



Maldives Visitor Survey

DECEMBER 2021



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1. INTRODUCTION

This report presents the survey findings from the Maldives Visitor Survey (MVS) conducted in December 2021 by Ministry of Tourism, Government of the Maldives.

The MVS research has been conducted biannually since 2013. However, the surveys planned for off-peak season 2020 had to be postponed due to border closure from April - June 2020 resulting from the Covid-19 pandemic, followed by low arrivals during the rest of the year. Hence, the survey was replanned and executed in December 2021.

MVS presents the profile of international visitors to the Maldives and their opinions about the holiday experience in the Maldives. The December survey captures the views of the international visitors to the Maldives during the peak tourist season in 2021.

The survey was carried out at the International Departure Terminal of Velana International Airport in Hulhulé as an exit survey. The survey was conducted between 15 December 2021 and 28 December 2021.

This is the first visitor survey undertaken during the COVID-19 pandemic after the February 2020 survey undertaken at the onset of the Covid-19 outbreak globally. On 30 January 2020, the World Health Organization (WHO) had declared the outbreak a Public Health Emergency of International Concern (PHEIC) and on 3 February 2020, Maldives had suspended flights between China and Maldives. China hasn't opened their borders for visitors to travel to the Maldives. Thus, Chinese visitors are not part of the survey respondents during this survey.

To understand the impacts to travel during the Covid-19 pandemic, a new section was added to the questionnaire in this survey and the findings are presented under the topic: "Travel During the Covid-19 Pandemic".

The survey findings comprise of 1,676 responses from various nationalities and in-depth nationality analysis consists of 8 markets comprising 73% of the responses

2. KEY FINDINGS

- Most of the respondents were from India (23%), with visitors from the UK (10%), Germany (10%) and the Russia (7%) being the next highest. There were also respondents from the United States (6%), France (6%), Italy (6%), Switzerland (3%), Spain (2%) and Ukraine (2%). Most respondents resided within the country as that of their nationality
- A majority of visitors to the Maldives were aged between 25-34 (51%), a trend that has been seen consistently since February 2014 survey.
- Most respondents chose to stay at resorts only (81%), with 13% staying in guesthouses only, 4% staying in both resorts and guesthouses and 2% staying on liveaboards.
- The average duration of stay was 7.4 nights, with German respondents staying the longest (10.6 nights) and Indian respondents staying the least amount of time (4.1 nights).
- 22% visitors were repeat visitors to the Maldives, with 18% having visited 2-5 times, 2% having visited 6-10 times and 1% having visited more than 10 times.
- Most respondents travelled with their partner (64%), while 25% travelled with their family. 6% of visitors travelled alone and 4% travelled with friends.
- Natural beauty of the Maldives was the dominating motivation to visit the Maldives. Most respondents chose to visit the Maldives due to the beach (77%), underwater beauty (59%), weather (57%) and peacefulness (50%). Other reasons for visiting included the small islands (39%), uniqueness (37%), privacy (34%) and reputation (30%).
- Rest and relaxation (35%), honeymoon (25%) and snorkelling (17%) were the main reasons cited as to why respondents visited the Maldives.
- Most respondents heard about the Maldives through the internet (64%) and word of mouth (43%).
- 30% of respondents booked their travel directly through airlines while 13% booked through a flight search engine. Meanwhile, 46% of guests booked their accommodations on the internet, via a travel agency or tour operator website, while 15% booked via a resort or hotel website.
- TripAdvisor was the most common website used to plan their trip (29%) while Instagram (24%) and online travel blogs (14%) were also commonly used. Booking.com (22%) was the most commonly used website when it came to booking a trip. Other websites used include Makemytrip (7%), Agoda (4%) and Expedia (4%).
- Most respondents booked their trip to the Maldives 1-2 months (30%) or 3-5 months (23%) in advance, with a further 17% booking 2-4 weeks in advance.
- The most common wait times at the airport were less than 30 minutes (33%) and 30-60 minutes (31%). 25% of guests had to wait 1-2 hours, whilst 12% waited 3 hours or more for a transfer.
- Transfer time from the airport to place of stay was less than 1 hour for most guests (62%), 1-3 hours for 31% of respondents and 3 or more hours for 7%. Guests who had a speedboat transfer, on average, had shorter airport wait times, while guests with domestic flight transfers had the longest wait times.
- The most common method of transportation was by speedboat (52%), followed by seaplanes (31%) and domestic flights (17%). Most guests who had speedboat (72%) or seaplane (59%) transfers had less than an hour of transfer time, while those taking a domestic flight were more likely to have longer transfer, with 49% taking 1-3 hours to arrive at their final destination, while 15% had a transfer time of 3 or more hours.

- About 86% of the respondents were satisfied with their transfers. When rated on a scale from 1-10, 26% rated transfer satisfaction with 10, while 20% rated a 9 and 19% rated an 8.
- Most guests chose an all-inclusive meal plan (52%), while an additional 23% chose full board dining. 13% opted for half board and 10% chose bed and breakfast. 2% of respondents took the room only option. Guests who stayed at resorts only were most likely to take the all-inclusive meal plan (61%) or the full board option (21%), while those who stayed in guesthouses only commonly opted for bed and breakfast (38%) or full board (22%).
- Generally, respondents gave excellent ratings to the friendliness of staff (77%), safety (66%), service (62%), comfort (58%) and cleanliness (56%) of their place of stay.
- Dining was commonly rated as excellent, with 47% rating quality of food, 46% rating Maldivian cuisine and 45% rating diversity of food choices as excellent.
- Water (61%), food (60%) and soft drinks (57%) were commonly seen as value for money. 49% of respondents believed alcoholic beverages were also value for money, while another 49% believed they were expensive.
- Snorkeling (53%), sight-seeing (51%), diving (50%) and picnic/sandbank visits (50%) were most commonly rated as excellent, while water sports (41%), spa treatments (40%), surfing (38%), night fishing (37%) and local island visits (37%) were rated as very good. Shopping was generally rated the lowest with 27% rating it average and 27% citing it poor (17%), or very poor (10%).
- Over the course of their holidays, 8% of respondents went whale watching at Ari Atoll, 4% visited Hanifaru bay, 2% visited surf spots and 1% visited cultural and heritage sites.
- 53% of respondents stated that they travelled to the Maldives as the borders were open during this period, while 43% stated that they chose it as there was no quarantine upon arrival. 40% cited the COVID-19 safety measures taken at their destination, and 29% chose it for easy flight connections and seat availability. 21% said they believed the Maldives was a safe destination to travel with children and family while 20% of respondents liked the natural quarantine conditions that presented themselves on an island.
- 33% of respondents sought information regarding COVID-19 measures and potential changes to their trip from their travel agent, while 30% visited tourism.gov.mv. An additional 27% received information from immigration.gov.mv and 19% from visitmaldives.com. 13% received information from their tour operator and 10% visited hpa.gov.mv.
- Most respondents who visited in December 2021 planned their trip to the Maldives during 2021 (71%) while 16% stated it was a last-minute choice, and a further 10% planned it during 2020. 2% planned this trip in 2019, and another 2% planned prior to 2019.
- 85% of respondents did not have to make any changes to their booking due to the COVID-19 pandemic, while 15% had to make changes. These changes included rebooking travel due to the Maldives border closure (36%), flight unavailability (25%) and safety concerns (15%).
- When asked about concerns of personally contracting COVID-19 on their trip, 31% of respondents stated that they were not at all concerned. 47% of respondents were somewhat concerned, and 22% of respondents were very concerned at the possibility of contracting COVID-19. Visitors were very or somewhat concerned most while on the flight and at the Velana International Airport.
- 97% of respondents did not have to extend their trip in the Maldives due to a family member testing positive to COVID-19.
- A majority of respondents were very satisfied by the room cleaning services (55%), PPE used by staff (52%) and COVID testing (48%) in the Maldives. Guests were also satisfied by social distancing arrangements (34%) and food services (31%).

- Overall, respondents were very satisfied with COVID-19 preparations in their place of stay (57%), restaurants and cafés (48%), and recreation and entertainment settings (47%).
- The words most commonly used to describe the Maldives included amazing, paradise, wonderful, relaxing, beautiful and peaceful. The things most liked about the Maldives included beaches, the ocean, weather, the people; and activities such as diving and snorkelling.
- The most common social media sites used to share respondents' experiences in the Maldives was Instagram (66% of respondents). Facebook was used by 39% of guests while Snapchat was used by 11%. 12% of guests went social media free, while 1% shared their experiences on both Pinterest and WeChat.
- Most respondents were satisfied with their trip to the Maldives, with 95% rating it as excellent or very good. This included 45% rating their satisfaction as 10/10, 26% rating it a 9/10, 18% rating it an 8/10 and 6% rating it as 7/10.
- 82% respondents were extremely likely (58%) or very likely (24%) to return to the Maldives again.
- Most respondents would recommend the Maldives to others, with 95% stating they are extremely likely or very likely to recommend (ranked between 10 and 7).
- Most guests rated the Maldives resorts and hotels (58%) and underwater beauty (57%) to be higher than that of similar destinations.
- 54% of respondents visited the Maldives as part of a travel package. Aspects of the trip commonly included on travel packages included accommodation (44%), food and beverage (43%) and airfare (32%). 20% of respondents had domestic travel included, while 13% had activities and entertainment included. 9% of guests stated that tours and excursions were included in their travel packages.

3. VISITOR MARKETS AND PROFILE

3.1. Survey Nationality

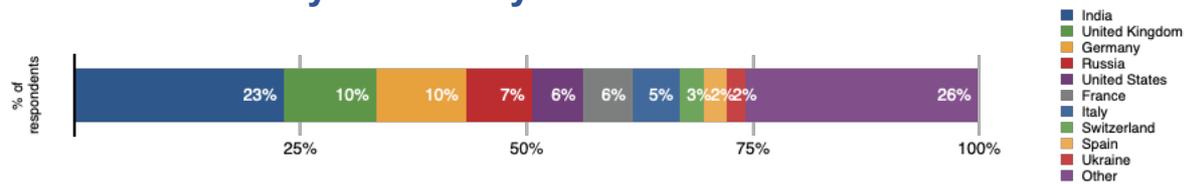


Figure 2.1: Visitor nationality

Most of the respondents were from India (23%), with visitors from the UK (10%), Germany (10%) and the Russia (7%) being the next highest. There were also respondents from the United States (6%), France (6%), Italy (6%), Switzerland (3%), Spain (2%) and Ukraine (2%).

3.2. Departing Airlines

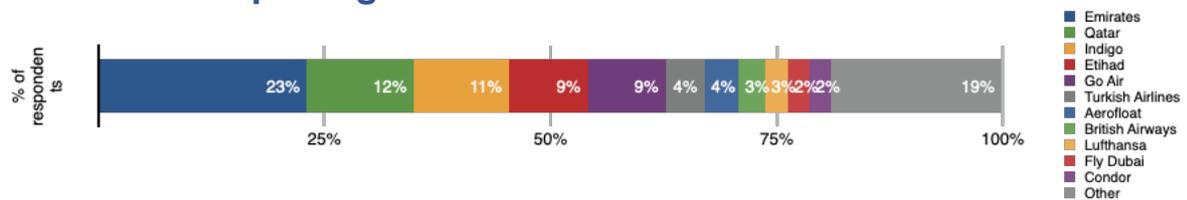


Figure 2.2: Departing airlines

Most of the respondents travelled via Emirates (23%), Qatar (12%) and Indigo (11%) airlines. 9% of respondents also travelled with Etihad, with another 9% travelling with Go Air.

3.3. Residential Country and City of Visitors

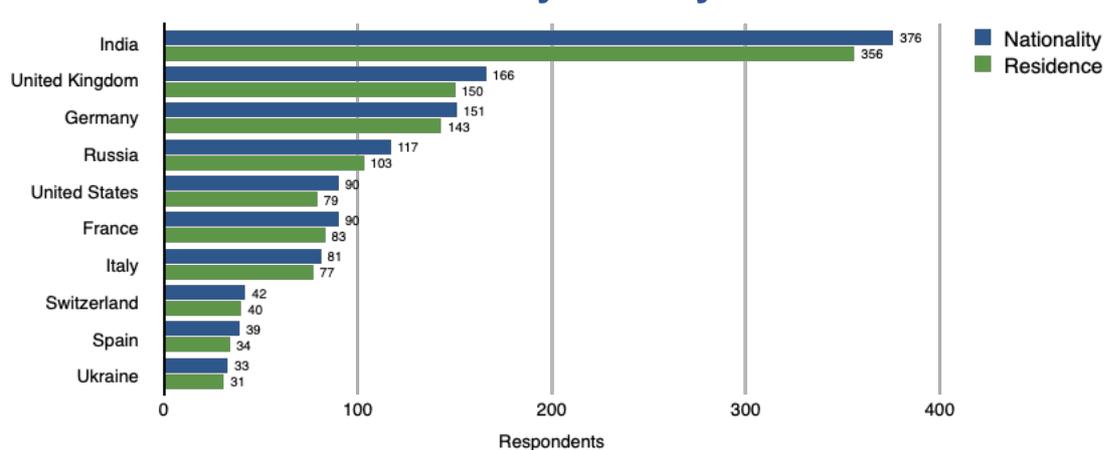


Figure 2.3: Place of residence of visitor nationalities

Most respondents resided within the country as that of their nationality.

3.4. Age Group of Visitors

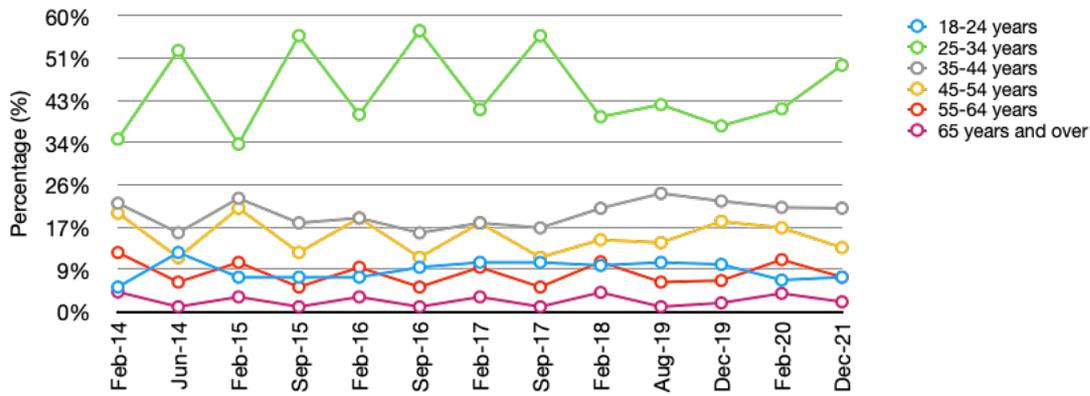


Figure 2.4: Visitor age group trends

A majority of visitors to the Maldives were aged between 25-34 (51%), a trend that has been seen consistently since February 2014. The next most common age groups of visitors are 35-44 (20%) and 45-54 years (15%), also a consistent trend over the years.

3.5. Place of Stay

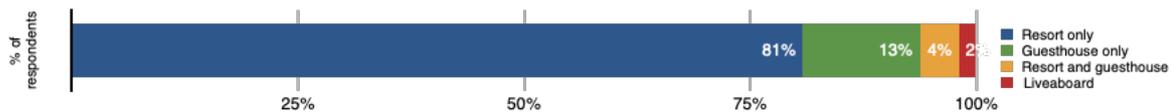


Figure 2.5: Place of stay of visitors

Most respondents chose to stay at resorts only (81%), with 13% staying in guesthouses only, 4% staying in both resorts and guesthouses and 2% staying on liveaboards.

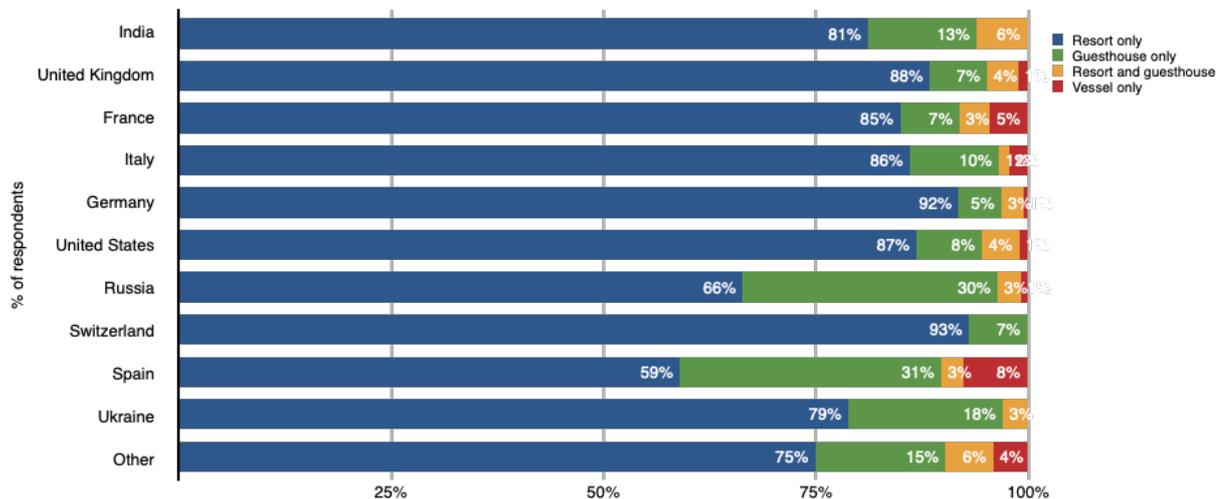


Figure 2.6: Place of stay of visitors by nationality

Most respondents of all nationalities chose to stay in resorts. Swiss (93%) and German (92%) respondents were more likely to stay in resorts only. Respondents from Spain (31%) and Russia (30%) were more likely to stay in guesthouses, with respondents from Spain also being the most likely to stay in liveaboards (8%).

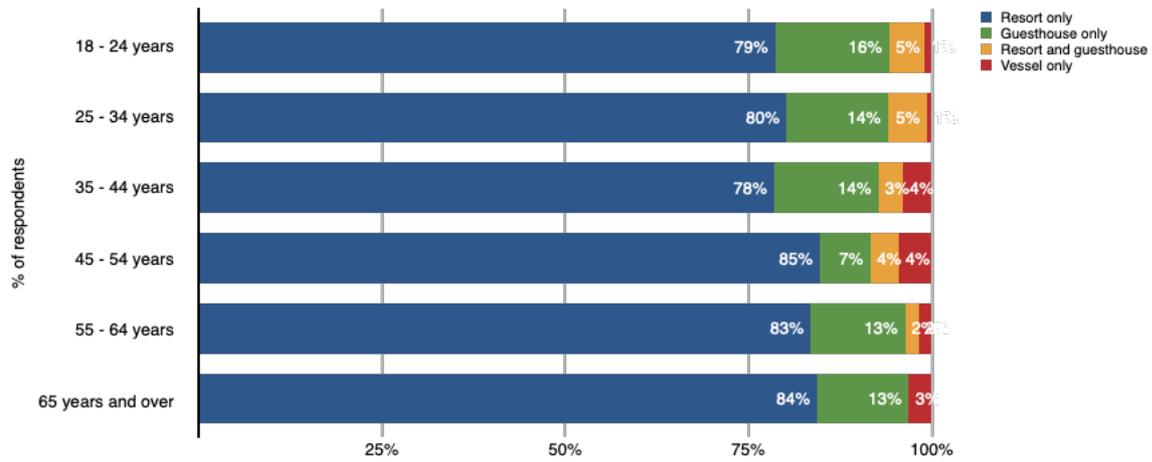


Figure 2.7: Place of stay of visitors by age group

Similarly, resorts were the most popular place of stay for visitors of all age groups. Respondents aged 45-54 years (85%) and 65 years and over (84%) were most likely to stay in resorts only, while visitors aged 18-24 (16%), 25-34 (14%) and 35-44 (14%) were more likely to stay in guesthouses. Respondents aged 35-44 (4%) and 45-54 (4%) were most likely to stay on liveaboards.

