



MALDIVES VISITOR SURVEY

JUNE 2014



MINISTRY OF TOURISM

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Published by
Ministry of Tourism
Malé, Republic of Maldives
www.tourism.gov.mv

Prepared by
CDE Consulting
Republic of Maldives
www.cde.com.mv

Cover photo: Gili Lakanfushi
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INTRODUCTION

This report presents the finding from the Maldives Visitor Survey June 2014. Maldives Visitor Survey is an on going effort by the Ministry of Tourism that contributes to the efforts by the tourism industry by providing the industry with a useful resource for understating the characteristics, preferences and expectations of tourists who visit the Maldives. The Maldives Visitor Survey collects information from the international visitors to the Maldives on some of the key aspects of trip planning, airport services and their stay in the Maldives.

The survey was conducted at the Departure Terminal of Ibrahim Nasir International Airport. The survey was conducted for a period of 3 weeks between 23rd June 2014 and 21st July 2014. This report has been prepared based on the survey results from visitors of all nationalities that visited the Maldives during the survey period.

This is the ninth survey conducted by the Ministry of Tourism. Previous reports of were published in 1999, 2004, 2008, 2011, 2012, February 2013 and October 2013 and February 2014. This report outlines the findings of the survey undertaken in June 2014 to capture the opinions of the international visitors to the Maldives during the off-peak season.

The survey respondents represent all the international visitors to the Maldives during the survey period. International visitors from China represent 20% of the survey respondents. Visitors from Britain represent 15% of the respondents each, while respondents from Germany represent 13% of the survey respondents. Russians represent 9% of the survey respondents while Italians represent 6%, Japanese 5% and French 4%, Indians 3%, Australians 2% and Thai 2%. The rest of the 21% of the respondents are from different nationalities, all covering a percentage less than 2%. Hence for the purpose of the report compilation, the visitors of nationalities representing 2% or more of those surveyed, with a minimum of 30 respondents from the same nationality have been used for analysis.

The questionnaire was distributed in seven different languages: English, Italian, German, French, Japanese, Chinese and Russian. Sample size by language was based on the top ten nationalities of February 2013 arrivals. By the end of the survey period, 1,722 questionnaires were distributed, and 1,718 collected. Results presented are based on the 1,621 questionnaires that were fit for analysis. The following chapter outlines the findings of the survey for June 2014.

SUMMARY OF KEY FINDINGS

Visitors to the Maldives

More than half of the international visitors to the Maldives are between the ages of 25 to 34 years of age. Of the international visitors to the Maldives, 16% of respondents are between 35-44 years of age and 11% between 45- 54 years of age. 6% of the respondents are between 55-64 years age group and visitors above 65 years of age who responded to the survey represent 1%.

20% of the international visitors to the Maldives are repeat visitors. Of the international visitors, 80% are first time visitors. Of the repeat visitors, 15% cited that they have visited the Maldives between two to five times while 3% have visited between 6 to 10 times and 2% have visited more than 10 times.

An overwhelming 88% of the respondents travel with partner or family to the Maldives. Of them 55% travelled with a partner, while 28% travelled as a group or family. 7% of the visitors travelled with friends while 4% travelled unaccompanied or as single travellers.

Trip Planning

27% of the international visitors to the Maldives discover the Maldives through Internet. 22% of the respondents discovered Maldives through word of mouth and 14%, through travel agents. 11% of the respondents stated that they discovered through TV and 11% through magazines. 7% of the visitors said they have visited the Maldives before.

One in every two international visitor to the Maldives is motivated to visit by its beauty. 19% are motivated to visit the Maldives by its beaches, while 16% of the visitors are motivated by the underwater beauty of the Maldives. Other motivators to visit the Maldives as stated by the respondents include peacefulness (14%), small islands (12%), weather (11%), uniqueness (11%), reputation (8%) and privacy (8%).

Two out of every five international visitor to the Maldives visit the Maldives for rest and relaxation. The second most popular reason to come to Maldives is honeymoon (32%), followed by snorkelling (11%) and diving (8%)

One in every two international visitor to the Maldives book their trip to the Maldives via Internet. Of them 44% used travel agents' or tour operators' website to book their trip, and 9% organised their trip using the resort's or hotel's website. 37% of the international visitors who responded to the survey stated that they visited a travel agency to organize the trip and 4% cited that family or friends booked the trip. 3% of the respondents said that their employer booked their trip while, 2% of the respondents made a telephone booking.

34% of the international visitors to the Maldives refer to Trip Advisor to plan or organize their trip to the Maldives. 14% referred to Visit Maldives while another 14% referred to Booking.com. 8% of the respondents referred to Agoda and another 7% to Expedia and 7% to cTrip to plan or organize their trip to the Maldives.

Two out of every five international visitor to the Maldives book their trip more than 3 months in advance. Of them, 26% book their holiday 3 to 5 months in advance, 14% book their holiday 6 to 12 months in advance and 1% book their holiday more than 1 year in advance. Amongst the other visitors, 23% booked their holiday 1 to 2 months in advance, 19% booked their holiday 2 to 4 weeks in advance while 8% of visitors cited that they book 1 week in advance and 9% of respondents said that they book less than 1 week in advance.

Airport Services

Customs services rank best (80%) amongst services at INIA with combinations of excellent and very good. Check-in, immigration service and customs service are the most highly ranked with almost 80% combination of excellent and very good. Shopping, cafés, restaurants, lounges and banking services rank in the category of poor, with over 40% categorising the services as average, poor and very poor.

One in every two international visitor to the Maldives use speedboat transfer to get to their place of stay. Of the other respondents to the survey, 36% said they used seaplanes to get their place of stay and 13% used domestic flights. 4% of the respondents said they used public ferries from the airport to the place of stay.

Waiting time at airport for 52% of the international visitors to the Maldives is 30 minutes or less. For 8% of the visitors, the waiting time was 30-45 minutes while another 14% said the waiting time at the airport was between 1 to 2 hours. 15% of the visitors responded their waiting time was between 45 minutes and 1 hour. 7% of the visitors stated the waiting time was between 2 to 3 hours, while 5% said their waiting time at the airport was for more than 3 hours.

80% of the respondents said it took them less than an hour to reach their place of stay. Of them 31% of visitors took less than 30 minutes to reach their place of stay while an overwhelming 49% took between 30 to 60 minutes to reach their place of stay. Another 16% of the respondents said it took them 1 to 2 hours to reach the place of stay and 3% said it took them 3 to 4 hours, while 1% responded it took them 5 to 6 hours and 2% said it took them more than 6 hours to reach to their place of stay.

On quality of hotel transfer, comfort was rated highest. International visitors who were surveyed were mostly happy with comfort quality of hotel transfers, which was rated at 41% as 'excellent' and 'very good'. However, majority of the respondents cited that the quality of hotel transfer as average. 21% of the respondents think that information briefing during hotel transfer is poor or very poor.

Stay in the Maldives

Four out of every five visitor to the Maldives stay in the resorts. Of the other international visitors, 2% stayed in hotels, 3% stayed in guesthouses and 1% on boat or safari vessels. Only one per cent of the international visitors stayed in cruisers or luxury yachts.

37% of the international visitors to the Maldives stay for 4-7 nights in the Maldives. 22% of the visitors stayed for 0-3 nights while 24% stayed for 8-11 nights. 15% of the international visitors stayed for 12 to 15 nights and 1% of the visitors stayed for more than 20 nights.

Two out of every five international visitor to the Maldives choose all-inclusive meal plans during their stay in the Maldives. 20% of the respondents opted for full board while 19% chose half board and 15% chose bed and breakfast as their meal plan. The room-only plan was chosen by only 3% of those surveyed.

Of the services at place of stay, quality of services rank highest with combination of “excellent” or “very good” ranking over 80% or more. In the following six categories: guest services, cleanliness, management, room, dining experience and public areas, more than 45% ratings are ‘excellent’. 56% perceive guest services as ‘excellent and 33% ‘very good’. All services, except for in-room experience have been rated ‘excellent’ by more than 44% of the respondents.

Snorkelling and diving are the most popular activities for the international visitors to the Maldives. 89% of respondents rated snorkelling ‘excellent’ and ‘very good’ followed by 84% of visitors rating diving as ‘excellent and ‘very good’. Of the other activities most popularly ranked activities as ‘excellent’ and ‘very good’ are sight seeing (81%), spa (84%) and dolphin watching (78%). Of the activities at place of stay that needs most improving is shopping, with one fourth perceiving shopping to be ‘poor’ or ‘very poor’.

23% of international visitors to the Maldives visited a local island during their stay in the Maldives. Of the respondents to the question, 51% of the visitors visited the capital city Male’, while 20% visited a Male’, 5% to a picnic island and 1% visited the Baa Atoll Biosphere Reserve.

More than 60% of international visitors perceive prices for diving, excursions, water sports, Internet, water, food and room as “cheap” or “value for money”. 77% perceive the room to be ‘value for money’ and 52% perceive internet to be ‘value for money’ with 7% who perceived internet to be ‘cheap’. Souvenirs and spa are perceived most expensive. 57% perceive souvenirs to be ‘expensive’, while 54% perceive spa to be ‘expensive’.

37% of the international visitors to the Maldives spent between USD 1000 to 5,000 during their stay in the Maldives. 35% spend between USD 5000 to USD 10,000. 20% of respondents spent below USD 1,000 per trip during their stay in the Maldives.

1 out of every 4 international visitor to the Maldives had visited similar destinations. Of them, the beaches and the underwater was rated higher by more than 55% compared to other similar destinations. More than 50% rated privacy in the Maldives higher than other similar destinations. Most respondents considered friendliness, security or safety and quality of food, the same compared to other destinations.

Visitor Satisfaction

An overwhelming 98% said that they would recommend the Maldives to others as a holiday destination.

95% of the visitors to the Maldives stated their visit met their holiday expectation.

Of the international visitors, 92% of visitors stated that they intend to visit the Maldives again.

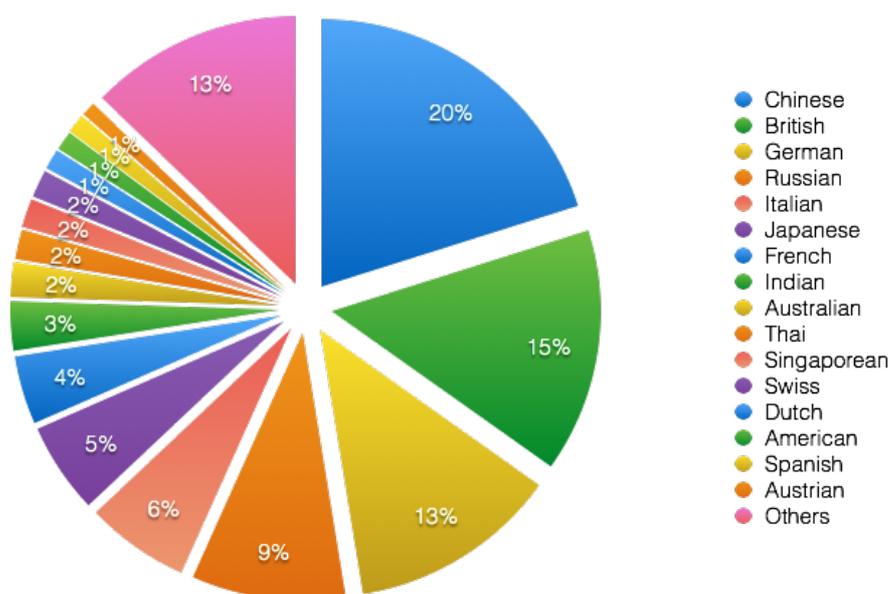
VISITOR PROFILE, TRENDS & OPINIONS

Nationality of respondents

The survey respondents represent all the international visitors to the Maldives during the survey period. International visitors from China represent 20% of the survey respondents. Respondents from Britain represent 15% while respondents from Germany represent 13%. Russians represent 9% of the survey respondents while Italians represent 6%, Japanese 5% and French 4%, Indians 3%, Australians 2% and Thai 2%. The rest of the 21% of the respondents are from different nationalities, all covering a percentage less than 2%. Hence for the purpose of the report compilation, the visitors of nationalities representing 2% or more of those surveyed, with a minimum of 30 respondents from the same nationality have been used for analysis.

Thai nationality has been observed amongst top ten nationalities of respondents for the first time throughout the history of the Maldives Visitor Survey.

