50	18	1	111	3	316
26 - 30 yrs	440	138	45	3	329	7	962
31 - 35 yrs	344	137	43	11	245	2	782
36 - 40 yrs	153	70	17	2	110	2	354
41 - 45 yrs	105	54	7	1	83		250
46 - 50 yrs	60	34	10		53	1	158
51 - 55 yrs	55	30	7	2	45	1	140
56 - 64 yrs	47	21	7	1	38	1	115
Above 65 yrs	14	11			8		33
Not Stated	33	8	3	1	19	6	70
Total	1414	568	159	22	1054	24	3241

Table A13: Purpose of Visit by Age Group

Age	Leisure, relaxation, holiday selected	Diving selected	Honeymoon selected	Business and profession selected	Transit selected	Surfing	Anniversary	Snorkeling	Fishing	Underwater world	Sailing	Visiting friends	No Response	Total
Under 15 yrs	11	5	1	1										16
16 - 20 yrs	29	10	4	2		3								45
21 - 25 yrs	183	35	129	3	3	5								316
26 - 30 yrs	453	106	502	5	2	14		1	1		1	1	1	962
31 - 35 yrs	435	151	322	5		14			1					782
36 - 40 yrs	226	83	80	5	1	8	1							354
41 - 45 yrs	192	57	31	4	1	3	1	1						250
46 - 50 yrs	138	27	1	1	1	1		1		1				158
51 - 55 yrs	116	29	2	3		4	1				1		1	140
56 - 64 yrs	99	19	5	4		1	1	1					1	115
Above 65 yrs	31	3			1									33
No Response	34	11	22	1		1								70
Total	1947	536	1099	34	9	54	4	4	2	1	2	1	3	3241

Table A14: Activities Enjoyed by Nationality

Nationality	Diving	Swimming	Snorkeling	Fishing	Spa & Health Club	Island Hopping	Others
Algeria			1				
Australia	11	31	41	7	15	8	
Austria	18	36	42	7	4	5	
Bahrain		1	1	1		1	
Bangladesh			1		1		
Belgium	5	8	4	1		2	1
Brazil	2		2		1		
Canada	5	4	6	1	3		
China	17	24	41	13	5	5	1
China, Hong Kong	1	4	4		3		
Croatia			1				
Cyprus		1	1		1	1	
Czech Republic		2	1	1			
Denmark		5	5	2	2		1
Estonia	1	1					

Finland		3	4	1			
France	55	33	86	3	28	21	3
Germany	185	241	347	28	71	39	5
Greece	3	12	9	2	7	2	
Hungary		1	3				
India	1	4	5	3		1	1
Indonesia	1	1	1				
Ireland	2	6	8	1	6		1
Israel	7	6	10	1	2	2	
Italy	152	172	559	66	106	228	6
Japan	63	5	160	9	14	4	3
Kenya			1		1		
Kuwait		1			1	1	1
Lebanon		2	2		1		
Lithuania		1				1	
Malaysia	4	6	4	3	1	2	1
Malta		5	5			4	
Morocco	1	1	3	1	1	1	
Nepal	1	1				1	
Netherlands	30	31	38	5	10	4	1
New Zealand	3	2	3	1	2		
Norway	1	5	8	2	2	2	
Pakistan		1	2			2	
Peru		1	1				
Philippines			2				
Poland	3	1	4			1	
Portugal	4	3	11	3	3	2	2
Romania		1				1	
Russia	7	9	7	2	3	3	
Saudi Arabia	1	4	4	1	2	2	
Singapore	2	6	6	1	1	2	1
Slovakia		1	1				
Slovenia		3	3		2		
South Africa	7	16	21	2	11	7	2
South Korea	4	6	22	1	8	4	1
Spain	8	9	22	1	9	2	
Sri Lanka	2	4	3				2
Sweden	1						
Switzerland	77	113	158	13	27	8	3
Taiwan	1	2	4	1	1		1
Thailand	8	1		1	2		
Turkey	2	7	5		1	4	
Ukraine						1	
United Kingdom	190	444	531	73	200	64	21
United States	5	11	20	2	8	2	4
No Response	20	23	37	9	16	6	
Total	911	1322	2271	269	582	446	62

