

The background of the cover features a 3D bar chart with several bars of increasing height from left to right, and a 3D pie chart with one slice separated. The entire scene is rendered in a monochromatic red and orange color scheme with a grid pattern and a line graph in the upper left corner.

# TOURIST PROFILE AND OPINION SURVEY REPORT 2008

Ministry of Tourism Arts & Culture



# Tourist Profile and Opinion Survey Report 2008

Ministry of Tourism, Arts & Culture



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# summary of key findings

## 1. VISITOR ARRIVALS

Europe (66%) and Asia (22%) are the major regional markets of tourists to the Maldives. Of the European visitors, most were from Western Europe.

Britain is the largest inbound market (16%) of tourist arrivals to the Maldives, followed by France (13%); Germany (12%) and Italy (12%). China is the largest Asian inbound market (7%) followed by Japan (6%).

Compared to tourist arrivals in 2004, there was an 8% increase in visitor numbers from France, while there was an 11% decrease in visitor numbers from Italy.

## 2. DEMOGRAPHICS

Visitors aged 25 to 44 years (62%) are the largest international holiday market to the Maldives followed by visitors aged 45 to 64 years (20%).

For every 100 international female tourists to the Maldives there were 108 male tourists. The greatest gender disparity in arrivals was in the Middle East market with 65% more male arrivals.

## 3. PURPOSE OF VISIT

The main reasons for tourists coming to the Maldives were relaxation (55%); honeymoon (28%) and diving (11%).

The main reasons for choosing the Maldives as a holiday destination were peacefulness and tranquility (34%); white sandy beaches (31%) or climate (18%).

#### **4. SOCIO-ECONOMIC PROFILE**

Of the tourists to the Maldives, 39% were professionals; 16% were legislators, senior officials, or managers; and 11% were technicians or associate professionals.

Of the tourists to the Maldives, 36% earn more than USD 41,000 annually. Middle income earners who earn within the income bracket of USD 31,000 to 40,000 accounted for 9% of visitors. Income earners within the income brackets of USD 21,000 to 30,000 and USD 20,000 or less made up 21% and 14% respectively.

When compared to 2004, there is a 16% increase in the number of high income earners (USD > 51,000 annually) visiting the Maldives in 2008 and there is a 5% decrease in the number of low income earners (USD < 20,000).

#### **5. MODE OF TRAVEL**

Singapore Airlines (16%), Sri Lankan (15%) and Emirates (14%) were the most popular airline choices for tourists to the Maldives.

#### **6. TRIP PLANNING**

Travel agents were used to organize travel to the Maldives by 45% of tourists; while tour operators were used by 24% and the internet by 24%.

#### **7. INFORMATION SOURCES AND INTERNET USAGE**

The most common information sources used by tourists to the Maldives were friends and relatives (24%); internet (23%) or travel agents (18%).

#### **8. TRAVEL PARTY**

The majority of tourists to the Maldives travelled as an adult couple (67%) while 18% travelled as groups of family, relatives or friends. Of all tourists to the Maldives, 6% travelled unaccompanied.

## 9. REPEAT VISITORS

The majority of visitors were first-time-visitors to the Maldives (75%), with only 25% repeat visitors.

## 10. LENGTH AND PLACE OF STAY

The average length of stay for tourists to the Maldives is 8 nights.

Of the tourists to the Maldives, 90% stayed in resorts, 4% in hotels and guest houses and 2% in safari vessels.

## 11. MEAL PLAN

Full-board (32%) and all-inclusive (31%) are the most popular meal plans. Of the visitors, 19% opted for half board and 13% chose bed and breakfast.

## 12. ACTIVITIES

The activities enjoyed most by tourists to the Maldives were: diving (32%); spa (20%); water sports (18%) and island hopping (14%). Surfing was enjoyed by 2% of tourists.

Although the capital Male' is a short distance away from most resorts, only 30% of tourists visited the capital. Of whom, 70% stated sightseeing as their main reason for traveling to Male' while 14% stated shopping.

## 13. EXPENDITURES

Of the tourists to the Maldives, 48% spent below USD 1,000 during their trip, 36% spent between USD 1,000 and 5,000, and 10% of visitors spent more than USD 5,000.

## 14. QUALITY OF AIRPORT SERVICES

Of the tourists to the Maldives, only 34% rated immigration services as 'excellent', while only 35% rated customs services as 'excel-

lent'. Less than 26% rated the services at the information counter as 'excellent'. For an up market holiday destination, airport services have to be outstanding. Several of the visitors commented on the need for a speedier immigration process and friendly greetings.

## **15. QUALITY OF MEET-N-GREET SERVICES**

Over 71% of the tourists were more than satisfied with the meet n greet service provided at the airport by resort representatives and 45% rated the service as 'excellent'. Similarly, 70% of tourists were more than satisfied with the sea transfer service from the airport to the resort and 42% rated the service as 'excellent'. Of those who evaluated the sea plane air transfer services, 47% rated the service as 'excellent'.

## **16. QUALITY OF PLACE OF STAY**

The quality of place of stay was assessed on both front-line visitor services and facilities. The quality aspects assessed were accommodation, food, beverages, cleanliness, hospitality, resort facilities and recreational facilities. On average 44% rated their place of stay as 'excellent' in all 7 categories assessed. Hospitality was rated as 'excellent' by 57% of tourists and accommodation was rated as 'excellent' by 48% of the visitors.

The recreational facilities and beverages received the lowest score with only 35% and 36% rating these aspects as 'excellent'.

## **17. QUALITY OF ENVIRONMENT**

Of the tourists, 60% rated the natural environment at their place of stay as 'excellent'. The overall concept of resort/hotel was rated as 'excellent' by 46% of visitors. The design and interior decoration of the room was rated 'excellent' by 41% of visitors.

## **18. PRICE PERCEPTIONS**

Overall, the prices of water, alcoholic beverages and soft drinks were found to be 'expensive' in the Maldives. The prices charged for drinking water in the resorts of the Maldives was considered 'expensive' by 40% of tourists. Alcoholic beverages and soft drinks were considered 'expensive' by 38% and 36% of visitors respectively.

The souvenir items were considered 'expensive' by 40% of visitors.

Prices charged for accommodation and food in the Maldives is 'reasonable'. Of the tourists to the Maldives 53% considered accommodation prices as 'reasonable' while 52% considered food prices as 'reasonable'.

## **19. MEETING EXPECTATIONS**

Over 90% of tourists to the Maldives stated that the holiday met their expectations.

One out of two visitors to the Maldives had visited a destination similar to the Maldives. The most popular similar destinations are Phuket, Mauritius, and Seychelles. Other similar destinations include Caribbean, Bali, Malaysia, Tahiti, Hawaii, Fiji, Philippines, Goa, Indonesia and Hainan Islands.

The Maldives is competitive with other similar destinations and does not have a significant price disadvantage. Half of the tourists to the Maldives rated the quality of the services or facilities, security and hospitality in the Maldives to be at the same level as in similar destinations.

## **20. INTENTION TO REVISIT OR RECOMMEND**

Over 80% of tourists to the Maldives have the intention to visit the Maldives again, while 98% of the visitors would recommend the Maldives to others as a holiday destination.



# introduction

This is the 2008 Tourist Profile and Opinion Survey Report of the Maldives. Tourist Profile and Opinion Survey Report is a periodic survey report published by the Ministry of Tourism, Arts and Culture as part of the efforts to improve the quality of tourism services in the Maldives. These reports are published with the aim of providing a useful resource for industry managers as well as policy makers. Previous editions of this report were published in 1999 and in 2004.

Data for this report was collected by the Statistics and Research Section of the Ministry of Tourism, Arts and Culture. Data processing and report writing was undertaken by Commerce, Development and Environment (CDE) Pvt. Ltd.

## goals and objective

The primary goal of the Tourist Profile and Opinion Survey report (2008) is to contribute to the efforts to enhance the tourism industry in the Maldives by providing those in industry and government with a resource which details the characteristics, preferences and expectations of tourists who visit the Maldives. This report will also seek to identify deviations from the last Tourist Opinion and Profile Survey report published in 2004 wherever possible. The key areas studied in this report are:

- the demographic, economic, social, and geographic profile of tourists who visit the Maldives;
- the opinions of tourists about their place of stay in the Maldives; services and facilities; modes of travel to the Maldives;
- sources of information about the Maldives as a tourist destination;
- patterns of visit; perceptions of value for money; holiday preferences and interests.





# GEOGRAPHIC PROFILE







PHOTO: CAROLINE VON TUEMPLING

## 1. GEOGRAPHIC PROFILE

### *Nationality*

Tourist arrivals in 2008 by region (Figure 1) show that Europe was the largest source of visitors to the Maldives (66%) while the second largest regional grouping was Asians (22%). The top regional source markets for tourist arrivals remain unchanged over the years. In 2004, largest source of visitors was Europe (73%) followed by Asia (22%).

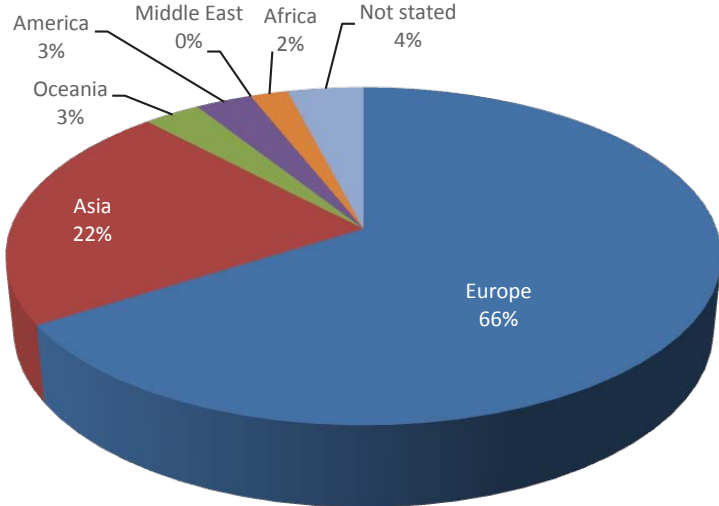


Figure 1 Tourist arrivals by region

In 2008, Britain was the largest source of visitors to the Maldives (16%) followed by France (13%), Germany (12%) and Italy (12%). Out of the Asian nationalities, most visitors were from China (7%) and Japan (6%) (Figure 2).

Compared to 2004, the number of tourist arrivals in 2008 decreased for Italy (-11%), Britain (-4%) and Switzerland (-4%) while an increase in the arrivals was recorded for France (+8%), China (+5%) and Australia (+5%) (Figure 3).

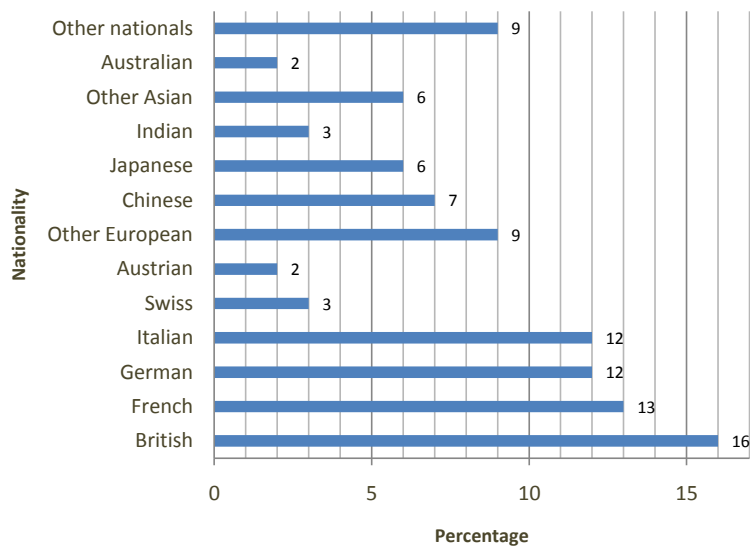


Figure 2 Tourist arrivals by nationality

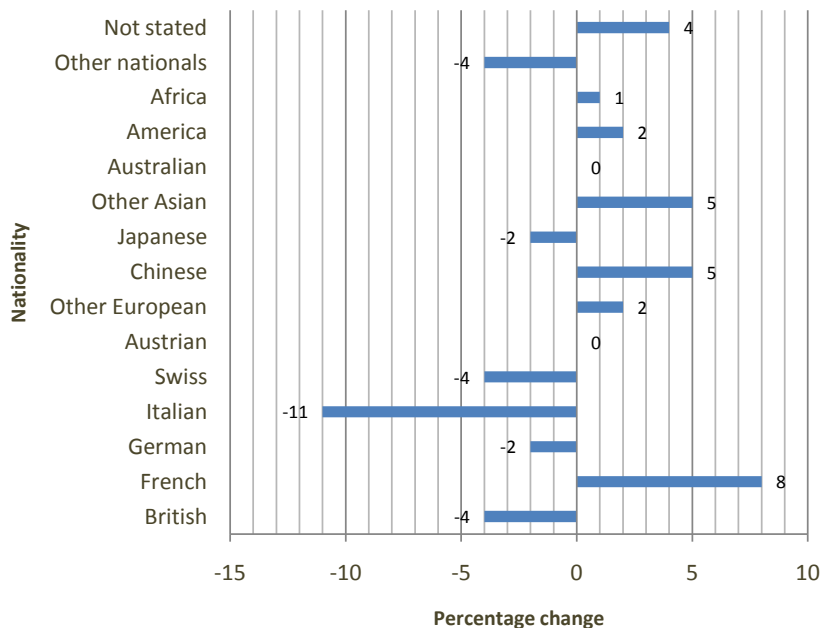


Figure 3 Percentage change (2008-2004) in tourist arrivals to the Maldives

The majority of visitors to the Maldives resided in their country of nationality. Of tourists to the Maldives, 17% of Chinese nationals and 12% of German nationals stated they resided in a country other than country of nationality (Figure 4). The high number of Chinese visitors residing elsewhere could be due to Hong Kong and Taiwanese residents carrying Chinese passports.

