

MALDIVES

# VISITOR SURVEY

FEBRUARY 2022



Ministry of Tourism  
Republic of Maldives



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# 1. Introduction

This report presents the survey findings from the Maldives Visitor Survey (MVS) conducted in February 2022 by Ministry of Tourism, Government of the Maldives.

The MVS research has been conducted biannually since 2013. However, the surveys planned for off-peak season 2020 had to be postponed due to the Maldives border closure from April - June 2020 resulting from the Covid-19 pandemic, followed by low arrivals during the rest of the year. Since then, the survey has been replanned and executed in December 2021 and February 2022.

MVS presents the profiles of international visitors to the Maldives and their opinions about the holiday experience in the Maldives. The February 2022 survey captures the views of the international visitors to the Maldives during the peak tourist season in 2022.

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

The survey was carried out at the International Departure Terminal of Velana International Airport in Hulhulé as an exit survey. The survey was conducted between 19 February 2022 and 1 March 2022.

The survey findings comprise of 1,789 responses from various nationalities and detailed nationality analysis consists of 9 markets comprising 71% of the responses. They are India, India, United Kingdom, Russia, Germany, France, America, Italy, Austria and Saudi Arabia.

## 2.Key Findings

- Age groups between 25-34 years is the most popular visitor age group to the Maldives.
- Most respondents chose to stay at resorts only followed by guesthouses.
- The average duration of stay by visitors during the February 2022 survey was 8 nights.
- 23% of visitors during this period were repeat visitors to the Maldives.
- Maldives remains to be a popular destination for travel with partners and family.
- Visitors to the Maldives are motivated to visit by the natural beauty of the Maldives including the white sandy beaches, pristine underwaters and the small islands of the Maldives.
- Rest and relaxation, honeymoon and snorkeling are the main reasons why visitors travel to the Maldives.
- Internet is the most popular source of information about the Maldives while word of mouth is also a key source.
- Booking via online sources on the internet through tour operator websites and via resort hotel websites continue to be a popular choice of booking accommodations in the Maldives.
- Although TripAdvisor is the most common website used to plan trips, Instagram, online travel blogs and visitmaldives.com are also commonly used for travel planning.
- Booking.com is the most popular website for booking the trip. Other websites used include Makemytrip, HolidayCheck and Agoda.
- Most visitors booked their trip to the Maldives 3-5 months or 1-2 months in advance.
- Speedboat and seaplane transfers are the most common modes of transport within Maldives.
- Friendliness of staff, safety, service quality, comfort and cleanliness are ranked highly by visitors.
- All-inclusive meal plan is the most popular option chosen by visitors.
- Dining experience including quality of food, Maldivian cuisine, and diversity of food choices is rated as excellent by most visitors.
- Over the course of their holidays, 11% of respondents went whale shark watching at Ari Atoll, 5% visited Hanifaru bay, 3% visited surf spots and 1% visited cultural and heritage sites.
- Visitors chose to travel to Maldives during this period as the borders were open, there was no quarantine upon arrival, due to COVID-19 safety measures taken, easy flight connections and as they believed the Maldives was a safe destination to travel with children and family.
- Visitors most commonly describe the Maldives as 'amazing', 'paradise', 'wonderful', 'beautiful' and 'peaceful'.
- Visitors mostly liked the beaches, the sea, the weather, the people; and activities such as diving and snorkeling in the Maldives.
- Instagram is the most popular social media site used by visitors to share their travel experience.

- 95% visitors rated their holiday satisfaction in the Maldives to be excellent or very good.
- 82% visitors were extremely likely or very likely to return to the Maldives again.
- An overwhelming majority of visitors would recommend the Maldives to others, with 96% stating they are extremely likely or very likely to recommend.