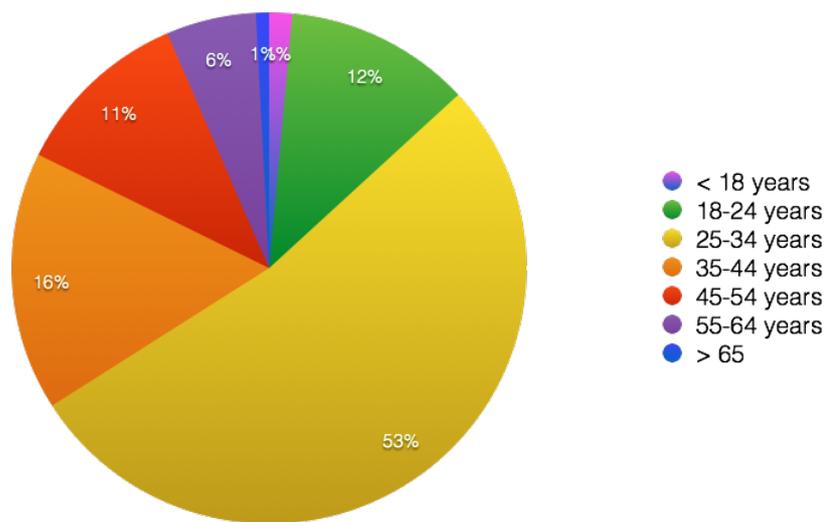
Figure 1: Nationality of respondents for Maldives Visitor Survey 2014



Age profile

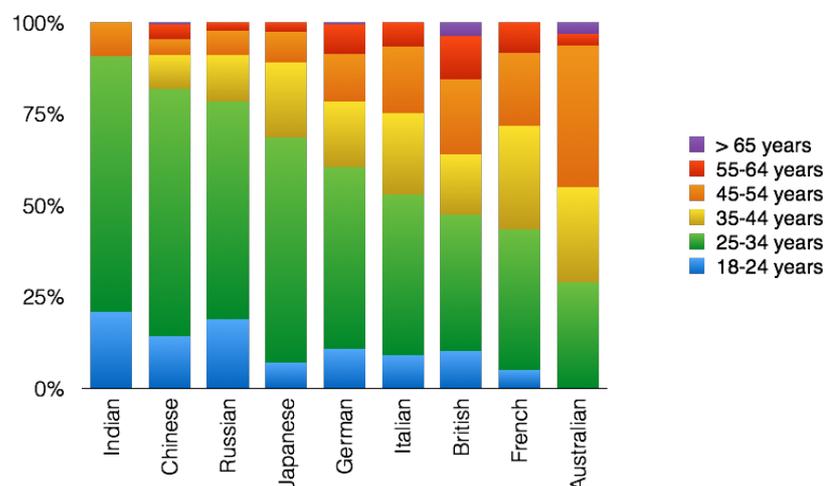
More than half of the international visitors to the Maldives were between the ages of 25 to 34 years of age. Of the international visitors to the Maldives, 16% of respondents were between 35-44 years of age and 11% between 45- 54 years of age. 6% of the respondents were between 55-64 years age group and visitors above 65 years of age who responded to the survey represent 1%.

Figure 2: International visitor arrivals by age group



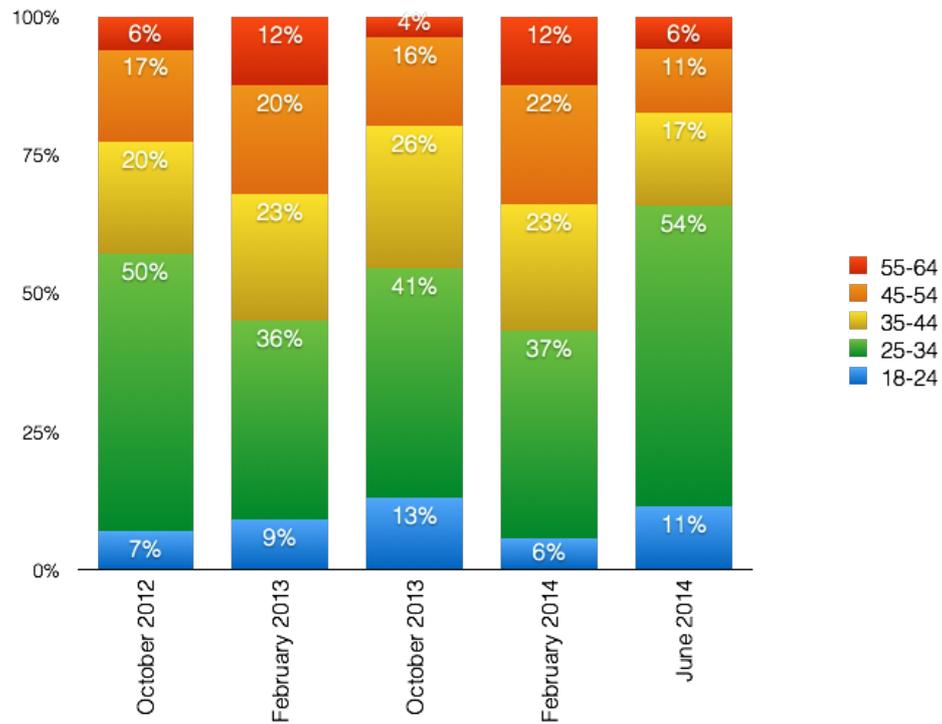
70% of the respondents from India are between the ages of 25 to 34 years. 67% of the Chinese respondents and 62% of the Japanese respondents fall under the same age group. 59% of Russian respondents are also between the ages of 25 to 34 years of age. Majority of the visitors from Britain, France and Australia are over the ages of 35 years. 71% of the visitors from Australia, 56% of visitors from France and 53% of respondents from Britain are 35 years of age and over.

Figure 3: International visitor arrival age groups by nationalities



Time trend of age of visitors between October 2012 survey and June 2014 survey show more young visitors travel during the off peak season in comparison with the peak season.

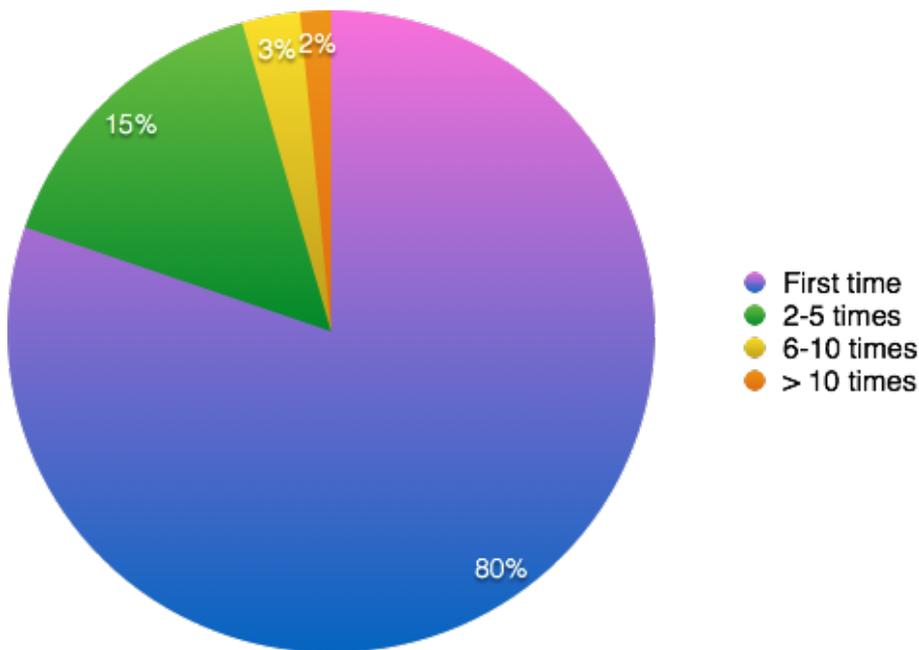
Figure 4: Time trend of International visitor arrival age groups



Repeat visitors

20% of the international visitors to the Maldives were repeat visitors. Of the repeat visitors, 15% respondents said that they had visited the Maldives between two to five times while 3% said they had visited between 6 to 10 times and 2% had visited more than 10 times. On the other hand 80% respondents said they were visiting the Maldives for the first time.

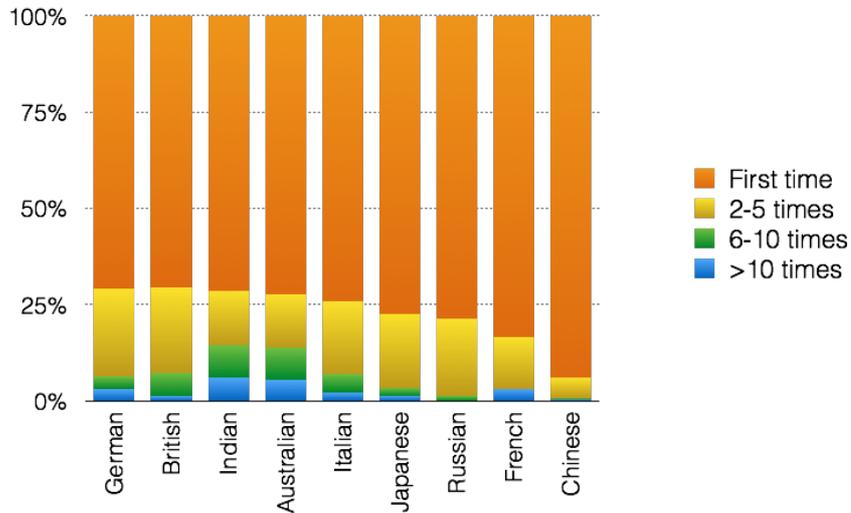
Figure 5: Number of visits to the maldives by international visitors



First time visitors are highest from China. 94% of the respondents from China during off peak season visited the Maldives for the first time. More than 75% of the respondents from France, Russia and Japan also said they were visiting the Maldives for the first time.

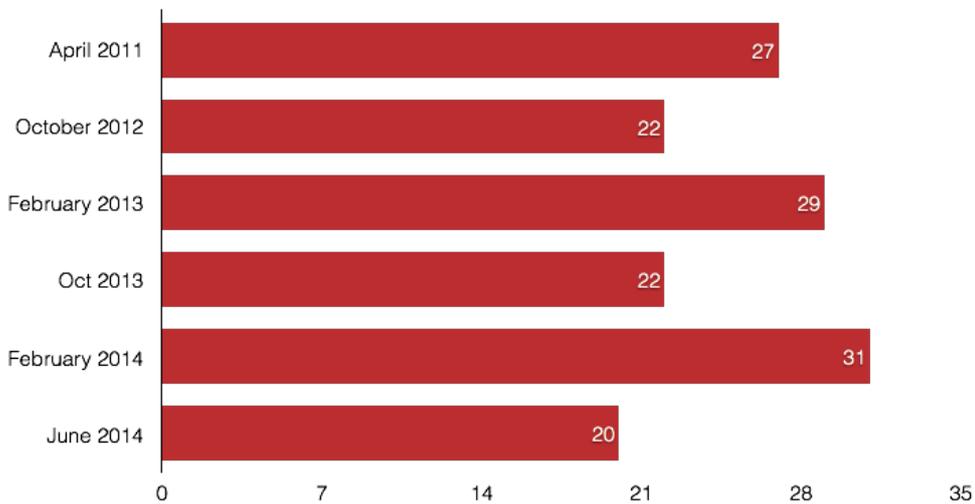
Repeat visitors were highest from Germany, Britain and India. 29% of the respondents from Germany, Britain (29%) and India (29%) during off peak season were repeat visitors. 28% of respondents from Australia and 26% from Italy during the off peak also responded they were repeat visitors to the Maldives.

Figure 6: First time visitors and repeat visitors by nationality



Repeat visitors travel more during the peak season. Time trend of repeat visitor data between April 2011 and June 2014 show that more repeat visitors travel to the Maldives during the peak season in comparison with the off peak season.