3.6. Duration of stay

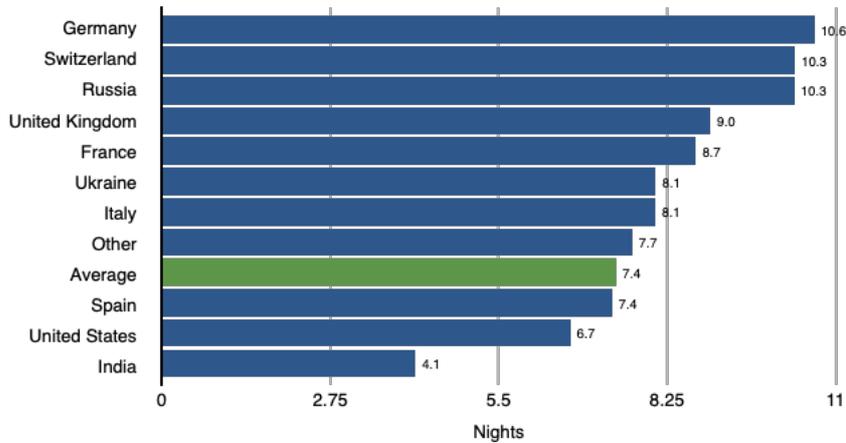


Figure 2.8: number of nights by nationality

The average duration of stay was 7.4 nights, with German respondents staying the longest (10.6 nights) and Indian respondents staying the least amount of time (4.1 nights).

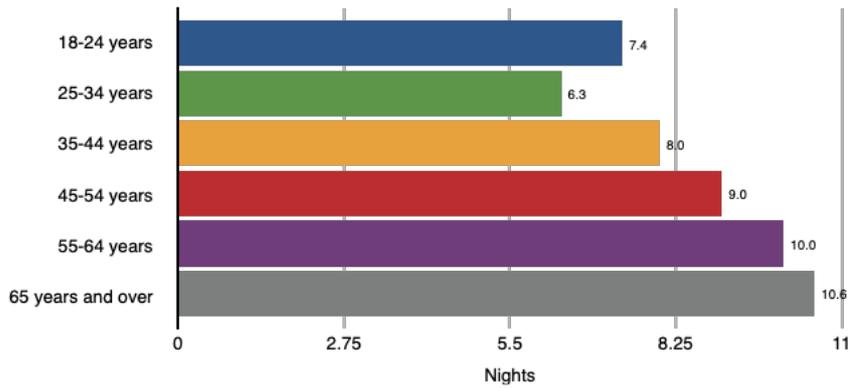


Figure 2.9: Number of nights by age group

Respondents that were older tended to have a longer duration of stay with visitors aged 65 and over, staying for 10.6 nights on average whilst visitors aged 25-34 stayed 6.3 nights on average.

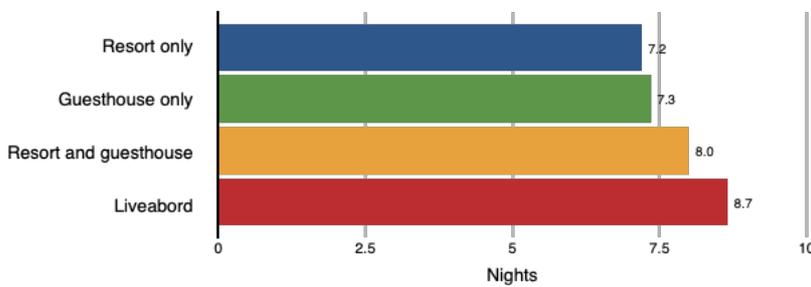


Figure 2.10: Number of nights by place of stay

Visitors who stayed on liveaboards tended to stay the longest (8.7 nights). Visitors staying in resorts only stayed 7.2 nights, while visitors that stayed in guesthouses only stayed 7.3 nights. Respondents that stayed in both resorts and guesthouses stayed an average of 8 nights.

3.7. Repeat Visitors

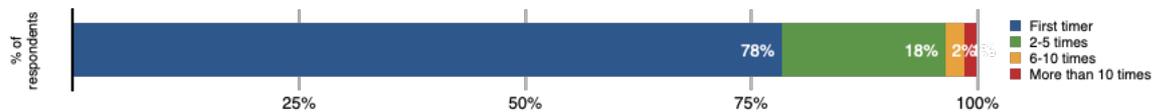


Figure 2.11: Repeat Visitors

78% of visitors were first time visitors to the Maldives, with 18% having visited 2-5 times, 2% having visited 6-10 times and 1% having visited more than 10 times.

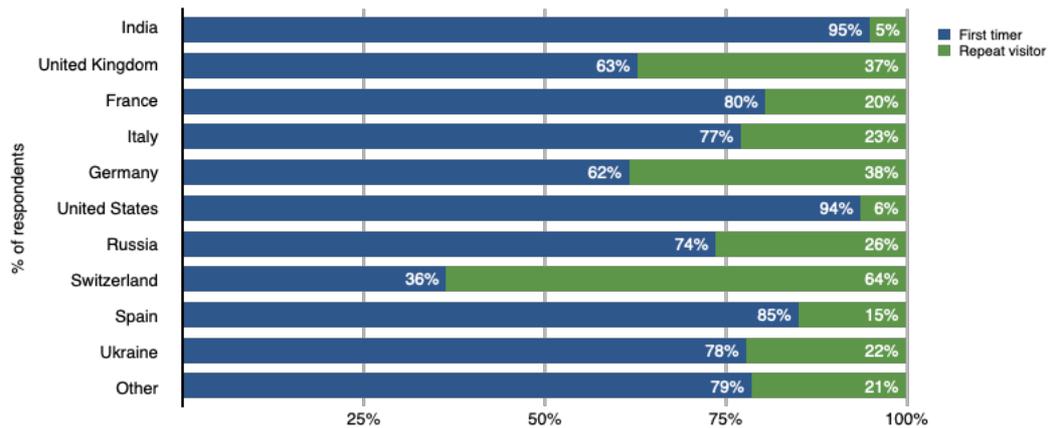


Figure 2.12: Repeat visitors by nationality

Visitors from most nationalities were first time visitors, with most first timers being from India (95%), the United States (94%) and Spain (85%). Respondents from Switzerland were mostly repeat visitors (64%) while 38% of German respondents were repeat visitors, as were 37% of British respondents.

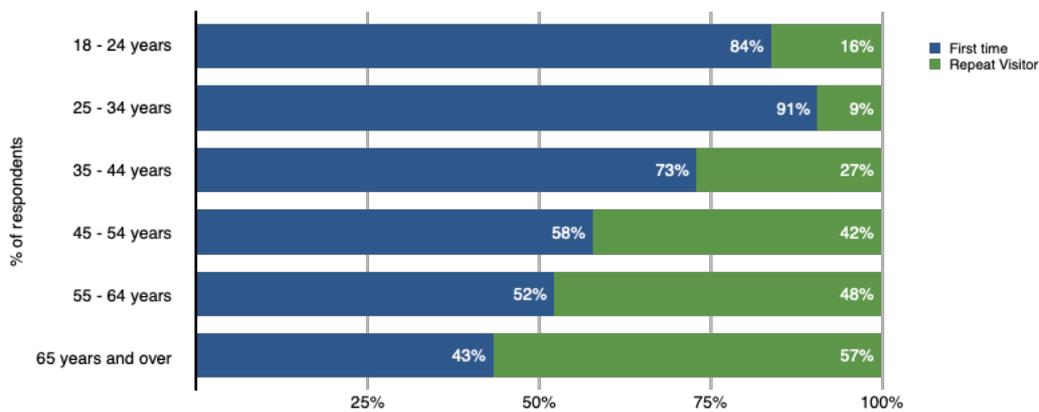


Figure 2.13: Repeat visitors by age group

84% of 18–24-year-old respondents were first time visitors, while 16% were repeat visitors. 91% of respondents aged 25-34 were first time visitors, with 73% of respondents aged 35-44 also visiting for the first time. In contrast, 57% of visitors aged 65 and over were repeat visitors, with 48% and 42% of those aged 55-64 and 45-54 being repeat visitors, respectively

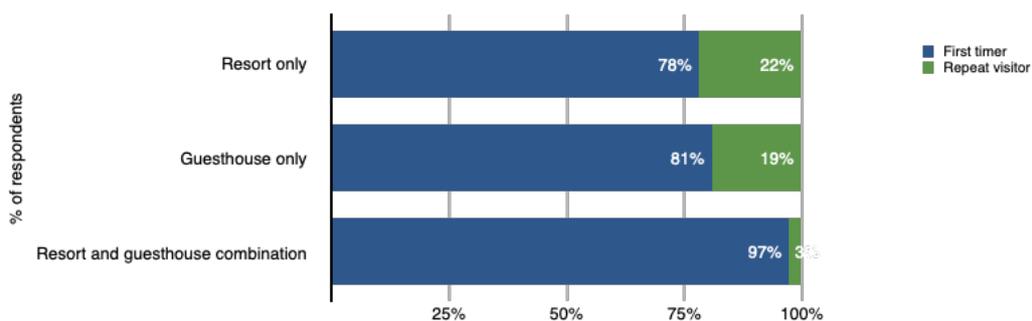


Figure 2.14: Repeat visitors by place of stay

78% of those who stayed at resort only were first time visitors while 81% of respondents who stayed at guest houses only were visiting for the first time. Of those who visited both resorts and guesthouses, 97% were first timers while only 3% were repeat visitors.

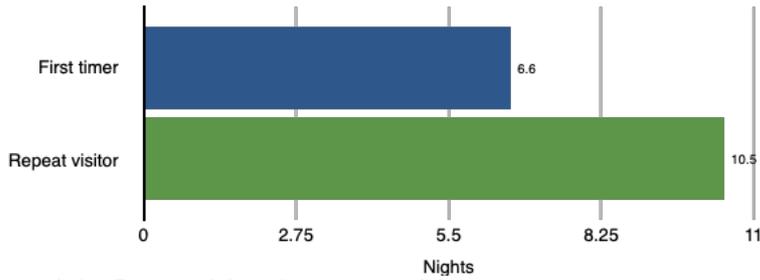


Figure 2.15: Repeat visitors by average nights

First time visitors stayed for an average of 6.6 nights whilst repeat visitors stayed for an average of 10.5 nights.

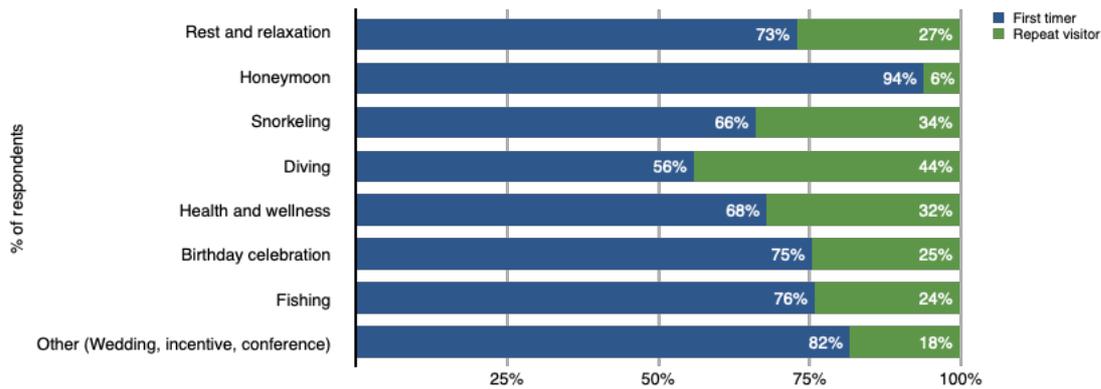


Figure 2.16: Repeat visitors by purpose of visit

73% of those who visited the Maldives for rest and relaxation were first time visitors, with 94% of those who travelled for their honeymoon were first timers. 66% of visitors who travelled for snorkelling and 56% who visited for diving were first time visitors. 68% who visited for health and wellness reasons and 75% who travelled for a birthday celebration were also visiting for the first time. 76% of those who visited for fishing were visiting for the first time, as were 88% of those who attended a wedding.

3.8. Travel Companion

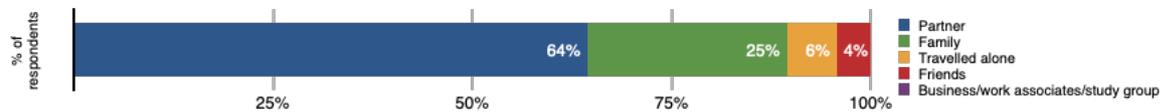


Figure 2.17: Travel companion

Most respondents travelled with their partner (64%), while 25% travelled with their family. 6% of visitors travelled alone and 4% travelled with friends.

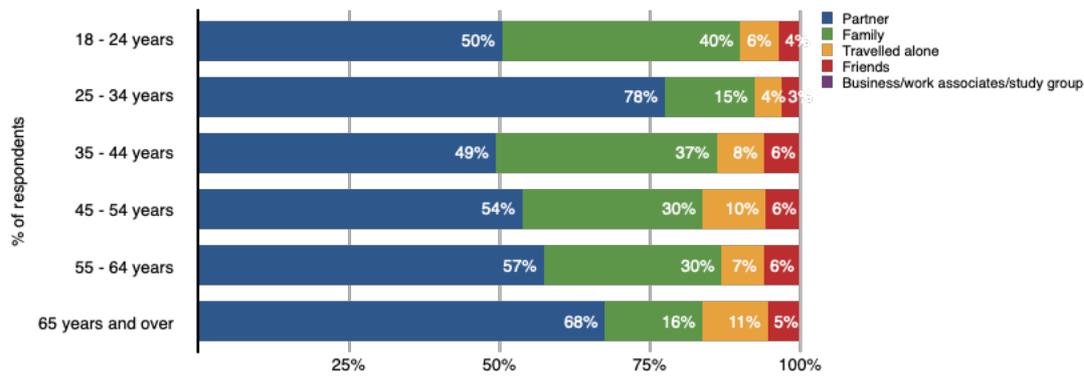


Figure 2.18: No of adults and children in the group / travel companion by age group

Across all age groups, most respondents travelled with their partners. Guests aged 25-34 (78%) and 65 years and over (68%) were most likely to travel with a partner, while 40% of those aged 18-24 and 37% aged between 35-44 travelled with family. 11% of respondents aged 65 and over travelled alone, as did 10% of those aged 45-54. 6% of respondents aged 35-44, 45-54 and 55-64 travelled with friends.

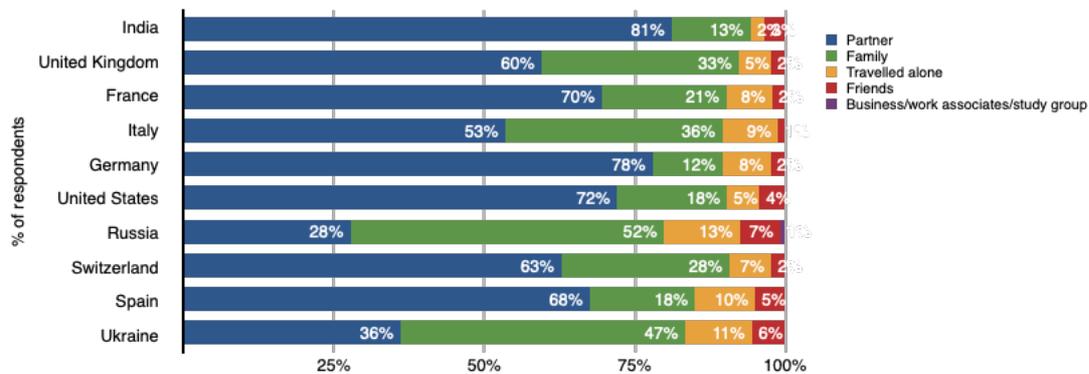


Figure 2.19: Travel companion by nationality

Respondents from India (81%), Germany (78%) and the United States (72%) were most likely to travel with a partner, while respondents from Russia (52%), Ukraine (47%) and Italy (36%) more commonly travelled with family. Respondents from Russia (13%) and Ukraine (11%) were also most likely to travel alone.

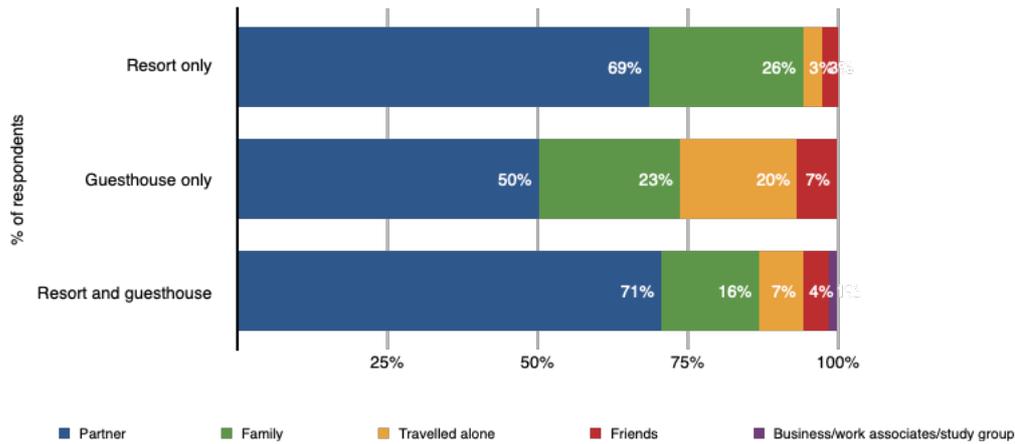


Figure 2.20: Travel companion by place of stay

69% of respondents who stayed at a resort only travelled with their partner, while 26% travelled with their family. 3% travelled alone and 3% travelled with friends. Of those staying in guesthouses, 50% travelled with a partner, 23% with family, 20% alone and 7% with friends. Respondents who stayed in a combination of resorts and guesthouses were most likely to travel with a partner (71%). 16% of respondents that stayed in a combination travelled with family, 7% travelled alone and 4% with friends.

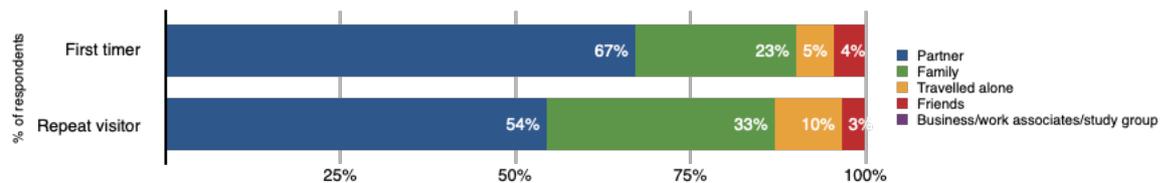


Figure 2.21: Travel companion by repeat visitors

Most first-time visitors travelled with a partner (67%), while 23% travelled with family. 5% travelled alone and 4% travelled with friends. Most repeat visitors also travelled with a partner (54%), while 33% travelled with family, 10% travelled alone and 3% travelled with friends.

4. MOTIVATION AND PURPOSE OF VISIT

4.1. Motivation to choose Maldives

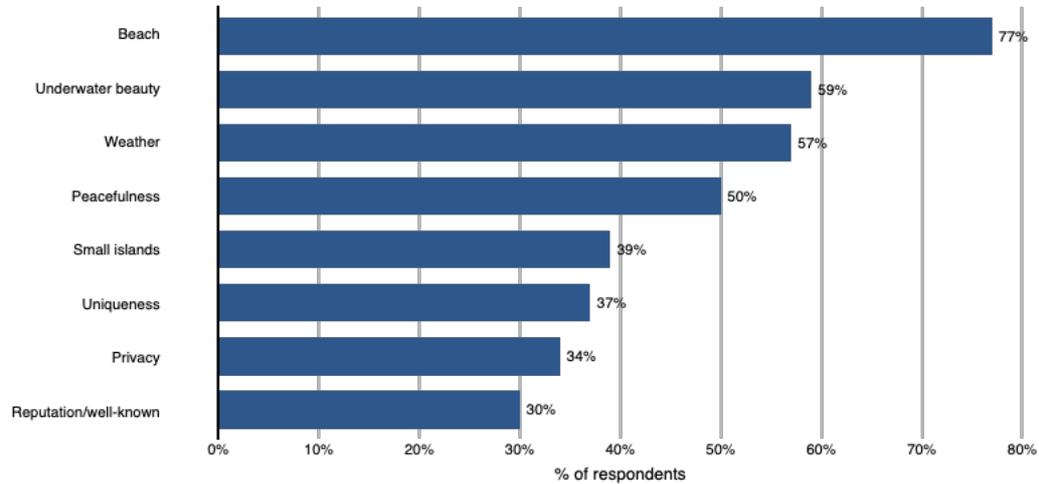


Figure 3.1: Motivation to choose Maldives

*Multiple response question

Most respondents chose to visit the Maldives due to the beach (77%), underwater beauty (59%), weather (57%) and peacefulness (50%). Other reasons for visiting included the small islands (39%), uniqueness (37%), privacy (34%) and reputation (30%).