Table A15: Expenditure by Nationality

Nationality	Below US\$ 5000	US\$ 6000 - 10,000	US\$ 11,000 - 15,000	US\$ 16,000 - 20,000	Above US\$ 21,000	No Response	Total
Algeria	1						1
Australia	35	18	1	1	1	2	58
Austria	42	12		1		2	57
Bahrain	1						1
Bangladesh	1						1
Belgium	11	2				1	14
Brazil	3		1				4
Canada	2	4	1	1			8
China	53	10					63
China, Hong Kong	5	1				1	7
Croatia	1						1
Cyprus	1	1					2
Czech Republic	3						3
Denmark	3	2				1	6
Estonia	1						1
Finland	4						4
France	133	21		2		7	163
Germany	379	76	3		1	16	475
Greece	8	4	1	1			14
Hungary	1	2					3
India	6	1					7
Indonesia	1						1
Ireland	6	3					9
Israel	14		1				15
Italy	639	89	5	2	1	38	774
Japan	152	61	17	17	10	11	268
Kenya		1					1
Kuwait	2						2
Lebanon	3						3
Lithuania		1					1
Malaysia	8	1					9
Malta	1	4					5
Morocco	3	1					4
Nepal	1						1
Netherlands	45	10	1			1	57
New Zealand	9						9
Norway	5	6					11
Pakistan	3						3
Peru		1					1

Philippines	2						2
Poland	3	1					4
Portugal	9	3	1			3	16
Romania	1						1
Russia	9	4					13
Saudi Arabia	4	3					7
Singapore	9	1					10
Slovakia	1						1
Slovenia	3	2					5
South Africa	13	10	2			1	26
South Korea	20	10		1	2		33
Spain	19	4				1	24
Sri Lanka	7						7
Sweden	1						1
Switzerland	137	57	8	6	2	9	219
Taiwan	2	1			1		4
Thailand	9	1					10
Turkey	12						12
Ukraine	1						1
United Kingdom	330	273	26	8	9	22	668
United States	15	6	3	1			25
No Response	33	10	1			41	79
Total	2226	718	72	41	27	157	3241

Table A16: Visit to Male' by Nationality

Nationality	Yes	No	No Response	Total
Algeria		1		1
Australia	35	23		58
Austria	11	46		57
Bahrain		1		1
Bangladesh		1		1
Belgium	7	7		14
Brazil		4		4
Canada	4	4		8
China	45	18		63
China, Hong Kong	3	3	1	7
Croatia		1		1
Cyprus	2			2
Czech Republic	3			3
Denmark		6		6
Estonia	1			1
Finland		4		4
France	42	119	2	163
Germany	113	359	3	475
Greece	9	5		14
Hungary	1	2		3
India	6	1		7

Indonesia	1			1
Ireland		9		9
Israel	5	10		15
Italy	191	577	6	774
Japan	130	138		268
Kenya		1		1
Kuwait	2			2
Lebanon	1	2		3
Lithuania		1		1
Malaysia	7	2		9
Malta	5			5
Morocco	1	3		4
Nepal	1			1
Netherlands	20	37		57
New Zealand	1	8		9
Norway	1	10		11
Pakistan	1	2		3
Peru		1		1
Philippines	1	1		2
Poland	1	3		4
Portugal	5	11		16
Romania		1		1
Russia	5	8		13
Saudi Arabia	3	4		7
Singapore	7	3		10
Slovakia		1		1
Slovenia	2	3		5
South Africa	11	15		26
South Korea	12	21		33
Spain	4	20		24
Sri Lanka	7			7
Sweden		1		1
Switzerland	39	180		219
Taiwan	2	2		4
Thailand	5	5		10
Turkey	10	2		12
Ukraine	1			1
United Kingdom	100	564	4	668
United States	10	15		25
Non Readable	2	4		6
No Response	8	31	40	79
Total	884	2301	56	3241