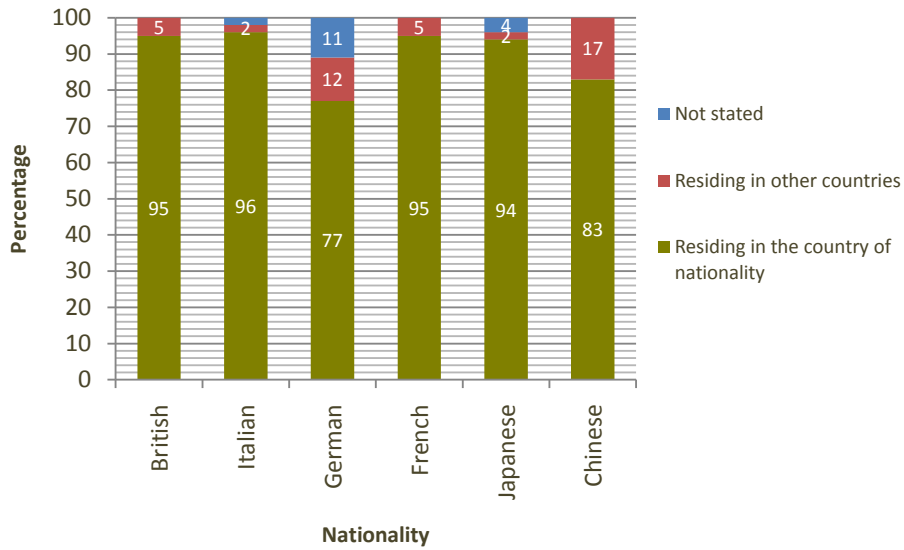


Figure 4 Tourist arrivals by nationality and country of residence





# DEMOGRAPHIC PROFILE





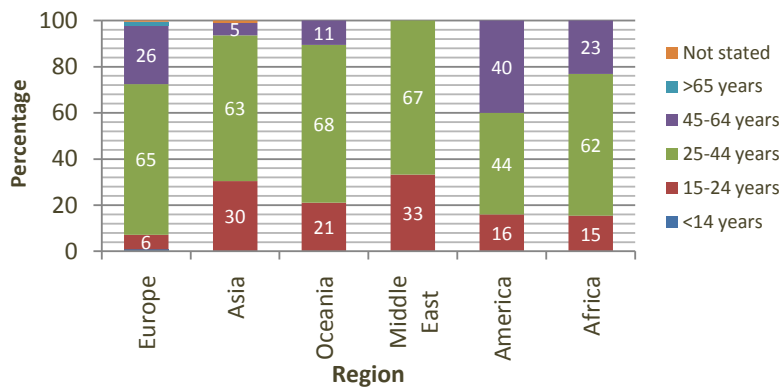
PHOTO: MOHAMED SHINAZ SAEED

## 2. DEMOGRAPHIC PROFILE

### *Gender & age*

The proportion of male tourists who visit the Maldives is slightly greater than females.

Majority of tourists who travelled to the Maldives were in the 25 to 44 years age group. Of the European visitors, 65% were in the 25 to 44 years age group while 26% were in the 45 to 64 years age group. The highest numbers of visitors in the 15 to 24 years age group were from Middle East (33%) and Asia (30%) (Figure 5). Among American visitors, the Maldives was equally popular in both 24 to 44 years age group (44%) and 46 to 64 years age group (40%).



The number of male tourists who visit the Maldives is slightly greater than females. For every 100 female tourists visiting the Maldives there were 108 male tourists. The Middle East had the greatest gender disparity in arrivals with around 65% of arrivals being male.

Figure 5 Tourist arrivals by region and age group





# PURPOSE OF VISIT



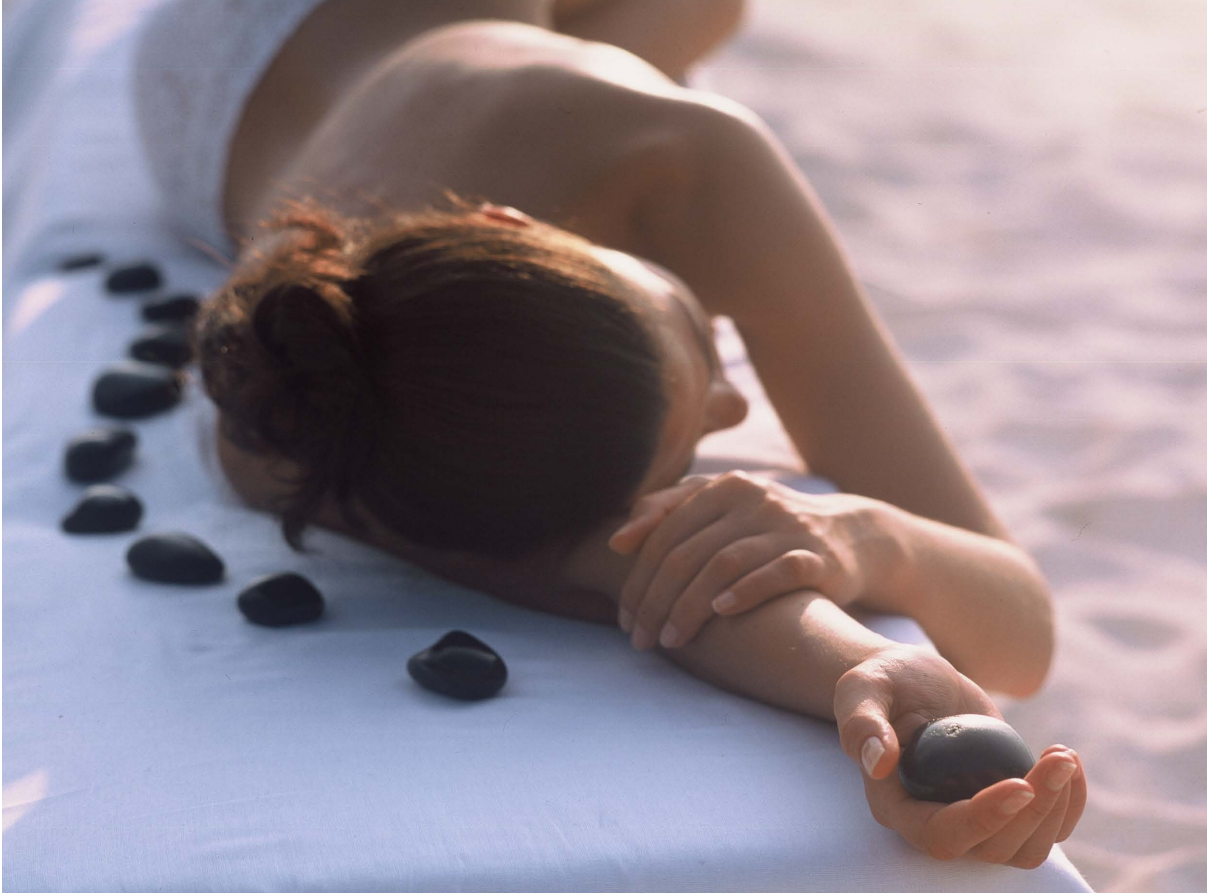


PHOTO: CAROLINE VON TUEMPLING

### 3. PURPOSE OF VISIT

#### *Purpose*

The main reasons for visitors coming to the Maldives were relaxation (55%); honeymoon (28%) and diving (11%) (Figure 6).

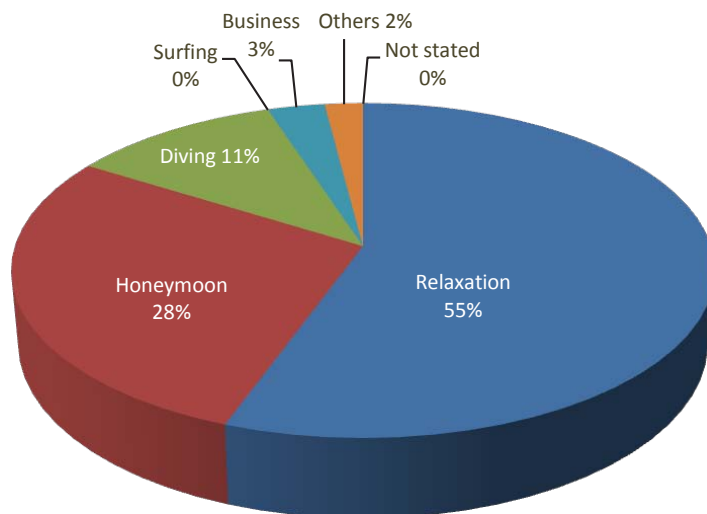
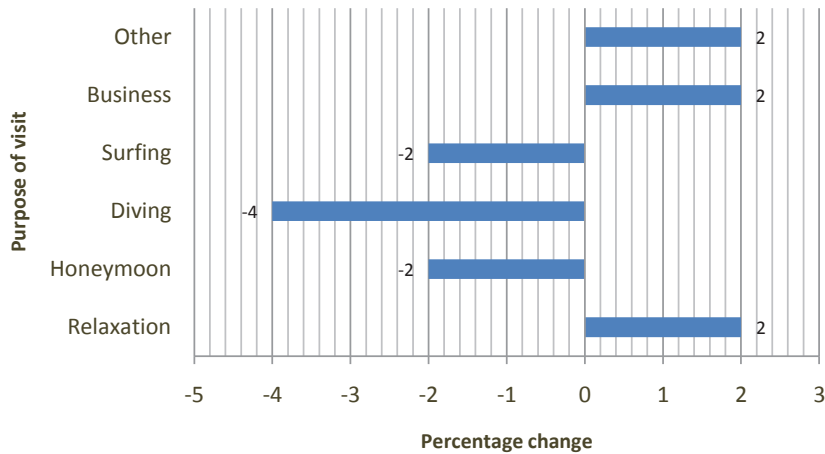


Figure 6 Purpose of visit to the Maldives



The tourists who came to the Maldives for relaxation and business in 2008 went up by 2% when compared to the arrivals in 2004. On the other hand, the visitors who stated diving as purpose of visit decreased by 4% in 2008 compared to 2004 (Figure 7).

Figure 7 Percentage change (2008-2004) in purpose of visit

Of the visitors, 64% of Europeans and 56% of Americans cited relaxation as their primary purpose of visit to the Maldives. The honeymoon market was the most significant among Australians (68%) and Asians (56%) (Figure 8).

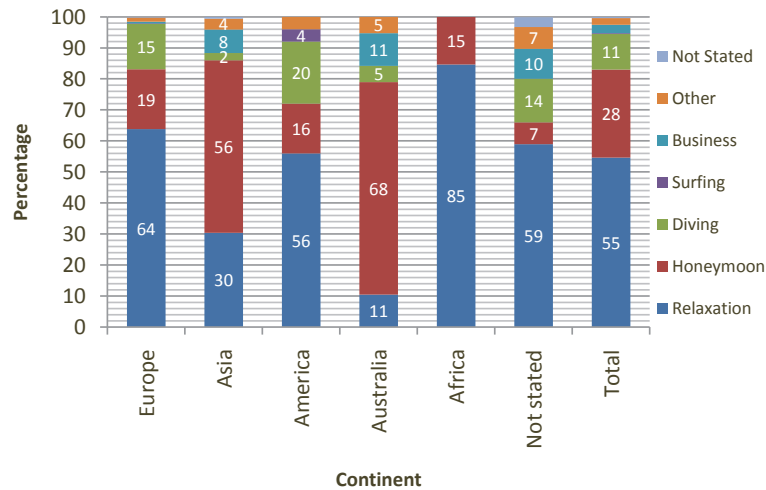


Figure 8 Purpose of visit to the Maldives by continent

The main reason European visitors come to the Maldives is for relaxation. Of the European visitors, 70% Germans, 66% Italians, 64% Swiss, 64% British and 59% French cited relaxation as their purpose of visit. Honeymooning was popular among Italians

(28%), French (22%) and British (22%) while Swiss (36%) and Germans (24%) cited diving as their purpose of visit (Figure 9).