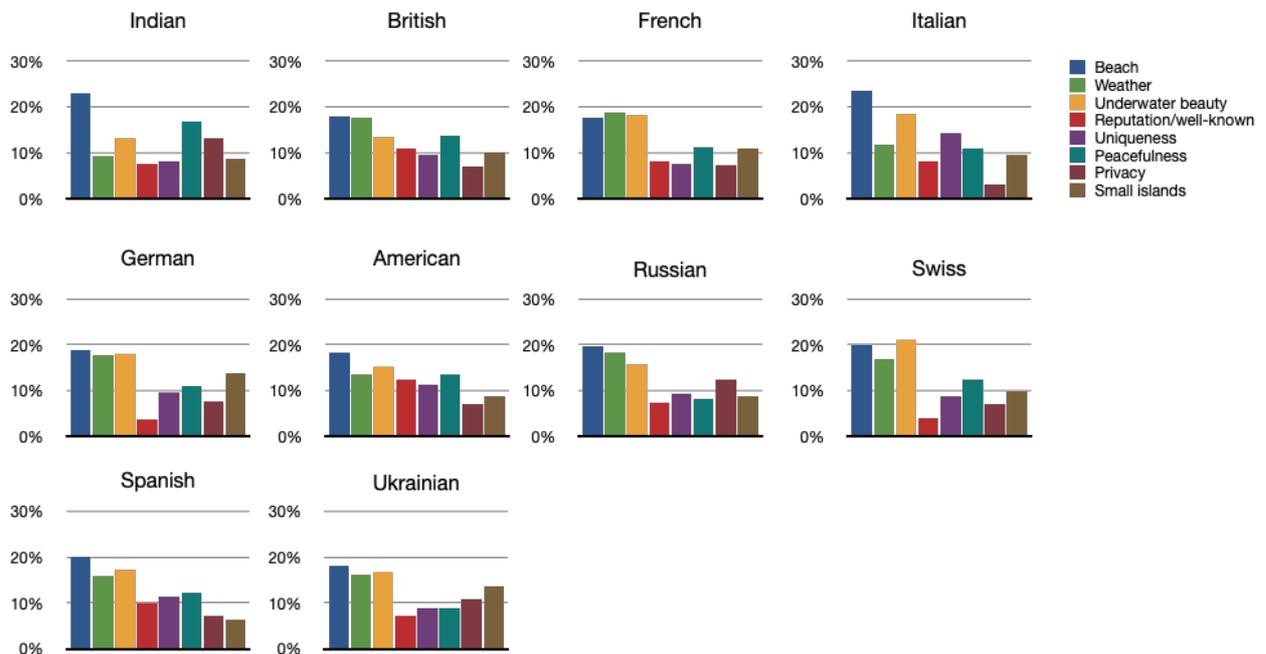


Figure 3.2: Motivation to choose Maldives by Nationality

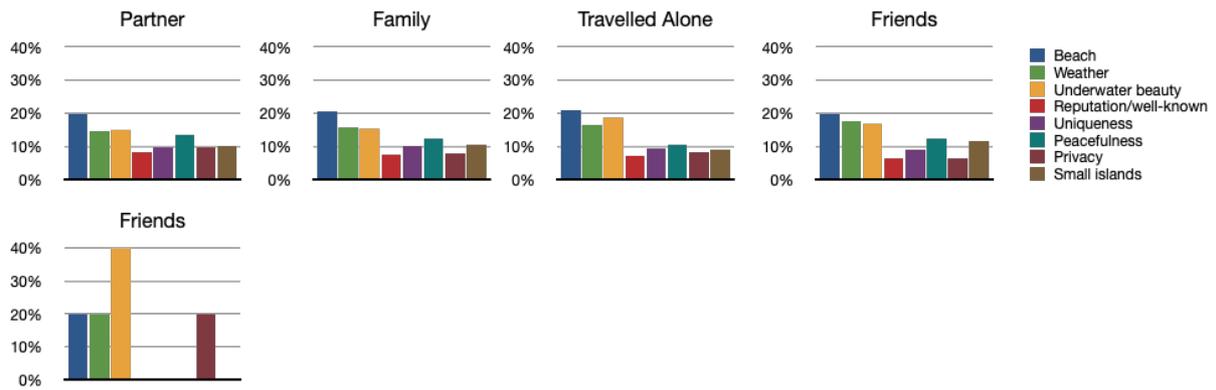


Figure 3.3: Motivation to choose Maldives by Travel Companion

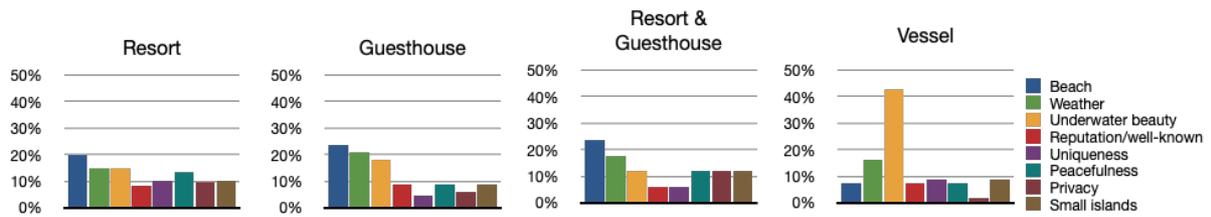


Figure 3.4: Motivation to choose Maldives by Place of Stay

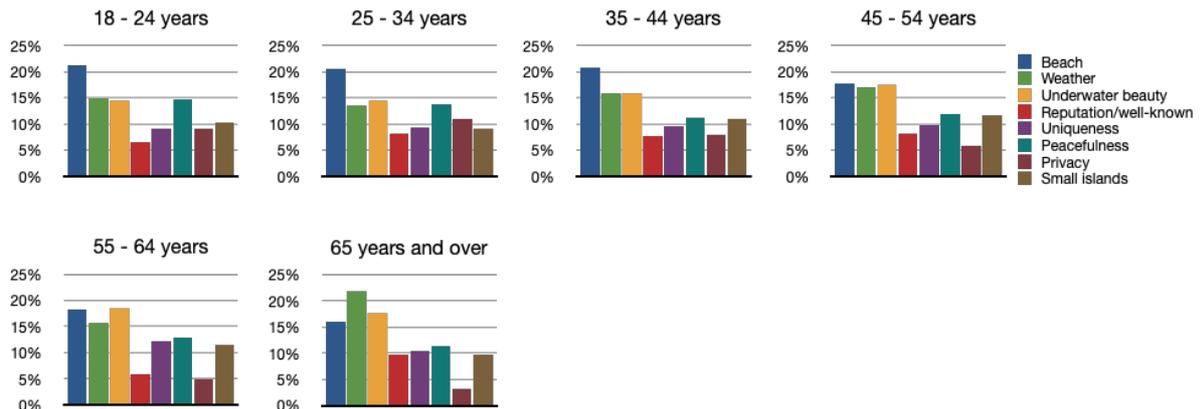


Figure 3.5: Motivation to choose Maldives by Age Group

The beach was the biggest motivator to visit the Maldives for most nationalities, with French respondents commonly citing the weather and Swiss respondents stating underwater beauty as their main reason for visiting. The beach was also the biggest motivator for respondents regardless of who they travelled with, or where they stayed. Underwater beauty was the main motivating factor for those who stayed on vessels only. Beaches were the main motivating factor for most age groups, with weather and underwater beauty being the biggest motivator for those aged 65 years and over.

4.2. Purpose of Visit

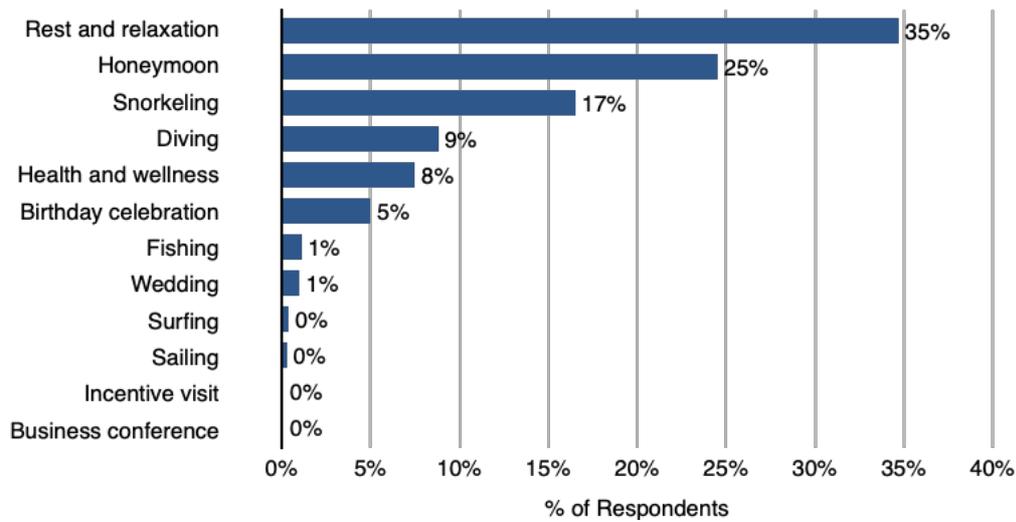


Figure 3.6: Purpose of visit

*Multiple response question

Rest and relaxation (35%), honeymoon (25%) and snorkeling (17%) were the main reasons cited as to why respondents visited the Maldives. 9% visited for diving, 8% for health and wellness and 5% visited for a birthday celebration. Other reasons for visiting included fishing (1%) and weddings (1%).

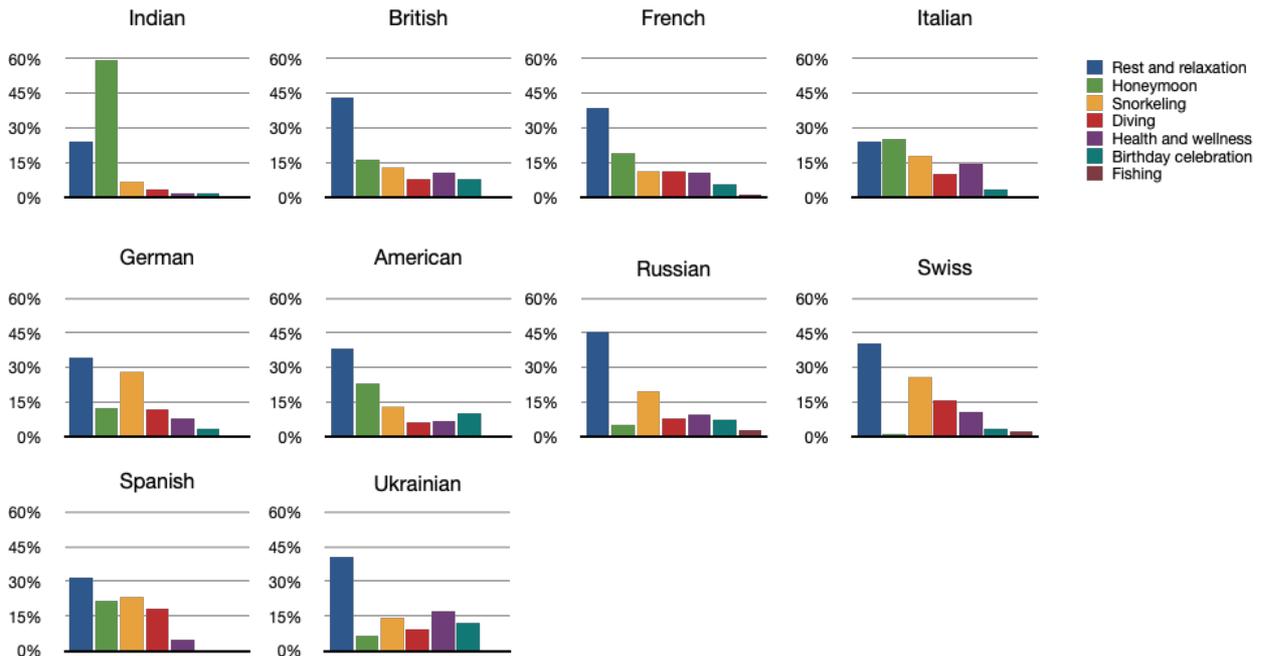


Figure 3.7: Purpose of visit by nationality

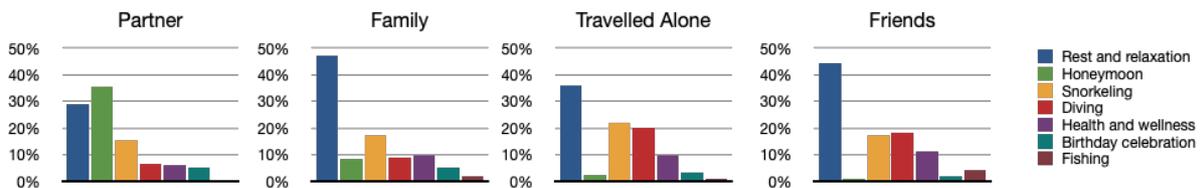


Figure 3.8: Purpose of visit by travel companion

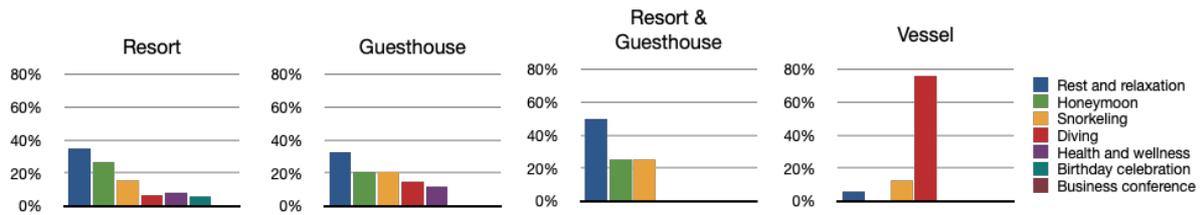


Figure 3.9: Purpose of visit by place of stay

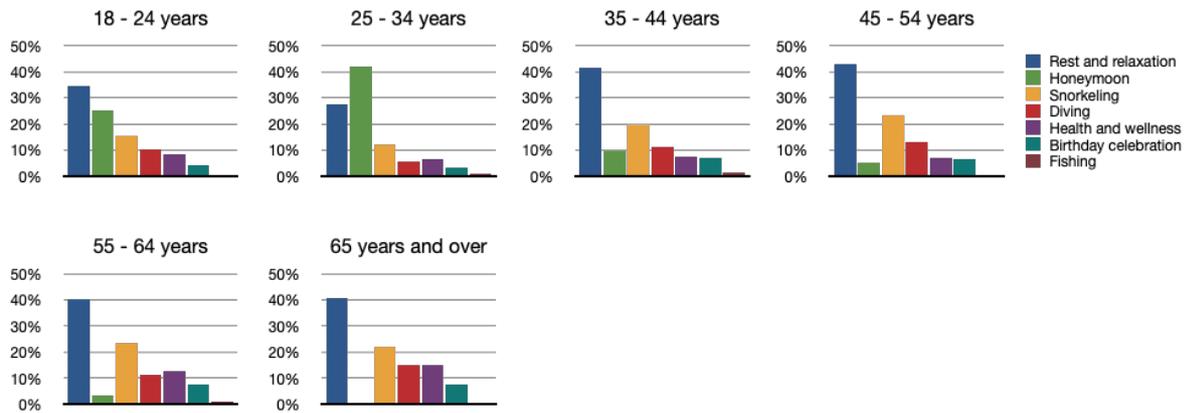


Figure 3.10: Purpose of visit by age group

Respondents from most nationalities visited the Maldives for rest and relaxation purposes, though 60% of Indians and 25% of Italians visited for a honeymoon. Those respondents who visited with a partner were most likely to have visited for a honeymoon whereas those traveling with family, friends, or alone visited for rest and relaxation, and most guests who stayed on a liveaboard only visited mainly for diving. Generally, most age groups visited for rest and relaxation while those aged 25-34 were most likely to be on a honeymoon.

5. PLANNING & BOOKING

5.1. Source of information about Maldives

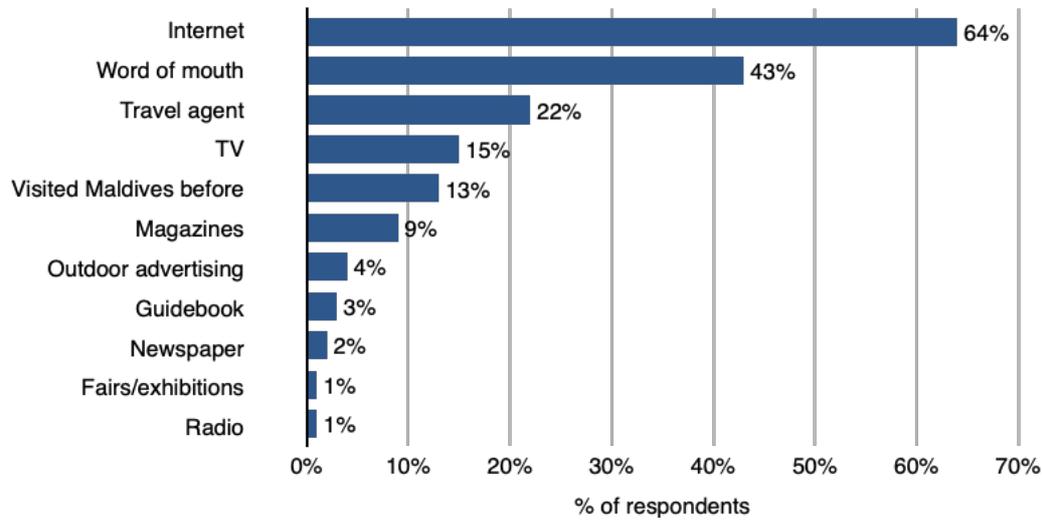


Figure 4.1: Source of information about the Maldives

- Multiple response question

Most respondents heard about the Maldives through the internet (64%) and word of mouth (43%). 22% heard of the Maldives through a travel agent, while 15% heard of it on TV. 13% of respondents had visited the Maldives before while 9% read about it in magazines. Other sources of information included outdoor advertising (4%), guidebooks (3%), newspaper (2%), fairs and exhibitions (1%) and over the radio (1%).