# 3. Visitor Markets and Profile

## 3.1. Survey Nationality

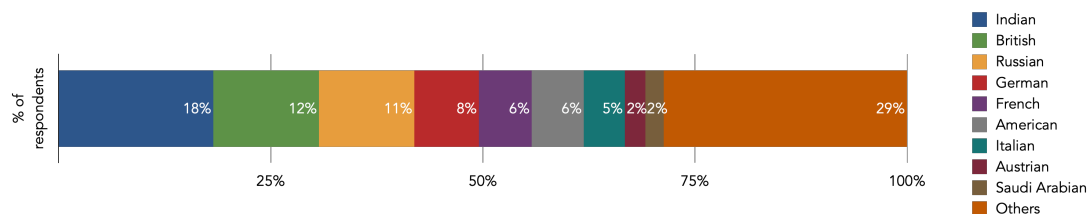


Figure 3.2. Visitor Nationality (n=1,789)

Most respondents were from India (18%), followed by the UK (12%), Russia (11%) and Germany (8%). There were also respondents from France (6%), USA (6%), Italy (5%), Austria (2%) and Saudi Arabia (2%).

## 3.2. Departing Airlines

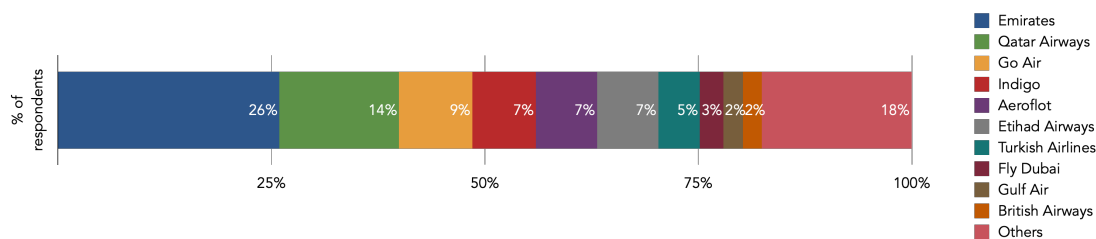


Figure 3.2. Departing Airlines (n=1,785)

Most of the respondents travelled via Emirates (26%), Qatar Airways (14%), Go Air (9%), Indigo (7%), Aeroflot (7%) and Etihad Airways (7%).