Table A17: Intention to Visit Maldives again

Nationality	In the near future	Distant future	No	No Response	Total
Algeria	1				1
Australia	17	37	4		58
Austria	27	30			57
Bahrain	1				1
Bangladesh		1			1
Belgium	4	8	2		14
Brazil	3	1			4
Canada	4	3	1		8
China	17	46			63
China, Hong Kong	2	5			7
Croatia		1			1
Cyprus		2			2
Czech Republic		3			3
Denmark		6			6
Estonia		1			1
Finland	1	3			4
France	41	100	19	3	163
Germany	224	235	12	4	475
Greece	4	10			14
Hungary	1	2			3
India	4	3			7
Indonesia	1				1
Ireland	7	2			9
Israel	1	9	5		15
Italy	391	348	26	9	774
Japan	115	140	11	2	268
Kenya	1				1
Kuwait	1	1			2
Lebanon	1	2			3
Lithuania		1			1
Malaysia	2	7			9
Malta	1	4			5
Morocco	2	2			4
Nepal	1				1
Netherlands	19	35	2	1	57
New Zealand	1	8			9
Norway		11			11
Pakistan	1		1	1	3
Peru	1				1
Philippines	2				2
Poland		2	2		4
Portugal	4	12			16
Romania	1				1

Russia	4	7	1	1	13
Saudi Arabia	1	6			7
Singapore	5	5			10
Slovakia		1			1
Slovenia	3	2			5
South Africa	9	17			26
South Korea	16	17			33
Spain	8	16			24
Sri Lanka	5	2			7
Sweden		1			1
Switzerland	96	121	1	1	219
Taiwan		4			4
Thailand	6	4			10
Turkey	1	10	1		12
Ukraine		1			1
United Kingdom	324	327	16	1	668
United States	10	15			25
Non Readable	3	2		1	6
No Response	5	18	3	53	79
Total	1400	1657	107	77	3241

Table A18: Intention to Visit Maldives again by Age Group

Age Group	In the near future	Distant future	No	No Response	Total
Under 15 yrs	7	9			16
16 - 20 yrs	24	20	1		45
21 - 25 yrs	136	171	7	2	316
26 - 30 yrs	372	544	36	10	962
31 - 35 yrs	339	422	18	3	782
36 - 40 yrs	180	167	6	1	354
41 - 45 yrs	120	116	10	4	250
46 - 50 yrs	73	75	7	3	158
51 - 55 yrs	73	56	9	2	140
56 - 64 yrs	55	50	10		115
Above 65 yrs	17	14	2		33
No Response	4	13	1	52	70
Total	1400	1657	107	77	3241

Table A19: Amount spent by visitors by nationality

Nationality	Below US\$ 5000	US\$ 6000 - 10,000	US\$ 11,000 - 15,000	US\$ 16,000 - 20,000	Above US\$ 21,000	No Response	Total
Algeria	1						1
Australia	35	18	1	1	1	2	58
Austria	42	12		1		2	57
Bahrain	1						1
Bangladesh	1						1
Belgium	11	2				1	14
Brazil	3		1				4
Canada	2	4	1	1			8
China	53	10					63
China, Hong Kong	5	1				1	7
Croatia	1						1
Cyprus	1	1					2
Czech Republic	3						3
Denmark	3	2				1	6
Estonia	1						1
Finland	4						4
France	133	21		2		7	163
Germany	379	76	3		1	16	475
Greece	8	4	1	1			14
Hungary	1	2					3
India	6	1					7
Indonesia	1						1
Ireland	6	3					9
Israel	14		1				15
Italy	639	89	5	2	1	38	774
Japan	152	61	17	17	10	11	268
Kenya		1					1
Kuwait	2						2
Lebanon	3						3
Lithuania		1					1
Malaysia	8	1					9
Malta	1	4					5
Morocco	3	1					4
Nepal	1						1
Netherlands	45	10	1			1	57
New Zealand	9						9
Norway	5	6					11
Pakistan	3						3
Peru		1					1

Philippines	2							2
Poland	3	1						4
Portugal	9	3	1				3	16
Romania	1							1
Russia	9	4						13
Saudi Arabia	4	3						7
Singapore	9	1						10
Slovakia	1							1
Slovenia	3	2						5
South Africa	13	10	2				1	26
South Korea	20	10		1	2			33
Spain	19	4					1	24
Sri Lanka	7							7
Sweden	1							1
Switzerland	137	57	8	6	2		9	219
Taiwan	2	1				1		4
Thailand	9	1						10
Turkey	12							12
Ukraine	1							1
United Kingdom	330	273	26	8	9		22	668
United States	15	6	3	1				25
Non Readable	5	1						6
No Response	28	9	1				41	79
Total	2226	718	72	41	27	157	3241	