The main reason Asian visitors come to the Maldives is for honeymoon. Of the Asian visitors, 70% Indians, 58% Japanese and 56% Chinese stated honeymooning as their main purpose of visit.

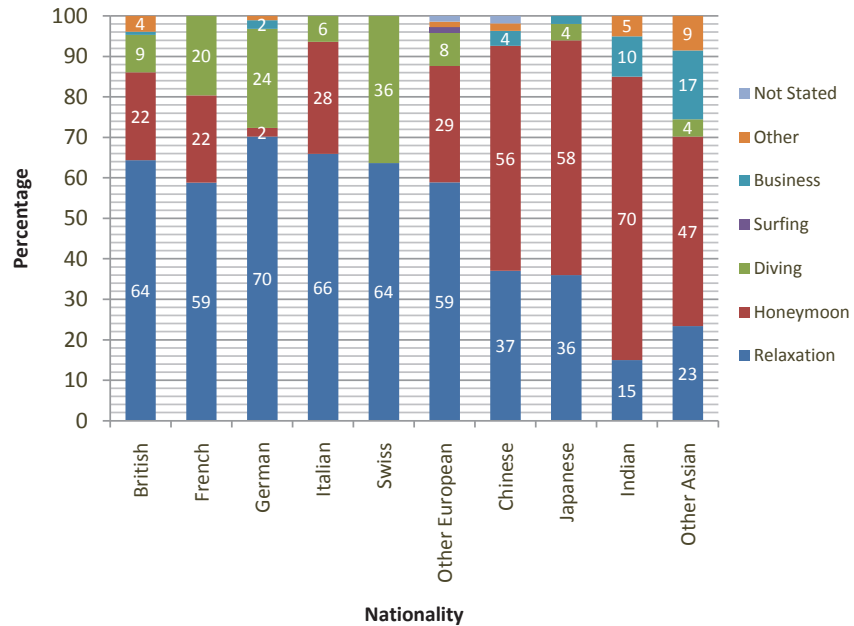


Figure 9 Purpose of visit to the Maldives by Nationality

### Maldives as a holiday destination

The main reasons for choosing the Maldives as a holiday destination were peacefulness and tranquility (34%); white sandy beaches (31%) and climate (18%). Only 1% cited price as a determining factor in choosing the Maldives (Figure 10).

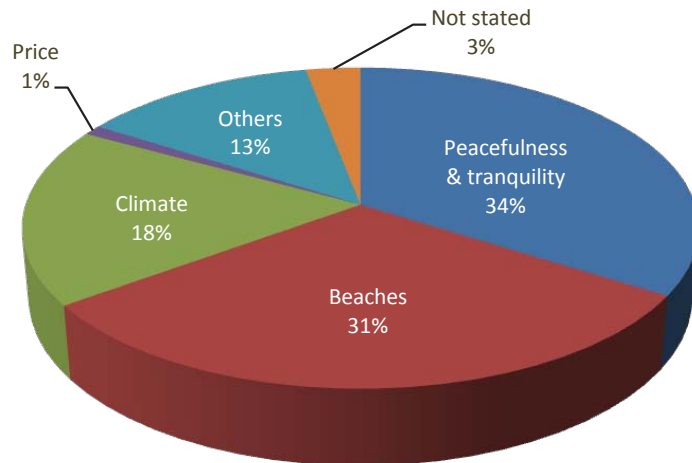


Figure 10 Reason for choosing the Maldives for holiday





# SOCIO-ECONOMIC PROFILE





PHOTO: CAROLINE VON TUEMPLING

#### 4. SOCIO-ECONOMIC PROFILE

##### *Profession*

Persons working as professionals (39%) accounted for the largest proportion of tourists to the Maldives followed by legislators, senior officials or managers (16%), and technicians or associate professionals (11%) (Figure 11). In the survey, 12% of the visitors did not state their occupation.

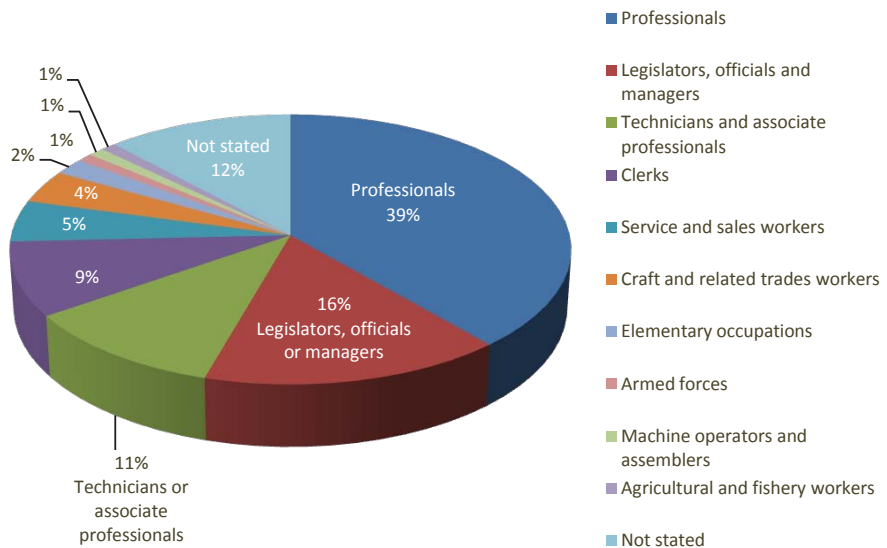


Figure 11 Tourists to the Maldives by occupational categories

There is no significant gender gap in the occupations of tourists to the Maldives. The highest gender disparity was among technicians and associate professionals (15% males to 6% females); clerks (6% males to 14% females); legislators, senior officials or managers (19% male to 13% female), and elementary occupations (0% males to 4% females) (Figure 12).



Figure 12 Occupations of holiday visitors by gender

### Income

Of the tourists to the Maldives, 36% earn more than USD 41,000 annually. Middle income earners who earn between USD 31,000 to 40,000 annually accounted for 9% of visitors. Low income earners within the income brackets of USD 21,000 to 30,000 and USD 20,000 or less annually made up 21% and 14% of visitors respectively (Figure 13). One fifth of tourists to the Maldives did not reveal their annual income.

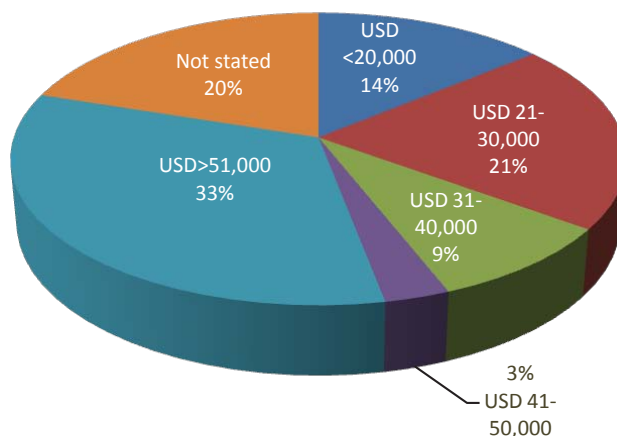


Figure 13 Annual income of tourists to the Maldives

The number of high income earners visiting the Maldives has risen by 16% in 2008 when compared to year 2004. On the other hand, the number of lower income earners has declined by 5% in the same period indicating that the Maldivian tourism industry is becoming more reliant on the higher income market (Figure 14).

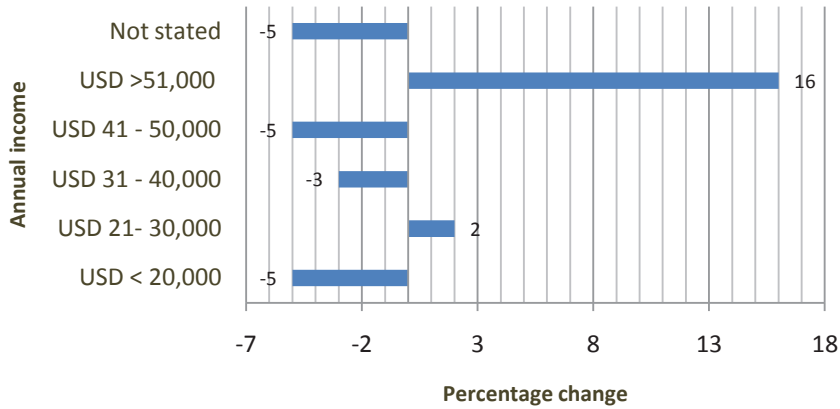


Figure 14 Percentage change (2008-2004) in income of tourists

Of the tourists to the Maldives, 68% of Americans, 50% of Australians, 50% of Africans and 33% of Europeans earn more than USD 51,000 annually. Half of the Asian holiday visitors to the Maldives earned less than USD 30,000 annually (Figure 15)

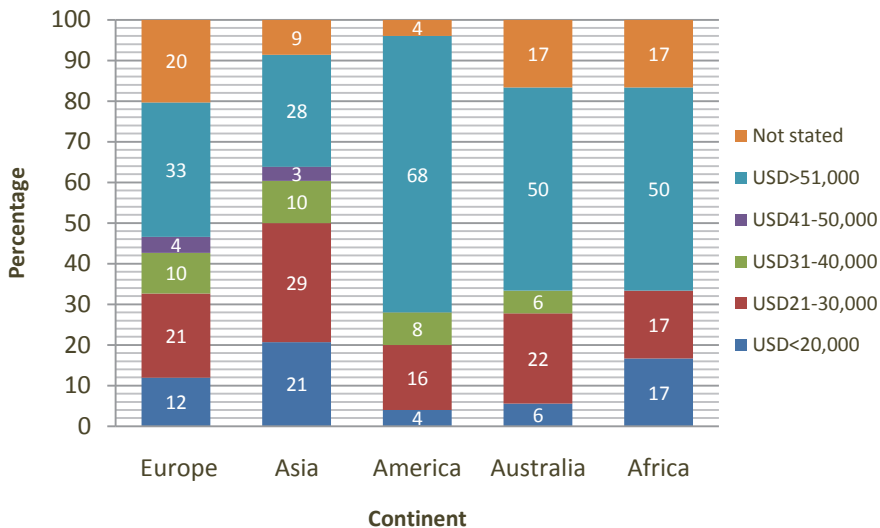


Figure 15 Annual income of tourists by continent

Of the European tourists, 73% of Swiss, 50% of British, 28% of Germans, 26% of French and 17% of Italians earned more than USD 51,000 annually. One third of Italians (29%) who visited the Maldives for holiday earned within the USD 21,000 to 30,000 income bracket (Figure 16).

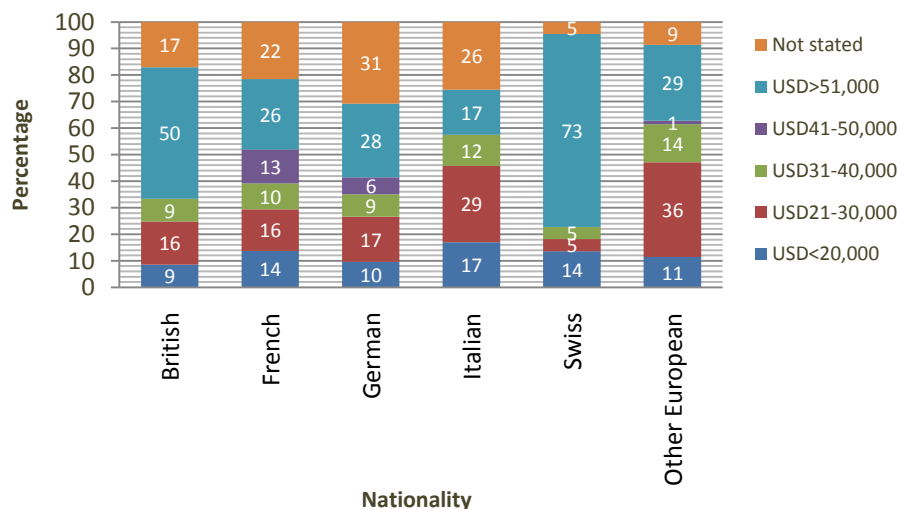


Figure 16 Annual income of European tourists to the Maldives

Among the Asians visiting the Maldives for holiday, the wealthiest group was the Japanese of whom 48% earn more than USD 51,000 annually. Of the Indian tourists, 25% earned more than USD 51,000 annually while 25% earned less than USD 20,000. Of the Chinese tourists to the Maldives, 15% earned more than USD 51,000 while 33% earned less than USD 20,000 annually (Figure 17).