## 3.3. Residential Country and City of Visitors

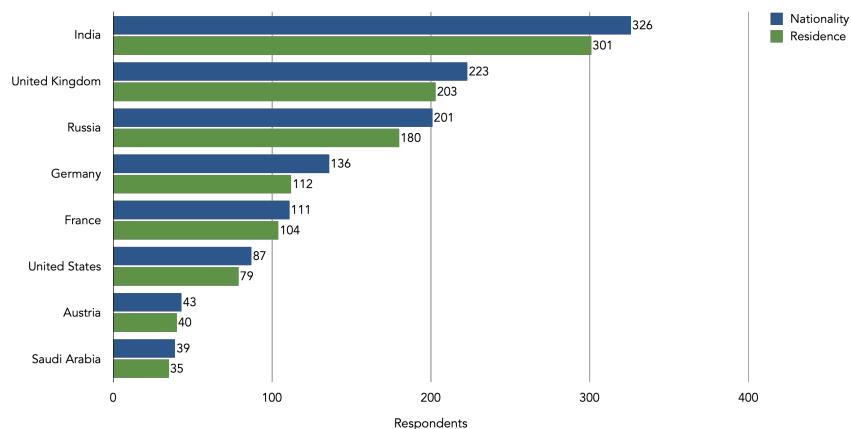


Figure 2.3: Place of residence of visitor nationalities

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

### 3.4. Age Group of Visitors

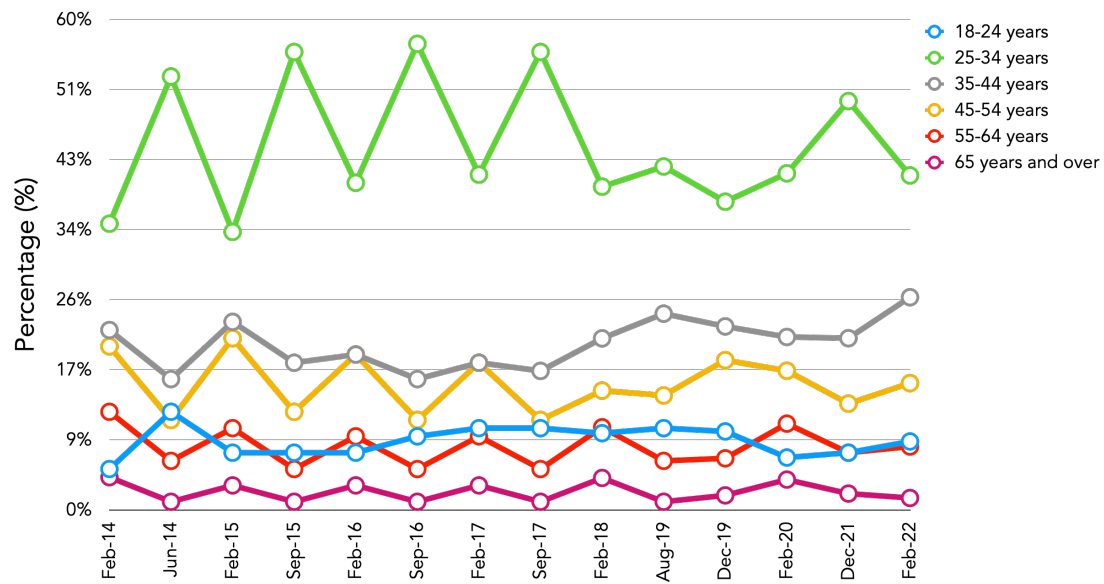


Figure 2.4: Visitor age group trends (n=1,780)

A majority of visitors to the Maldives were aged between 25-34 (41%), a trend that has been seen consistently since the February 2014 survey. The next most common age groups of visitors were 35-44 (26%) and 45-54 years (16%), also a consistent trend over the years.

### 3.5. Place of Stay



Figure 2.5: Place of stay of visitors (N=1,750)

Most respondents chose to stay at resorts only (79%), with 15% staying in guesthouses only, 4% staying in both resorts and guesthouses and 2% staying on liveboards.

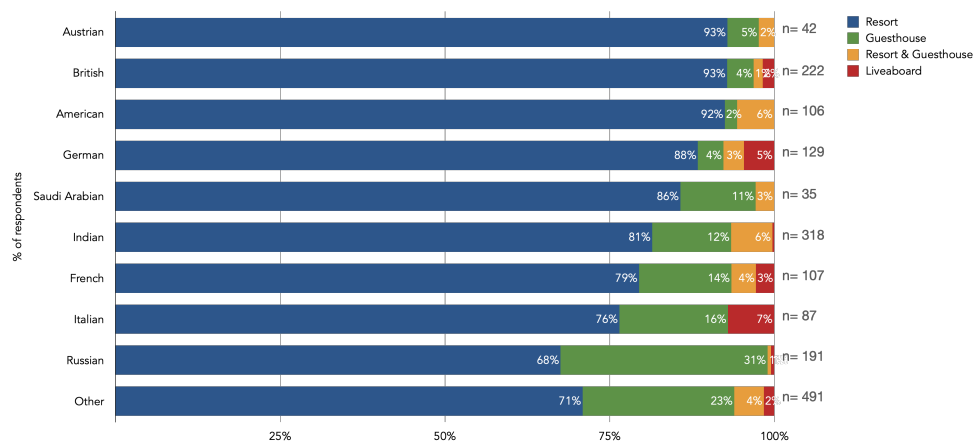


Figure 2.6: Place of stay of visitors by nationality (N=1,726)

Most respondents of all nationalities chose to stay in resorts. Austrian (93%), British (93%) and American (92%) respondents were more likely to stay in resorts only. Respondents from Russia (30%) and Italian (16%) were more likely to stay in guesthouses, with respondents from Italy also being the most likely to stay in liveaboards (7%). Indian (6%) and American (6%) were most likely to have stayed in both resorts and guesthouses.

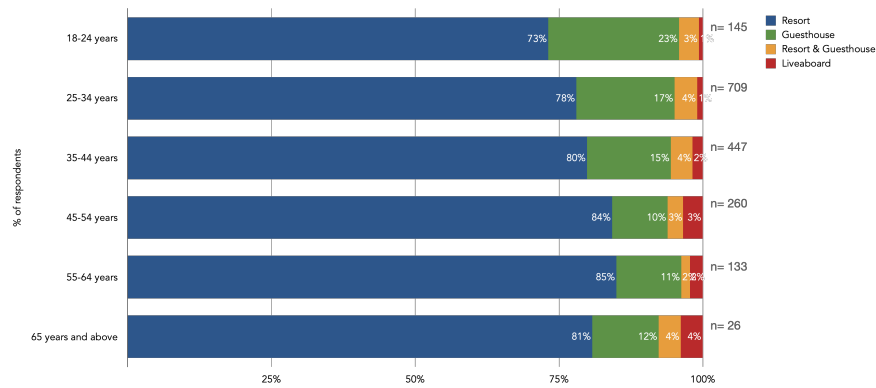


Figure 2.7: Place of stay of visitors by age group (N=1,720)