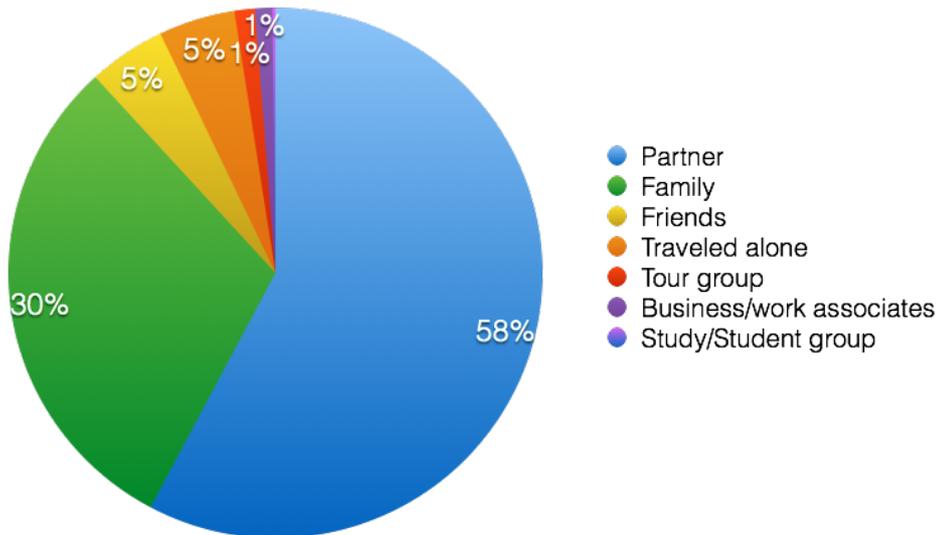
Figure 7: Time trends of repeat visitors



Travel companion

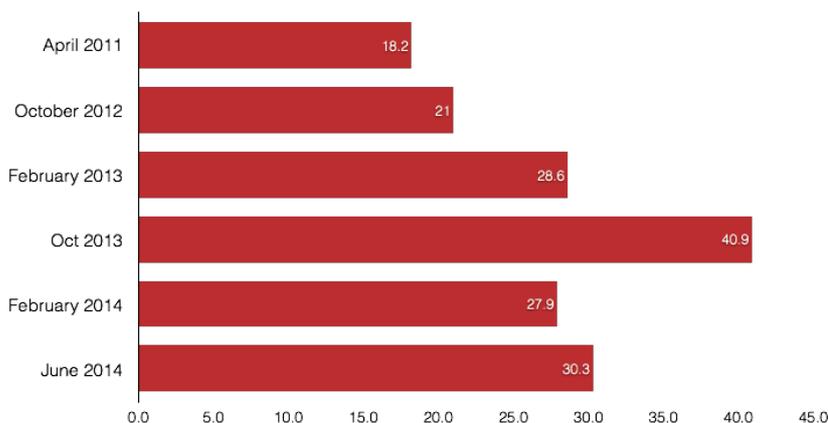
88% of the international visitors travel with partner or family to the Maldives. Of the respondents, 55% travelled with a partner, while 30% travelled with family. 7% of the respondents said they travelled with friends while 4% said they travelled as single travellers.

Figure 8: Type of travel companion



International visitors travelling with family to the Maldives is increasing. Time trend analysis of travel companion data between April 2011 and June 2014 show an increasing trend in the visitors travelling as family to the Maldives. The visitors travelling as family to the Maldives have increased from 18.2% in April 2011 to 30.3% in June 2014.

Figure 9: Time trends of visitors travelling as family

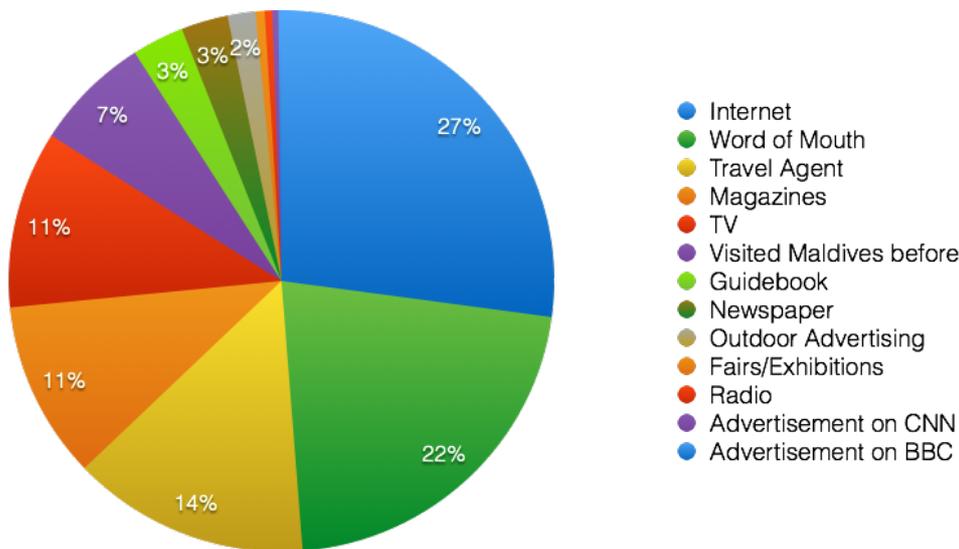


TRIP PLANNING

Source of information

27% of the international visitors to the Maldives discover the Maldives via Internet. 22% of the respondents discovered Maldives through word of mouth and 14%, through travel agents. 11% of the respondents stated that they discovered through TV and 11% through magazines. 7% of the visitors said they have visited the Maldives before. 3% of the visitors said they discovered through guidebooks, 3% through newspapers, 2% through outdoor advertising, 1% through fairs/exhibitions, 1% through radio, 1% through advertisement on CNN, and 1% through advertisement on BBC.

Figure 10: Source of pre-arrival information about Maldives



Across nationalities, internet and word of mouth are common sources of information about the Maldives. Internet and word of mouth are the most commonly stated sources of information amongst the French, Russian, Italian, German and Chinese. Most popular source of information for French visitors is internet (37%) and word of mouth (30%). For Russian visitors internet 34% and word of mouth 22%. For Italian visitors internet 33% and word of mouth 23%.

Word of mouth as a source of information is decreasing slightly. Time trend analysis of word of mouth as a source of information between April 2011 and June 2014 show slight decrease from 28.4% in April 2011 to 22% in June 2014.

Figure 10: Source of pre-arrival information about the Maldives

Figure 11: Source of pre-arrival information about Maldives by nationalities

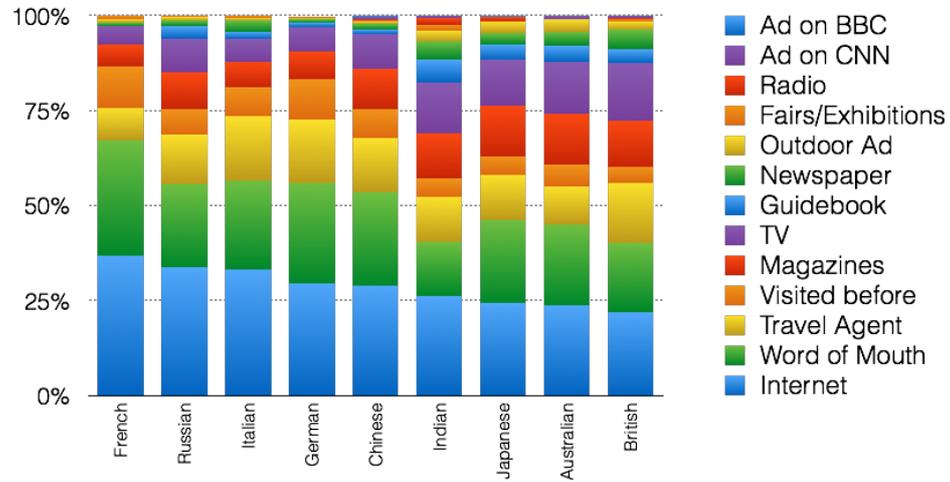
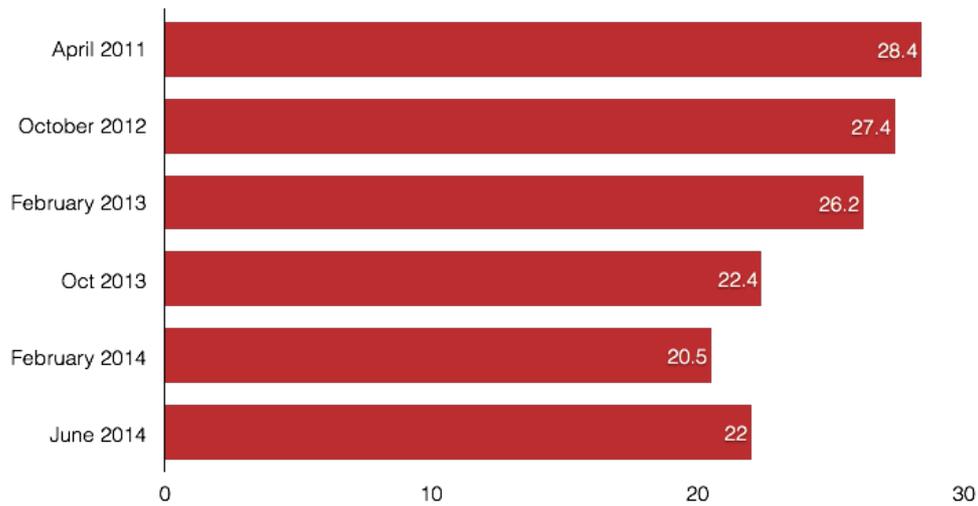


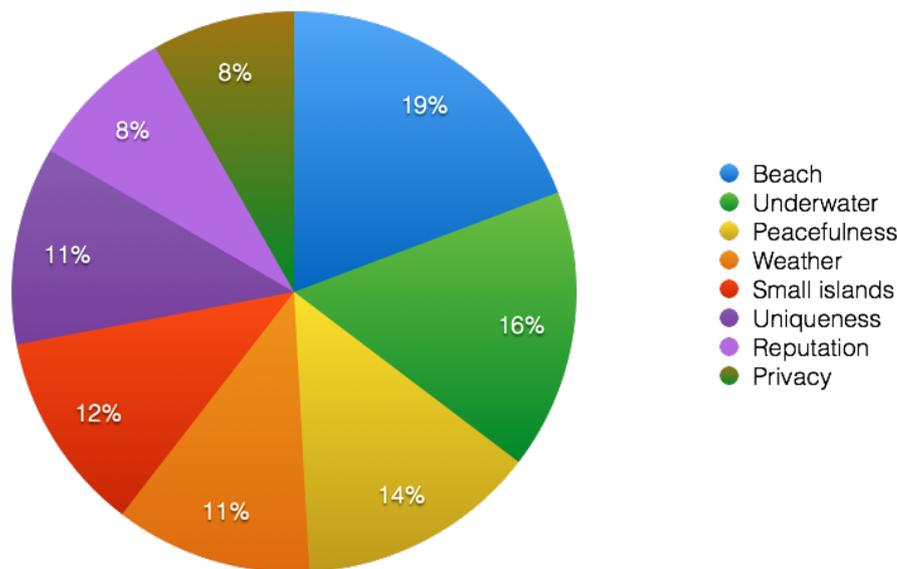
Figure 12: Time trend of word of mouth as a source of information



Motivators to visit the Maldives

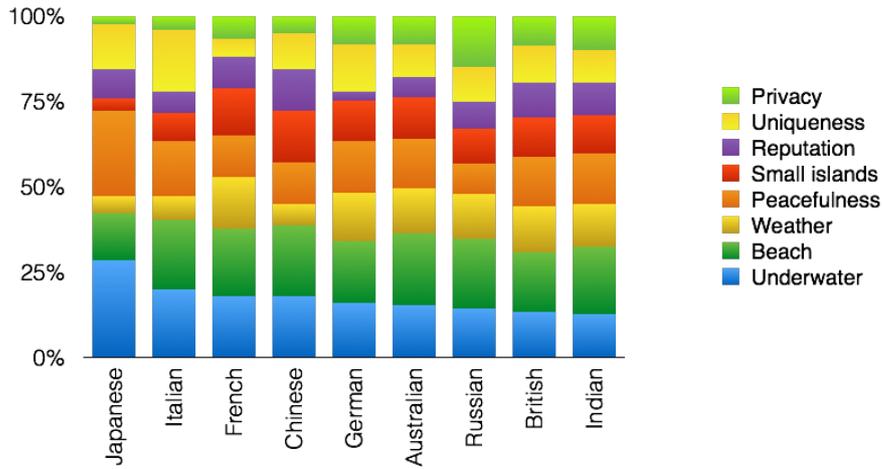
One in every two international visitor to the Maldives is motivated to visit by the beauty of the Maldives. 19% are motivated to visit the Maldives by its beaches, while 16% of the visitors are motivated by the underwater beauty of the Maldives. Other motivators to visit the Maldives as stated by the respondents include peacefulness (14%), small islands (12%), weather (11%), uniqueness (11%), reputation (8%) and privacy (8%).