Table A20: Annual income after tax by age group

Age group	Below US\$20,000	US\$ 21,000 - 30,000	US\$31,000 - 40,000	US\$41,000 - 50,000	Above US\$51,000	No Response	Total	Percentage
Under 15 yrs	5		1	1	2	7	16	0.5
16 - 20 yrs	26	3		1	3	12	45	1.4
21 - 25 yrs	105	59	32	14	21	85	316	9.8
26 - 30 yrs	249	213	112	76	108	204	962	29.7
31 - 35 yrs	117	165	108	73	158	161	782	24.1
36 - 40 yrs	41	57	41	35	91	89	354	10.9
41 - 45 yrs	27	49	26	20	65	63	250	7.7
46 - 50 yrs	18	19	16	20	46	39	158	4.9
51 - 55 yrs	17	20	19	21	32	31	140	4.3
56 - 64 yrs	10	24	10	5	28	38	115	3.5
Above 65 yrs		5	6		4	18	33	1.0
No Response	2	1	2	1	2	62	70	2.2
Total	617	615	373	267	560	809	3241	100.0
Percentage	19.0	19.0	11.5	8.2	17.3	25.0	100.0	

Table A21: Amount spent by age group

Age group	Below US\$ 5000	US\$ 6000 - 10,000	US\$ 11,000 - 15,000	US\$ 16,000 - 20,000	Above US\$ 21,000	No Response	Total	Percentage
Under 15 yrs	11	1	1	1		2	16	0.5
16 - 20 yrs	33	9	1	1		1	45	1.4
21 - 25 yrs	226	64	11	2	3	10	316	9.8
26 - 30 yrs	694	200	16	14	6	32	962	29.7
31 - 35 yrs	555	174	19	9	5	20	782	24.1
36 - 40 yrs	240	86	6	3	3	16	354	10.9
41 - 45 yrs	160	63	5	6	3	13	250	7.7
46 - 50 yrs	106	33	6	1	1	11	158	4.9
51 - 55 yrs	93	36	1	4	5	1	140	4.3
56 - 64 yrs	69	36	4		1	5	115	3.5
Above 65 yrs	19	10	1			3	33	1.0
No Response	20	6	1			43	70	2.2
Total	2226	718	72	41	27	157	3241	100
Percentage	68.7	22.2	2.2	1.3	0.8	4.8	100	

Table A22: Visitors by Age Group by Gender

Age group	Male	Female	No Response	Total	Percentage
Under 15 yrs	8	8		16	0.5
16 - 20 yrs	18	26	1	45	1.4
21 - 25 yrs	116	200		316	9.8
26 - 30 yrs	473	482	7	962	29.7
31 - 35 yrs	464	309	9	782	24.1
36 - 40 yrs	220	132	2	354	10.9
41 - 45 yrs	138	108	4	250	7.7
46 - 50 yrs	90	67	1	158	4.9
51 - 55 yrs	76	64		140	4.3
56 - 64 yrs	61	50	4	115	3.5
Above 65 yrs	19	14		33	1.0
No Response	9	4	57	70	2.2
Total	1692	1464	85	3241	100.0

Table A23: Visitors by Occupation by Gender

Occupation	Male	Female	No Response	Total	Percentage
Government	258	248	4	510	15.7
Private	870	741	15	1626	50.2
Self employed	372	217	6	595	18.4
Student	43	76	1	120	3.7
Retired	39	53	1	93	2.9
No Response	110	129	58	297	9.2
Total	1692	1464	85	3241	100.0

List of Tour Operator/Travel Agencies

20 Century
 5 VOV flag
 AAA & Touch down
 AAA Resorts
 Abreu
 Ace Travels
 Access TRC
 Acs
 Adda Viaggi
 Adra Voyages
 Adventure Travel Company
 AE
 AG Colors World
 Agenzia Viaggi
 Aguanant
 Air Tour
 Airline Network
 Airtur
 Akteul Tour
 Albatrus Top Boat
 All Destination, USA
 Alpi Tours
 Altoreno Viaggi
 American Express Travel
 Amerigo
 Amex Platinum
 Amicale de la Police
 Amondi Travel Agency KSA, Jeddah
 Andes Travel
 Aqua Diving
 Arcoiris Viaggi
 Arequipa Viaggi
 Arke
 Arrange
 Asent
 Asia On
 Asia Travel
 Athena Vigg
 Atlantis Reisen
 Atlas
 ATO
 Atoll Adventures
 Atoll Travel
 AVA
 Aviva
 Azemar
 Bachmann Spitzer
 Bamaca Viaggi
 Barrthead Travel Glasgow
 Becking Tours
 Ben Lawie Travel
 Berge & Meer
 Best At Travel
 Best Tour
 Big Wide World Travel
 Bitburg
 Blu Vacanze