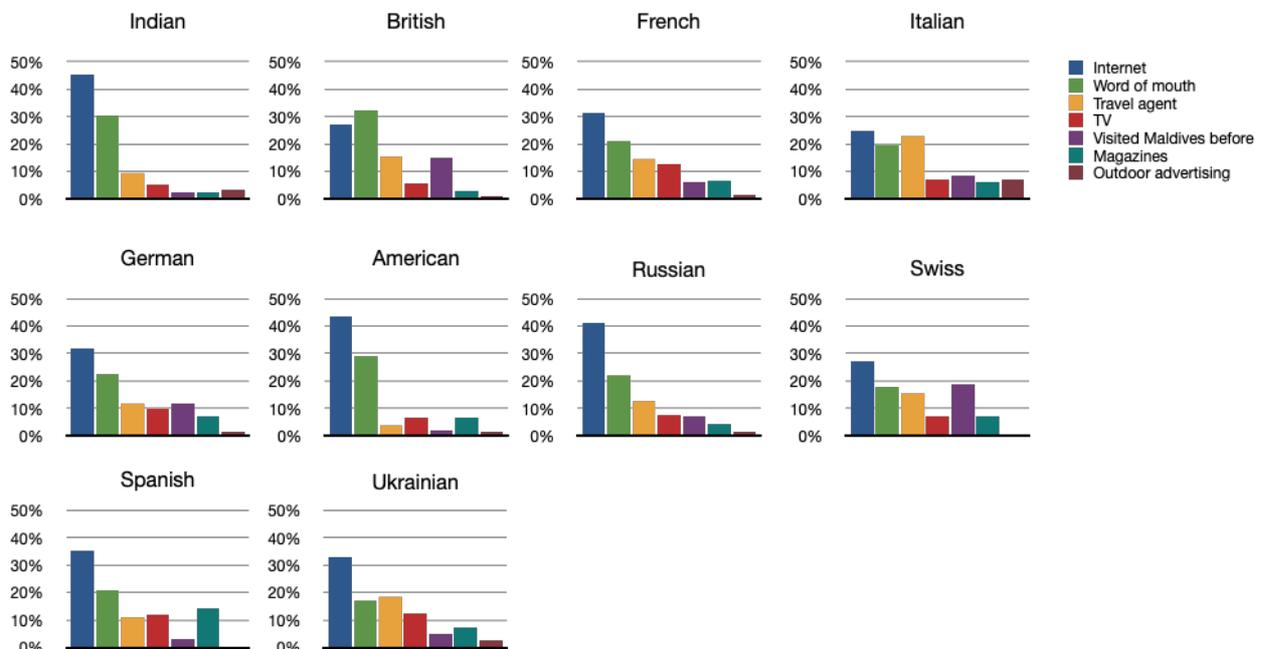


Figure 4.2: Source of information about the Maldives by Nationality



Figure 4.3: Source of information about the Maldives by Place of Stay

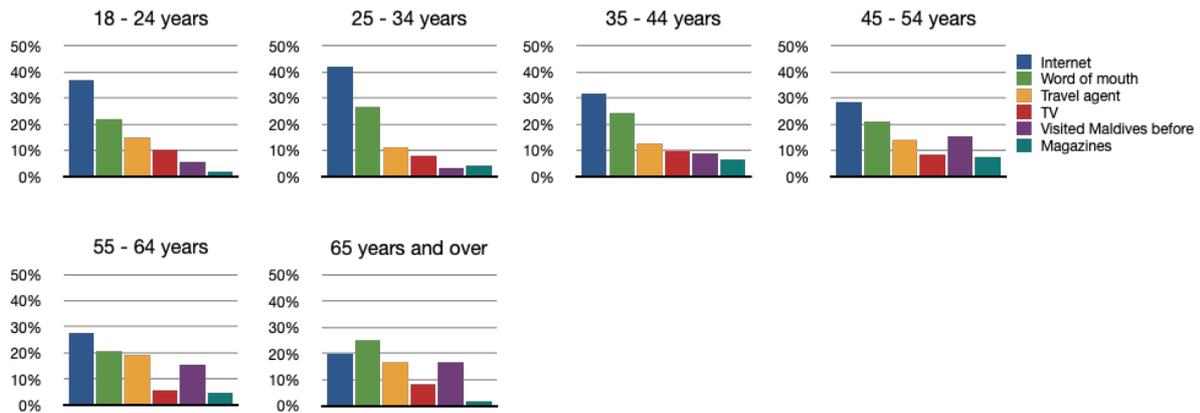


Figure 4.4: Source of Information about the Maldives by age group

Respondents of most nationalities heard of the Maldives on the internet, with British respondents being most likely to hear of it through word of mouth. Similarly, amongst the different age groups, most heard of the Maldives on the internet while the 65 and older age group tended to hear of it through word of mouth.

5.2. Airline Reservations



Figure 4.5: Airline Reservations

30% of respondents booked their travel directly through airlines while 13% booked through a flight search engine. A majority of respondents (55%) booked travel through travel agents and tour operators, and 1% booked through a travel club/corporate travel.

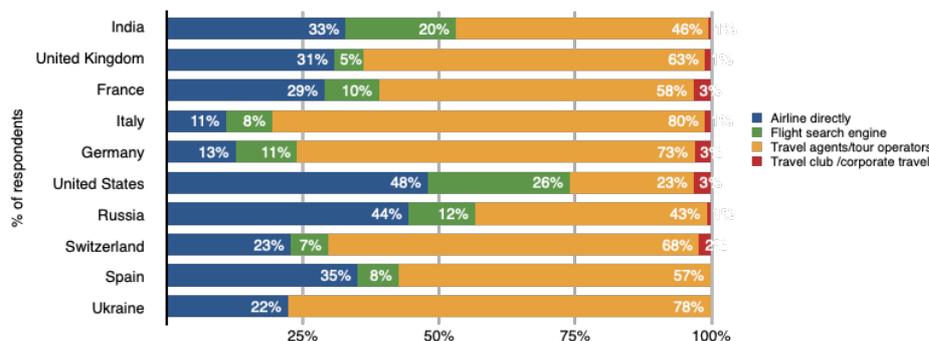


Figure 4.6: Airline Reservations by Nationality

Americans (48%) and Russians (44%) were most likely to book with the airline directly, with 26% of Americans and 20% of Indians booking with flight search engines. The most common method of booking was through travel agents/tour groups with 80% of Italians, 78% of Ukrainians and 73% of Germans choosing to book their travel this way. 3% of American, German and French respondents booked through travel clubs/corporate travel.

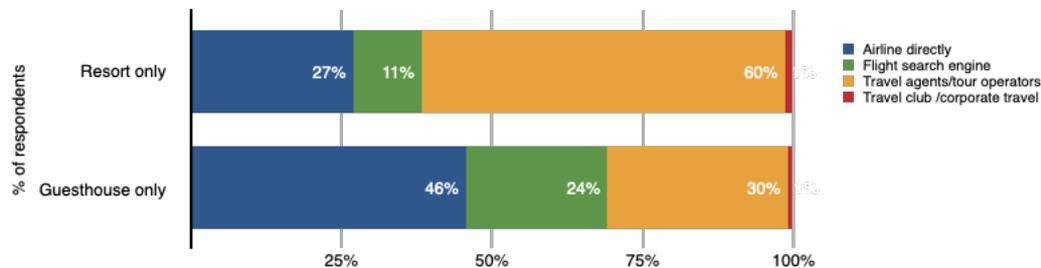


Figure 4.7: Airline Reservations by Place of Stay

Most visitors who stayed at resorts only booked flights through travel agents and tour groups (60%), while most respondents who stayed at guesthouses only booked travel directly through the airline.

5.3. Accommodation Reservations

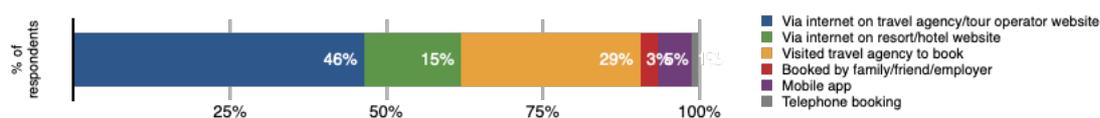


Figure 4.8: Accommodation Reservations

46% of guests booked accommodations on the internet, via a travel agency or tour operator website, while 15% booked via a resort or hotel website. 20% of guests visited a travel agency to book their accommodation while 3% had their accommodation booked by a family member, friend, or employer. Other methods of booking were through mobile apps (5%) or a telephone booking (1%).

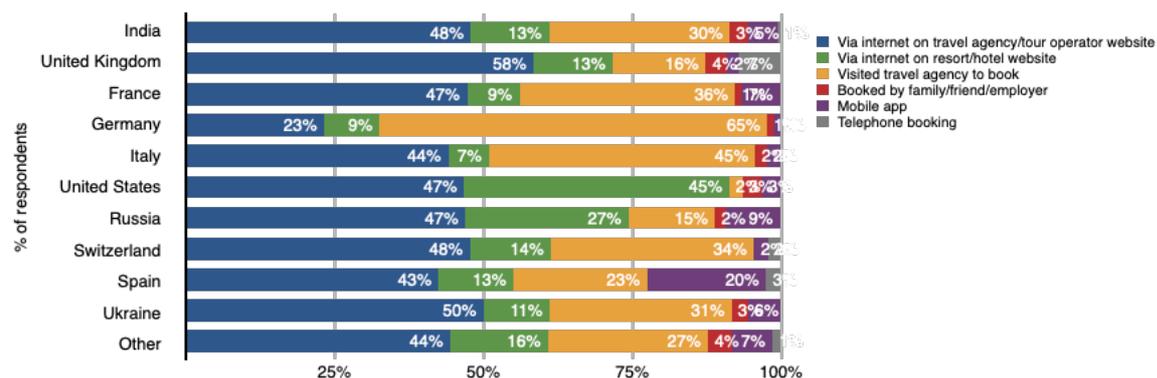


Figure 4.9: Accommodation Reservations by Nationality

British (58%), Ukrainian (50%), Swiss (48%) and Indian (48%) respondents were most likely to book accommodation through a travel agency/tour operator website while American respondents (45%) were most likely to book directly through a resort or hotel website. German (65%) and Italian (45%) visitors commonly booked by visiting a travel agency or tour operator while Spanish respondents tended to book accommodation through a mobile app (20%). Amongst the nationalities, British respondents (7%) were most likely to have made a telephone booking.

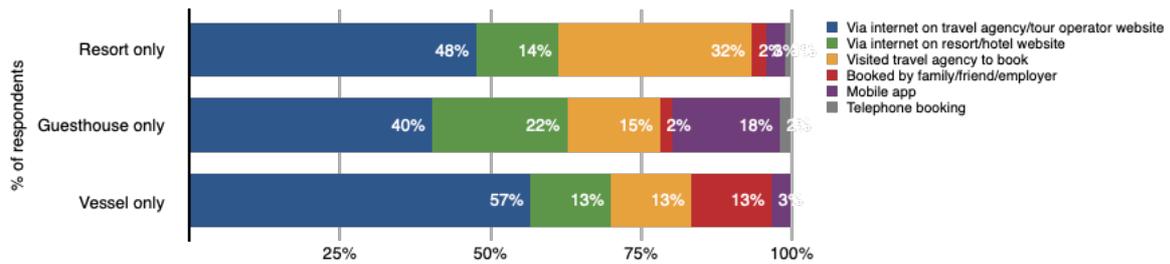


Figure 4.10: Accommodation Reservations by Place of Stay

A majority of guests who stayed in all three types of accommodation booked through a travel agency or tour operator website, while 22% of those who stayed in guesthouses only booked directly via the hotel website. 32% of those who stayed in resorts only visited a travel agency to book, and 18% of those who stayed in guesthouses only booked through a mobile app. 13% of respondents who stayed in both resorts and guesthouses had their accommodation booked by family members, friends, or employers.

5.4. Websites used to plan/organise trip

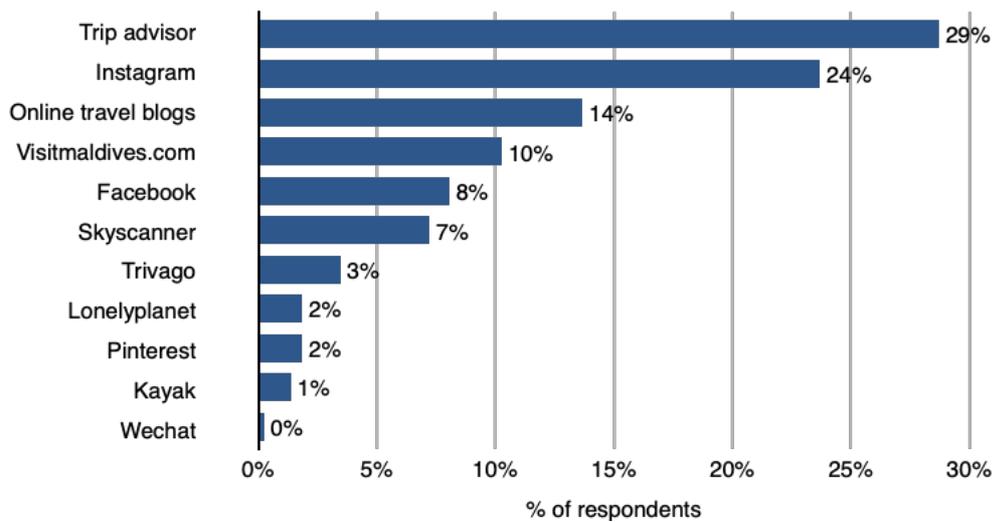


Figure 4.11: Websites used to plan/organise trip

* Multiple response question

TripAdvisor was the most common website used to plan trips (29%) while Instagram (24%), online travel blogs (14%) and Visitmaldives.com were also commonly used.



Figure 4.12: Websites used to plan/organise trip by Nationality

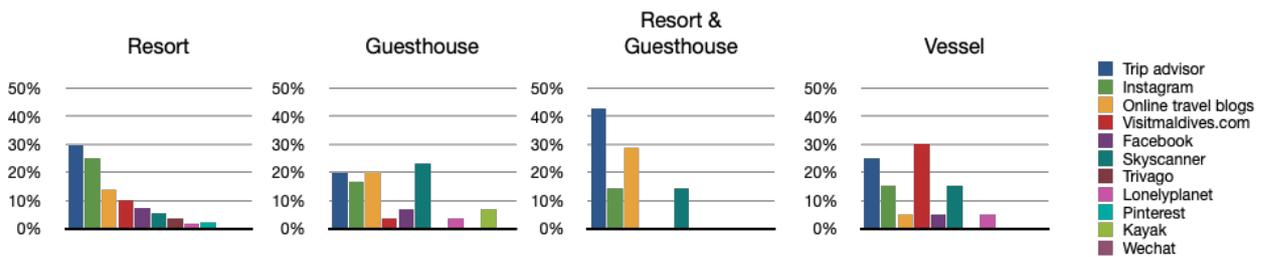


Figure 4.13: Websites used to plan/organise trip by Place of Stay

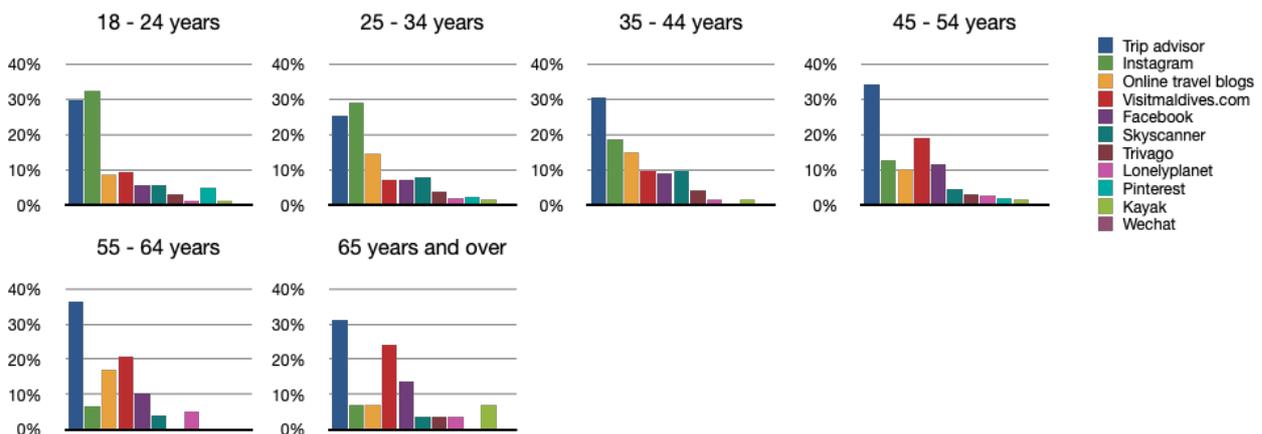
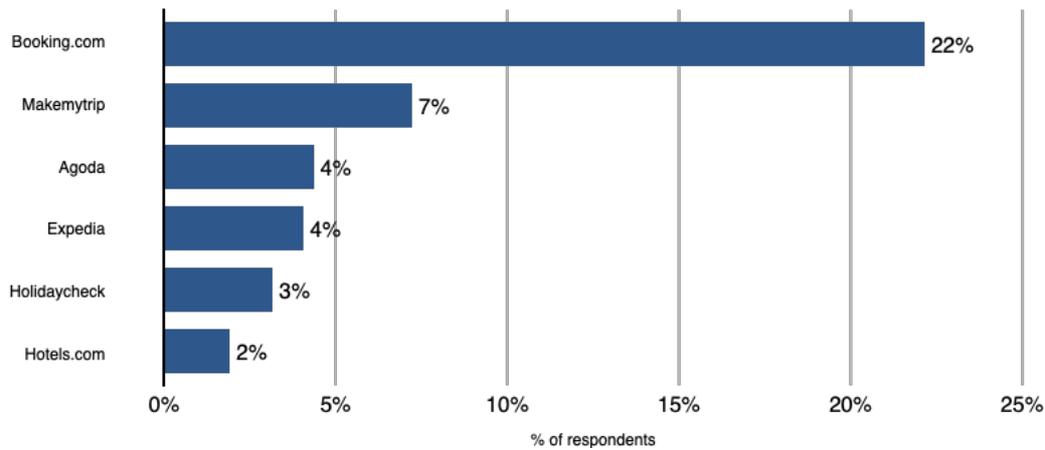


Figure 4.14: Websites used to plan/organise trip by Age Group

TripAdvisor was the most commonly used website across the board with all nationalities, with Instagram being the second most common with most nationalities. Online travel blogs were most common amongst Indian. Spanish and American visitors, while Visitmaldives.com was most commonly used by Italian and American visitors.

Younger respondents (18-24 years and 25-34 years) commonly used Instagram to plan and organise their trips, while respondents in all other age groups most commonly used TripAdvisor.

5.5. Websites used to book trip



*Multiple response question

Figure 4.15: Websites used to book trip

Booking.com (22%) was the most commonly used website when it came to booking a trip. Other websites used include Makemytrip (7%), Agoda (4%) and Expedia (4%).



Figure 4.16: Websites used to book trip by Nationality

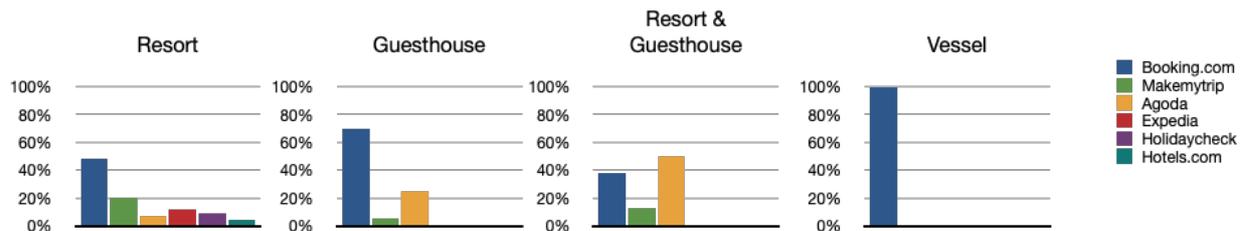


Figure 4.17: Websites used to book trip by place of stay

Booking.com was the website used by most nationalities to book their trip, with Indian respondents choosing to use Makemytrip, German respondents using Holidaycheck and American respondents most commonly using Expedia. Booking.com was also most commonly used by respondents staying in resorts only, guesthouses only and liveboards only; while those staying in a combination of resorts and guesthouses tended to book through Agoda.

5.6. Booking Period

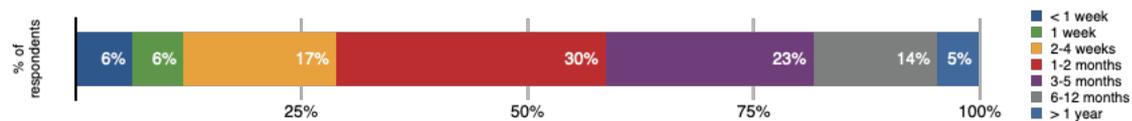


Figure 4.18: Booking period

Most respondents booked their trip to the Maldives 1-2 months (30%) or 3-5 months (23%) in advance, with a further 17% booking 2-4 weeks in advance. 14% booked 6-12 months in advance while 6% booked less than 1 week or 1 week in advance. 5% of respondents booked their trip over a year in advance.