Figure 13: Motivators for choosing the Maldives



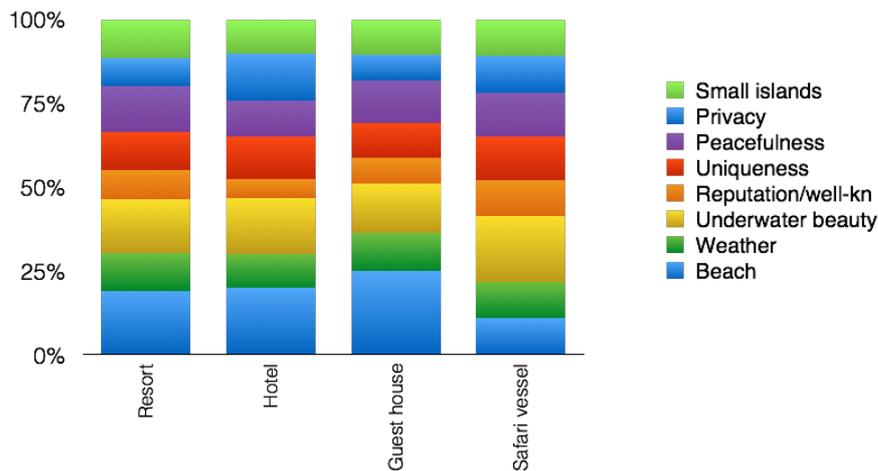
Motivating factors to visit the Maldives are distributed almost evenly amongst all nationalities. However, amongst the Japanese visitors' preference for underwater beauty (28%) and peacefulness (25%) as motivators to visit the Maldives is more significant than other motivating factors for the Japanese visitors. Similarly, privacy as a motivator is the second most popular motivating factor for Russian visitors to visit the Maldives. Survey results from off peak survey in June 2014 for motivators to visit the Maldives show similar trends to that of the peak season survey conducted in February 2014.

Figure 14: Motivators for choosing the Maldives by nationalities



International visitors to the resorts are equally motivated by all factors. Whereas visitors to guest houses are motivated most by the beaches of the Maldives and visitors staying in safari vessels are motivated most by the underwater beauty of the Maldives.

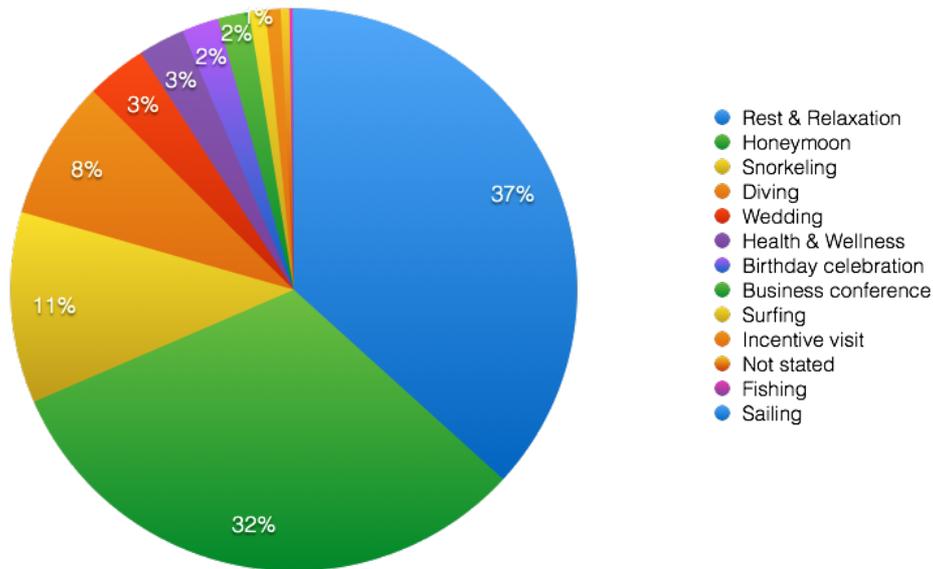
Figure 15: Motivators for choosing the Maldives by place of stay



Reasons to visit the Maldives

Two out of every five international visitor visit the Maldives for rest and relaxation. The second most popular reason to come to the Maldives is honeymoon (32%), followed by snorkelling (11%) and diving (8%)

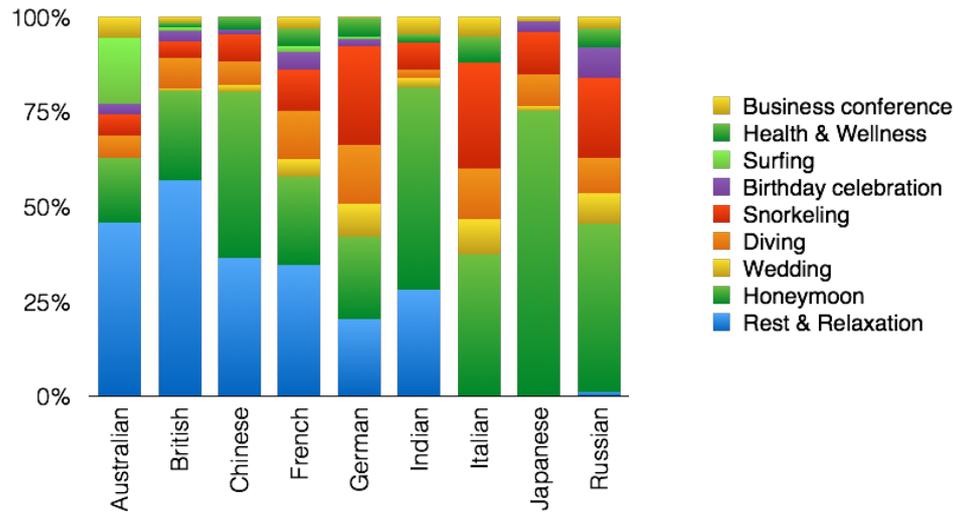
Figure 16: Purpose of visit to the Maldives



Nationalities show varying trends as the primary reason to visit the Maldives. Of the visitors, British (57%), Australian (46%) and French (34%) responded rest and relaxation as their main reason for visiting the Maldives. However, three out of every four Japanese visitor, one out of every two Indian visitor and two out of every five Italian visitor responded honeymoon as their main reason to visit the Maldives. Similarly 44% of Chinese and 44% of Russians said honeymoon as the main reason to visit the Maldives.

One fourth of the German visitors responded their primary reason to visit the Maldives is snorkelling. This is the most significant reason for Germans to visit the Maldives according to respondents from off peak survey. Likewise, 28% of Italians and 21% of Russians also responded snorkelling as a reason to visit the Maldives. Diving as a reason to visit the Maldives was most significant for visitors from Germany.

Figure 17: Purpose of visit to the Maldives by nationality

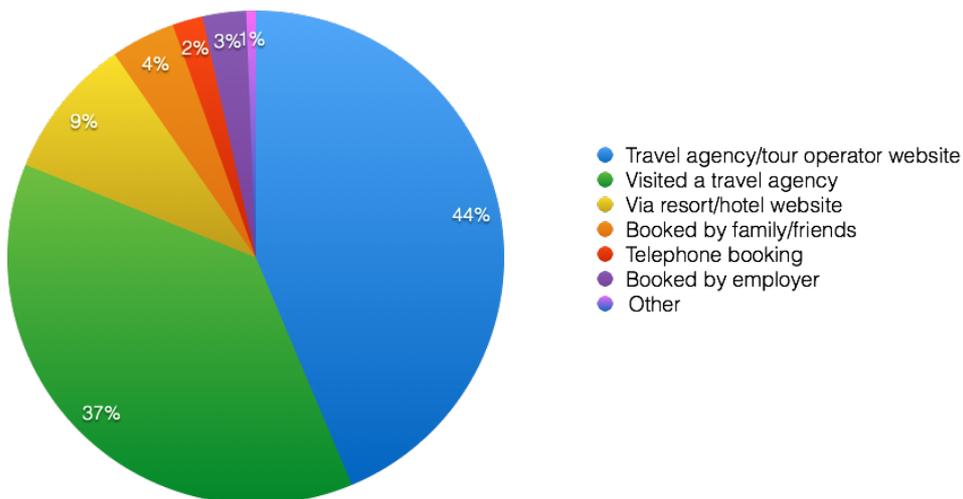


Booking method

One in every two international visitor to the Maldives book their trip to the Maldives via Internet. Of them 44% used travel agents' or tour operators' website to book their trip, and 9% organised their trip using the resort's or hotel's website. 37% of the international visitors stated that they visited a travel agency to organize the trip and 4% cited that family or friends booked the trip. 3% of the respondents said that their employer booked their trip while, 2% of the respondents made a telephone booking.

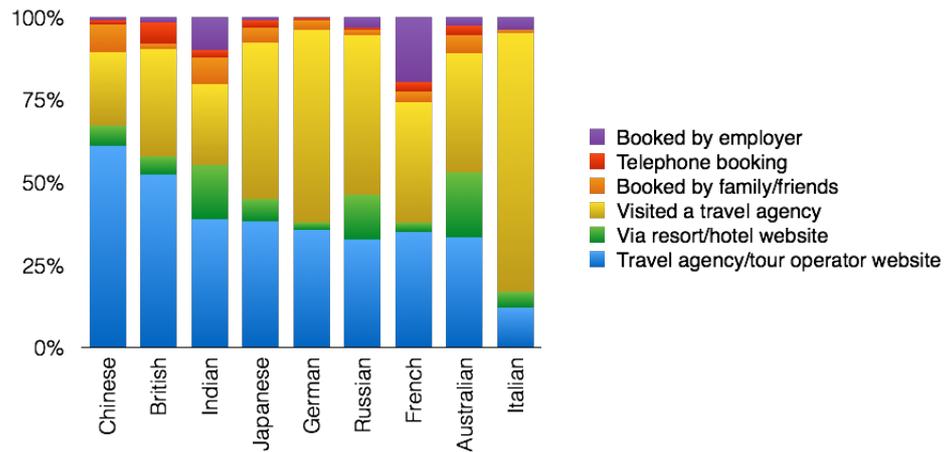
The booking method varies across nationalities. More than 60% of visitors from China book via internet with bookings via travel agency website the main method of booking for 61% of the visitors. More than half the visitors from Britain and Indian nationalities also book via internet on travel agents' website or via resort/hotel's website. 52% of British visitors and 39% of Indians visitors book via travel agents' website. 6% of British visitors and 16% of Indian visitors book via resort's or hotel's website.

Figure 18: Mode of trip organization used by international visitors



However, 78% of visitors from Italy, 58% of visitors from Germany, 47% of visitors from Japan, 36% of visitors from France and 36% from Australia cited they visited a travel agency to book their trip to the Maldives. This is the most common method of booking for these countries. 20% of visitors from France and 10% of visitors from India said the employer booked their trip to the Maldives. Also 8% Chinese visitors and 8% Indian visitors cited that family or friends booked their trip.

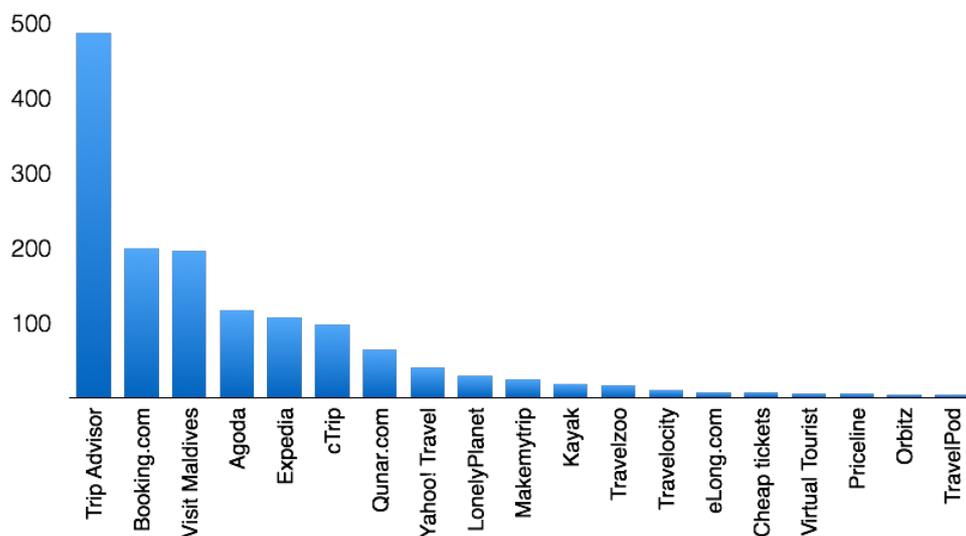
Figure 19: Mode of trip organization used by international visitors by nationalities



Websites used

34% of the international visitors to the Maldives refer to Trip Advisor to plan or organize their trip to the Maldives. 14% referred to Visit Maldives while another 14% referred to Booking.com. 8% of the respondents referred to Agoda and another 7% to Expedia and 7% to cTrip to plan or organize their trip to the Maldives.