Blutechila
 Booda Aviation - Kuwait
 Bordin Vigg
 Braver Club
 Braxted Travel
 Britian + Eurpoe Tours
 British Airways
 Bucher Reisen
 Budget Voyages
 Bul Tour
 Bunte Urlaubswelt
 Caesar
 Carlson Wagonsuts, France
 Carrier
 Carucci Travel
 Catai
 Catti Viaggi
 Champion Travel
 Charlie Reid Travel
 Charter SA
 Chian Tourist Agency
 China Comfort Travel
 China International Travel
 China Travel Agency
 China Youth Tourism Agency
 China Youth Travel Service (CYTS)
 Chundo
 CIC
 Cisalpina
 Cisalpina
 CIT Viaggi
 Cliimera
 Climate Du Monde
 Club Azul
 Club Island
 Club Med
 Club Vacanze
 Cmimera Viaggi
 CO.OP Travel
 Coconut Club
 Colours of Asia
 Colours World
 Columbus
 Comfort Travel Agency
 Condor Airline
 Cook World
 Cormorano
 Cosmos Distant Dreams
 Costless Holidays
 Cowrini Viaggi
 Cox & Kings
 Crescent
 Cresta/Cresta Holidays/My Travel
 Crista
 Crossly Travel
 Crown Tours
 Ctrip

CTS
 Da Ponte Viaggi
 Dawson Sandeson
 De Reserveiz Travel Agency
 Deir
 Delare
 Demi Reisen
 Dertour
 Devince
 Dial a Flight
 Dimension
 Direct Holidays
 Direct Travel
 Directions
 Discovery Travel/Discovery Dive Travel
 Dive & Travel
 Diveht Reisen
 Divers Dream
 Diving Adventure
 Diving Holidays
 Diving World
 Dnata in Dubai
 Donegal Viaggi
 Dook & Go Bandeu Swilberlant
 Dream Maldives
 Dreamland
 DT (Dream Ticket)
 Duncans Travel
 Duru Tourist
 East Residents Travel Culture
 Easy Go Travel
 E-Bookers
 Eclipse
 Eden Viaggi
 Eigen Wjze Dul
 Elite Vacations
 Emirates
 Energy
 Epay
 Escape Travel
 Esco Reisen
 Esmeraida Viaggi
 Essance of Tuscany
 Essentail Escape
 E-Two Travel
 Eureka Travel (Singapore)
 Euro Bank Travel
 Euro Travel
 Every Tour
 Evzonas Travel
 Ezway
 Felvic Tours Iswerland
 Ferkenrs Burd, Austria
 Fiesta
 Finestra Surmondo
 First Choice
 Five Star Club
 Flight Centre
 Fluid Tour
 Fortune Travel

Fram
 Francorosso
 Frantour
 Frelander Viaggi
 Freeway Tourists
 Fregerio Roma
 Frenesia Viaggi Alpit
 Fujitsu Travellers
 G Z International Travel Limited
 Gallo Rosso
 Garber Travel Portsmouth
 Gate
 Gateway Travel
 Gatfinoni
 Geo Trend
 Giramondo
 Givamondo
 Global Travel
 Globetrotter , Switzerland
 Go Maldives
 Go Travel
 Going Places
 Gold Medal Travel
 Goodacre & Townsend
 Gramondo
 Grandi Viaggi
 Grecian Travel
 Groovy Tours
 GSA (Singapore)
 Guangchon International Travel
 Gullet
 Gullivers Travel, Dubai
 Gung Raya
 Halcom Viagens
 Halifax Holidays
 Hankyn Kotsu
 Happy Tour
 Harlequin Worldwide/Harlequin
 Harveys Travel
 Hayes & Jarvis
 Heeper Viaggiare
 Heidi Frey
 Helvetic Tour
 HIS
 Holiday
 Holiday Bazar - Kenya
 Holiday Hypermart
 Holiday Inn
 Holiday Place Plc
 Holiday Tours
 Honey World Travel/Thompsons
 Hotel Plan
 HotelTravel.com
 House of Travel Hamilton
 Humara Reize
 Hummingbird
 Hydra Travels
 I Viaggi Delle Robinic
 Id
 Idee Per Viaggiane