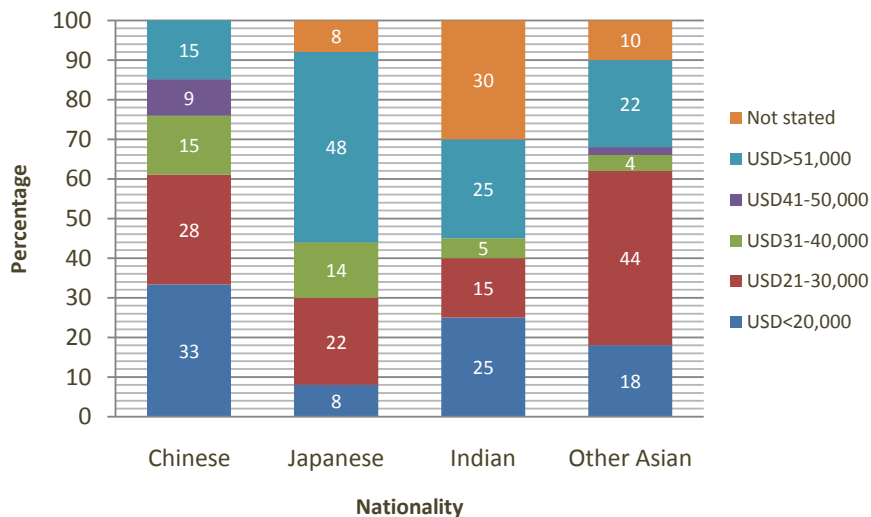


Figure 17 Annual income among Asian nationalities



# TRAVEL ORGANIZATION





PHOTO: ANDREA POHLMAN

## 5. TRAVEL ORGANIZATION

### *Airlines used*

Singapore Airlines (16%), Sri Lankan (15%) and Emirates (14%) were the most popular airline choices of tourists to the Maldives (Figure 18).

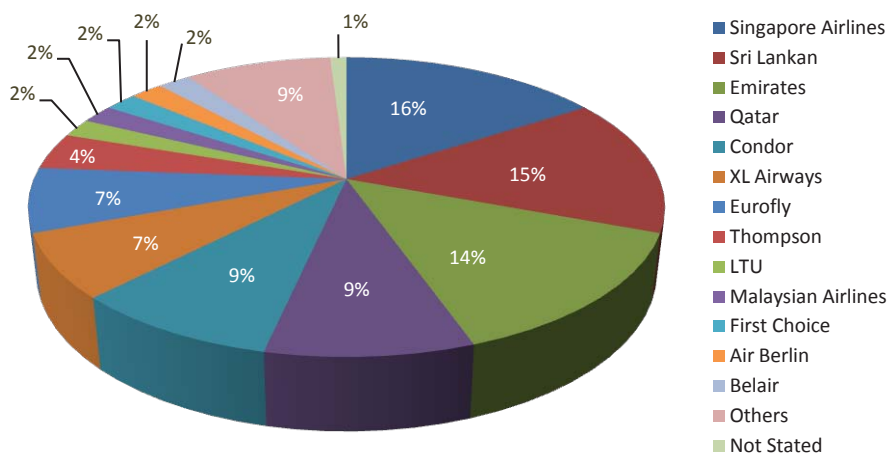


Figure 18 Airlines used by tourists to travel to the Maldives

Of the tourists to the Maldives, 45% used travel agents while 24% used tour operators and 24% used internet to organize their trip (Figure 19).

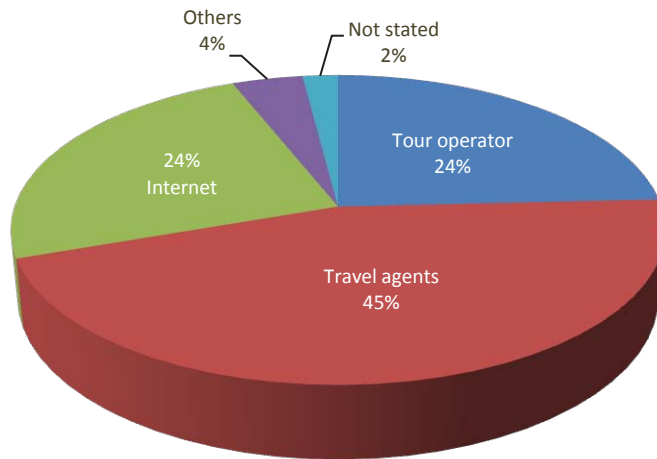


Figure 19 Mode of Trip organization by tourists

### Source of information

The most common source of pre-arrival information for tourists was friends/relatives (24%) followed closely by internet (23%) and travel agents (18%) (Figure 20).

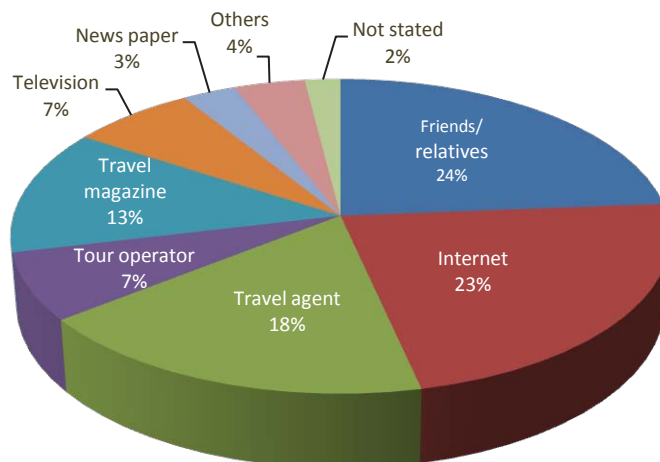


Figure 20 Source of pre-arrival information about the Maldives

Of the tourists, 30% used electronic media and 16% used print media to obtain information about the Maldives. The change in source of pre-arrival information shows there was an increase of 6% in use of print media and 2% increase in use of internet in 2008 compared to 2004 (Figure 21).

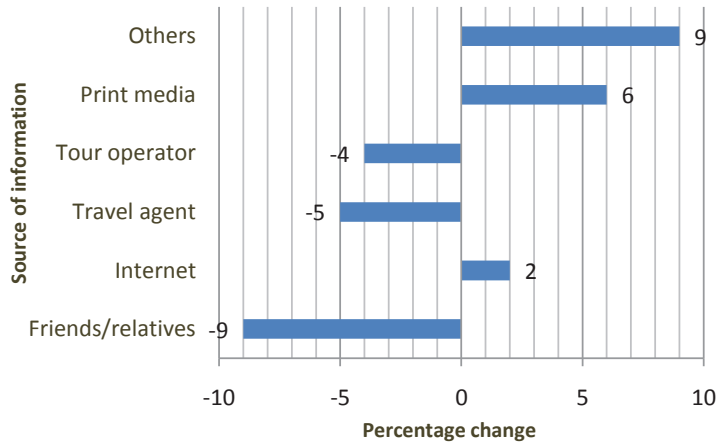


Figure 21 Percentage change (2008-2004) in source of pre-arrival information about Maldives

### Travelling companion

Of all tourists to the Maldives, 67% travelled as an adult couple; while 18% travelled as a group of family, friends or relatives; and 6% travelled unaccompanied (Figure 22).

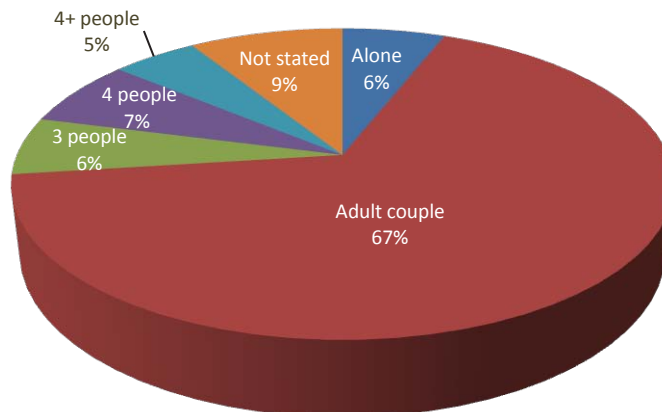
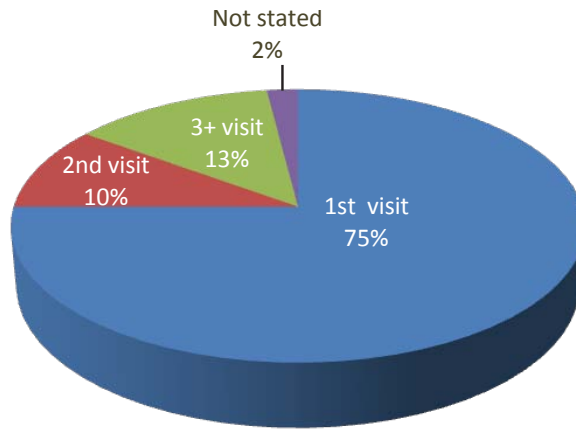


Figure 22 Travel party and number of companions

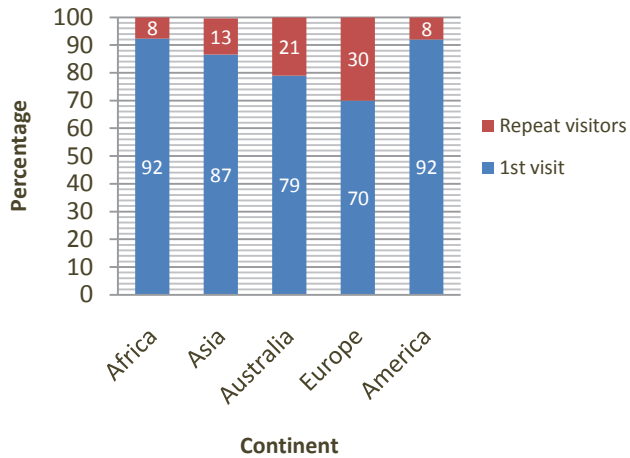
***Frequency of visit***

Of the tourists, 75% identified themselves as first time visitors while 10% and 13% cited as their second and third visit respectively (Figure 23).



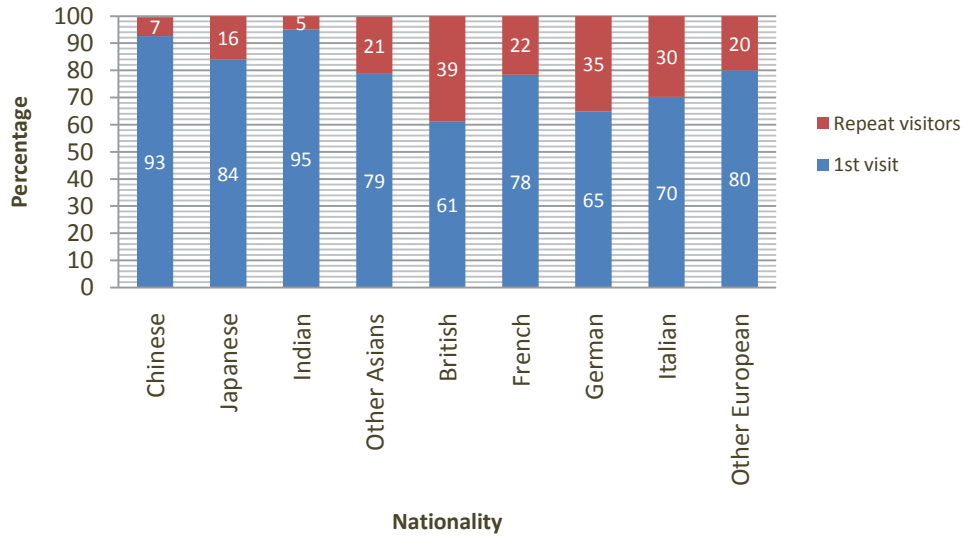
*Figure 23* Number of return visits to the Maldives by tourists

Most of the repeat visitors were from Europe (30%), followed by Australia (13%) and Asia (13%) (Figure 24).



*Figure 24* First time visitors and repeat visitors by continent

Of the European repeat visitors, 39% were British, 35% German, 30% Italian and 22% French. Only 13% of Asians visited the Maldives more than once (Figure 25).



*Figure 25 First time visitors and repeat visitors by nationality*

The 2004 survey showed that 18% of tourist arrivals to the Maldives were repeat visitors, whereas in 2008, repeat visitors have increased to 25%.