Most respondents of all age groups chose to stay in resorts. Visitors between the age groups 45-54 years (84%) and 55-64 years (85%) were the most likely to stay in resorts, while visitors between the age groups 18-24 years (23%) and 25-34 years (17%) were more likely to stay in guesthouses.

### 3.6. Duration of Stay

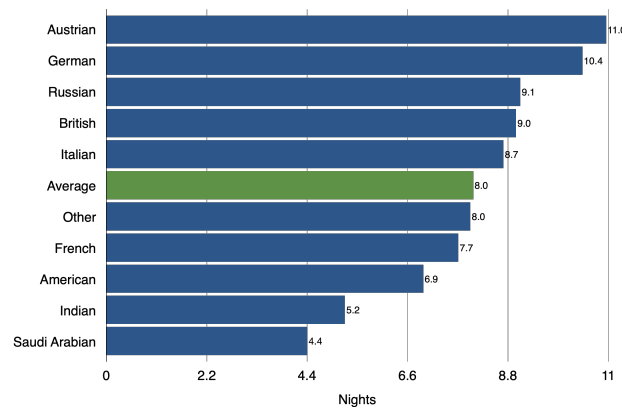


Figure 2.8: Average number of nights by nationality (N=1,763)

The average duration of stay for all respondents was 8 nights. Austrians (11 nights) and Germans (10.4 nights) stayed the longest. Indians (5.4 nights) and Saudi Arabians (4.4 nights) stayed the least amount of time.

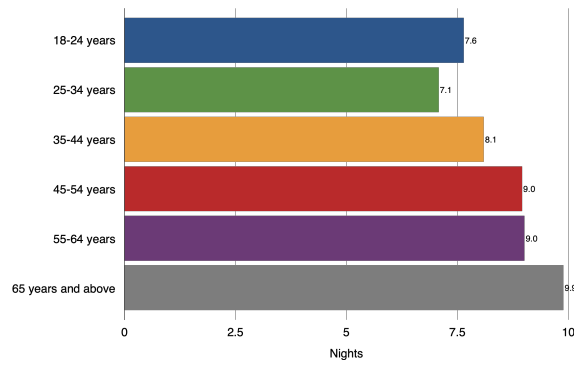


Figure 2.9: Average number of nights by age group (N=1,755)

Respondents that were older tended to have a longer duration of stay with visitors aged 65 and over, staying for 9.9 nights on average whilst visitors aged 25-34 stayed 7.1 nights on average.

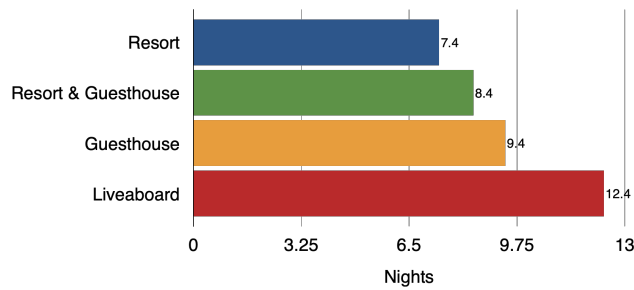


Figure 2.10: Average number of nights by place of stay (N=1,718)

Visitors who stayed on liveaboards tended to stay the longest (12.4 nights). Visitors staying in resorts only stayed 7.4 nights, while visitors that stayed in guesthouses stayed 9.4 nights. Respondents that stayed in both resorts and guesthouses stayed for an average of 8.4 nights.

### 3.7. Repeat Visitors



Figure 2.11: Repeat Visitors (N=1,793)

77% of visitors were first time visitors to the Maldives, with 20% having visited 2-5 times, 2% having visited 6-10 times and 1% having visited more than 10 times.