Ideex Viaggiane Gate
 IGV Club
 IL Grillo
 IL Miuone SRL Roma
 Imholz
 Impac
 Impex
 Indoriente
 Inner Circles
 Insurance and Travel
 Interline Bookers
 International Ventures & Travel
 Intourist
 Intravco
 Island Collection
 Island Safaris
 ITC
 ITS
 Jahn Reisen
 JAL
 Japan Travel
 Jet Air
 Jet Reisen
 Jet Tours
 Jiangsu China Travel Agency
 JMC
 JTB
 JTS
 Kanazawa Tours
 Karibuni Viaggi
 Karisma Tours
 Kerviaggi
 Key 2 Holidays
 Kiuki Tourist Holiday
 KMV Travel
 Kompass Travel
 Kouni (Travel Connection)
 Kumara Reisen
 Lafayeite Voyage/Tour Inter
 Landes Tourisne
 Lanka Tours
 Lanka Travel
 Last minute.com
 Lawson Travel
 Le Marmotic
 Leclerc Voyage
 Leisure Reledives
 Lets Travel
 Listrop
 LIUR
 Ltours
 LTU
 L'tur
 Lunn Poly
 LUO collection du Monde
 Lupetta Viaggi
 M&J
 Magic Travel
 Maldives Scuba
 Maldives Tourism Board

Maldivian Holidays
 Maldivian.com
 Maldiviana
 Manta Reisen
 Manta Travel
 Maria Slater Travel (Australia)
 Marimba Viaggi
 Marina Viaggi
 Marks Travel
 Massyn
 Maxi Travel Land
 Mayer
 Meditrad
 Medoacus Viaggi
 Meier's Manta
 Meier's Weltreisen
 Mercuriale Viaggi
 Merry Tour
 Mersuly Tours
 Messereiser
 Milae Viaggi
 Misa Travel
 Mondo Viggi
 Monitech/Monitech Management Pvt Ltd
 Monogram Travel
 Monto Tours
 Mosial Holidays
 MPT Avellino
 MPT Spa Avezzino
 Mundo VIP
 Muni Travel
 MV Kiris
 MWR
 Na Tour Aumeisell
 NEC
 Neckerman
 Nettune (CBO)
 New wage Reisen
 Niagara
 Nippon Travel
 Nishitesu Travel
 Nittsu Travel
 Nivana Surf Trips
 No Response
 Non Readable
 Nouvelles Frontier
 NUR
 Ofir Tour
 Olympia Viaggi
 Olympic
 OM Tour
 Omega Viaggi 2000
 OPODO
 Orca
 Orka - Reisen Treichesen
 Ostiensis
 Over Sea Travel
 Pacific Tourist
 Pan Australia Tourist
 Paradise Holidays

Paradise Travels
Parma Tour
Pefrix Viaggi
Pineapple Tours
Play Guide Tours
Podvodu Ru
Pomodoro Viaggi
Popagayo Viaggi
Premier Travel
Prime Vacation
Principle Travel
PTS Travel Salon
Quelle
R & C International
Reethi Rah
Reisebuero Hufnagel
Reisefieber
Reisen Centre All tours
Rejoyce
Relax Tours Regensbourg
Reliance
Rensaince-Moscow
Resort and Safari
Resort Life
Restplatzorse
Rialto Viaggi
Ridgeways
Rieseland
Robinson Adventure
Romantour
Roozo Diving Tours
Roxton Bairlcy Robinson
Ruditlofmann Saerbruchen
Rudolf Reisan , Leipeig
Sadovar Vigg PIJA
Saltur
Samford Travel
Samovak Viaggi
Sanjeev Travels
Sauma Vacanze
Scernic Viaggi
Schmidt Reisaburg
Scott Dunn World
Scuba Tours
Sea & See
Seasons in Style
Seltimo Tours
Shanghai Bus Travel Agency
Sharran's Travel
Shinkimoto Kokusai Kyokosha
Siesta Travel Avenue. Melbourne
Simply Bookings
Singopora Airlines Holidays
Sinong Travel Agency
Sironetta Viaggi
Skopion Travel
Sodis
Solea
Special Travel
Sport Away