## EXPERIENCES & ACTIVITIES

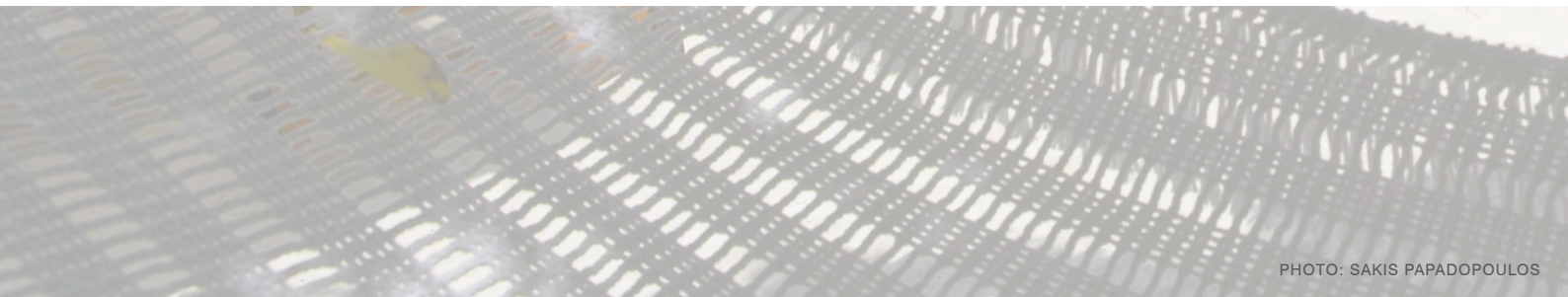






PHOTO: MOHAMED SHAMEEM

## 6. EXPERIENCES AND ACTIVITIES

### *Place of stay*

The Tourist Profile and Opinion Survey (2008) identified the type of accommodation preferred when visiting the Maldives. Of the tourists, 90% stayed in resorts while 4% stayed in hotels and guesthouses and 2% stayed on safari vessels (Figure 26).

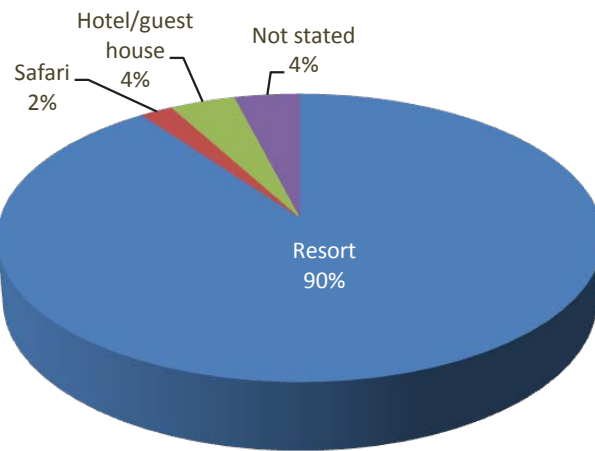


Figure 26 Type of accommodation selected by tourists

Five different meal plans are offered to tourists to the Maldives. Of the 776 visitors who responded to the survey, 32% opted for full-board while 31% chose all-inclusive, 19% chose half board and 13% chose bed and breakfast. The room-only plan was chosen by 2% of those surveyed (Figure 27).

When compared with 2004 meal preferences the general trend has remained the same with full-board and all inclusive as the two most popular options.

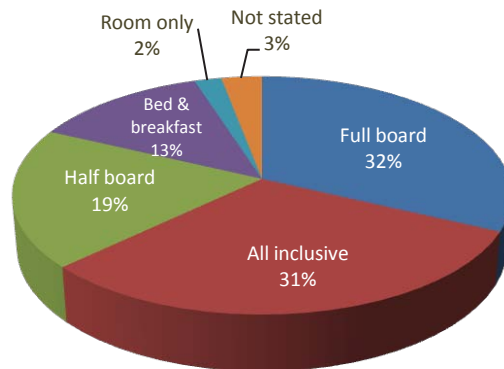


Figure 27 Types of meal-plan chosen by tourists

### ***Duration of stay***

Of the tourists, 51% stayed in the Maldives for 4-7 days while 45% stayed more than 7 days. Only 4% stayed less than 4 days (Figure 28). The average length of stay of 8 days has remained constant since 1999.

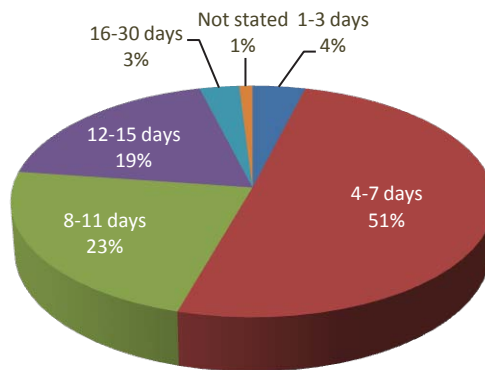


Figure 28 Duration of stay in the Maldives

**Activities enjoyed**

This survey explored what activities the tourists enjoyed most in the Maldives. Of all the tourists, 32% enjoyed diving, 20% spa treatments and 18% water sports (Figure 29).

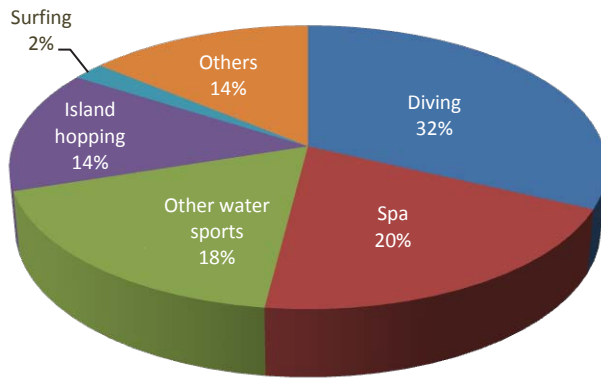


Figure 29 Activities most enjoyed by tourists

Of the tourists by region, Asians (40%) and Australians (31%) enjoyed water sports most while diving was the most popular activity among Africans (32%) and Europeans (27%) (Figure 30).

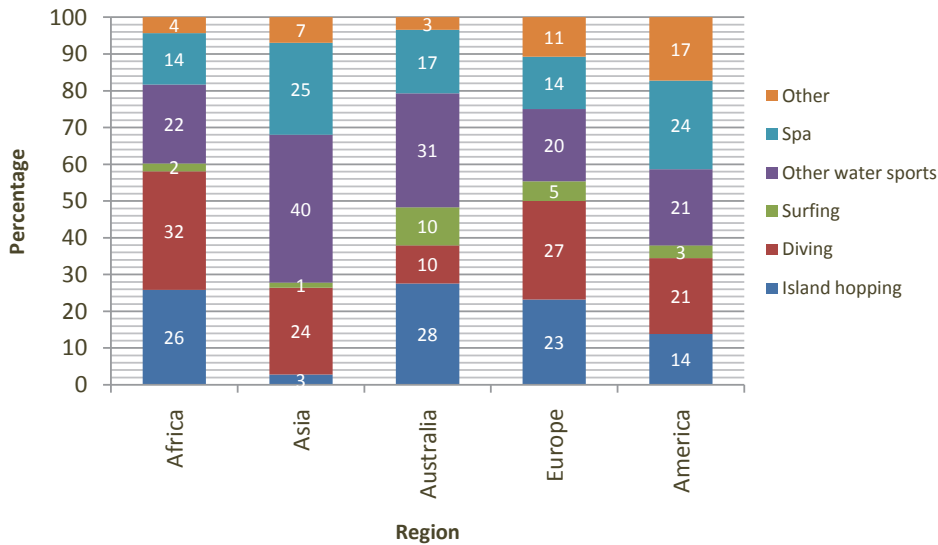


Figure 30 Activities most enjoyed by geographical region

Of the European tourists to the Maldives, diving was the most popular activity among French (49%), Swiss (38%), German (38%) and British (26%) while Italians (38%) enjoyed island hopping most (Figure 31).

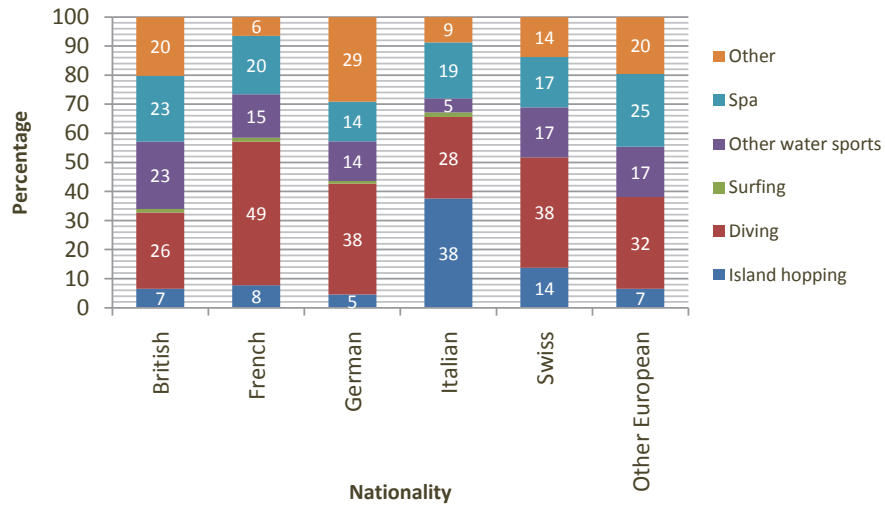


Figure 31 Activities most enjoyed by Europeans

Of the Asian tourists, 40% Japanese and 31% Indians stated water sports as the activity they enjoyed most, while 32% Chinese enjoyed diving most (Figure 32).

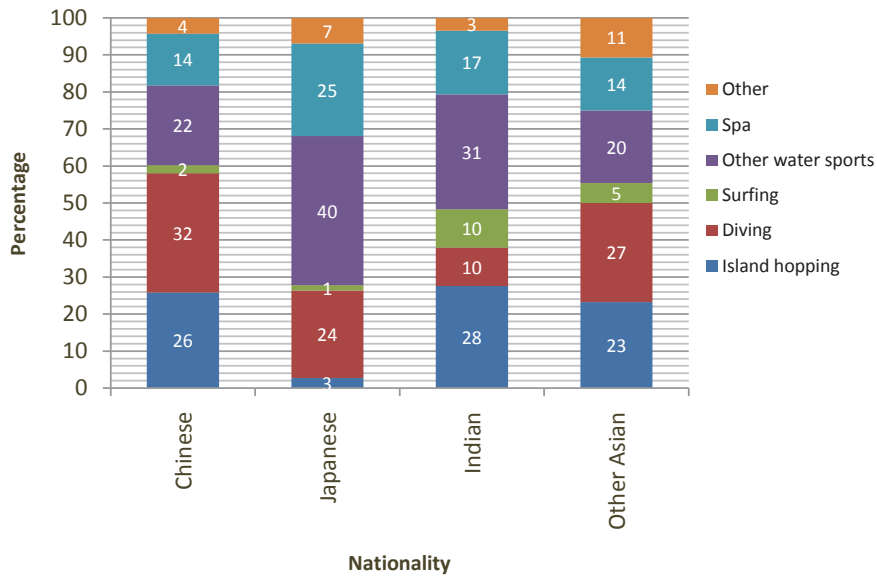


Figure 32 Activities most enjoyed by Asians

A comparison of activities most enjoyed by gender shows that more males (38%) enjoy diving than females (28%). Spa treatments were more popular among females (22%) than males (16%). Water sports and island hopping were equally popular among both sexes. Only 2% stated surfing as an activity they enjoyed (Figure 33).

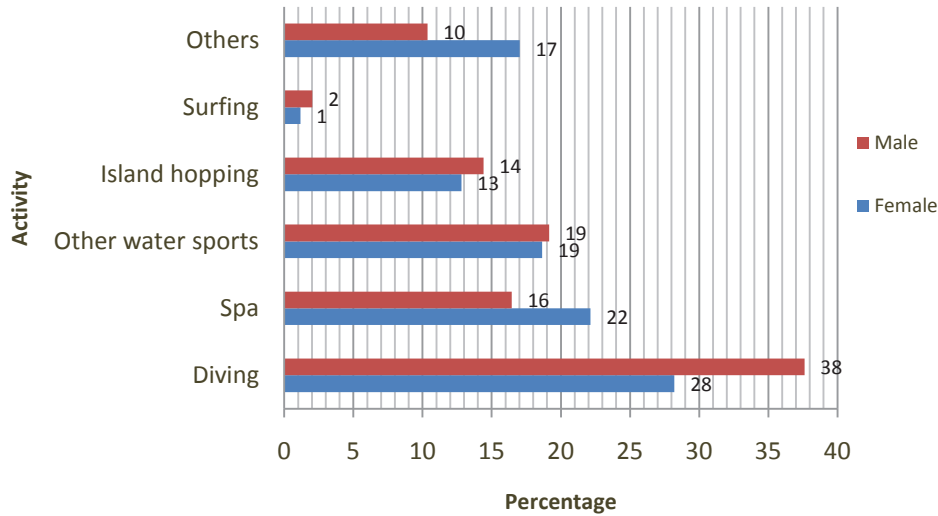


Figure 33 Activities most enjoyed by tourists by gender

Although Male’ - the capital of the Maldives, lies a short distance away from the resorts only 30% of the tourists visited the capital city. Of the visitors to Male’, 70% stated sightseeing as their main purpose to visit Male’, while 14% stated shopping (Figure 34).