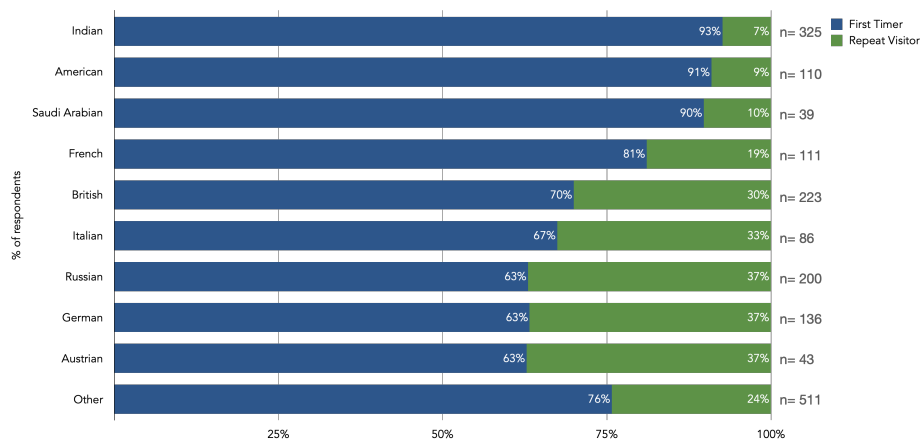


Figure 2.12: Repeat visitors by nationality (N=1,784)

Visitors from most nationalities were first time visitors, with most first timers being from India (93%), the United States (91%) and Saudi Arabia (90%). Respondents from Russia (37%), Germany (37%), Austria (37%) and had the highest number of repeat visitors.

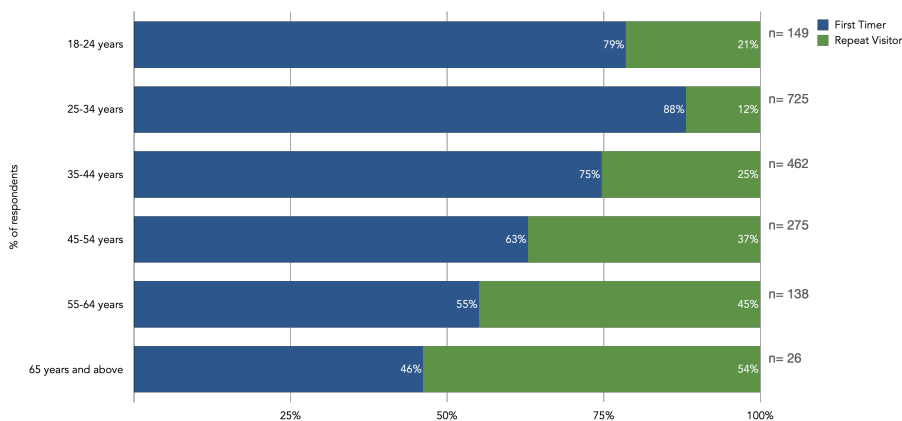


Figure 2.13: Repeat visitors by age group (N= 1,775)

88% of respondents aged 25-34 years were first time visitors, while 79% of 18–24-year-olds and 75% of respondents aged 35-44 years were also visiting for the first time. In contrast, 54% of visitors aged 65 years and over and 45% of those aged 55-64 years were repeat visitors to the Maldives.

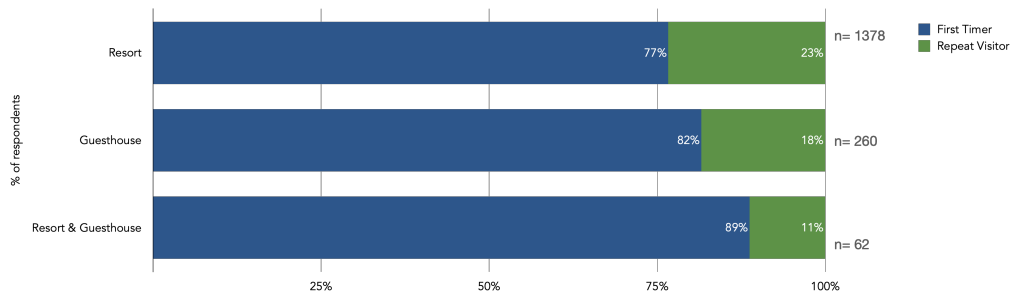


Figure 2.14: Repeat visitors by place of stay (N= 1,700)

77% of those who stayed at resorts only were first time visitors while 82% of respondents who stayed at guesthouses only were also visiting for the first time. Of those who visited both resorts and guesthouses, 89% were first timers while 11% were repeat visitors.