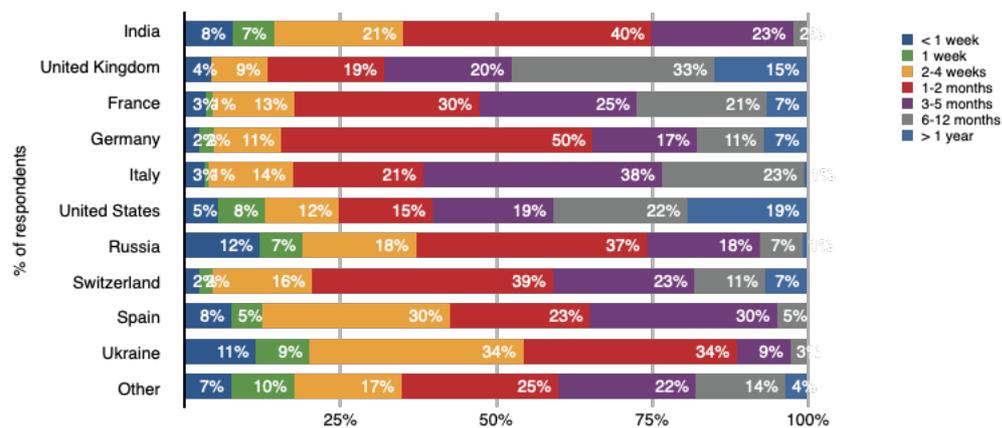


Figure 4.19: Booking period by nationalities

Of all the nationalities, Russians (12%) and Ukrainians (11%) were most likely to book accommodation less than one week before travel, whilst respondents of other nationalities were most likely to book one week in advance. Ukrainian (34%), Spanish (30%) and Indian (21%) respondents were likely to book 2-4 weeks ahead of time, and German (50%) and Indian (40%) respondents tended to book 1-2 months before travel. 38% of Italian respondents and 30% of Spanish respondents booked 3-5 months ahead of time, whilst 33% of respondents from the United Kingdom booked 6-12 months ahead of time. American (19%) and British (15%) respondents were likely to book over a year in advance of travel.

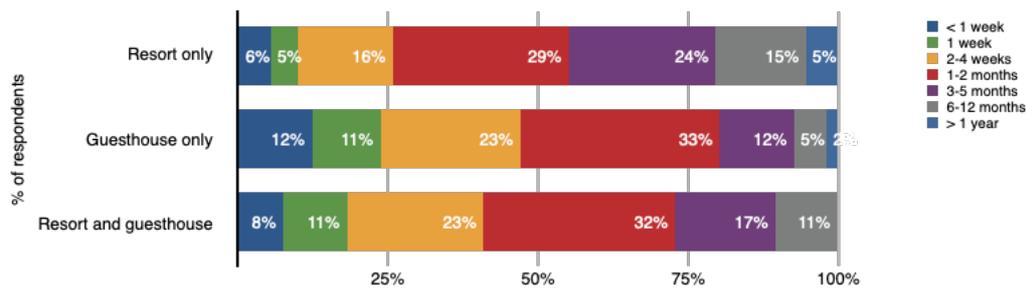


Figure 4.20: Booking period by place of stay

29% of guests who stayed in resorts booked their trips 1-2 months in advance while 24% guests booked 3-5 months in advance. 15% of respondents staying at resorts only booked their trip 6-12 months in advance while 5% booked over a year in advance. 12% of guests who stayed in guesthouses only booked their trip less than 1 week in advance. 11% of those who stayed in guesthouses and a combination of guesthouses and resorts booked one week in advance, while 23% of those respondents booked their trip 2-4 weeks in advance. 33% and 32% of guests who stayed in guesthouses only and a combination of guesthouses and resorts booked their trips 1-2 months in advance.

6. TRANSPORTATION TO PLACE OF STAY

6.1. Main method of transportation

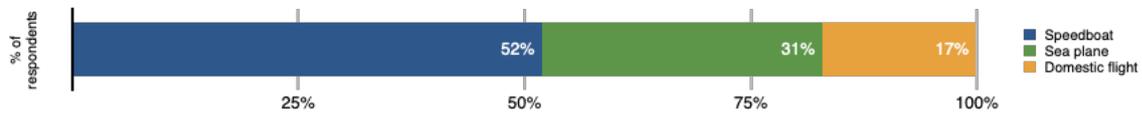


Figure 5.1: Main method of transport

The most common method of transportation within Maldives was by speedboat (52%), followed by seaplanes (31%) and domestic flights were the least common, at 17%.

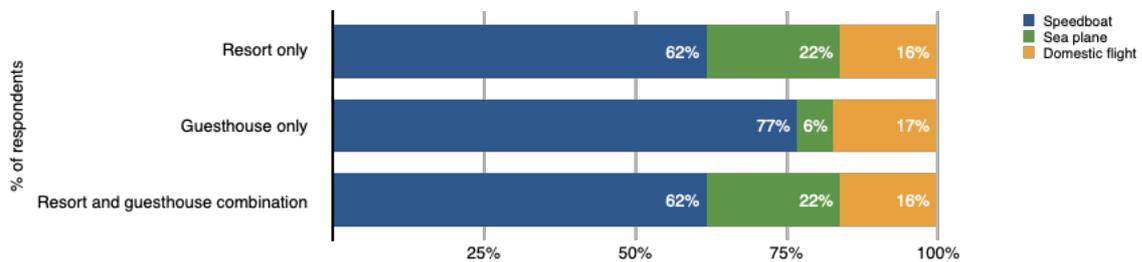


Figure 5.2: Main method of transport by place of stay

Guests who stayed in either resorts only, or a combination of resorts and guesthouses, were transported by speedboat 62% of the time. 22% of these guests travelled by seaplane, and 16% by domestic flight. Guesthouse only transfers were also most commonly done through speedboats (77%), with domestic flights (17%) and seaplanes (6%) being less common.

6.2. Wait time at airport

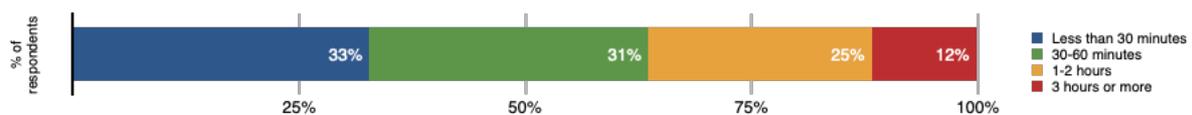


Figure 5.3: Wait time at airport

The most common wait times at the airport were less than 30 minutes (33%) and 30-60 minutes (31%). 25% of guests had to wait 1-2 hours, whilst 12% waited 3 hours or more for a transfer.

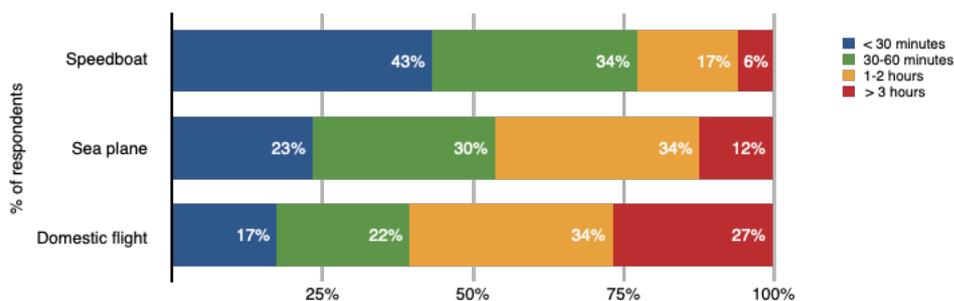


Figure 5.4: Wait time at airport by method of transport

Guests who had a speedboat transfer, on average, had shorter airport wait times, with 43% waiting less than 30 minutes and another 34% waiting 30-60 minutes. Guests with seaplane transfers commonly waited 30-60 minutes (30%) or 1-2 hours (34%), while guests with domestic flight transfers had the longest wait times. These respondents tended to wait 1-2 hours (34%) or more than 3 hours (27%).

6.3. Transfer time from airport to place of stay

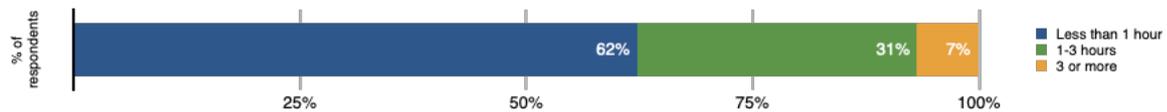


Figure 5.5: Transfer time

Transfer time from the airport to place of stay was less than 1 hour for most guests (62%), 1-3 hours for 31% of respondents and 3 or more hours for 7%.

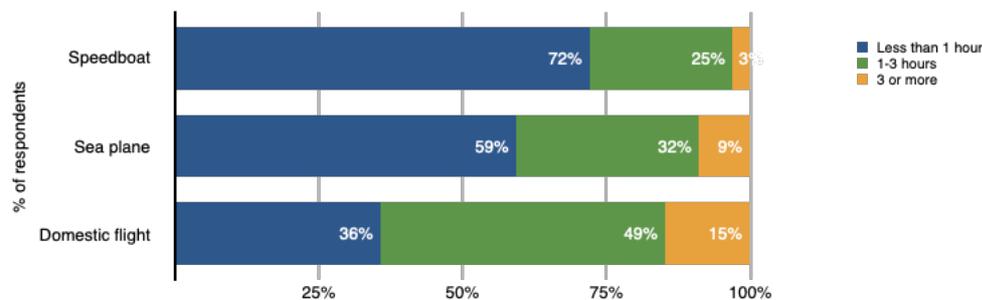


Figure 5.6: Transfer time by method of transport

*Speedboat and public ferry have been used interchangeably

Most guests who had speedboat (72%) or seaplane (59%) transfers had less than an hour of transfer time, while those taking a domestic flight were more likely to have longer transfer, with 49% taking 1-3 hours to arrive at their final destination, while 15% had a transfer time of 3 or more hours.

6.4. Satisfaction with transfer

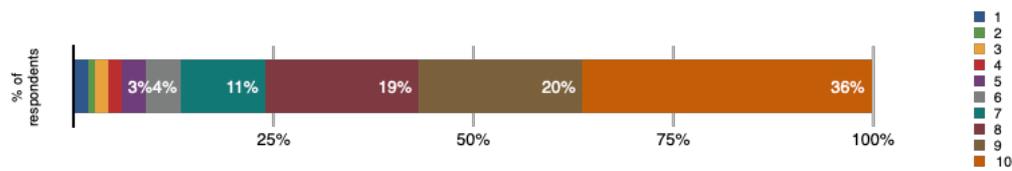


Figure 5.7: Satisfaction with transfer

Most guests were satisfied with their transfers. When rated on a scale from 1-10, 26% rated transfers 10, with 20% rating a 9, 19% rating an 8 and 11% rating a 7.

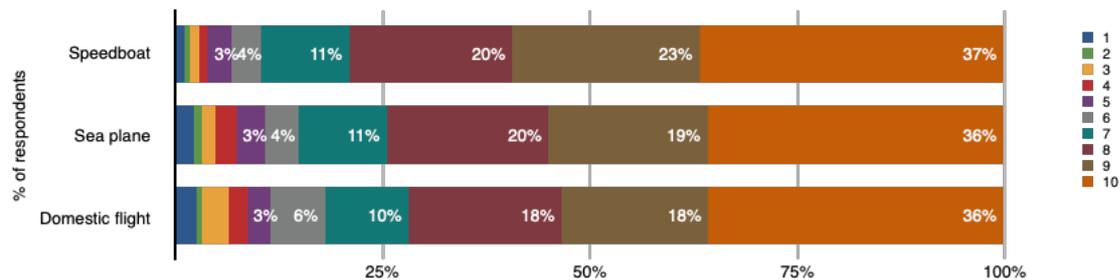


Figure 5.8: Satisfaction with transfer by method of transport

The most common score given to all three types of transfers was a 10/10. Generally, respondents favoured speedboats with 37% rating them a 10/10, 23% rating a 9, 20% rating an 8 and 11% rating a 7. 4% rated them a 6/10 and 3% rated 5/10.

Respondents also had a positive view on seaplanes with 36% giving seaplanes a perfect score, 19% rating them a 9, 20% rating them an 8 and 11% rated them a 7. 4% rating speedboat transfers a, with 3% rating them a 5.

Domestic flights were also seen favourably with 36% rating them a 10, 18% a 9, 18% an 8 and 10% of respondents rating them a 7. These were, however, the least popular option, with 6% rating them a 6. 3% of respondents gave domestic flights a score of 1/10.

Whilst respondents were generally satisfied with the fast service, staff hospitality and cleanliness of transfers, they were let down by long wait times and delays, bad food and communication issues.

7. ACCOMMODATION EXPERIENCE

7.1. Ratings for place of stay

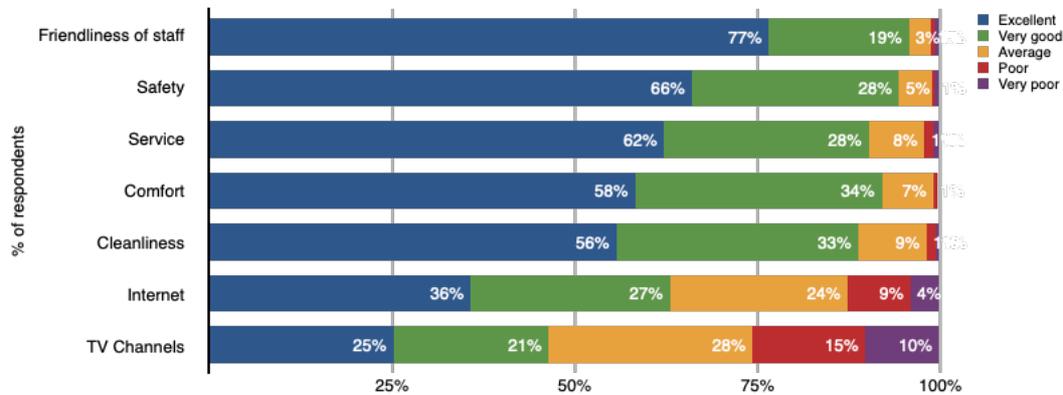


Figure 6.1: Ratings for place of stay

Generally, respondents gave excellent ratings to the friendliness of staff (77%), safety (66%), service (62%), comfort (58%) and cleanliness (56%) of their place of stay. However, internet (24%) and TV channel options (28%) were rated as average, with 15% rating TV channels as poor and 10% rating them as very poor.

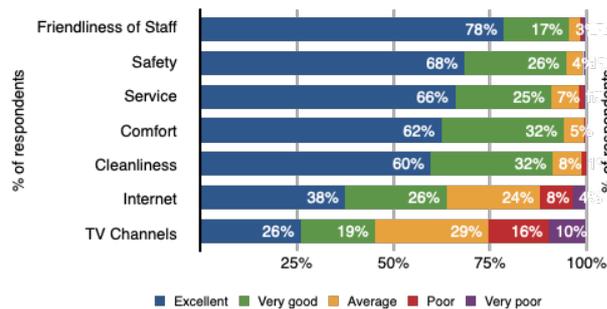


Figure 6.2: Ratings for place of stay for resort

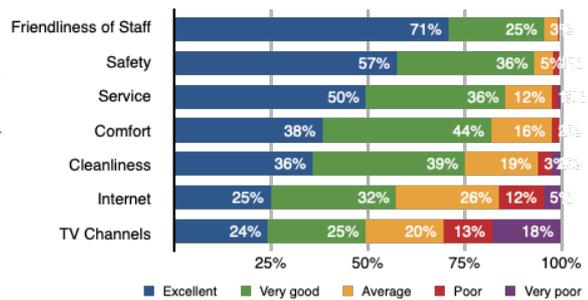


Figure 6.3: Ratings for place of stay for guesthouses

Respondents who stayed at resorts rated friendliness of staff as excellent (78%) or very good (17%) with safety being rated excellent (68%) or very good (26%), with service as excellent (66%) or very good (25%), comfort as excellent (62%) or very good (32%), and cleanliness also being rated as excellent (60%) or very good (32%). Internet was viewed as very good by 26% and average by 24% of respondents. TV channels were not as impressive, with 16% rating them as poor and 10% rating it very poor.

Respondents who stayed at guesthouses generally rated friendliness of staff as excellent (71%) or very good (25%), safety as excellent (57%) or very good (36%), service as excellent (50%) or very good (36%), comfort as excellent (38%) or very good (44%), with cleanliness also commonly being rated as excellent (36%) or very good (39%). Internet was rated as very good by 32% and average by 26%. TV channel options were regarded unfavourably, with 13% rating it as poor and 18% rating it very poor.

7.2. Perception of prices of room and services

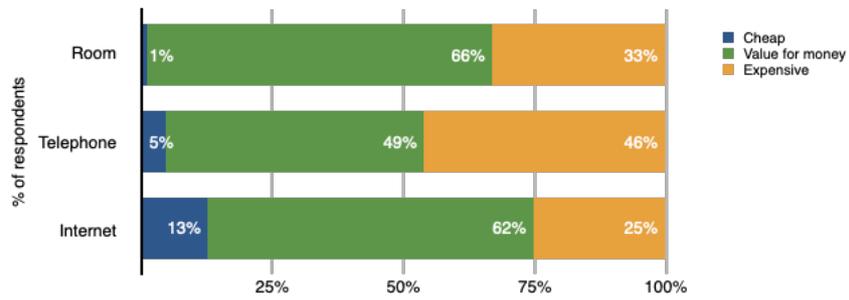


Figure 6.4: Perception of price charged for Room & Services

66% of respondents believed room prices were value for money, with 62% rating internet as value for money. 49% rated telephones as value for money, with 46% rating them as expensive.

8. DINING EXPERIENCE

8.1. Meal plan at place of stay



Figure 7.1: Meal plan

Most guests chose an all-inclusive meal plan (52%), while an additional 23% chose full board dining. 13% opted for half board and 10% chose bed and breakfast. 2% of respondents took the room only option.

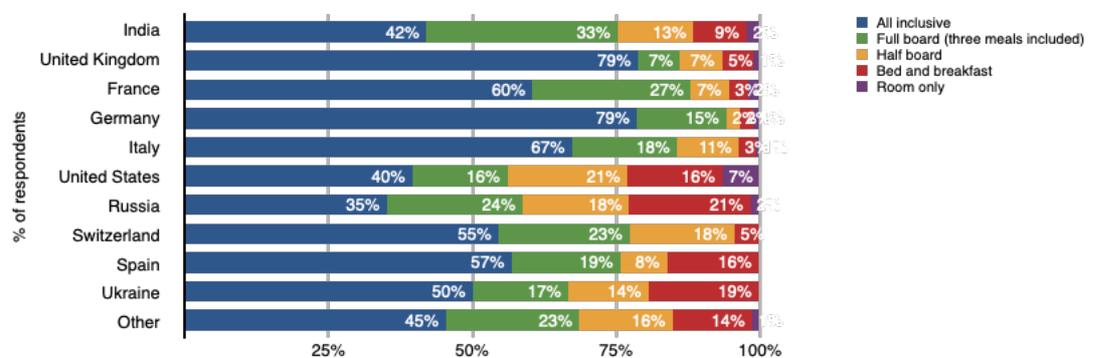


Figure 7.2: Meal plan by nationality

Respondents from all nationalities most commonly opted for the all-inclusive meal plan, with this being most popular among British (79%) and German (79%) respondents. Indian (33%) and French (27%) respondents most commonly opted for full board, while American (21%), Russian (18%) and Swiss (18%) favoured half board. 21% of Russian respondents and 19% of Ukrainian respondents chose the bed and breakfast, with 7% of respondents from the United States opting for room only.