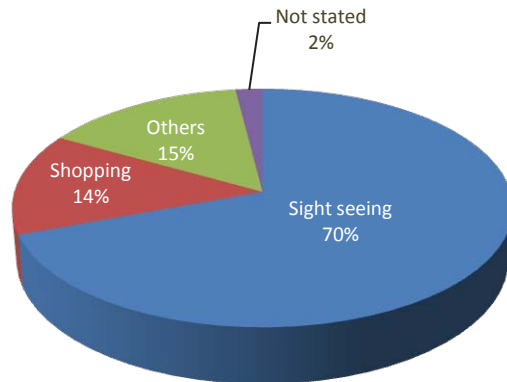


Figure 34 Main purpose of visit to Male’

Of the visitors to Male', 63% used the assistance of tour guides while 35% reported not having availed such assistance. Over 40% of visitors to Male' rated the service quality of tour guides as 'excellent' in all categories inquired while less than 10% rated services as 'poor' in all categories (Figure 35).

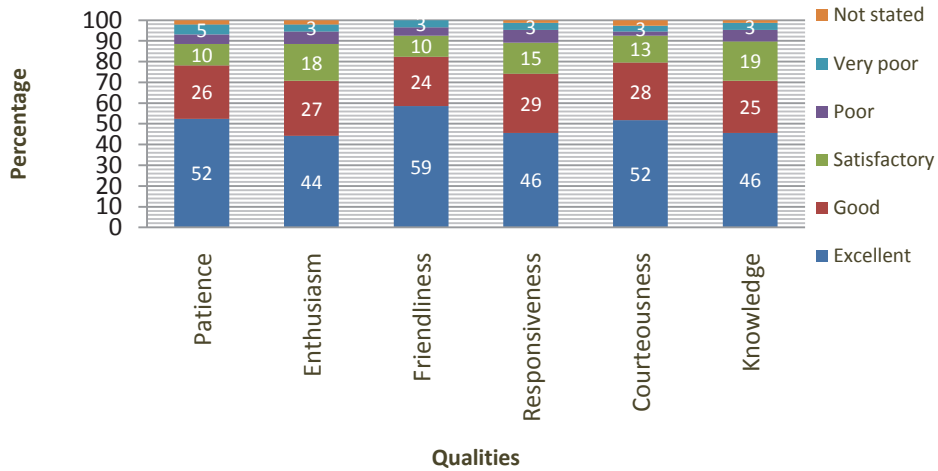


Figure 35 Service quality rating for Male' tour guides

### Expenditure in the Maldives

The trip expenditure in the Maldives per tourist is low. Of the visitors, 48% spent below USD 1,000 per trip. On the other hand, 10% of visitors spent over USD 5,000 during their visit to the Maldives (Figure 36).

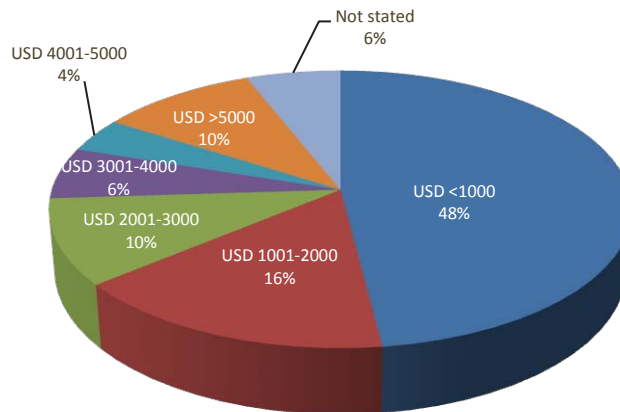


Figure 36 Expenditure per trip by visitors in the Maldives (excluding tour package)



## VISITOR SATISFACTION







PHOTO: GEORGE FISCHER

## 7. VISITOR SATISFACTION

### *Services at the airport*

Overall satisfaction of the visitors who visited the Maldives during the survey period in 2008 indicated an improvement in services (32%) compared to the 2004 (22%). In particular, tourists were most satisfied by the services received by resort airport representatives and the transfer by boat/launch staff. Of the tourists, 45% rated the services of airport representatives as ‘excellent’ while 42% of tourists rated the services of resort transfer speed boats as ‘excellent’ (Figure 37).

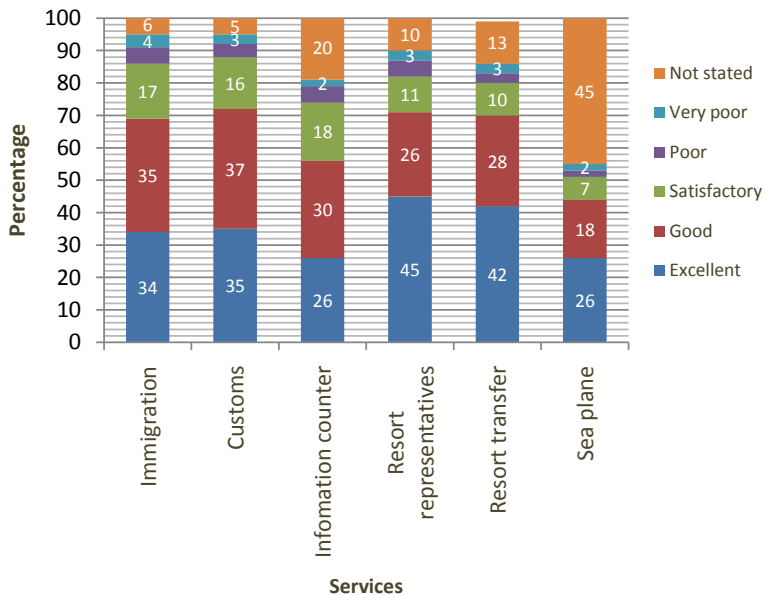


Figure 37 Ratings on services provided at the Malé international airport

Of the tourists to the Maldives, only 34% rated immigration services as 'excellent', while only 35% rated customs services as 'excellent'. Less than 26% rated the services at the information counter as 'excellent'. Twenty percent of respondents did not state their rating for the service provided by the information counter at the airport. Perhaps, the information counter was not commonly used by the tourists. For an up market holiday destination, airport services have to be outstanding. Several of the visitors commented on the need for a speedier immigration process and friendly greetings.

Of all tourists to the Maldives, 64% stated the airport services being more than satisfactory. However, when compared with airport services satisfaction levels in 2004 (73%) there was a drop of nine percentage points in 2008. A higher percentage of tourists stated the service to be either 'poor' or 'very poor' in 2008 (7%) than in 2004 (4%).

It should be noted that a high percentage (just under 45%) of those surveyed did not respond to the question regarding the sea-plane service. This was probably because many respondents have not used the sea plane service and may have thus left the question unanswered.

### *Services at the place of stay*

The quality of place of stay was assessed on both front-line visitor services and facilities. The quality aspects assessed were accommodation, food, beverages, cleanliness, hospitality, resort facilities and recreational facilities. On average 44% of tourists rated their place of stay as 'excellent' in all 7 categories assessed while 32% rated as 'good' and 12% rated as 'satisfactory'. On the other hand, 7% were not satisfied with the service/facilities at their place of stay.

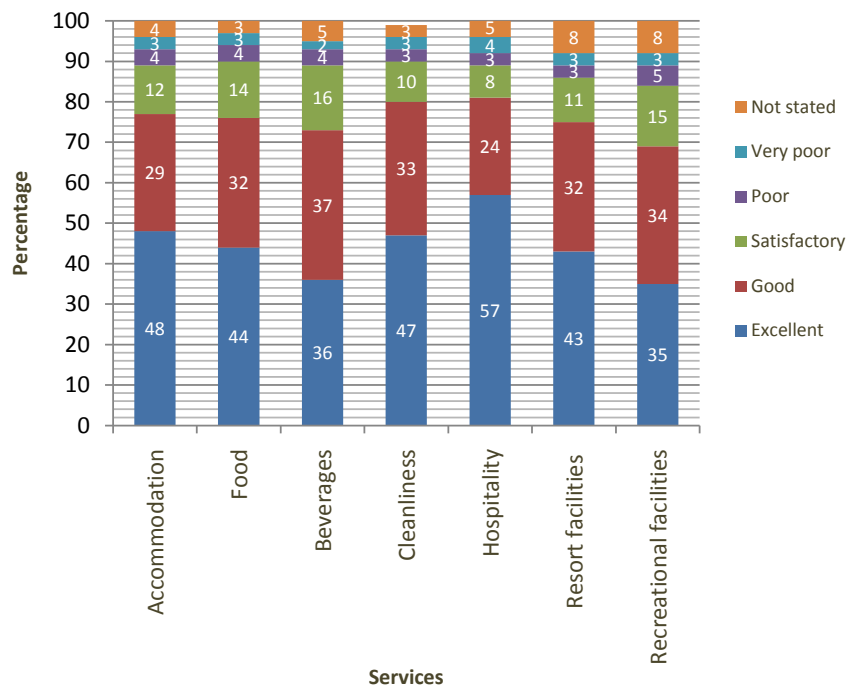


Figure 38 Service ratings for place of stay in the Maldives

Hospitality was rated as ‘excellent’ by 57% of tourists and accommodation was rated as ‘excellent’ by 48% of the visitors (Figure 38).

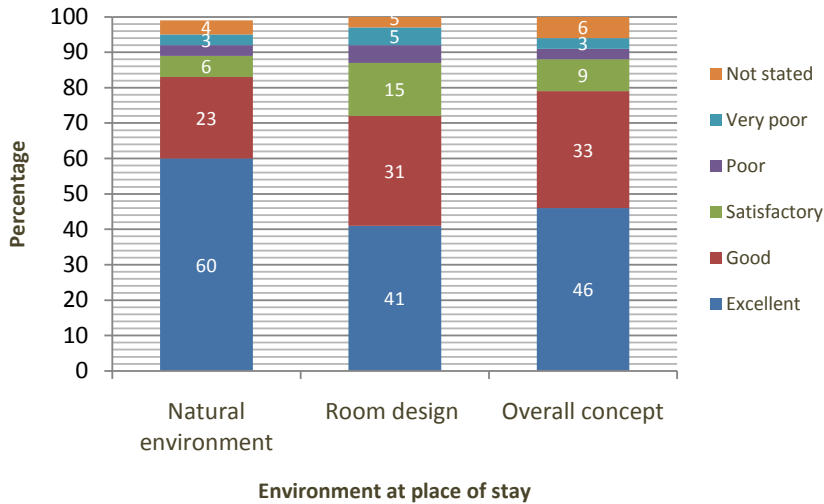
The recreational facilities and beverages are the areas where there is most room for improvement. Recreational facilities were rated as ‘excellent’ by only 35% of holiday visitors. Tourists stated the need for more recreational facilities in the place where they stayed. Only 37% of visitors rated beverages as ‘excellent’.

Although visitor satisfaction levels are impressive in 2008 and confirm the high quality of the Maldives tourism product, they represent a slight decline from 2004 levels. In 2004, of all tourists, 50% stated services and facilities at their place of stay being ‘excellent’; 35% stated them being ‘good’; 8% stated them being ‘satisfactory’; and 1% reported the services and facilities to be either ‘poor’ or ‘very poor’.

***Environment at place of stay***

Tourists were more than satisfied with their place of stay. The natural environment of the place was the most appreciated with 60% of tourists rating it as ‘excellent’ and 23% rating as ‘good’ (Figure 39).

The two other aspects queried about also received more than satisfactory ratings from over 50% of respondents. The overall concept of resort/hotel was rated as ‘excellent’ by 46% of visitors and as ‘good’ by 33%. The design and interior decoration of the room was rated as ‘excellent’ by 41% while 31% rated it as ‘good’. These opinions show that the place of stay in the Maldives are of a high quality and meets the expectations of most customers.



*Figure 39 Rating for environment of place of stay in the Maldives*

### Perception of prices

Prices charged for accommodation and food in the Maldives is reasonable. Of the tourists to the Maldives 53% considered accommodation prices as 'reasonable' while 32% perceived the prices to be 'expensive'. Of the visitors 51% considered food prices as 'reasonable' while 30% perceived them to be 'expensive' (Figure 40).

Overall, the prices of water, alcoholic beverages and soft drinks were found to be 'expensive' in the Maldives. The prices charged for drinking water in the resorts of the Maldives was considered 'expensive' by 40% of tourists. Alcoholic beverages and soft drinks were considered 'expensive' by 38% and 36% of visitors respectively.

The souvenir items were considered 'expensive' by 40% of visitors.