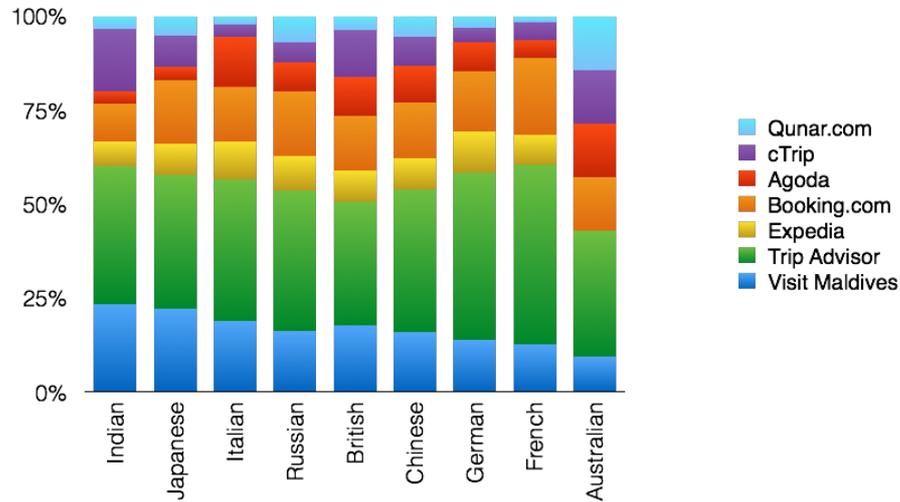
Figure 20: Websites referred to plan or organize trip



Trip Advisor is the most common website used by all nationalities to assist in their bookings. Half the visitors from France, 44% of the visitors from Germany and over 30% of visitors from Italy, Britain, Russia, Australia, India, China and Japan use Trip Advisor to book their trip to the Maldives. Unlike the peak season survey in February 2014 where Makemtrip was the most commonly used website by Indian visitors, 17% of Indian visitors cited they used cTrip to book their trip to the Maldives.

Booking.com is the third most popular website used by visitors from Italy, France, Britain, Germany, Russia, Japan and China to book their trip to the Maldives. Amongst Australian visitors, Booking.com, Agoda, cTrip and Qunar.com are equally popular websites to book their trip to the Maldives.

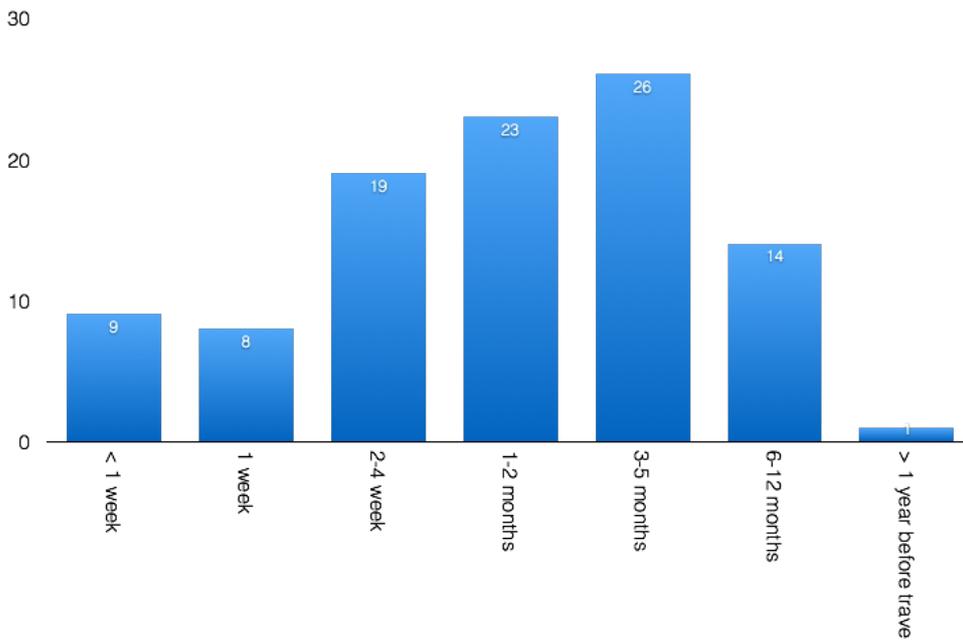
Figure 21: Websites referred to plan or organize trip by nationalities



Advanced booking

Two out of every five international visitor to the Maldives book their trip more than 3 months in advance. Of them, 26% book their holiday 3 to 5 months in advance, 14% book their holiday 6 to 12 months in advance and 1% book their holiday more than 1 year in advance. Amongst the other visitors, 23% booked their holiday 1 to 2 months in advance, 19% booked their holiday 2 to 4 weeks in advance while 8% of visitors cited that they book 1 week in advance and 9% of respondents said that they book less than 1 week in advance.

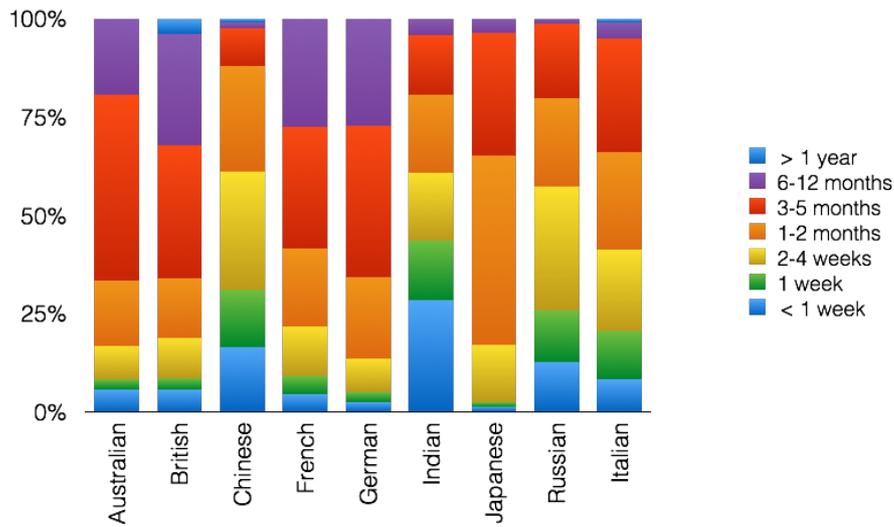
Figure 22: Duration of advance booking of holiday by respondents



Most of the international visitors from China, India, Russia, Japan and Italy book their trip in less than 2 months prior to travel to the Maldives. Around 90% of visitors from China book in less than 2 months prior to travel to the Maldives. Of them, 30% book within 2-4 weeks and 27% between 1 to 2 months prior to travel to the Maldives. Furthermore, about 80% of visitors from India book in less than 2 months prior to travel to the Maldives. Of them, 28% book in less than a week before travel to the Maldives. 25% of Italians book between 1 to 2 months and 21% between 2 to 4 weeks prior to travel to the Maldives. Almost half the visitors from Japan book their trip to the Maldives between 1 to 2 weeks prior to travel to the Maldives. 31% of Russian visitors book their trip between 1 to 2 months prior to travel to the Maldives.

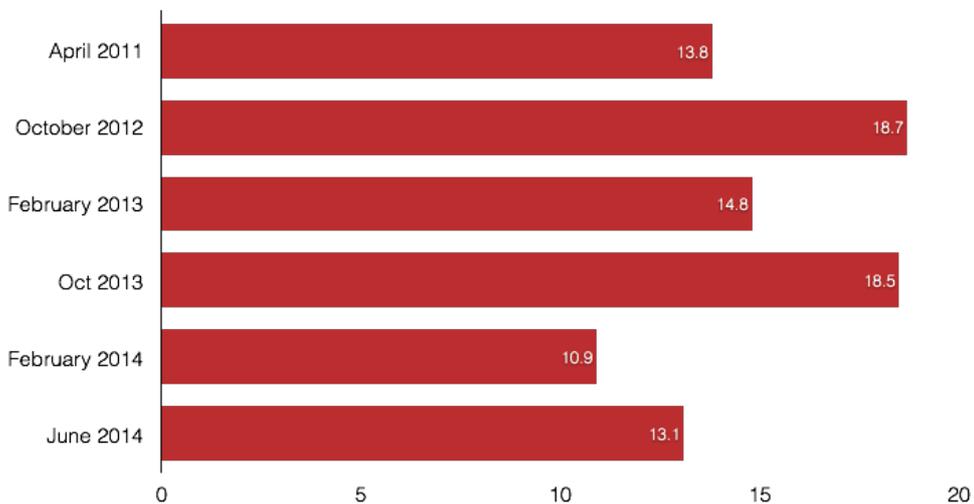
International visitors from most European nationalities book more than 3 months prior to travel to the Maldives. More than 60% of the visitors from Britain, Germany, Australia and 60% from France book their trip more than 3 months in advance. Half the visitors from Australia, 38% of German visitors and 34% of British visitors book their trip between 3 to 5 months prior to travel to the Maldives. Almost 30% of French and 30% of British visitors book their trip between 6 to 12 months prior to travel to the Maldives.

Figure 23: Duration of advance booking of holiday by nationalities



Time trend analysis of booking period between 6 to 12 months for surveys conducted between April 2011 and June 2014 show that more international visitors book their trip in advance for the off peak season compared to the same booking period for peak season.

Figure 24: Time trend of booking period 6 to 12 months in advance

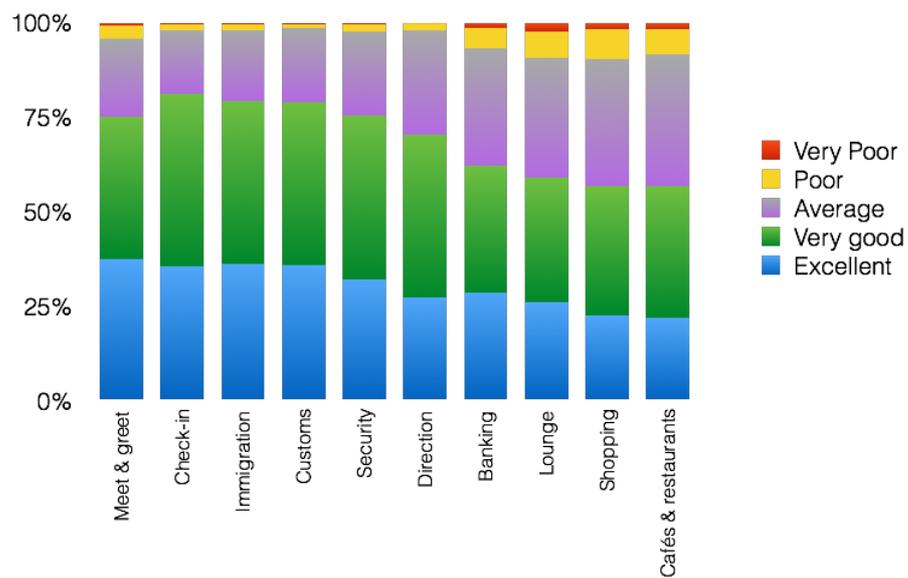


AIRPORT SERVICES

Services at Ibrahim Nasir International Airport

Services at the Ibrahim Nasir International Airport (INIA) rank above 70% with combinations of excellent and very good for meet & greet, check-in services, customs, immigration, security direction signs. Check-in, immigration service and customs service are the most highly ranked with almost 80% combination of excellent and very good. Shopping, cafés, restaurants, lounges and banking services rank in the category of poor, with over 40% categorising the services as average, poor and very poor.

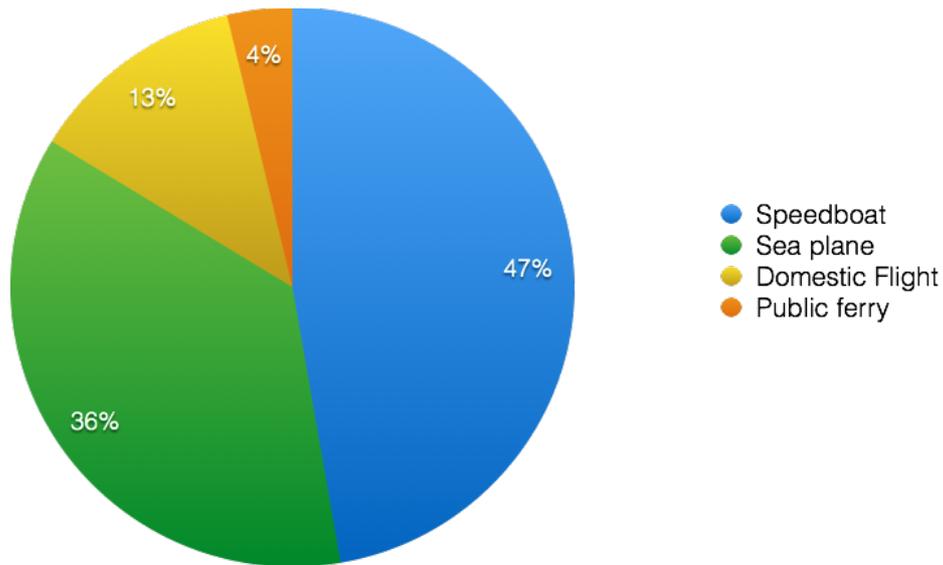
Figure 25: Ratings on services provided at the Ibrahim Nasir International Airport



Transport method

One in every two international visitor to the Maldives use speedboat transfer to get to their place of stay. Of the other respondents to the survey, 36% said they used seaplanes to get their place of stay and 13% used domestic flights. 4% of the respondents said they used public ferries from the airport to the place of stay.