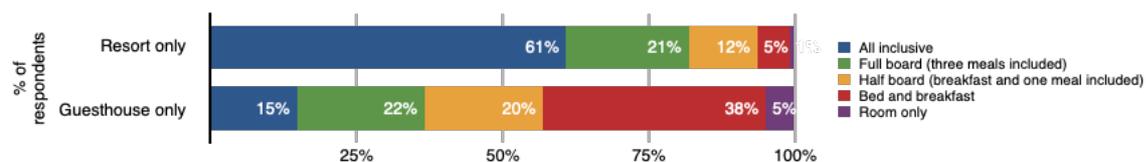


Figure 7.3: Meal plan by place of stay

Respondents who stayed at resorts only were most likely to take the all-inclusive meal plan (61%) or the full board option (21%), while those who stayed in guesthouses only commonly opted for bed and breakfast (38%) or full board (22%).

8.2. Perception of prices for food and beverages

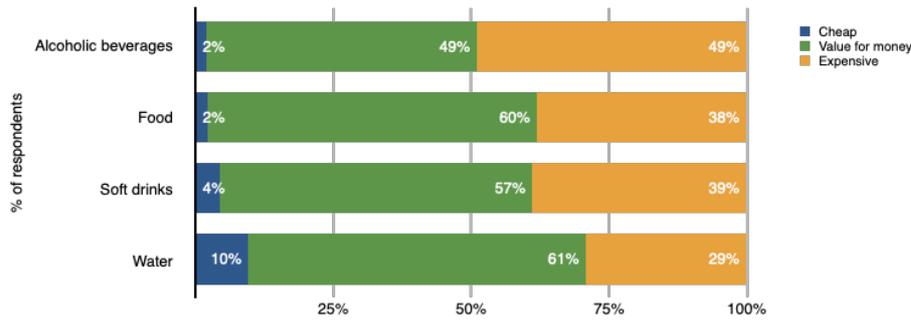


Figure 7.4: Perception of prices charged for food and beverages

Water (61%), food (60%) and soft drinks (57%) were commonly seen as value for money. 49% of respondents believed alcoholic beverages were also value for money, while another 49% believed they were expensive.

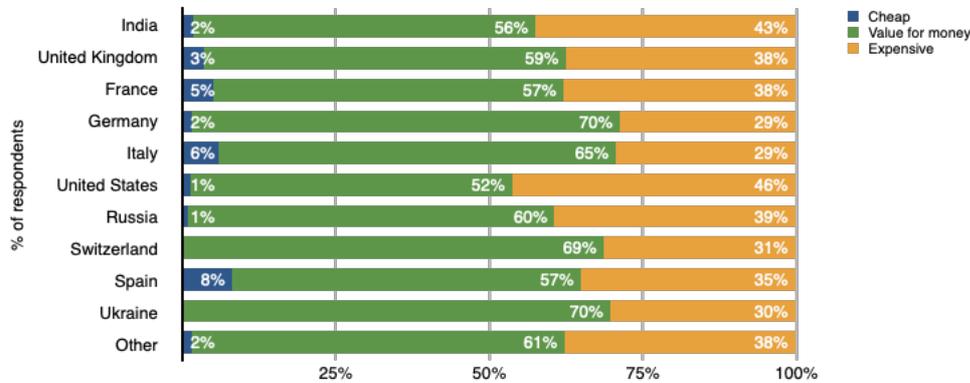


Figure 7.4: Perception of prices charged for food by nationality

Generally, respondents of all nationalities viewed food prices as value for money. 8% of Spanish respondents and 6% of Italian respondents believed food to be cheap, while 70% of both Ukrainian and German respondents believed it value for money. American (46%) and Indian (43%) respondents most commonly cited food as being expensive.

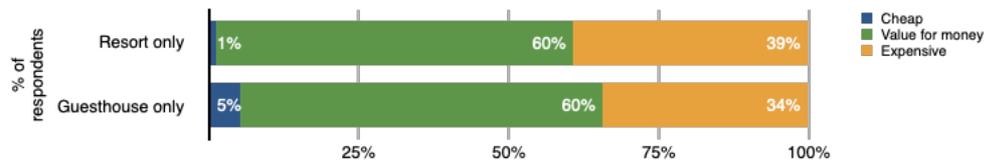


Figure 7.5: Perception of prices charged for food by place of stay

60% of respondents staying at resorts only believed food to be value for money, while 39% found it expensive. Of those staying in guesthouses only, 5% believed food to be cheap, 60% cited it as value for money, with 34% considering it expensive.

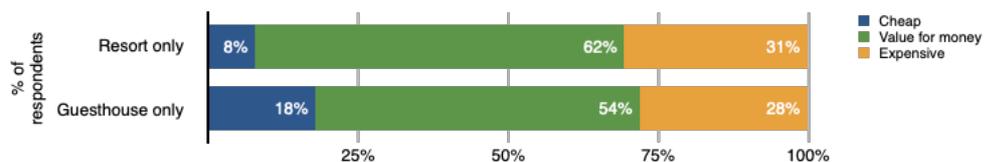


Figure 7.6: Perception of prices charged for water by place of stay

62% of respondents staying at resorts only rated water as value for money, while 31% found it expensive. 18% of guests staying in guesthouses only rated water to be cheap, 54% cited it as value for money, with 28% considering it expensive.

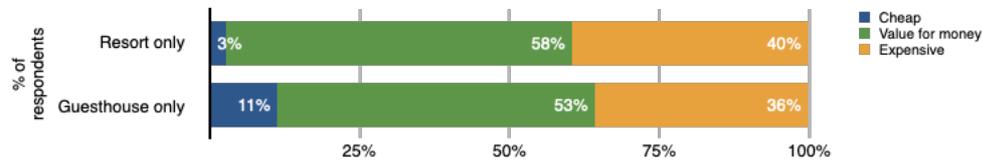


Figure 7.7: Perception of prices charged for soft drinks by place of stay

58% of respondents staying at resorts only believed soft drinks to be value for money, while 40% found it expensive. Of those staying in guesthouses only, 11% believed food to be cheap, 53% cited it as value for money, with 36% considering it expensive.

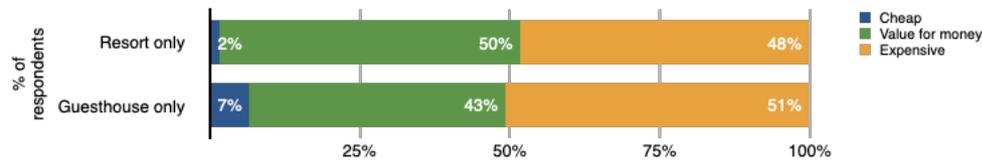


Figure 7.8: Perception of prices charged for alcoholic beverages by place of stay

50% of respondents staying at resorts only rated alcoholic beverages as value for money, while 48% found it expensive. 7% of guests staying in guesthouses only believed alcoholic beverages were cheap, 43% cited it as value for money, and 51% considered it expensive. Of the visitors who stayed at guesthouses and rated perception of prices for alcohol, most stayed in Maafushi and Greater Male Region, while others who rated stayed in guesthouses in Kaafu Atoll, Baa, Alif Alif, Gaaf Dhaal, Haa Dhaal or Addu Atoll.

8.3. Ratings for dining at place of stay

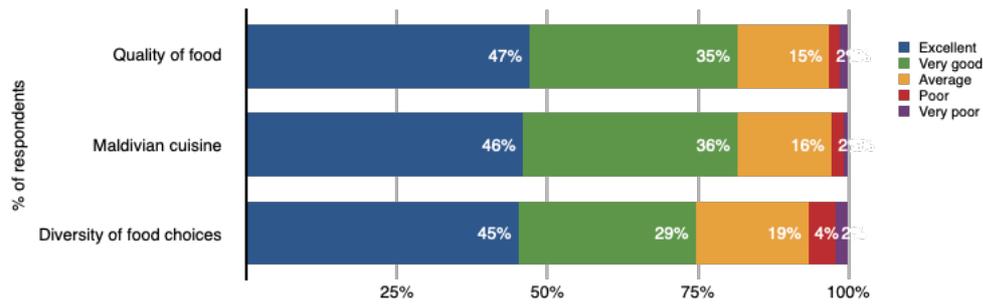


Figure 7.9: Ratings for dining experience at place of Stay

Dining was commonly rated as excellent, with 47% rating quality of food, 46% rating Maldivian cuisine and 45% rating diversity of food choices as excellent. 35% rated quality of food and 36% rated Maldivian cuisine as very good, while 19% rated diversity of food choices as average, with 4% rating it poor.

9. ACTIVITY RATINGS

9.1. Perception of prices of activities

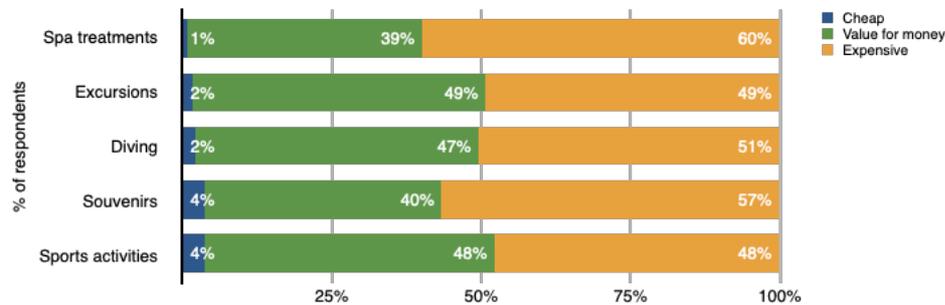


Figure 8.1: Ratings for price charged for activities

Activities were generally rated as being expensive or value for money. 60% of respondents believed spa treatments to be expensive, while 57% thought souvenirs were expensive and 51% believed diving to be so. 49% of respondents rated excursions as value for money while 49% believed it to be expensive. 48% rated sports activities as value for money, while another 48% believed them expensive.

9.2. Ratings for activities at place of stay

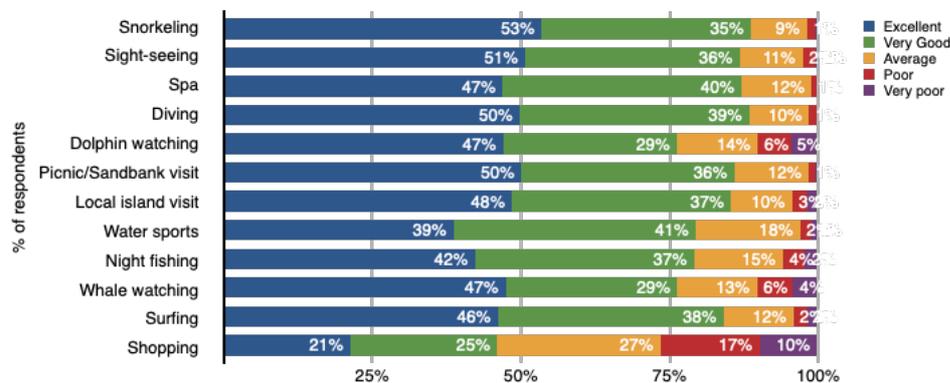
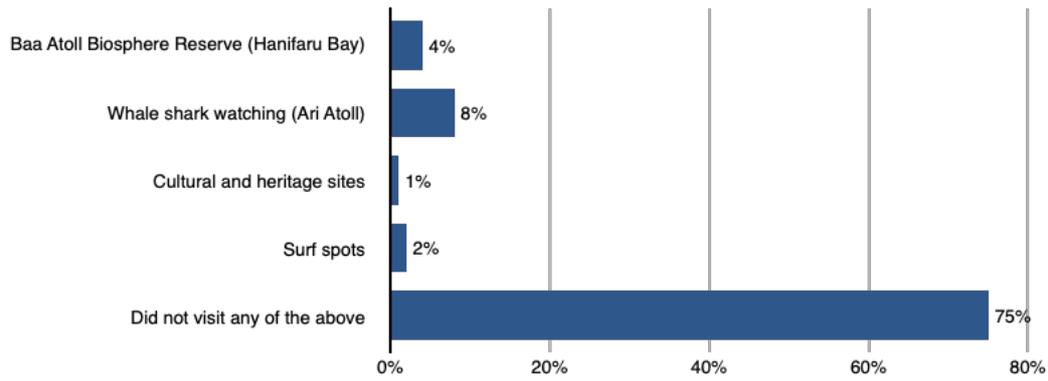


Figure 8.2: Ratings for activities at place of stay

Snorkeling (53%), sight-seeing (51%), diving (50%) and picnic/sandbank visits (50%) were most commonly rated as excellent, while water sports (41%), spa treatments (40%), surfing (38%), night fishing (37%) and local island visits (37%) were rated as very good. Shopping was generally rated the lowest with 27% rating it average, 17% citing it as poor, and 10% believing it was very poor.

9.3. Placed visited during the holiday



*Multiple response question

Figure 8.3: Places visited while in the Maldives

Over the course of their holidays, 8% of respondents went whale watching at Ari Atoll, 4% visited Hanifaru bay, 2% visited surf spots and 1% visited cultural and heritage sites.

10. TRAVEL DURING THE COVID-19 PANDEMIC

10.1. Travel Plan and Choosing Maldives

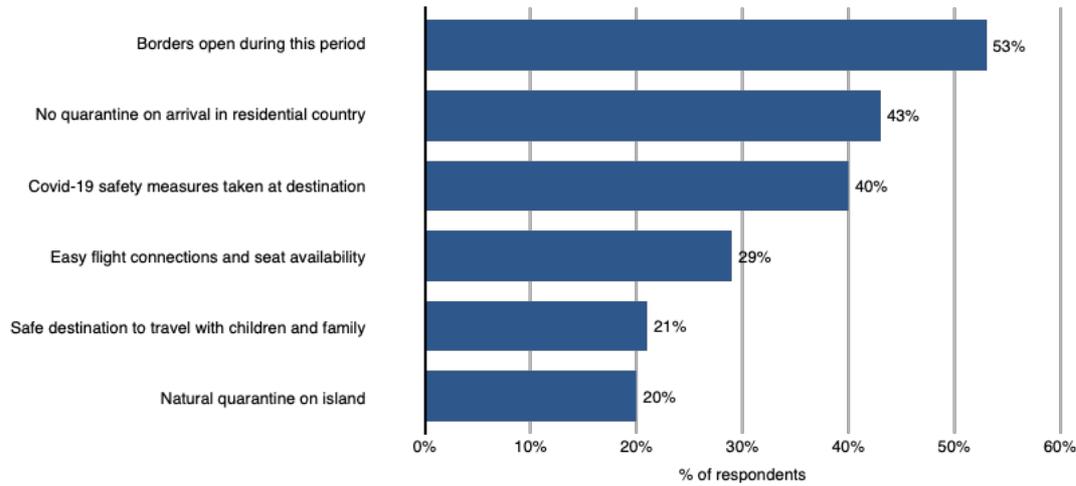


Figure 9.1: Factors Considered in Choosing Maldives

*Multiple response question

This survey was conducted during the COVID-19 pandemic, which presented unprecedented challenges to the travel and tourism industry. Respondents were asked what COVID-19 related factors they considered when choosing the Maldives as a travel destination. 53% of respondents stated that they travelled to the Maldives as the borders were open during this period, while 43% stated that they chose it as there was no quarantine upon arrival. 40% cited the COVID-19 safety measures taken at their destination and 29% chose it for easy flight connections and seat availability. 21% said they believed the Maldives was a safe destination to travel with children and family while 20% of respondents liked the natural quarantine conditions that presented themselves on an island.

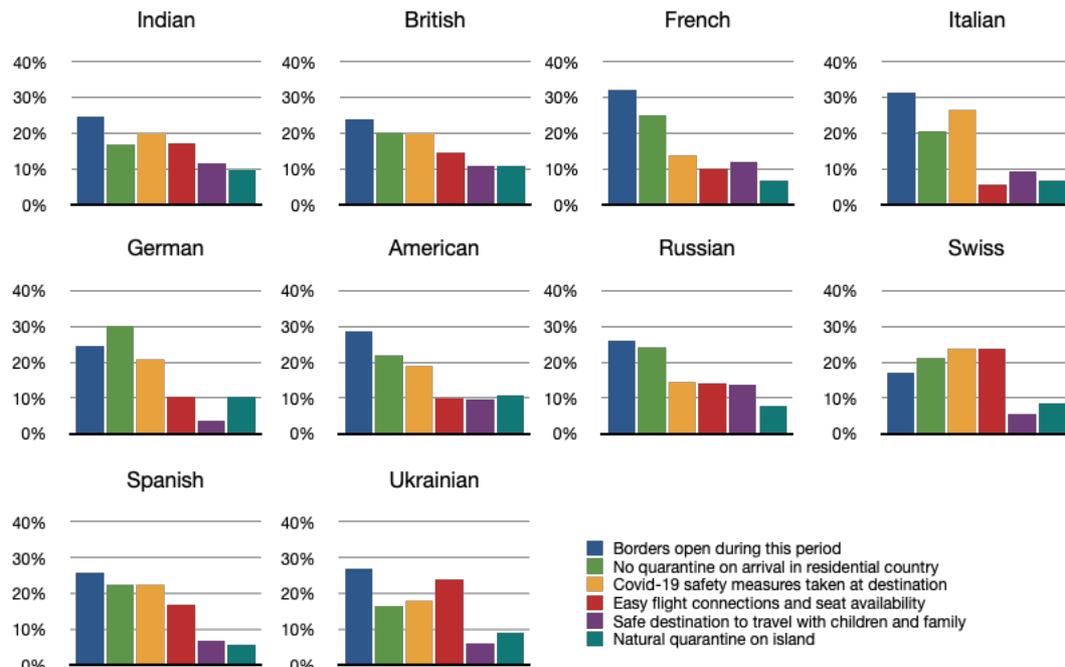


Figure 9.2: Factors Considered in Choosing Maldives by Nationality

32% of French respondents and 31% of Italian respondents said one of the factors that made them choose the Maldives was that the borders were open during this period, while 30% of Germans and 25% of French respondents liked that there was no quarantine upon arrival. 27% of German and 24% of Swiss respondents cited the COVID-19 safety measures taken. A further 24% of Swiss respondents and 24% of Ukrainian respondents cited easy flight connections and seat availability as a reason for choosing to holiday in the Maldives; and 14% of Russians believed it to be a safe destination to travel to with children and family. 11% of British and American respondents liked the natural quarantine on islands.

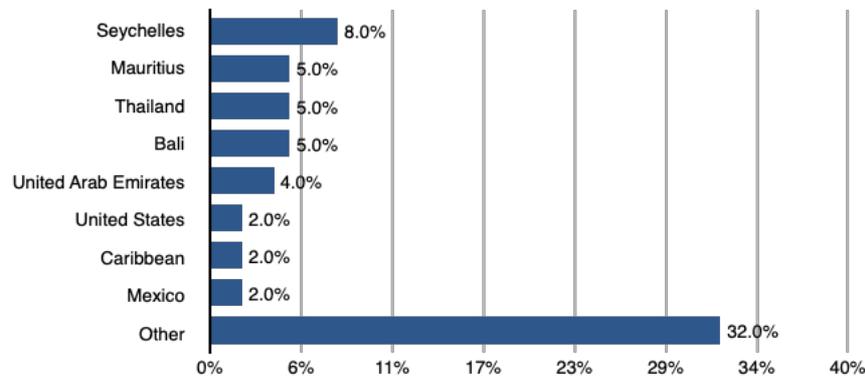


Figure 9.3: Other Destinations Considered for Travel

Other destinations that were considered for travel by respondents were Seychelles (8%), Mauritius (5%), Thailand (5%), Bali (5%) and the United Arab Emirates (4%).