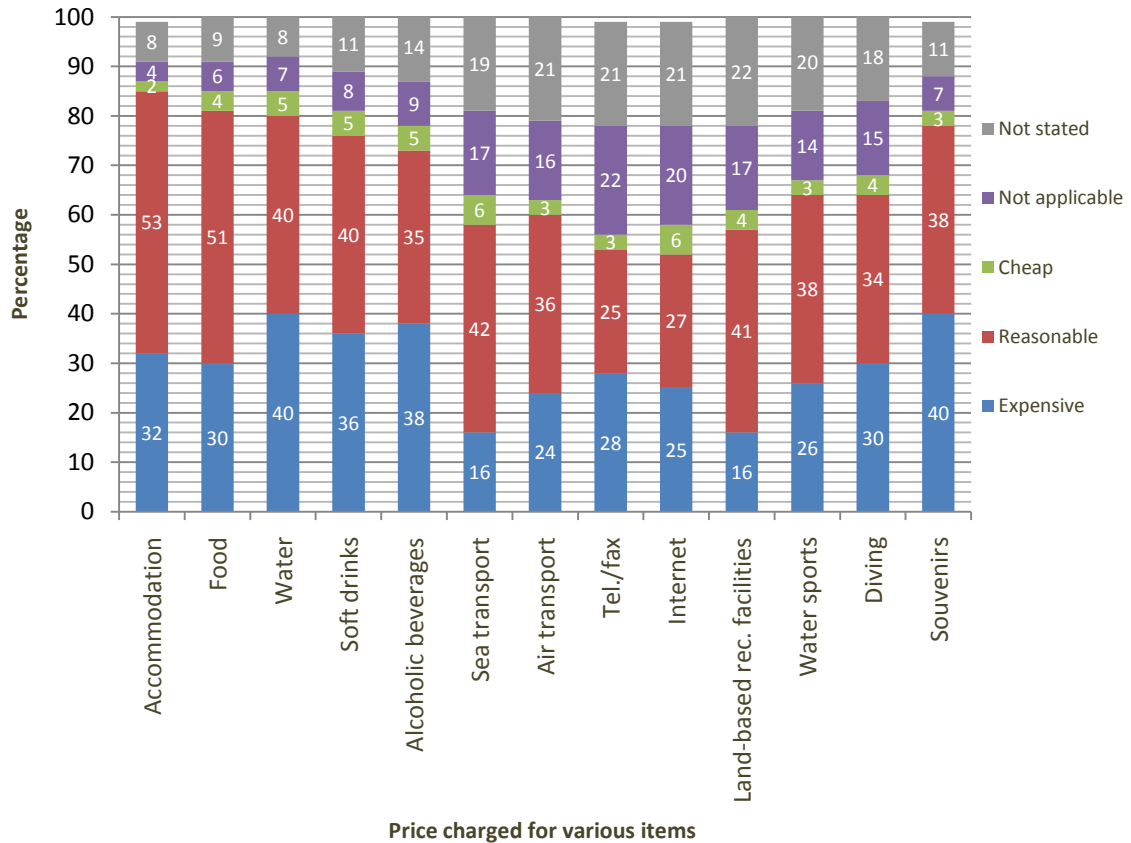


Figure 40 Rating for price of items in the Maldives

In case of transportation, 36% of visitors perceived air transport prices to be 'reasonable' while 24% perceived the prices to be 'expensive'. Sea transport prices were seen as 'reasonable' by 42% and as 'expensive' by 16%.

Amongst sports and recreational activities; land based recreational facilities were perceived as reasonably priced by 41%, water sports by 38% and diving by 34%. On the other hand, diving was perceived as 'expensive' by 30%, water sports by 26% and land based recreational facilities by 16% of visitors.

With respect to communication facilities; internet was seen as reasonably priced by 27% and as 'expensive' by 25% while telephone/fax was seen as reasonably priced by 25% and as 'expensive' by 28%. The high number of 'not applicable' and 'non-responses' to communication prices could be explained by the increasing popularity of international roaming. More tourists now use their own mobile phones for communication during travel.





# OVERALL PERCEPTION OF THE HOLIDAY

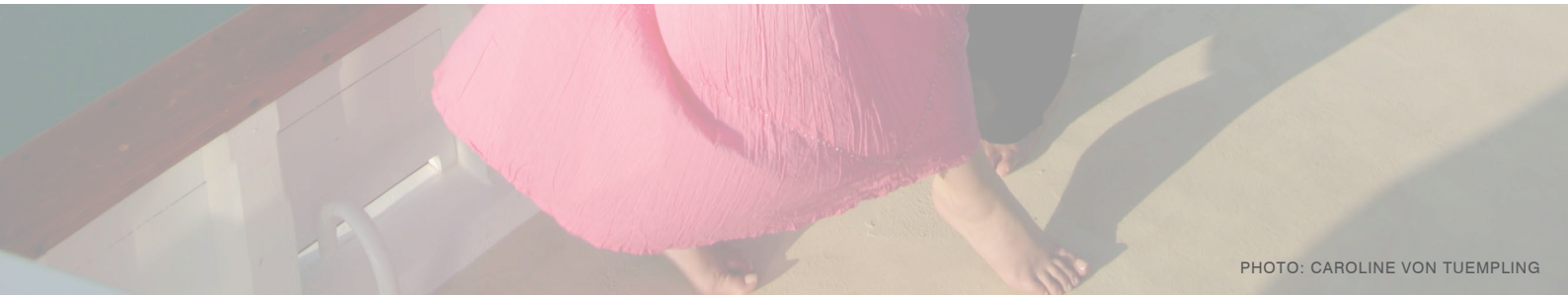




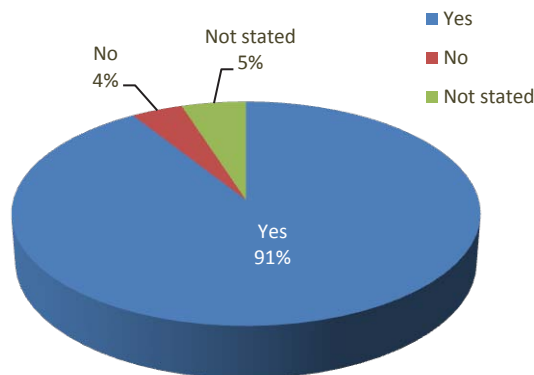


PHOTO: MOHAMED AZMEEL

## 8. OVERALL PERCEPTION OF THE HOLIDAY

### *Overall satisfaction*

The overwhelming majority of tourists (91%) stated that the holiday met their expectations. Only 4% of visitors felt that holiday did not meet their expectations (Figure 41). These levels of satisfaction are similar to those recorded in 2004.



*Figure 41* Holiday met with expectation

The reasons given by the 4% of tourists whose holiday did not meet their expectations were that it was too expensive; environmental issues; people not being friendly; lack of satisfaction with the services provided; and lack of female staff on re-

sorts. This last factor could be explained by the fact that the tourism industry employs relatively few females. Female tourists accompanying children often feel more comfortable with female service providers. The stated environmental issues are damaged reef and corals, poor underwater visibility, and beaches having pebbles.

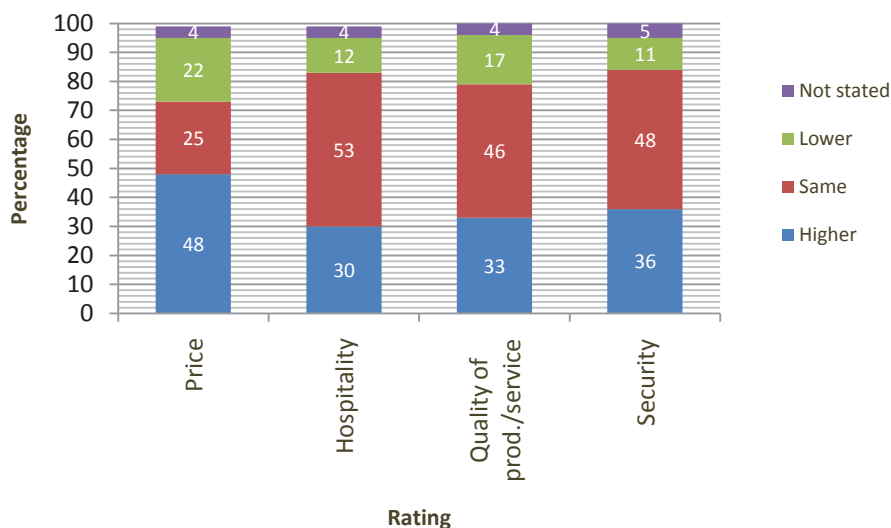
### ***Comparison with similar destinations***

Almost half (48%) of the tourists stated that they had not visited a destination similar to the Maldives. On the other hand, 44% of visitors reported having visited other destinations similar to the Maldives.

Among the tourists who had visited destinations similar to the Maldives, the most commonly visited were Phuket in Thailand (12%), Mauritius (9%) and Seychelles (7%). The Caribbean, Bali, Malaysia, Tahiti, Hawaii, Fiji, Philippines, Bahamas, Indonesia, Hainan Island and Goa were among the other destinations that tourists to the Maldives had previously been to.

Half of the tourists to the Maldives rated the quality of product or service, security and hospitality in the Maldives to be at the same level as in the similar destination they had visited last. A third of tourists rated the Maldives as better in these categories while 13% believed the other destinations were better. These ratings too are testament to the high quality of the Maldives tourism product. It shows the country is competitive with other similar destinations.

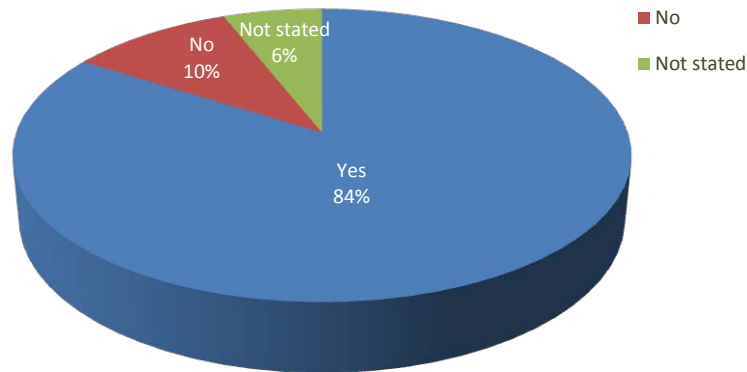
Of the tourists to the Maldives, 48% perceived prices in the Maldives to be higher than prices in the similar destination they had visited last. Almost an equal proportion of visitors perceived the prices to be either the same or lower in the Maldives (Figure 42). This indicates that the Maldives does not have a significant price disadvantage when compared to similar competitors.



**Figure 42** Rating of the Maldives compared to similar destinations

### ***Intention to visit again***

Over 90% of the tourists were very happy with their holiday experience in the Maldives and 84% of them expressed their intention to visit again (Figure 43).



**Figure 43** *Intention to visit the Maldives again*

Of the 10% of visitors who stated that they did not intend to visit again, the main two reasons given were: the Maldives being expensive and their desire to see new places. Less common reasons for the decision to not visit again included: feeling the Maldives was a once in a life time experience; the resort being too westernized; a need for better facilities; lack of night life; and lack of recreational activities.

### ***Recommend the Maldives***

Of the tourists, 98% stated that they would recommend the Maldives to others as a holiday destination. This is very positive and extremely important as nearly a quarter of holiday visitors stated that they came to know about the Maldives through their friends and family.

## 9. METHODOLOGY

Data for this study was collected through a survey conducted at Male' International Airport from 21 to 27 December 2008. This week long survey targeted all tourists departing from the Maldives. Questionnaires were given at the check-in counters and completed questionnaires were collected at the departure gates.

This survey was conducted in the period when the decline in visitor arrivals due to the 2008 global economic recession began. A 4% decline in arrivals was recorded for December 2008 compared with December 2007.

The questionnaire was prepared in six different languages. Altogether 1,271 questionnaires were distributed. Of the 807 completed questionnaires that were collected, 776 were completed to the level fit for analysis. Table 1 shows the number of questionnaires printed, distributed and completed.

*Table 1 Questionnaires printed, distributed and completed in different languages*

LANGUAGES	NUMBERS			PERCENTAGES		
	Printed	Distributed	Completed	Printed	Distributed	Completed
English	1,550	600	408	31	47	51
Italian	1,000	178	95	20	14	12
German	900	216	96	18	17	12
French	550	156	113	11	12	14
Japanese	400	59	45	8	5	6
Chinese	600	62	50	12	5	6
<b>Total</b>	<b>5,000</b>	<b>1271</b>	<b>807</b>	<b>100</b>	<b>100</b>	<b>100</b>

Tourist arrivals in 2008 were 683,012 of whom 62,578 arrived during the month of December. The survey sample thus amounted to 0.1% of all arrivals during 2008 and 1.2% of arrivals during the survey month of December. This represents one in every thousand tourists that arrived during the year or 12 per thousand of those who arrived in December (Table 2).