Sporting Club
Sporting Vacanze
Sprin Tours
Sri Lanka Tours
ST World
STA Sydney
Star Tour
Stonehedge Milano
Stopover
Stylism Resorts
Sub Aqua
Success Trc Company
Summer Winter
Sun Break
Sun Secker
Sun Travel
Sun Trips
Sun Way
Sunderwand Travel Gold Madel
Sunfeight
Sunland
Sunpet Travel
Sunset
Sure Travel/Top Holidays
Surf Corner
Surf Regroot
Surf Travel Company/Sun Tours
Surya Travel
Swan Tour
Tai Pan Touristik
Taj Exotica
Tanea Tour
Tanga Tour
Tarconte Viaggi
Teorema
The Holiday Place
The Honeymoon (Korea)
The Turquoise Holiday Co
Thitan Touristik
Thlhaagiri Island Resort
Thomas Cook
Thomson
Tjaere Bourg
Tlamoross
Tobu Travel
Tony Blank Hursf
Top Service
Top Tour
Torelli Tours
Torello Viaggi
Toukya
Tour 74
Tour Dolomit - Miers
Tour Express
Tourinter
Tourist Service
Touristic Union International
Trade Winds
Traicfinoers
Trail Finders

Tram Dz Albiez Basel
Transcontinental
Trapix
Travel 4 Less
Travel Air , India
Travel Bag
Travel Choice
Travel Company Sabia
Travel enders
Travel Finders
Travel Gallery
Travel Overland
Travel Pack
Travel Scene
Travel Shop, UK
Travel sia
Travel Wind
Travel World
Travel Zone
Trips International
TRMA
Tropic Tours
Tropical Places Holiday
Truentum
Tuialtsladl Reisenbero
Tuialtsladl Reisenbero
Turisanda
TV Travel
Ultramarina
Uniclan
Unielam
Universal Tours
Unmode Adeux
Vacanze
Vacao
Vacation
Vagero Viggi
Valenz World Travel
Valture
Vand
VAS
Venta Club
Ventaglio
Vera Club
Veratour
Vermillion
Versus Travel
Viagg Elem STR
Viaggi de sole
Viaggi Idea dart travel
Viatges Estiber (BCN)
Villa Holiday
Vire Viaggi
Virgin Holidays
Vista
Voegele
Voyages Associes
Voyages Jules Verne
Voyages Maldives
Wahoo Dive (Thailand)

Wako International
Waterways Travel/Atoll Adventure
Western & Oriental
Wever Lau Germany
Wickers World
Wingtips
Wired-destinations.com
Wiz on
World Explorer
World Safaris
World Tour Planner
World Travel
World Vacation Travel Direct
www.ctrip.com
www.toptour.dc
Yamjbateva
Youre Choice Travel
Zani Uaggi Reuance
Zomar Vacance

TOURIST OPINION SURVEY 2004

Serial No:



Ministry of Tourism
Republic of Maldives

Dear Guest,

The **Ministry of Tourism, Government of the Republic of Maldives** is conducting a survey among the departing international tourists from the country to compile a tourist profile and to understand your perception of the quality of experience in the Maldives. The information collected through this survey will be treated confidential and will not be used for any other purpose. **Please complete this questionnaire and return it to Immigration Counters or to our staff at the Departure Terminal Hall.**

Thank you for your participation in the survey and wish you a safe and happy journey.