10.2. Source of Information and Changes to Trip

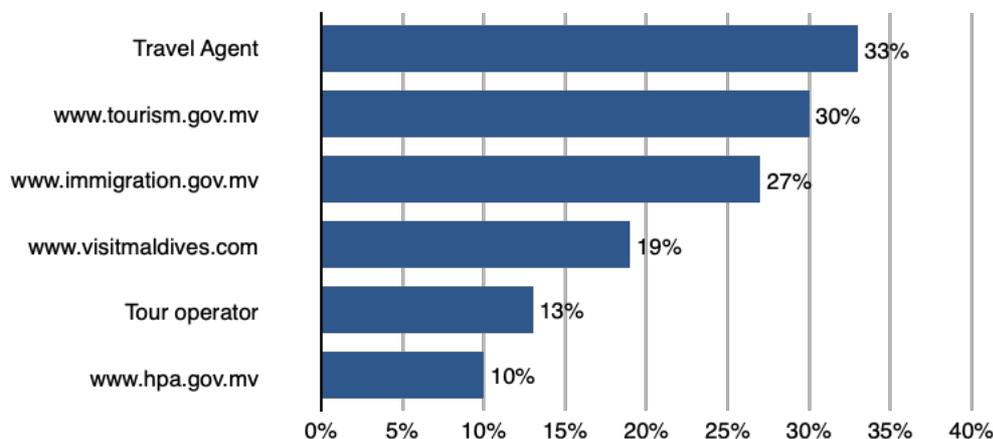


Figure 9.4: Source of Information about Covid-19

*Multiple response question

Due to the rapidly evolving nature of the COVID-19 pandemic, respondents were questioned on where they received their information regarding COVID-19 measures and potential changes to their trip. 33% of respondents got this information from their travel agent, while 30% visited www.tourism.gov.mv. An additional 27% received information from [immigration.gov.mv](http://www.immigration.gov.mv) and 19% from [visitmaldives.com](http://www.visitmaldives.com). 13% received information from their tour operator and 10% visited [hpa.gov.mv](http://www.hpa.gov.mv).



Figure 9.5: When trip to Maldives was planned

Most respondents planned their trip to the Maldives during 2021 (71%) while 16% stated it was a last-minute choice, and a further 10% planned it during 2020. 2% planned this trip in 2019, and another 2% planned prior to 2019.

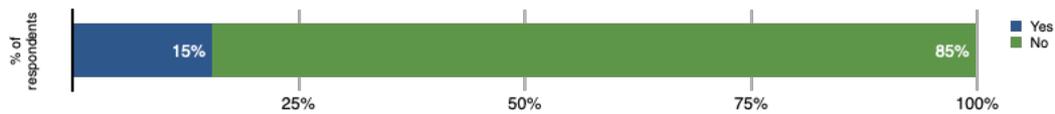


Figure 9.6: Any Changes were made to the Booking

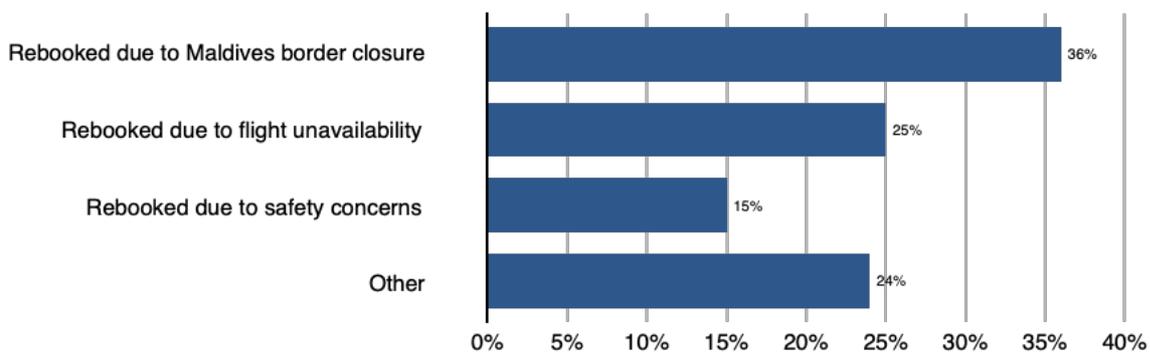


Figure 9.7: reasons for Changes to the Booking

85% of respondents did not have to make any changes to their booking due to the COVID-19 pandemic, while 15% had to make changes. These changes included rebooking travel due to the Maldives border closure (36%), flight unavailability (25%) and safety concerns (15%).

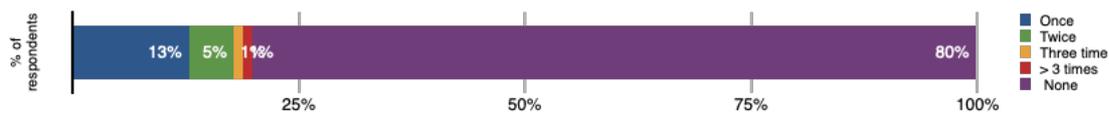


Figure 9.8: Number of Times Changes to Booking was Made

Of those who made changes to their booking, 13% of respondents had to make changes to bookings once, while 5% had to change bookings twice. 1% had to change their bookings 3 times, and a further 1% made changes to their bookings more than 3 times.

10.3. Covid-19 Safety & Satisfaction

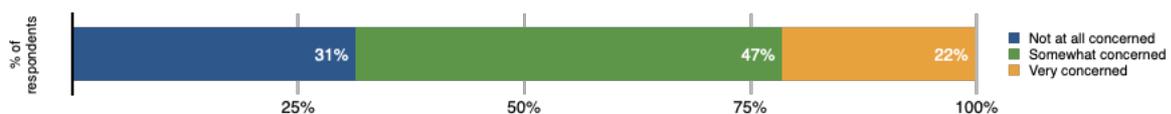


Figure 9.9: Concerns of Personally contracting Covid-19

When asked about concerns of personally contracting COVID-19 on their trip, 31% of respondents stated that they were not at all concerned. 47% of respondents were somewhat concerned, and 22% of respondents were very concerned at the possibility of contracting COVID-19.

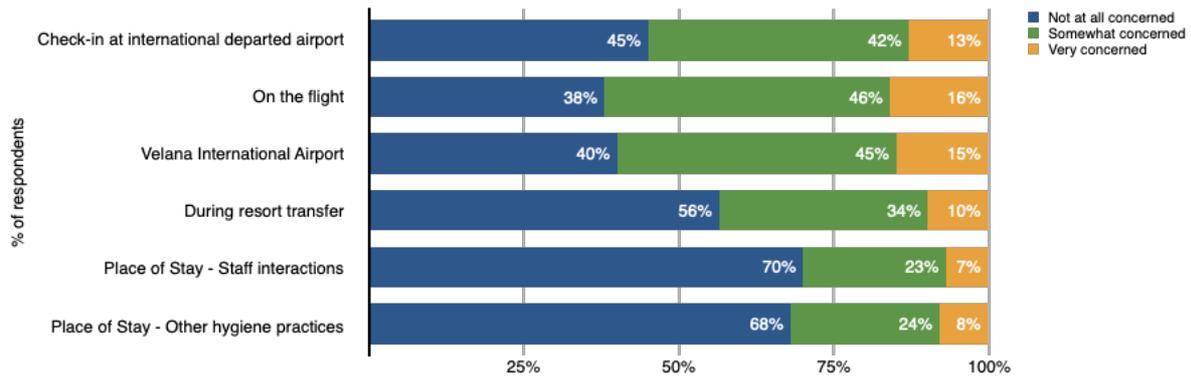


Figure 9.10: Concerns of contracting Covid-19 During the travel period

Respondents were least concerned about COVID-19 at their place of stay, with 70% stating that staff interactions at their place of stay and 68% saying hygiene practices at their place of stay made them not at all concerned about contracting COVID. 56% of respondents were also unconcerned during their resort transfers. Places where respondents felt somewhat concerned included on their flight (46%), Velana International Airport (45%) and during check in at the international departed airport (42%).

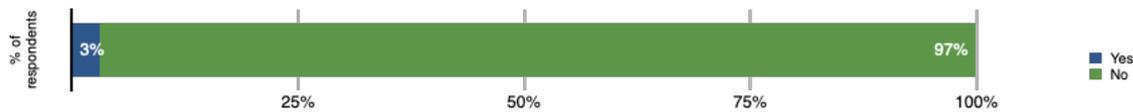


Figure 9.11: Trip Extension while in Maldives due to a family member testing positive to Covid-19

97% of respondents did not have to extend their trip in the Maldives due to a family member testing positive to COVID-19.

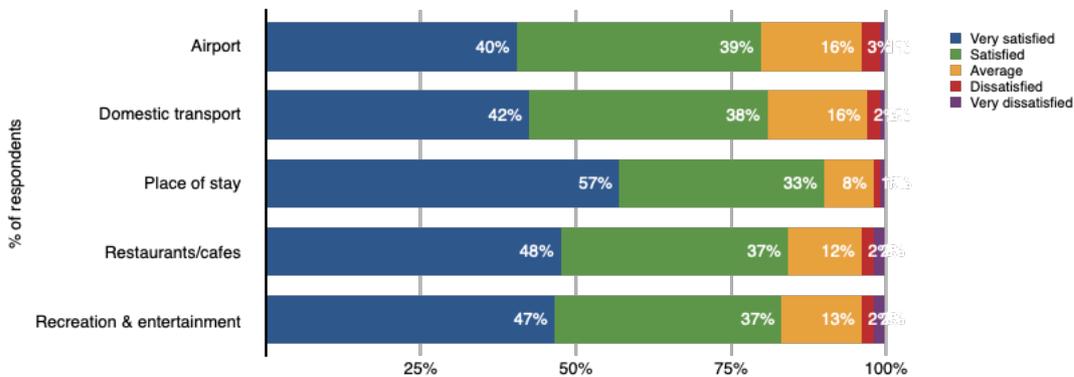


Figure 9.12: Satisfaction with Covid-19 preparations

A majority of respondents were very satisfied by the room cleaning services (55%), PPE used by staff (52%) and COVID testing (48%) in the Maldives. Guests were also satisfied by social distancing arrangements (34%) and food services (31%). Social distancing was rated average by 14% of guests, while isolation in place of stay and health care services both left 8% of guests feeling very dissatisfied. Generally, guests staying at resorts only or a combination of resorts and guesthouses were very satisfied by COVID-19 protocols, while guests staying in guesthouses only were satisfied with protocols.

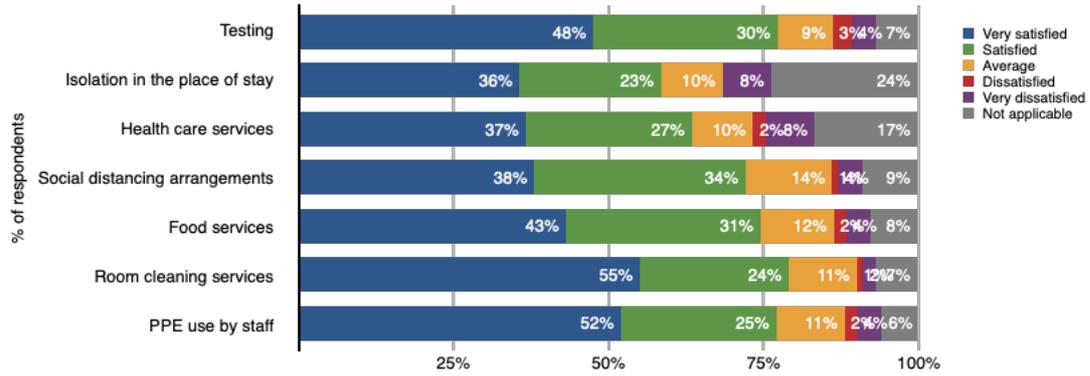


Figure 9.13: Satisfaction with Covid-19 Preparation in Maldives

Overall, respondents were very satisfied with COVID-19 preparations in their place of stay (57%), restaurants and cafés (48%), and recreation and entertainment settings (47%). 39% of guests were satisfied with preparations in the airport, and 38% were satisfied with preparation in domestic transport. 16% of guests rated COVID-19 preparations in the airport and on domestic transport as average.

11.4. Satisfaction

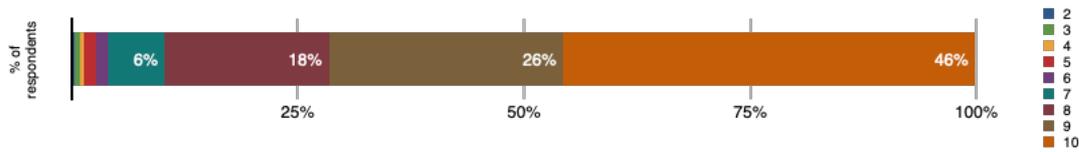


Figure 10.4: Satisfaction with holiday

Most respondents were satisfied with their trip to the Maldives, with 95% rating it as excellent or very good. This included 45% rating their satisfaction as 10/10, 26% rating it a 9/10, 18% rating it an 8/10 and 6% rating it as 7/10.

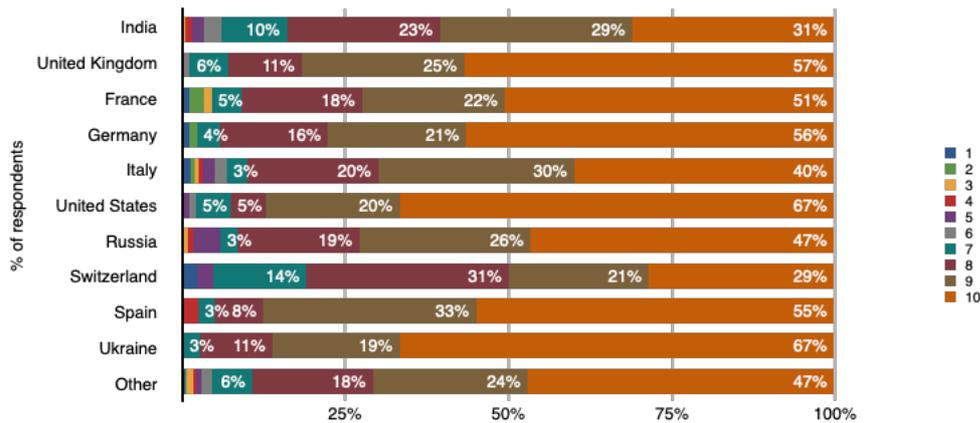


Figure 10.5: Satisfaction with holiday by nationality

By nationality, Americans and Ukrainians were most satisfied with their trips, with 67% rating their satisfaction as 100%. 57% of British respondents, 56% of Germans and 55% of Spanish guests also rated their satisfaction as 10/10. 33% of Spanish respondents rated their satisfaction a 9, as did 30% of Italian respondents and 29% of Indian respondents. Swiss respondents were the least satisfied with their holiday experience, with only 29% rating it a 10. 21% of Swiss respondents rated it a 9, 31% an 8 and 14% a 7.

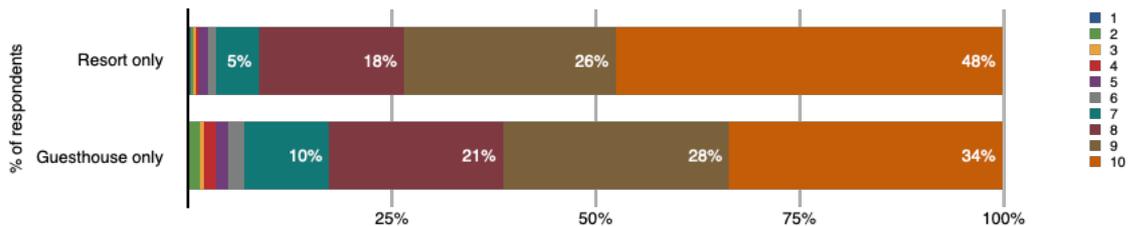


Figure 10.6: Satisfaction with holiday by place of stay

Guests generally were more satisfied with their holiday if they stayed in resorts as opposed to guesthouses. 48% of respondents who stayed in resorts gave their satisfaction a 10/10, while only 34% of those who stayed in guesthouses did the same. 10% of respondents who stayed in guesthouses rated their trip as a 7/10.

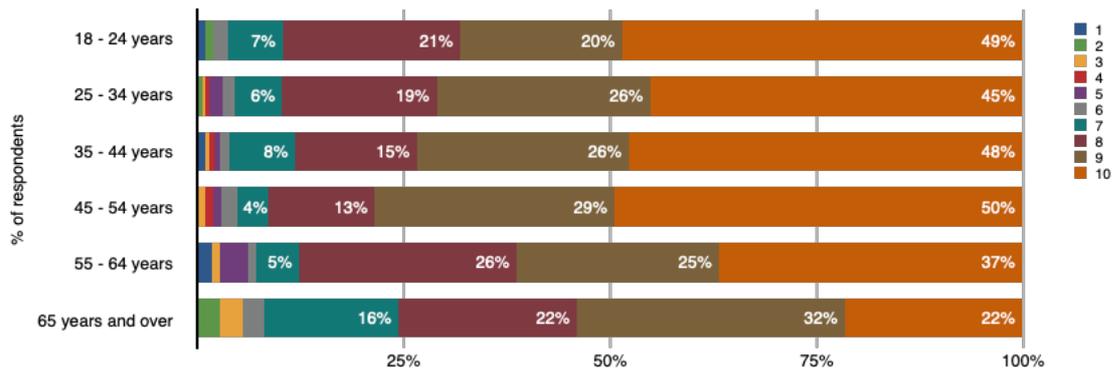


Figure 10.7: Satisfaction with holiday by age group

By age groups, those aged 45-54 (50%) and 18-24 (49%) were most likely to rate their experience a 10/10. 48% of those aged 35-44 and 45% aged 25-34 rated it a 10/10. 32% of those aged 65 and over rated their experience a 9/10, with 22% rating it an 8/10 and 16% rating it a 7/10.

11.5. Intention to return

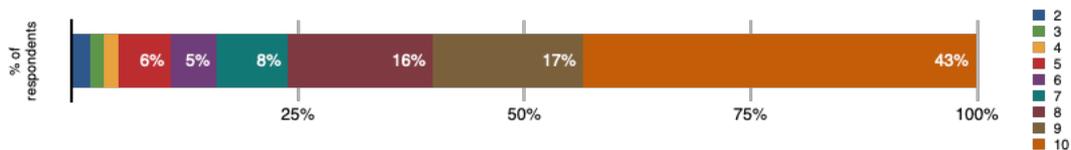


Figure 10.8: Intention to return to Maldives

82% respondents were extremely likely (58%) or very likely (24%) to return to the Maldives again. 4% stated that they were extremely unlikely to return.

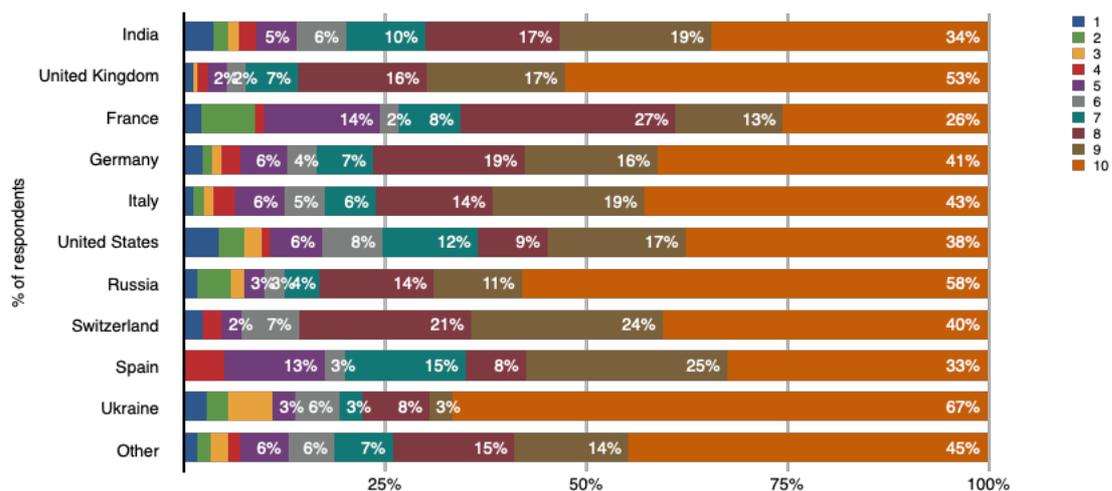


Figure 10.9: Intention to Return to Maldives by Nationality

Ukrainian (67%), Russian (58%) and British (53%) respondents are most likely to return to the Maldives, while Indian (4%) and American (4%) tourists are the least likely.