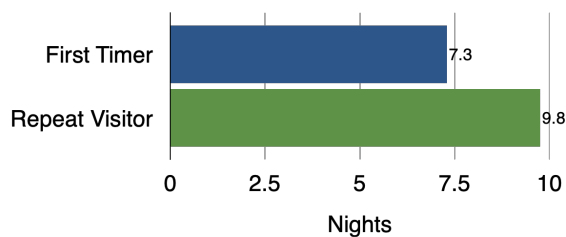


Figure 2.15: Repeat visitors by average nights (N=1,793)

First time visitors stayed for an average of 7.3 nights whilst repeat visitors stayed for an average of 9.8 nights.

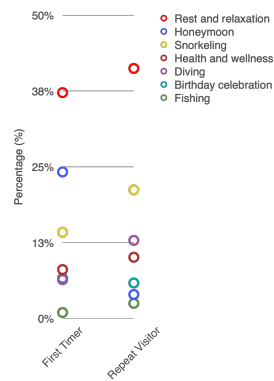


Figure 2.16: Repeat visitors by purpose of visit (N= 2,733)

\*Multiple Choice Question

Majority of first-time visitors to the Maldives came for rest and relaxation (37%), honeymoon (24%), and snorkelling (14%). Majority of repeat visiting respondents also came for rest and relaxation (41%), followed by snorkelling (21%) and diving (13%).

### 3.8. Travel Companion

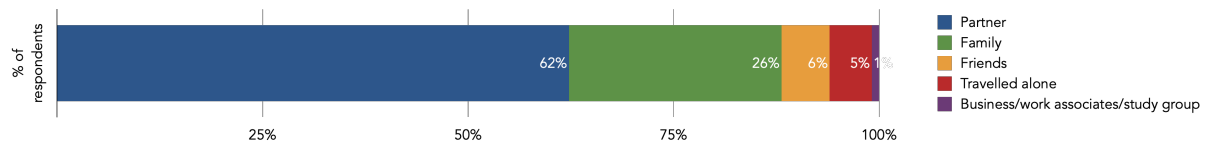


Figure 2.17: Travel companion (N=1,795)

Most respondents travelled with their partner (62%), while 26% travelled with their family. 6% of visitors travelled with friends and 5% travelled alone.

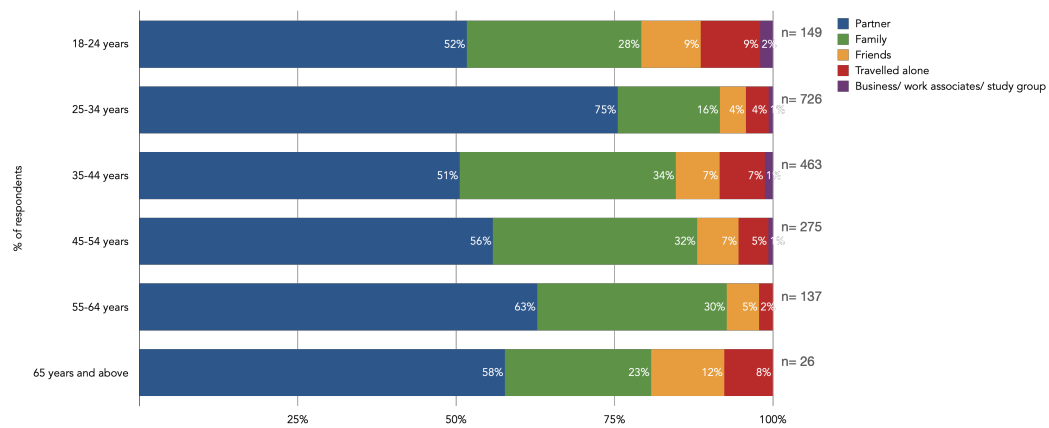


Figure 2.18: No of adults and children in the group / travel companion by age group (N=1,777)

Across all age groups, most respondents travelled with their partners. Visitors aged 25-34 years (75%) and 55-64 years (63%) travelled with a partner, while 34% of visitors aged 35-44 years and 32% between 45-54 years travelled with family. 9% of respondents aged 18-24 years travelled alone, as did 8% of those aged 65 years and over. 12% of respondents aged 65 years and over travelled with friends.