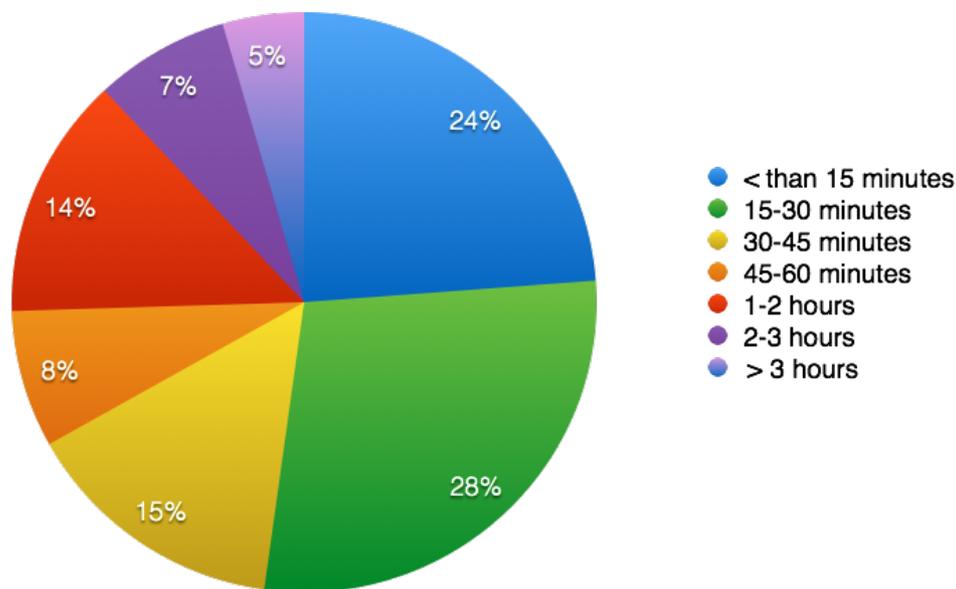
Figure 26: Transport methods to the place of stay



Waiting time at airport

Waiting time at airport for 52% of the international visitors to the Maldives is 30 minutes or less. For 8% of the visitors, the waiting time was 30-45 minutes while another 14% said the waiting time at the airport was between 1 to 2 hours. 15% of the visitors responded their waiting time was between 45 minutes and 1 hour. 7% of the visitors stated the waiting time was between 2 to 3 hours, while 5% said their waiting time at the airport was for more than 3 hours.

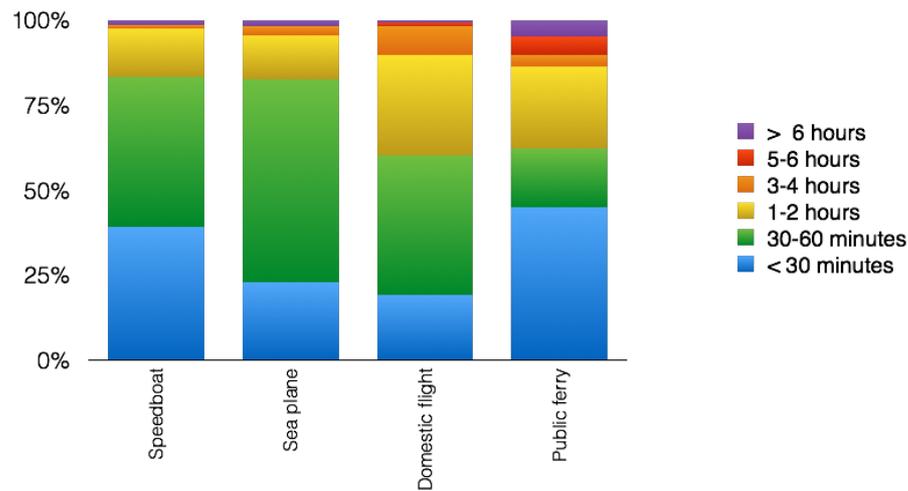
Figure 27: Waiting time at airport by respondents



Waiting time more than 1 to 2 hours and 3 to 4 hours was highest for visitors travelling via domestic flights. For 29% of the visitors travelling by domestic flight, the waiting time at airport was 1 to 2 hours and for 8%, the waiting time was between 3 to 4 hours.

The waiting time at airport is shortest for visitors travelling by speedboats and seaplanes. For more than 83% of the visitors travelling by speedboat and seaplane, waiting time at airport was less than an hour. Of the visitors who travelled by speedboat, for 39% visitors, waiting time was less than 30 minutes at the airport and for 44% of visitors, waiting time at the airport was between 30 to 60 minutes. For visitors traveling via seaplane, for 60% of visitors the waiting time was 30 to 60 minutes while for 23% of visitors, the waiting time was less than 30 minutes. Also the waiting time for 45% of the visitors who travelled by public ferry cited their waiting time was less than 30 minutes

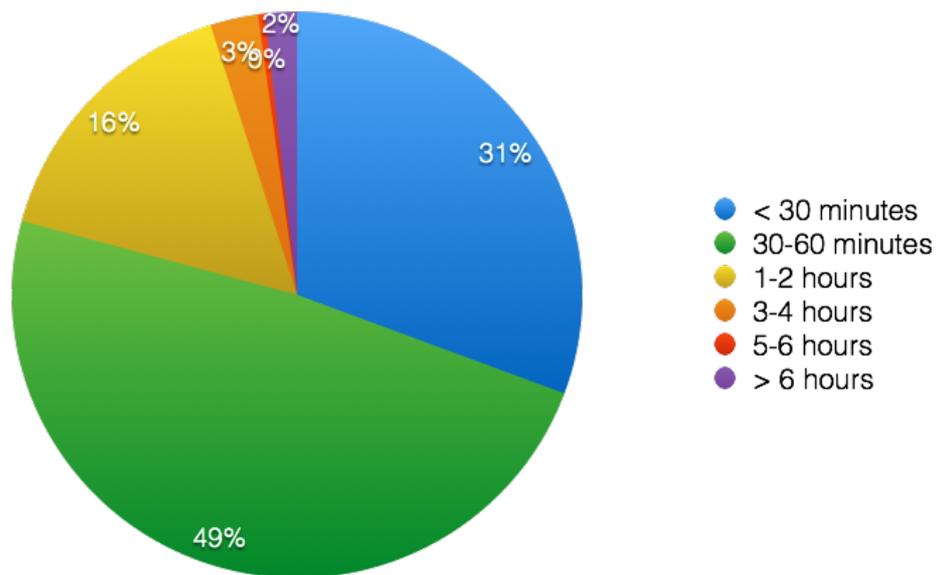
Figure 28: Waiting time at airport by method of transport



Time to reach place of stay

An overwhelming 80% of the international visitors to the Maldives take less than an hour to reach their place of stay. Of them 31% of visitors took less than 30 minutes to reach their place of stay while an overwhelming 49% took between 30 to 60 minutes to reach their place of stay. Another 16% of the respondents said it took them 1 to 2 hours to reach the place of stay and 3% said it took them 3 to 4 hours, while 1% responded it took them 5 to 6 hours and 2% said it took them more than 6 hours to reach to their place of stay.

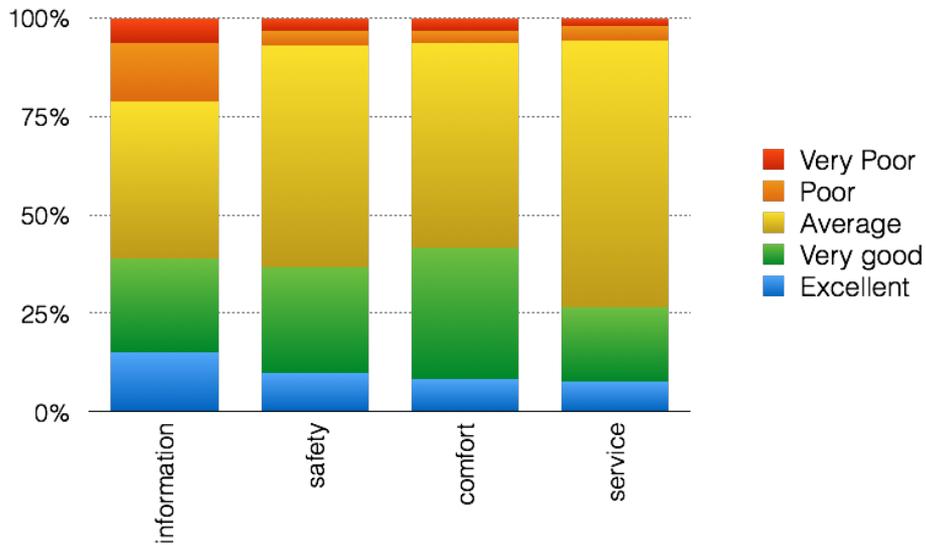
Figure 29: Time taken to reach place of stay



Quality of hotel transfer

The combination of 'excellent' and 'very good' ratings for transportation services remained above 40% for quality of hotel transfer in terms of information briefing, safety and comfort. International visitors who were surveyed were mostly happy with comfort quality of hotel transfers, which was rated at 41% as 'excellent' and 'very good'. However, majority of the respondents cited that the quality of hotel transfer as average. 21% of the respondents think that information briefing during hotel transfer is poor or very poor.

Figure 30: Rating on quality of transport services to hotel

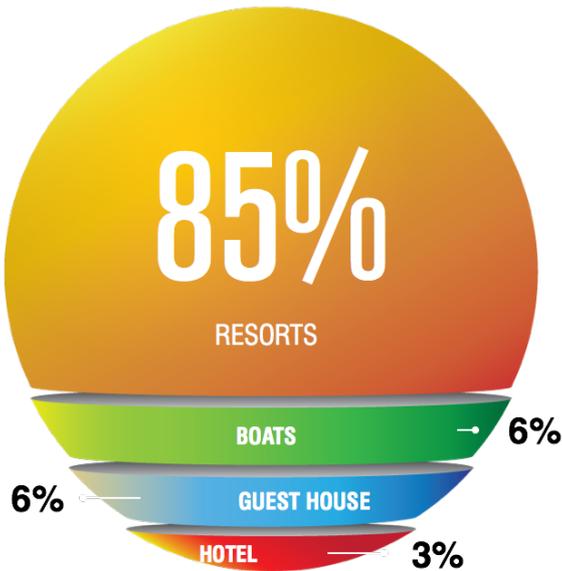


STAY IN THE MALDIVES

Place of stay

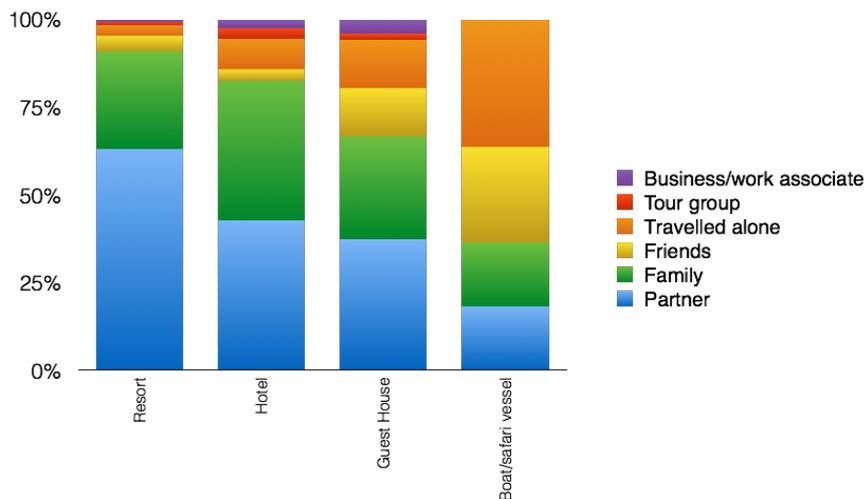
An overwhelming 85% of visitors to the Maldives stay in the resorts. Of the other international visitors, 6% stayed in guesthouses and 6% on boat or safari vessels and 3% stayed in hotels.