Yours Sincerely,

IKLEELA ISMAIL
Senior Research Officer

1st Floor, Ghazee Building, Ameeru Ahmed Magu, Male', Republic of Maldives.
Phone: +960 323224, Fax: +960 322512 E-mail: info@maldivestourism.gov.mv, Website:
www.maldivestourism.gov.mv

1. Where did you stay in Maldives for most part of your holiday on this trip? (Please tick (✓) only one box)

- a. Tourist Resort b. Hotel c. Guesthouse d. Safari Vessel

2. How many days did you spend in the Maldives on this trip? (Please tick (✓) only one box)

- a. 1 - 3 days b. 4 - 7 days c. 8 - 30 days d. 31 - 60 days
e. 61 - 90 days

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

- a. Only once b. 2 - 3 times c. 4 - 5 times d. More than 6 times

4. Did you have difficulties in organizing your holiday? a. Yes b. No
(Please tick (✓) applicable boxes)

- If YES what were the difficulties:** 4.1. Flight bookings 4.2. Unavailability of information
4.3. Accommodation 4.4. Others

5. How did you organise this trip? (Please tick (✓) only one box)

- a. Through tour operator b. Travel agency c. Internet d. On your own

6. Please name the tour operator/ travel agency who organized your trip:

7. What type of meal plan did you use? (Please tick (✓) only one box)

- a. Full Board b. Half Board c. Bed & Breakfast d. Room Only
e. All inclusive

8. Did you combine any other countries in your holiday package to Maldives?
 a. Yes b. No **If YES please name those countries:**

9. How did you know about Maldives? (Please tick (✓) applicable boxes)
 a. Tour Operators b. Travel Agents c. Electronics Media d. Print Media
 e. Tourism Fairs f. Friends and Relatives g. Official Website www.visitmaldives.com.mv

10. What is the purpose of your visit to the Maldives? (Please tick (✓) applicable boxes)
 a. Leisure, relaxation, holiday b. Diving c. Honeymoon
 d. Business & profession e. Transit f. Others, specify.....

11. What activities did you enjoy most during your stay? (Please tick (✓) applicable boxes)
 a. Diving b. Swimming c. Snorkeling d. Fishing
 e. Spa & Health Club f. Island Hopping g. Others, specify.....

12. What are the main attractions for you in the Maldives? (Please tick (✓) applicable boxes)
 a. Beach/Sand b. Climate/Sun c. Lagoon/Sea d. Underwater Life/Fish
 e. Islands/Tropical Vegetation f. People/Culture
 g. Others specify.....

13. How much did you spend in TOTAL for your visit to Maldives? (Please tick (✓) only one box)
 a. Below US\$ 5000 b. US\$ 6000 – 10,000 c. US\$ 11,000 – 15,000
 d. US\$ 16,000 – 20,000 e. Above US\$ 21,000

14. Did you visit the capital City Male'?
 a. Yes b. No *(If NO please GO TO a & b of Question 17)*

15. What is the purpose of your visit to Male'? *(Please tick (✓) only one box)*
 a. Sightseeing b. Shopping c. Others, specify.....

16. Are you satisfied with your visit to Male'? a. Yes b. No
 If NO please specify the reason

17. How do you rate the following?
(Please tick (✓) where appropriate)

	<i>Excellent</i>	<i>Good</i>	<i>Satisfactory</i>	<i>Poor</i>	<i>Very Poor</i>
a. Services at Male' International Airport	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Services & Facilities at Place of Stay in Maldives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Services & Facilities available in Male' City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

18. Are you satisfied with your visit to the Maldives? (Please tick (✓) only one box)
 a. Very satisfied b. Satisfied c. Can not decide d. Unsatisfied
 e. very unsatisfied

19. Is your holiday worth the money spent? a. Yes b. No
 If NO please specify reason.....

20. Do you intend to visit Maldives again? ? (Please tick (✓) only one box)
 a. In the near future b. Distant future c. No
 If NO please specify reason.....

21. Would you recommend Maldives as a tourist destination to others? a. Yes b. No
If NO please specify the reason.....

22. Nationality

23. Country of Residence.....

24. Sex : a. Male b. Female

25. Age group in years: *(Please tick (✓) only one box)*

- a. Under 15 yrs b. 16 – 20 yrs c. 21 – 25 yrs d. 26– 30 yrs e. 31 – 35 yrs
f. 36 - 40 yrs g. 41 – 45 yrs h. 46 – 50 yrs i. 51– 55 yrs j. 56 - 64 yrs
k. Above 65 yrs

26. Occupation: a. Government b. Private c. Self employed d. Student e. Retired

27. What is your Annual Income after tax? *(Please tick (✓) only one box)*

- a. Below US\$20,000 b. US\$ 21,000 - 30,000 c. US\$ 31,000 - 40,000
d. US\$ 41,000 - 50,000 e. Above US\$ 51,000

28. General comments:
.....
.....
.....