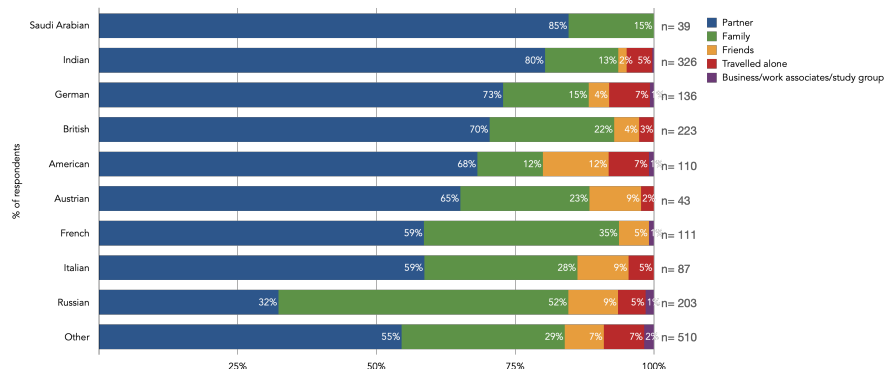


Figure 2.19: Travel companion by nationality (N=1,786)

Respondents from Saudi Arabia (85%), India (80%) and Germany (73%) were most likely to travel with a partner, while respondents from Russia (52%), France (35%) and Italy (28%) more commonly travelled with family. Respondents from Germany (7%) and America (7%) were most likely to travel alone.

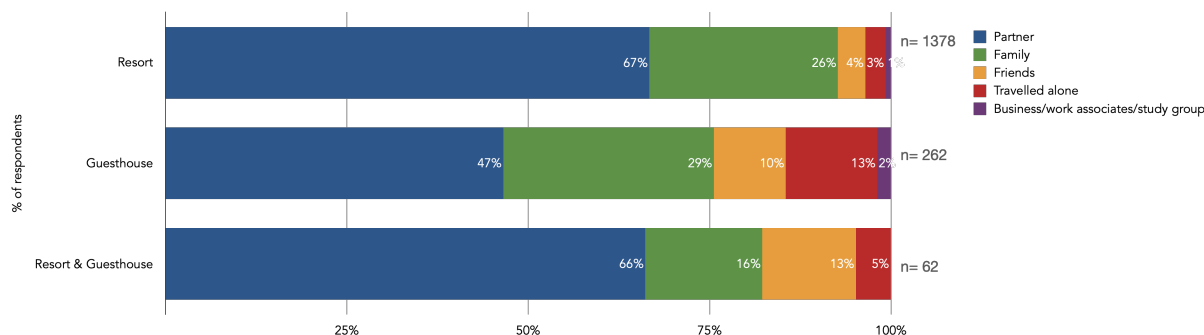


Figure 2.20: Travel companion by place of stay (N=1,702)

67% of respondents who stayed at a resort only travelled with their partner, while 26% travelled with their family. 4% travelled with friends and 3% travelled alone. Amongst those staying in guesthouses, 47% travelled with a partner, 29% with family, 10% with friends and 13% alone. Respondents who stayed in a combination of resorts and guesthouses were most likely to travel with a partner (66%). 16% of respondents that stayed in a combination travelled with family, 13% travelled with friends and 5% alone. About 1% of the respondents in resorts and 2% who stayed in guesthouses travelled with business/work associates or study groups.

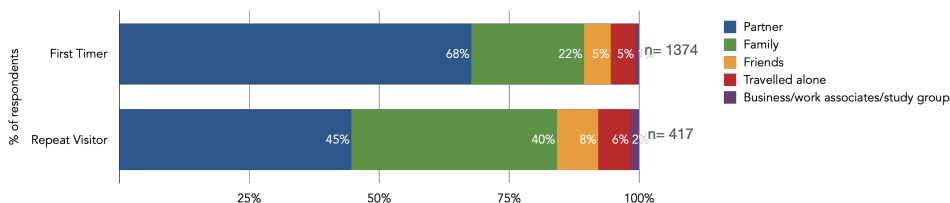


Figure 2.21: Travel companion by repeat visitors (N=1,791)

Most first-time visitors travelled with a partner (68%), while 22% travelled with family. 5% travelled with friends and 5% travelled alone. Most repeat visitors also travelled with a partner (45%), while 40% travelled with family, 8% travelled with friends and 6% travelled alone.