Figure 31: Type of accommodation selected by international visitors



From the international visitors to the resort, 91% of visitors are those who travel with their partner or family. However, the proportion of visitors travelling with partner and family is lower in hotels, guesthouses or safari vessels. Of visitors who stayed in guesthouses, 14% travelled alone and 14% travelled with friends to the Maldives. 36% of the visitors who stayed in safari vessels travelled alone to the Maldives and 27% of the visitors who stayed in safari vessels travelled with their friends to the Maldives.

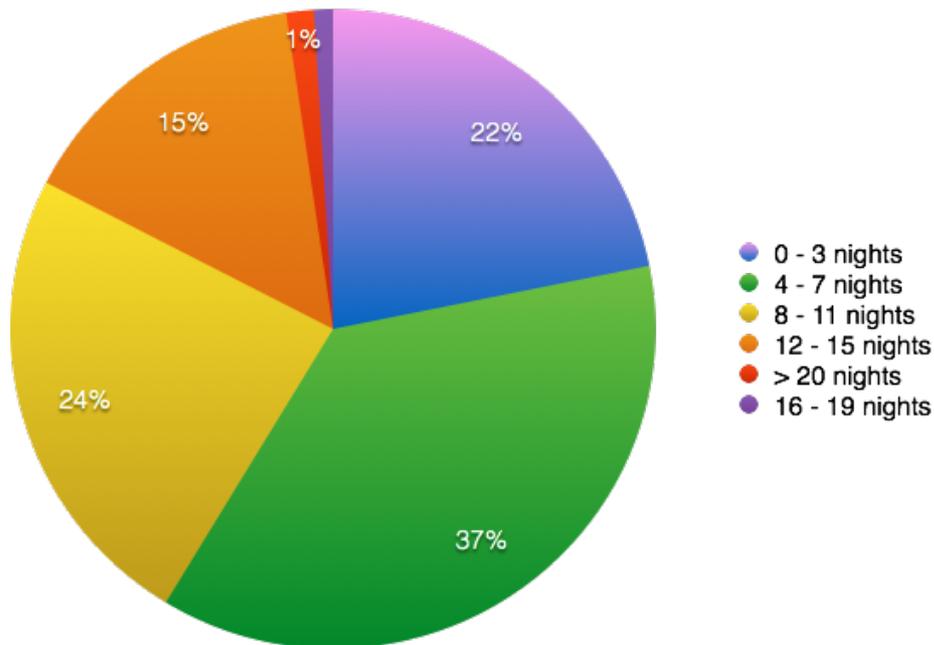
Figure 32: Type of accommodation selected by travel companion



Length of stay

37% of the international visitors to the Maldives stay for 4-7 nights in the Maldives. 22% of the visitors stayed for 0-3 nights while 24% stayed for 8-11 nights. 15% of the international visitors stayed for 12 to 15 nights and 1% of the visitors stayed for more than 20 nights.

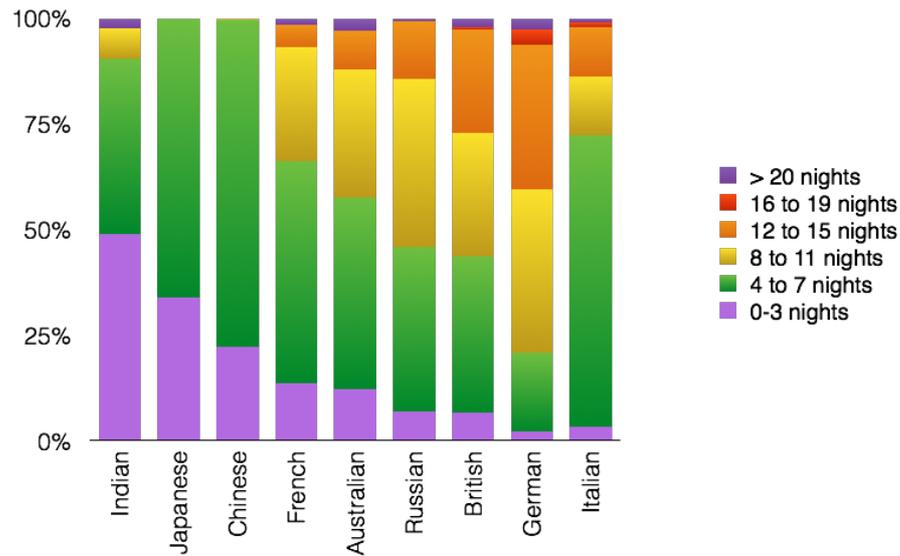
Figure 33: Number of nights spent in the Maldives



Length of stay is shortest for visitors from India, China and Japan. 90% of the Indian visitors stayed for 7 nights or less in the Maldives. Of them 49% stayed for 0 to 3 nights and 41% stayed for 4 to 7 nights in the Maldives. 78% of the visitors from China stayed for 4 to 7 nights and 22% for 0 to 3 nights. 66% of the visitors from Japan stayed for 4 to 7 nights and 34% stayed for 0 to 3 nights. The 0 to 3-night stay category is highest amongst Indian visitors. Furthermore, 69% of the Italians and more than 53% of the French also stayed for 4 to 7 nights in the Maldives.

Length of stay is longest for visitors from Germany and Britain. 80% of German visitors stayed for 8 nights or more in the Maldives. More than 50% of British and Russian visitors, 40% of Australian visitors and 34% of French visitors stayed for 8 nights or more in the Maldives. About 41% of the visitors from Germany and 28% of visitors from Britain stayed for 12 nights or more in the Maldives. Of them, more than 34% of German visitors stayed for 12 to 15 nights, 4% for 16 to 19 nights and 3% for more than 20 nights in the Maldives.

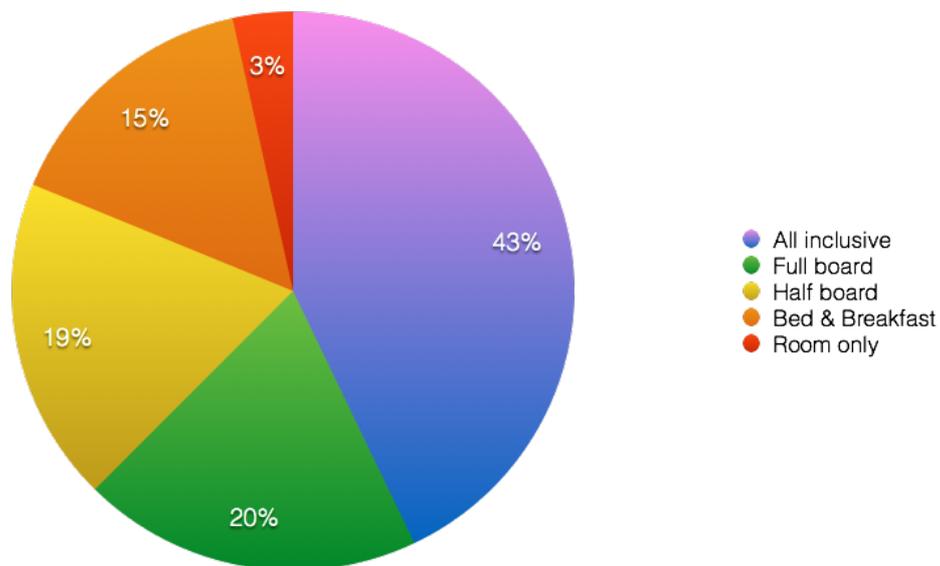
Figure 34: Number of nights spent in the Maldives



Meal plan

Two out of every five international visitor to the Maldives choose all-inclusive meal plans during their stay in the Maldives. 20% of the respondents opted for full board while 19% chose half board and 15% chose bed and breakfast as their meal plan. The room-only plan was chosen by only 3% of those surveyed.

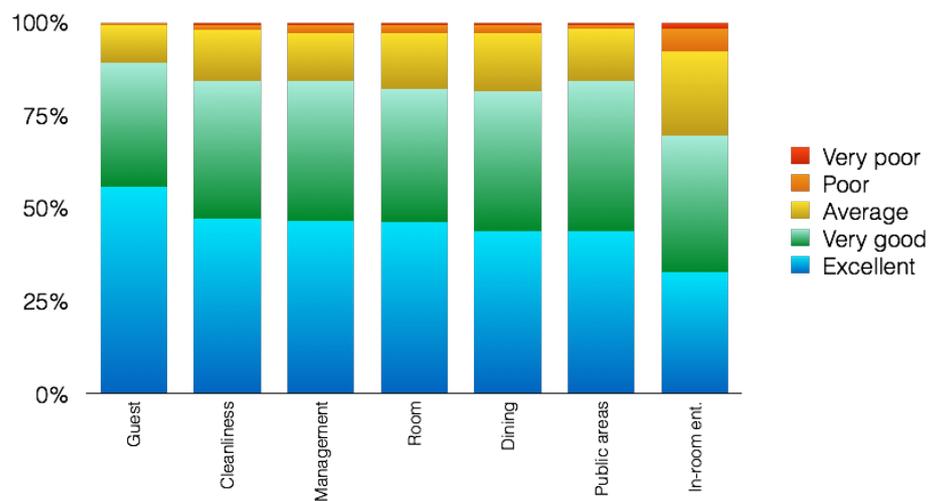
Figure 35: Type of meal plan chosen by international visitors



Services at place of stay

The combination of “excellent” or “very good” for quality of services is over 80% or more for the place of stay in the Maldives. In the following six categories: guest services, cleanliness, management, room, dining experience and public areas, more than 45% ratings are ‘excellent’. 56% perceive guest services as ‘excellent and 33% ‘very good’. All services, except for in-room experience have been rated ‘excellent’ by more than 44% of the respondents.

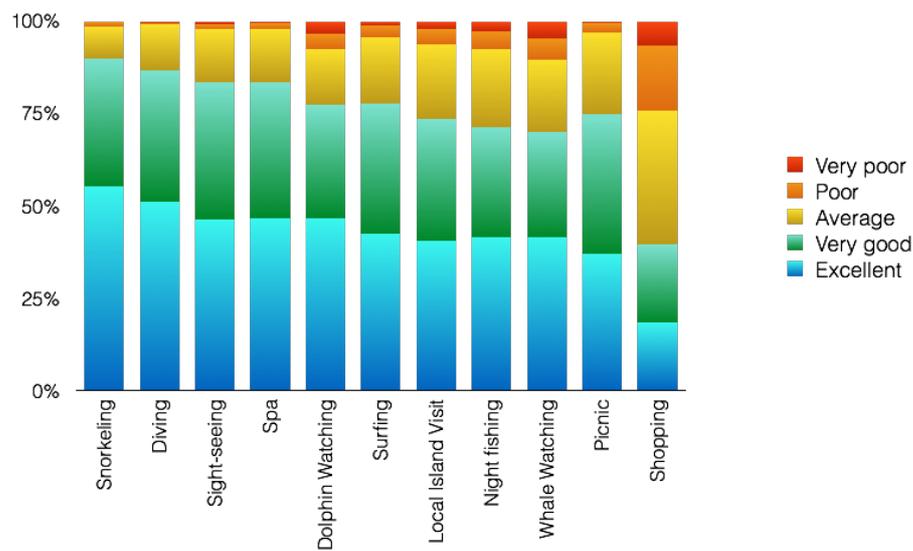
Figure 36: Quality of services at place of stay



Activities at place of stay

Snorkelling and diving are the most popular activities for the international visitors to the Maldives. 89% of respondents rated snorkelling ‘excellent’ and ‘very good’ followed by 84% of visitors rating diving as ‘excellent and ‘very good’. Of the other activities most popularly ranked activities as ‘excellent’ and ‘very good’ are sight seeing (81%), spa (84%) and dolphin watching (78%). Of the activities at place of stay that needs most improving is shopping, with one fourth perceiving shopping to be ‘poor’ or ‘very poor’.