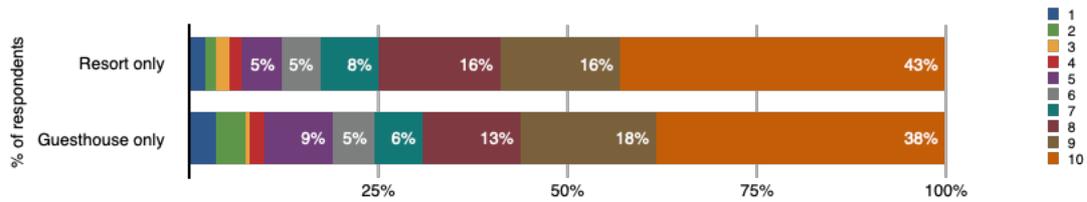


Figure 10.10: Intention to Return to Maldives by Place of Stay

Respondents who stayed at resorts are more likely to return to Maldives, with over 83% of them having rated intention to return as 7 or higher. In comparison 75% of tourists who stayed at a guesthouse rated intention as 7 or higher.

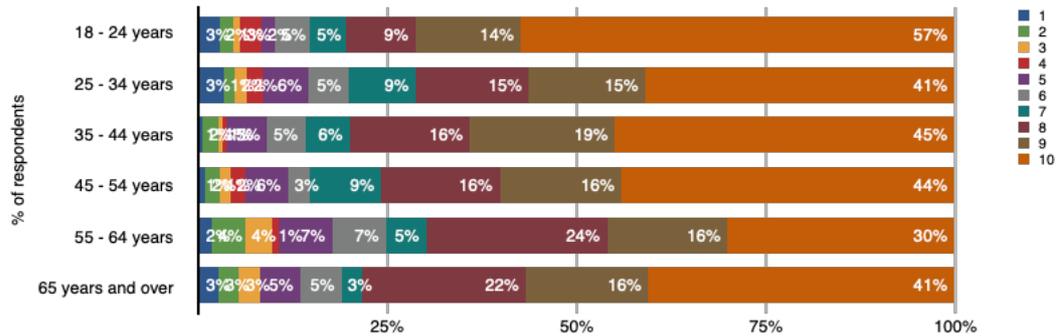


Figure 10.11: Intention to return to Maldives by age group

Majority of respondents (over 75%) in all age groups have rated intention to return as 7 or higher. 57% of 18-24 year olds have rated intention to return as 7 or higher.

11.6. Recommend Maldives

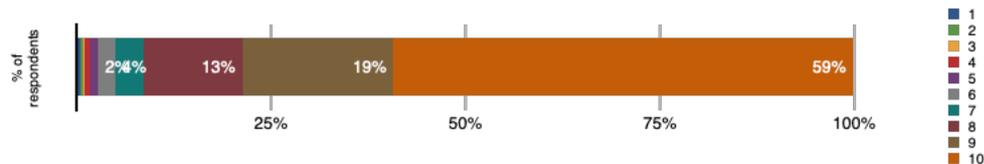


Figure 10.12: Recommend Maldives

Most respondents would recommend the Maldives to others, with 95% stating they are extremely likely or very likely to recommend (rated between 10 and 7).

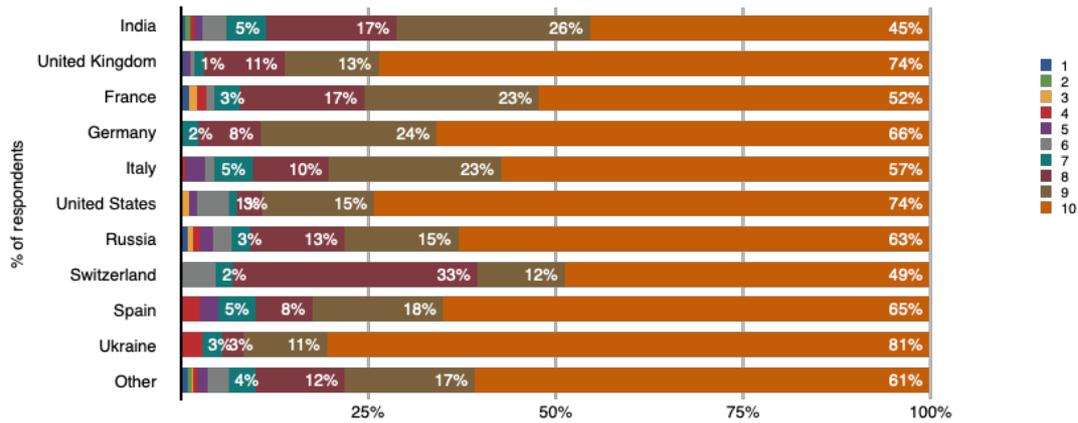


Figure 10.13: Recommend Maldives by Nationality

Ukrainian (81%), American (74%) and British (74%) respondents were most likely to recommend the Maldives to other people.

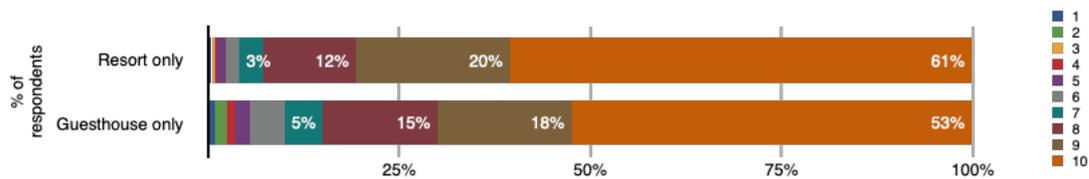


Figure 10.14: Recommend Maldives by place of stay

61% of guests who stayed in resorts would definitely recommend (10/10) the Maldives while 53% of those who stayed in guesthouses would.

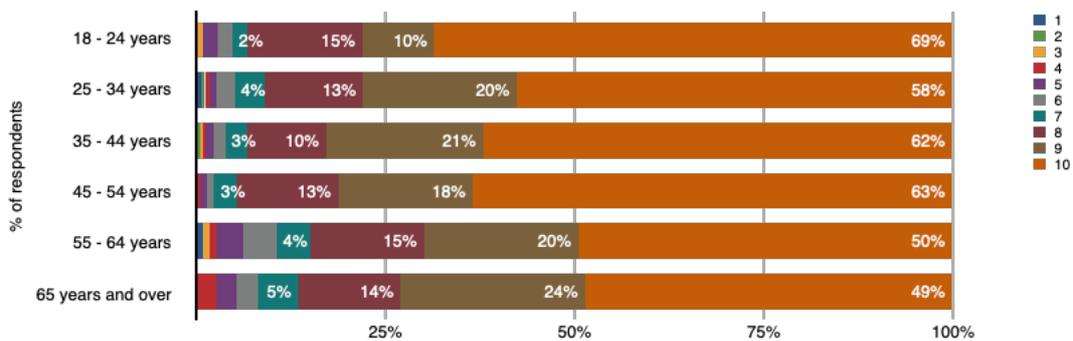


Figure 10.15: Recommend Maldives by age group

18–24-year-olds (69%), 45–54-year-olds (63%) and 35–44-year-olds (62%) are most likely to recommend the Maldives to other people. 58% aged 25-34 would recommend the Maldives, while 50% in the 55-64 age group and 49% of those aged 65 or over would.

11.7. Improving the Holiday Experience

Guests were asked on ways to improve their holiday experience. Some of the most common answers included making services and accommodation cheaper, better connectivity and faster airport transfers. Other answers included more food options for tourists with dietary requirements and making alcohol more readily available.

11.8. Experience at Similar Destination

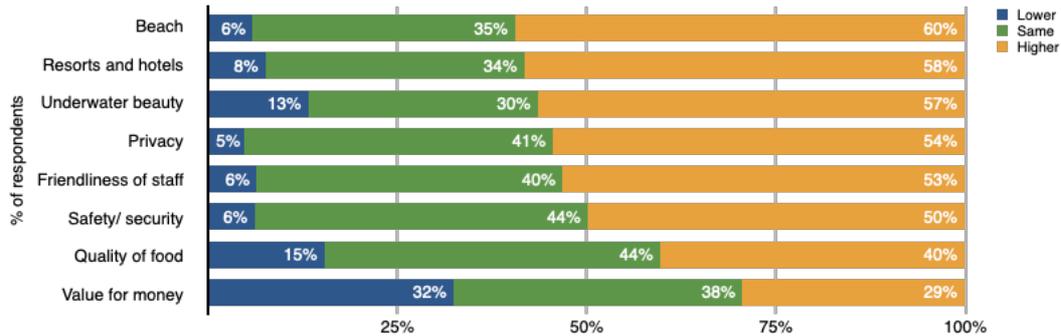


Figure 10.16: Visited a Similar destination

Most commonly stated similar destinations visited: Thailand, Mauritius, Seychelles, Bali, Caribbean, Goa, Dominican Republic, Hawaii, Bora, Bora, Andaman and Nicobar, Philippine

Most guests rated the Maldives resorts and hotels (58%) and underwater beauty (57%) to be higher than that of similar destinations. Other aspects of the Maldives rated higher were privacy (54%), friendliness of staff (53%) and the beach (50%). Aspects rated the same as those at similar destinations include safety/security (44%) and quality of food (44%). Value for money was rated lower than in similar countries by 32% of respondents.

12. EXPENDITURE & TRAVEL PACKAGE

12.1. Travel Package

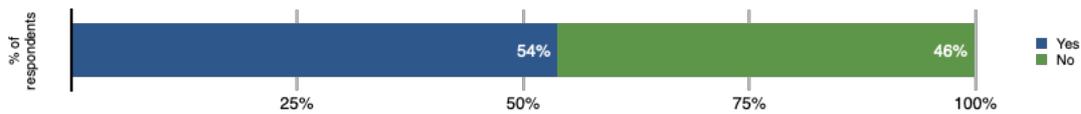


Figure 11.1: Travel Package

54% of respondents visited the Maldives as part of a travel package.

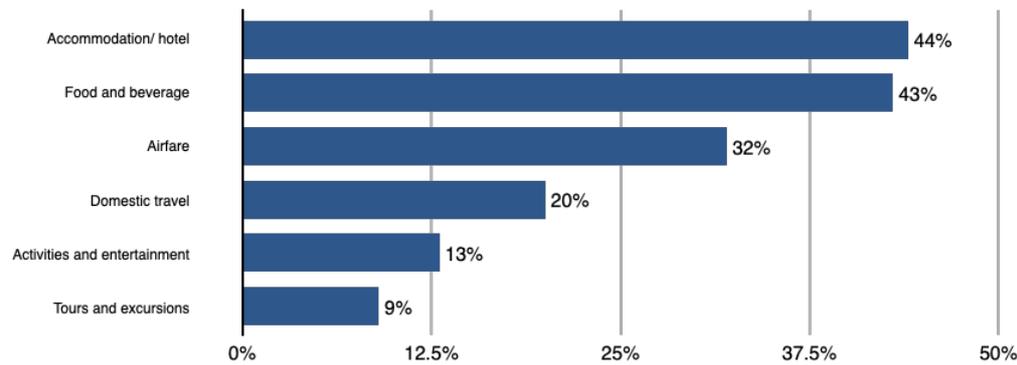


Figure 11.2: Travel Package Inclusion

*Multiple response question

Aspects of the trip commonly included on travel packages included accommodation (44%), food and beverage (43%) and airfare (32%). 20% of respondents had domestic travel included, while 13% had activities and entertainment included. 9% of guests stated that tours and excursions were included in their travel packages.

12.2. Trip Expenditure

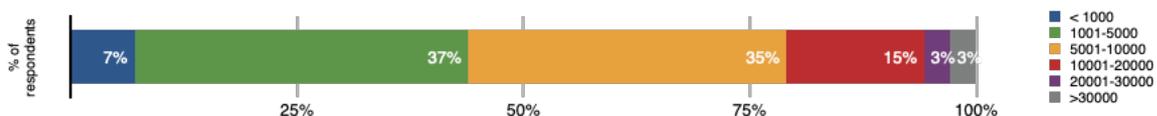


Figure 11.3: Trip Expenditure

Most respondents spent between USD1,001-5,000 (37%) and 5,001-10,000 (35%) on their trip. 15% spent USD10,001-20,000, while 6% spent USD 20,000 or more and 7% spent less than USD1,000.

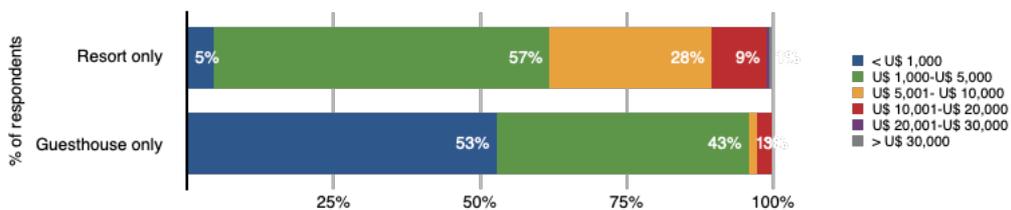


Figure 11.4: Trip Expenditure by Place Of Stay

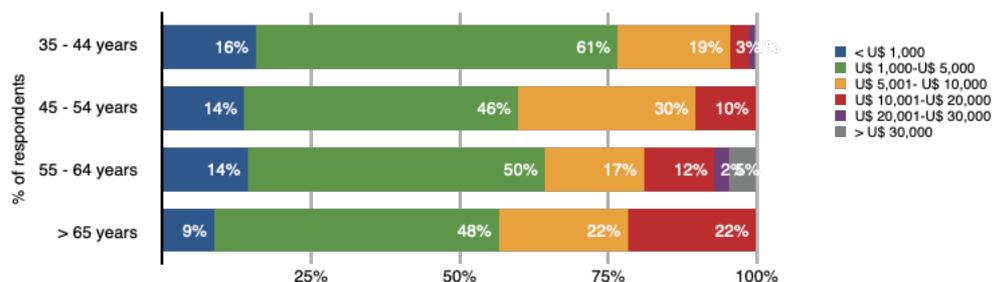


Figure 11.5: Trip Expenditure by Age Group

Respondents aged 35-44 (16%) were most likely to spend less than USD1,000 on their trip to the Maldives. An additional 61% of those aged 35-44 and 50% of 55-64-year-olds spent USD1,000-5,000. 30% of respondent aged 45-54 spent between USD5,001-10,000, and 22% of those aged 65 and over spent USD10,001-20,000. 2% of respondents aged 55-64 spent USD20,001-30,000, and a further 5% spent over USD30,000

12.3. Stops on the way to Maldives

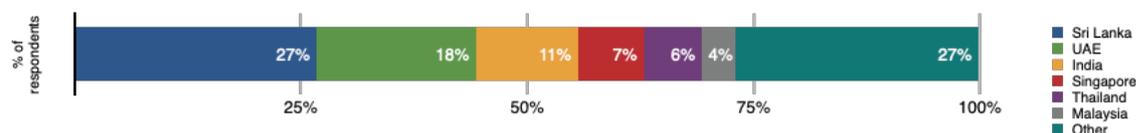


Figure 11.6: Stops on The Way to Maldives

27% of respondents stopped in Sri Lanka on their way to the Maldives, while another 18% had a layover in the United Arab Emirates. 11% stopped in India, 7% stopped in Singapore, while 6% had layovers in Thailand. 4% of respondents stopped in Malaysia. 27% of respondents had layovers in other countries.

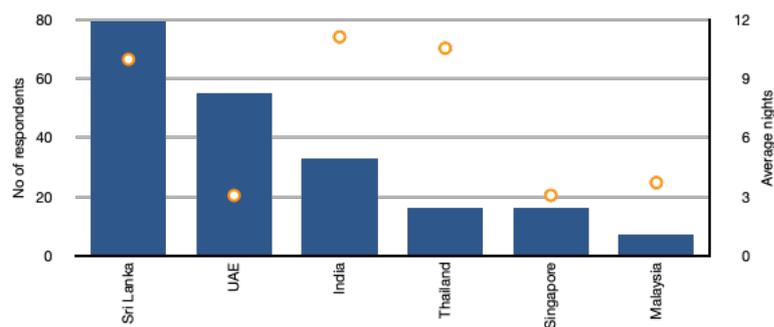


Figure 11.7: Number of Respondents and average nights by stop

Respondents who stayed in Sri Lanka stayed there for an average of 10 nights, while those who stayed in UAE stayed for 3 nights. Guests typically stopped over in India and Thailand stayed there for between 9-11 nights, while respondents with layovers in Singapore and Malaysia stayed around 3 nights.

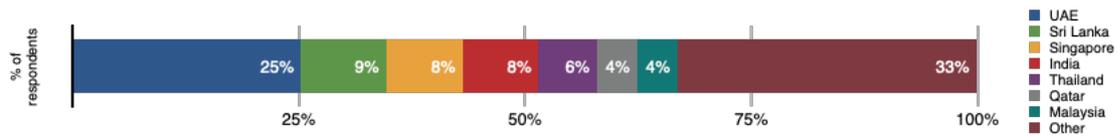


Figure 11.8: Stops on the way from Maldives

25% of respondents had layovers in UAE on their trip home from the Maldives, while 9% had stops in Sri Lanka. 8% of respondents had stops in both Singapore and India, while 5% had layovers in Thailand. 4% of guests had layovers in both Qatar and Malaysia on their trip home.

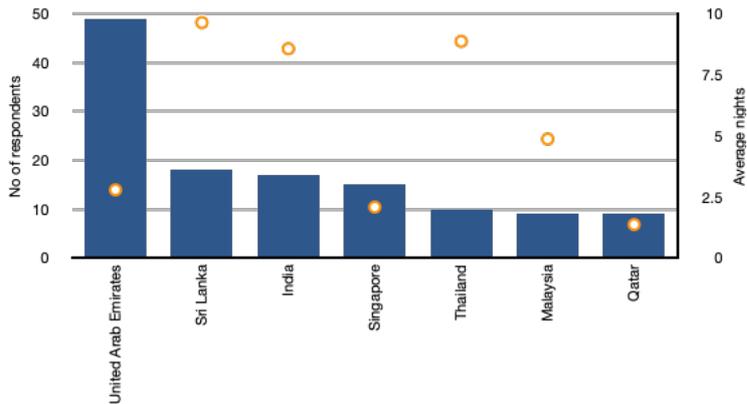


Figure 11.9: Number of respondents and average nights by stop

Respondents who had layovers in the United Arab Emirates, Singapore and Qatar were typically staying under 4 nights, while those with layovers in Malaysia were staying an average of 6 nights. Guests with layovers in Sri Lanka, India or Thailand were staying in those destinations 8-10 nights.

13. METHODOLOGY

The 2021 December Maldives Visitor Survey questionnaire was based on the questionnaire for the survey conducted in February 2020, with an additional new section on travel during Covid-19. The questionnaire consisted of six sections and 46 questions in total. The questionnaire was prepared and printed in six different languages. They are English, Italian, German, French, Japanese and Russian languages.

Prior to survey data collection, the flight schedule for the survey period was analysed. The arrival nationalities for the survey period were analysed using arrival data for the month of December for the previous years, the top 10 arrival markets in the past 5 years and the top 10 arrivals for the year 2019, since market rankings had shifted within the year 2019 compared to trends from past years.

The survey was conducted for a period of 7 days between 15 December 2021 and 28 December 2021 at Velana International Airport (Hulhule'). The minimum target for the survey was 1500 complete responses. All airlines and all nationality of visitors traveling out of Venal International Airport (VIA) during the survey period were targeted. The number of completed questionnaires collected was 1676.

Table 1: Completed Forms by Nationalities

Nationality	Forms Collected
India	384
United Kingdom	169
Germany	164
Russia	121
United States	93
France	92
Italy	87
Swiss	44
Spain	40
Ukraine	36
Others	428
Total	1658

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

The survey data was recorded into a predefined online data entry template. The data entry platforms had inbuilt validation and error detection. Once data entry started, regular discussions were held with the data collection team to provide feedback on data quality, incomplete questionnaires, issues, and anomalies that arise. Once all the survey data was entered and checked, all the files were combined, and single dataset generated on MS Excel. MS Excel was used for data analysis.