**Table 2** Comparison of Tourist arrivals in 2008, December 2008 and Surveyed

NATIONALITY	ARRIVALS (2008)	ARRIVALS DEC. (2008)	SURVEY		
			Number	Percentage (2008)	Percentage (Dec. 2008)
Europe	497560	47453	514	0.1	1.1
Asia	145558	11192	171	0.1	1.5
America	14485	1455	25	0.2	1.7
Oceania	10574	617	19	0.2	3.1
Middle East	9141	1187	3	0	0.3
Africa	5694	674	13	0.2	1.9
Not stated	0	0	31	0	0
<b>Total</b>	<b>683012</b>	<b>62578</b>	<b>776</b>	<b>0.1</b>	<b>1.2</b>

The distribution of tourist arrivals by continents during 2008 and during the survey period showed that Europeans were slightly under-represented in the survey at 66% compared to 73% arrivals in 2008. Other regions closely follow actual annual arrivals.

## 10. STATISTICAL ANNEX

*Table 1* Tourist arrivals by nationality (number surveyed)

Nationality	2008		2004		Percentage change (2008-2004)
	Number	Percentage	Number	Percentage	
British	122	16	668	20	-4
French	102	3	163	5	8
German	94	12	475	14	-2
Italian	94	12	774	23	-11
Swiss	22	3	219	7	-4
Austrian	12	2	57	2	0
Other European	68	9	224	7	2
Chinese	54	7	63	2	5
Japanese	50	6	268	8	-2
Other Asian	67	9	148	4	5
Australian	19	2	58	2	0
America	25	3	33	1	2
Africa	13	2	32	1	1
Other nationals	3	0	131	4	-4
Not stated	31	4	0	0	4

**Table 2** *Tourist arrivals by nationality and age group*

Nationality	Number					
	<14yrs	15-24yrs	25-44yrs	45-64yrs	>65yrs	Not stated
British	2	12	73	34	1	0
French	0	9	67	23	3	0
German	0	3	55	35	1	0
Italian	1	3	69	19	1	1
Swiss	1	3	12	4	0	2
Austrian	0	1	10	1	0	0
Other European	0	2	49	15	2	0
Chinese	0	42	11	0	0	1
Japanese	0	3	42	5	0	0
Indian	0	3	16	1	0	0
other Asian	0	4	39	3	0	1
America	0	4	11	10	0	0
Australia	0	4	13	2	0	0
Middle East	0	1	2	0	0	0
Africa	0	2	8	3	0	0
Not stated	0	1	6	0	0	24

**Table 3** *Tourist arrivals by age group and gender*

Age group	Number			
	Total	Female	Male	Not stated
<14yrs	4	3	0	1
15-24yrs	97	43	41	13
25-44yrs	483	190	214	79
45-64yrs	155	69	77	9
>65yrs	8	5	3	0
Not stated	29	1	1	27

**Table 4** *Tourist arrivals and their purpose of visit*

Nationality	Number							Total
	Relaxation	Honeymoon	Diving	Surfing	Business	Other	Not Stated	
Europe	328	99	75	1	3	7	1	514
British	83	28	12	0	1	5	0	129
French	60	22	20	0	0	0	0	102
German	66	2	23	0	2	1	0	94
Italian	62	26	6	0	0	0	0	94
Swiss	14	0	8	0	0	0	0	22
Other European	43	21	6	1	0	1	1	73
Asia	52	95	4	0	13	6	1	171
Chinese	20	30	0	0	2	1	1	54
Japanese	18	29	2	0	1	0	0	50
Indian	3	14	0	0	2	1	0	20
Other Asian	11	22	2	0	8	4	0	47
America	14	4	5	1	0	1	0	25
Australia	2	13	1	0	2	1		19
Africa	11	2	0	0	0	0	0	13
Not stated	17	5	4	0	3	2	1	31
Total	424	220	89	2	21	17	3	776

**Table 5** *Percentage change for purpose of visit (2008-2004)*

Purpose of visit	2008		2004		Percentage change (2008-2004)
	Number	Percentage	Number	Percentage	
Relaxation	424	55	1947	53	2
Honeymoon	220	28	1099	30	-2
Diving	89	11	536	15	-4
Surfing	2	0	54	2	-2
Business	21	3	34	1	2
Others	17	2	13	0	2
Not stated	3	0	0	0	0

**Table 6** *Number of travel companions*

Travel companions	Number			
	Total	Female	Male	Not stated
Unaccompanied	45	6	27	12
Adult couple	523	221	221	81
3 persons	44	18	19	7
4 persons	56	23	21	12
4+ persons	38	15	19	4
Not stated	70	28	29	13

**Table 7** Occupational categories of tourists visiting Maldives

Occupation	Number			
	Total	Female	Male	Not Stated
Professionals	301	119	137	45
Legislators, senior officials and managers	121	41	63	17
Technicians and associate professionals	86	20	50	16
Clerks	67	42	20	5
Service workers & shop & market sales workers	42	22	17	3
Craft and related trades workers	30	12	15	3
Elementary occupations	12	11	1	0
Armed forces	8	1	6	1
Plant & machine operators & assemblers	6	1	5	0
Skilled agricultural and fishery workers	5	0	4	1
Not stated	98	42	18	38

**Table 8** Annual income of tourists visiting Maldives

Income (USD)	Number			
	Total	Female	Male	Not stated
< 20,000	105	51	37	17
21- 30,000	166	69	79	18
31 - 40,000	73	38	27	8
41 - 50,000	26	10	12	4
>51,000	254	79	132	43
Not stated	152	64	49	39

**Table 9** Airlines used by tourists to visit Maldives

Airline	Number	Percentage
Singapore Airlines	128	16
Sri Lankan	115	15
Emirates	112	14
Qatar	70	9
Condor	68	9
XL Airways	57	7
Eurofly	51	7
Thompson	33	4
LTU	17	2
Malaysian Airlines	16	2
First Choice	13	2
Air Berlin	12	2
Balair	12	2
Others	66	9
Not Stated	6	1

**Table 10** Mode of organizing holiday

Trip organize	Number			
	Total	Female	Male	Not stated
Tour operator	188	79	86	23
Travel agent	353	149	148	56
Internet	188	71	82	35
Other	28	7	14	7
Not stated	19	5	6	8

**Table 11** *Source of pre-arrival information*

Pre-arrival information	Number	Percentage
Friends/relatives	183	24
Internet	177	23
Travel agent	138	18
Tour operator	57	7
Travel magazines	97	13
Television	58	7
News papers	21	3
Others	28	4
Not stated	17	2

**Table 12** *Motivation for choosing Maldives*

Reason	Number	Percentage
Peacefulness & Tranquillity	262	34
Beaches	240	31
Weather/climate	141	18
Price	11	1
Other	50	13
Not stated	22	3

**Table 13** *Frequency of visit to the Maldives*

Number of trips	Number			
	Total	Female	Male	Not stated
1st visit	583	239	252	92
2nd visit	80	35	31	14
>3 visits	98	32	48	18
Not stated	15	5	5	5

**Table 14** Frequency of visits to the Maldives by nationality

Nationality	Number					
	1	2	3	4	>5	Not stated
Africa	12	1	0	0	0	0
Asia	148	9	4	1	8	1
Chinese	50	2	0	0	2	0
Japanese	42	5	1	0	2	0
Indian	19	0	0	0	1	0
Other Asians	37	2	3	1	3	1
Australia	15	1	1	0	2	0
Europe	362	65	26	14	38	9
British	79	24	7	4	15	0
French	80	7	4	2	6	3
German	61	10	6	4	8	5
Italian	66	15	5	2	5	1
Other European	76	9	4	2	4	0
America	23	2	0	0	0	0
Not stated	20	2	2	0	2	5
Total	583	80	33	15	50	15

**Table 15** Type of accommodation

Place of stay	Number			
	Total	Female	Male	Not stated
Resort	700	294	295	111
Safari	18	5	10	3
Hotel/Guest house /Male'/Addu	28	3	18	7
Not Stated	30	9	13	8

*Table 16 Type of meal-plan used by tourists*

Meal-plan	Number	Percentage
Full board (3 meals)	246	32
All inclusive	240	31
Half board (breakfast & 1 meal)	147	19
Bed and breakfast	103	13
Room only	17	2
Not stated	23	3

*Table 17 Duration of stay in the Maldives*

Duration of stay	Number			
	Total	Female	Male	Not stated
1-3 days	31	10	15	6
4-7 days	396	163	167	66
8-11 days	175	74	78	23
12-15 days	147	59	62	26
16-30 days	22	5	10	7
Not stated	4	0	3	1

*Table 18 Best liked about Maldives*

Best feature	Number			
	Total	Female	Male	Not stated
Beach	532	218	236	78
Underwater life	512	208	231	73
Island ambiance	413	167	185	61
Climate	382	159	163	60
People& culture	240	109	91	40
Other	29	15	10	4

**Table 19** Activities most enjoyed by tourists by nationality

Nationality	Number					
	Island hopping	Diving	Surfing	Other water sports	Spa	Other
Africa	4	6	0	2	5	4
Asia	47	65	9	69	44	16
Chinese	24	30	2	20	13	4
Japanese	2	17	1	29	18	5
Indian	8	3	3	9	5	1
Other Asian	13	15	3	11	8	6
Australia	4	6	1	6	7	5
Europe	85	237	7	104	136	109
British	11	44	2	39	38	34
French	12	76	2	23	31	10
German	5	42	1	15	15	32
Italian	47	35	2	6	24	11
Swiss	4	11	0	5	5	4
Other European	6	29	0	16	23	18
America	1	13	0	5	11	6
Not stated	3	5	1	4	2	2

**Table 20** Purpose of visit to the capital city (Male)

Purpose of visit	Number			
	Total	Female	Male	Not stated
Sight seeing	165	64	78	23
Shopping	32	8	18	6
Others	35	13	15	7
Not stated	4	0	2	2

**Table 21** Amount of money spent in Maldives (excluding tour package)

Expenditure (USD)	Number			
	Total	Female	Male	Not stated
< 1,000	373	155	158	60
1,001-2,000	122	45	59	18
2,001-3,000	77	30	33	14
3,001-4,000	48	22	16	10
4,001-5,000	34	12	19	3
>5,000	76	29	35	12
Not stated	46	18	16	12

**Table 22** Service rating for tour guides

Qualities	Number					
	Excellent	Good	Satisfactory	Poor	Very poor	Not stated
Patience	77	38	15	7	7	3
Enthusiasm	65	39	26	9	5	3
Friendliness	86	35	15	6	5	0
Responsiveness	67	42	22	9	5	2
Courteousness	76	41	19	3	4	4
Knowledge	67	37	28	8	5	2

**Table 23** Tourist rating for airport services

Airport services	Number					
	Excellent	Good	Satisfactory	Poor	Very poor	Not stated
Immigration	261	271	130	36	32	46
Customs	271	290	124	34	21	36
Info. counter	203	231	137	37	15	153
Resort rep.	351	203	87	36	22	77
Resort transfer	328	219	80	25	27	97
Sea plane	202	137	56	17	18	346

**Table 24** Visitor rating for place of stay

Service at place of stay	Number					
	Excellent	Good	Satisfactory	Poor	Very poor	Not stated
Accommodation	375	223	96	28	25	29
Food	342	250	108	32	20	24
Beverages	280	287	122	31	17	39
Cleanliness	365	256	78	25	25	27
Hospitality	440	186	61	22	32	35
Resort facilities	332	252	82	26	21	63
Recreational facilities	275	260	118	38	24	61

**Table 25** Visitor rating for environment of place for stay

Environment at place of stay	Number					
	Excellent	Good	Satisfactory	Poor	Very poor	Not stated
Natural environment	466	182	48	22	27	31
Room design	315	237	113	38	37	36
Overall concept	356	258	69	24	25	44

**Table 26** Perception of prices of tourism product

Items	Number				
	Expensive	Reasonable	Cheap	Not applicable	Not Stated
Accommodation	251	411	18	34	62
Food	230	399	33	48	66
Water	313	308	39	55	61
Soft drinks	280	314	36	63	83
Alcoholic beverages	292	272	35	69	108
Sea transport	128	325	44	131	148
Air transport	186	279	22	126	163

Tel./fax	220	195	27	170	164
Internet	196	213	45	156	166
Land-based recreational facilities	126	316	34	133	167
water sports	200	294	20	106	156
Diving	236	260	28	114	138
Souvenirs	309	298	27	56	86

*Table 27 Rating compared to similar destinations*

	Number			
	Higher	Same	Lower	Not stated
Price	165	85	76	15
Hospitality	103	182	42	14
Quality of Prod./service	111	158	57	15
Security	122	165	37	17