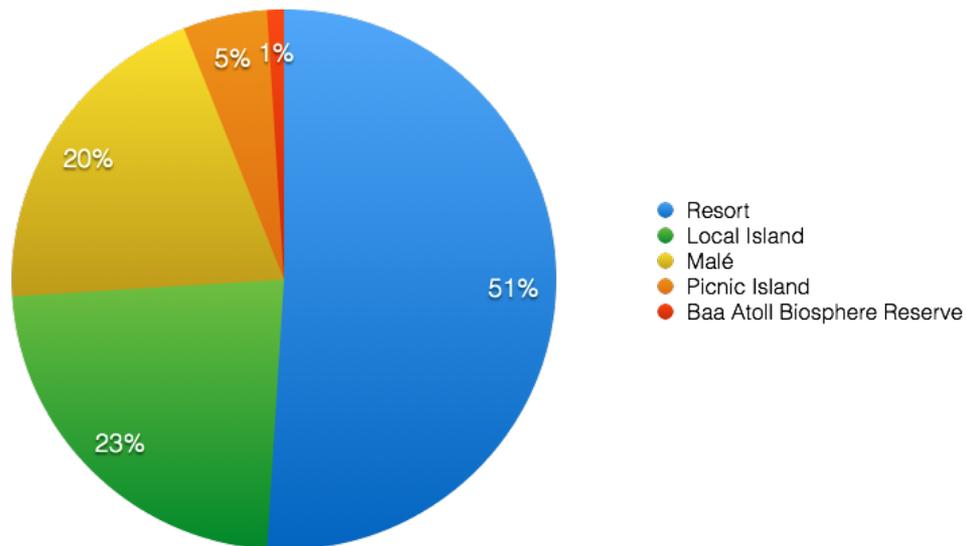
Figure 37: Activities most enjoyed by international visitors



Places visited during the stay

23% of international visitors to the Maldives visited a local island during their stay in the Maldives. Of the respondents to the question, 51% of the visitors visited the capital city Male', while 20% visited a Male', 5% to a picnic island and 1% visited the Baa Atoll Biosphere Reserve.

Figure 38: Places visited by international visitors

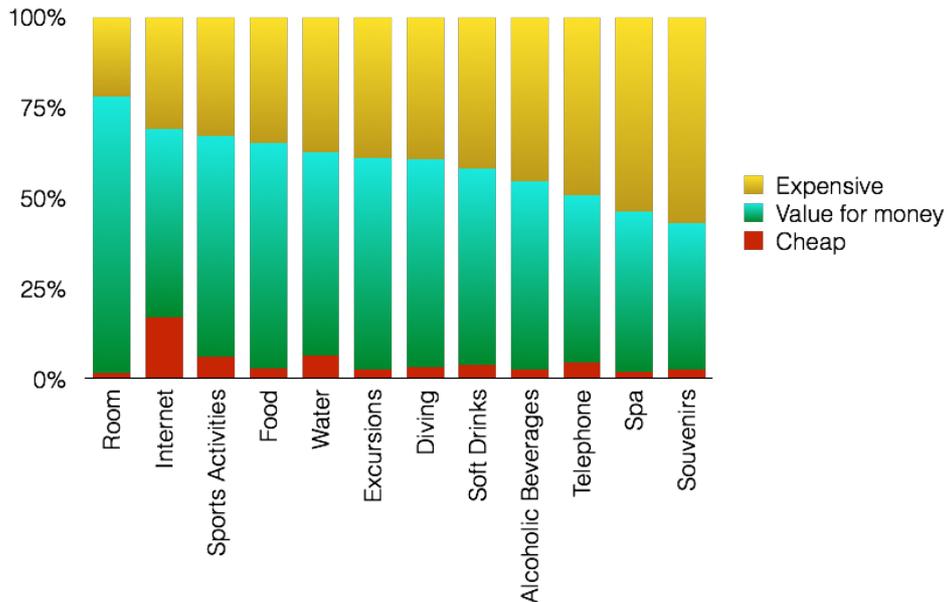


Perception of prices

More than 60% of international visitors perceive prices for diving, excursions, water sports, Internet, water, food and room as “cheap” or “value for money”. 77% perceive the room to be ‘value for money’ and 52% perceive internet to be ‘value for money’ with 7% who perceived internet to be ‘cheap’. Souvenirs and spa are perceived most expensive. 57% perceive souvenirs to be ‘expensive’, while 54% perceive spa to be ‘expensive’.

The prices charged for Internet in the resorts of the Maldives are considered ‘value for money’ by 52% and ‘cheap’ by 7% of visitors. Alcoholic beverages and soft drinks are considered ‘expensive’ by 45% of the respondents while 42% of the visitors respectively. 61% of respondents believe that sports activities are ‘value for money’, while 58% think the same about diving and 59% about excursions. On the other hand, sports activities are perceived as ‘expensive’ by 35%; diving by 39% and excursions also by 39% of the visitors.

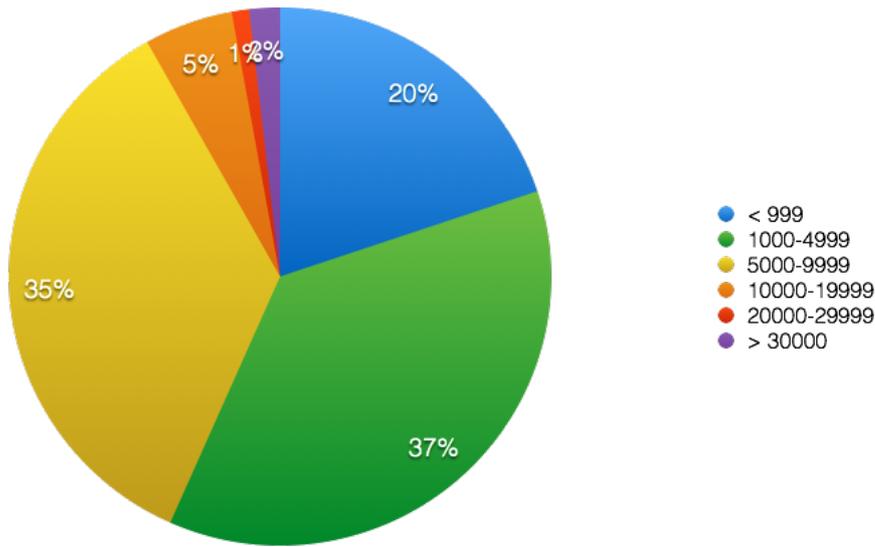
Figure 39: Perception of prices



Expenditure in the Maldives

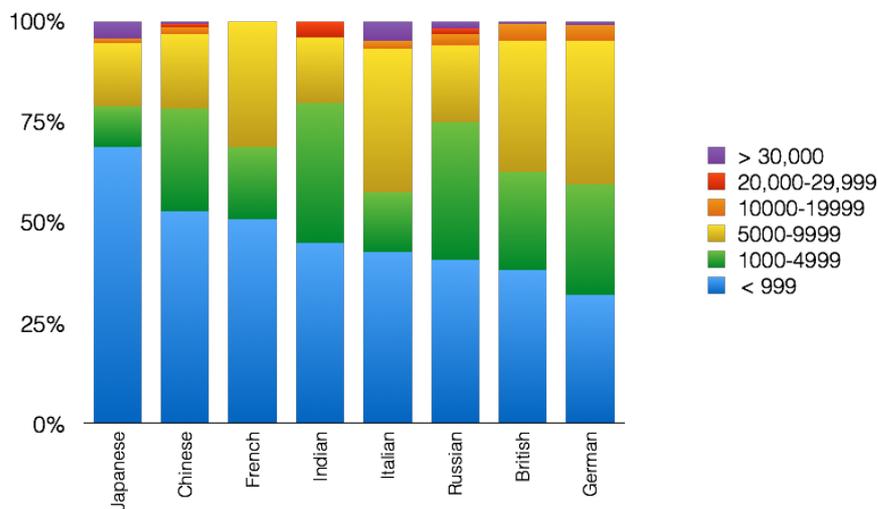
37% of the international visitors to the Maldives spend between USD 1000 to 5,000 during their stay in the Maldives. 35% spend between USD 5000 to USD 10,000. 20% of respondents spent below USD 1,000 per trip during their stay in the Maldives.

Figure 40: Expenditure by visitors in the Maldives



Of the visitors from the top 9 nationalities of respondents for this survey, more than 35% of German, British and Italian visitors spent between USD 5,000 and 10,000. More than 30% of French and 20% of German visitors also spent an equivalent amount. And More than 50% of visitors from Japan, China and France spent below USD 1,000 during their stay in the Maldives.

Figure 41: Expenditure by visitor nationalities

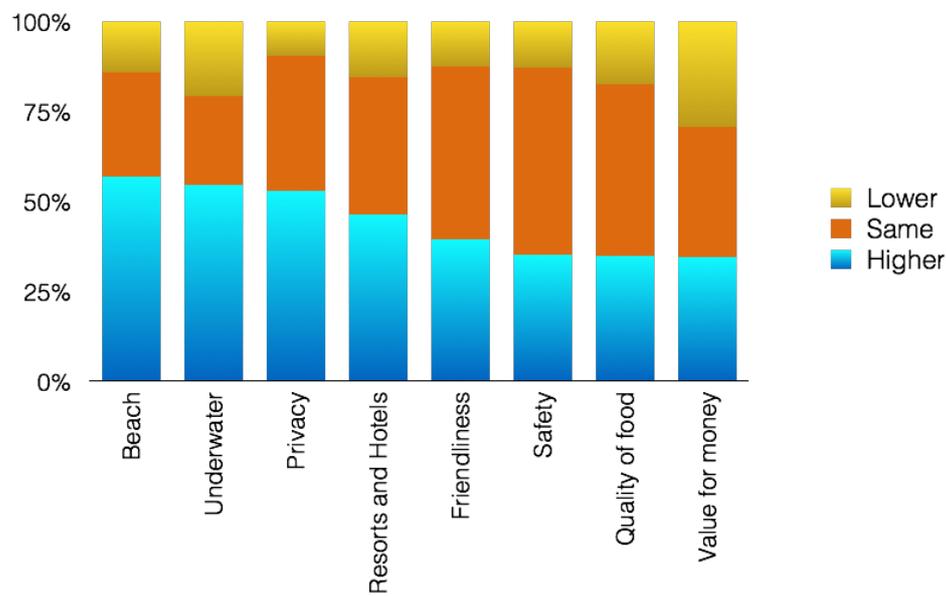


Visited similar destinations and comparisons

1 out of every 4 international visitor to the Maldives had visited similar destinations. Of them, the beaches and the underwater were rated higher by more than 55% compared to other similar destinations. More than 50% rated privacy in the Maldives rated higher than other similar destinations. Most respondents considered friendliness, security or safety and quality of food, the same compared to other destinations.

Other similar destinations stated by the visitors include Mauritius, Thailand, Seychelles and Polynesia etc.

Figure 42: Rating of the Maldives compared to similar destinations



VISITOR SATISFACTION

Visitor satisfaction

95% of the visitors to the Maldives stated their visit met their holiday expectation.

Of the international visitors, 92% of visitors stated that they intend to visit the Maldives again.

An overwhelming 98% said that they would recommend the Maldives to others as a holiday destination.

ANNEX 1: SURVEY METHODOLOGY

The questionnaire for the Maldives Visitor Survey undertaken in June 2014 is based on the questionnaire for the survey conducted in October 2013. The questionnaire consisted of three sections and 27 questions in total. The questionnaire was prepared and printed in seven different languages. They are English, Italian, German, French, Japanese, Chinese and Russian languages.

The sample for the survey was selected based on 5-year averages of the top ten inbound markets to the Maldives between the years 2010 and 2014. The sample was calculated using the tourist arrival data from the Ministry of Tourism. Derivation of sample size is given in Table 1. Based on the top ten nationalities, the minimum targeted distribution was 1,800.

Table 1: Derivation of sample size

Five year averages of arrivals by nationalities		Sample size for June 2014 survey		
China	19.60%	China	326	20%
UK	11.80%	UK	239	15%
Germany	9.80%	Germany	204	13%
Italy	9.20%	Russia	150	9%
Russia	6.60%	Italy	101	6%
France	6.40%	Japan	89	5%
Japan	4.60%	France	67	4%
Switzerland	3.60%	India	48	3%
Austria	2.60%	Australia	34	2%
India	2.80%	Thailand	29	2%
Korea	2.60%	Others	334	11%

A half-day training session was held for the enumerators prior to the commencement of the survey. The survey was conducted for a period of 14 days between 14 February 2015 and 28 February 2015 at Ibrahim Nasir International Airport (INIA). Questionnaires were distributed to the international visitors by the enumerators after immigration clearance and collected at departure gates after immigration and security clearance.

By the end of the survey period, the number of questionnaires distributed was 1,221. Respondents to the survey averaged at 152 per day. Total number of questionnaires collected was 2116. All 2116 questionnaires were deemed fit for data analysis.

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

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