# 4. Motivation and Purpose

## 4.1. Motivation to choose Maldives

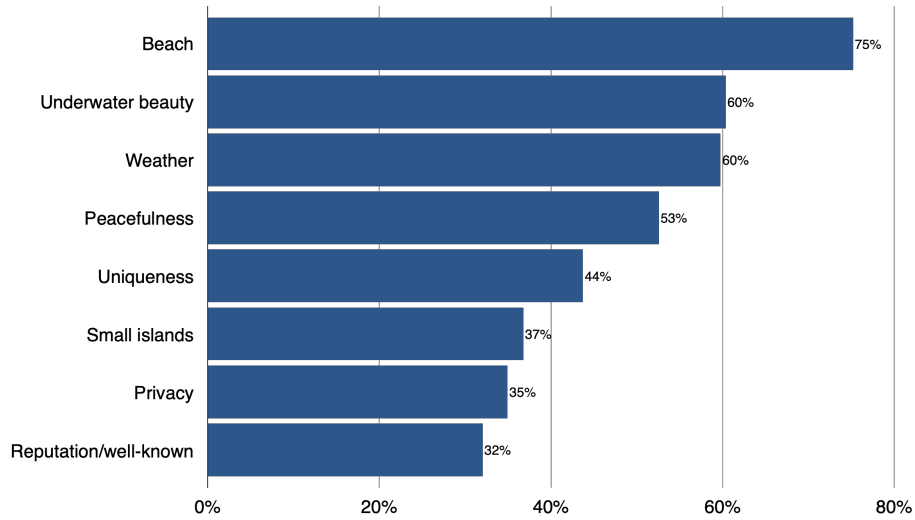


Figure 3.1: Motivation to choose Maldives

\*Multiple response question

Most respondents chose to visit the Maldives due to the beach (75%), underwater beauty (60%), weather (60%) and peacefulness (53%). Other key reasons for visiting included uniqueness (44%), small islands (37%), privacy (35%) and reputation (32%).

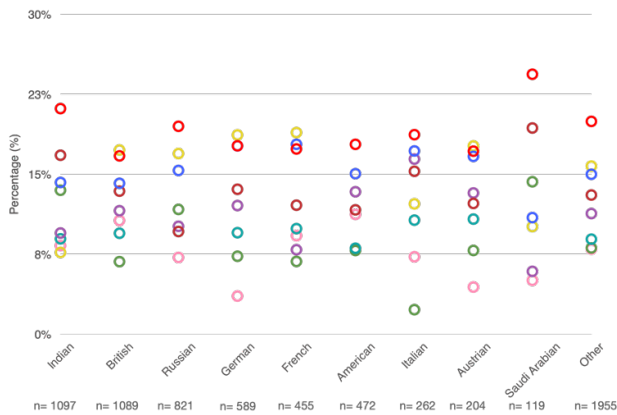


Figure 3.2: Motivation by Nationality

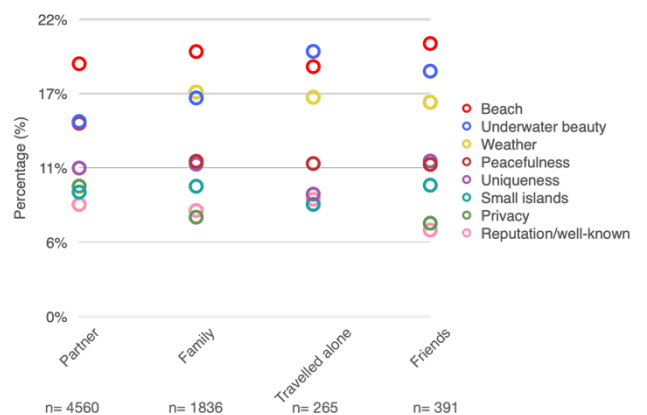


Figure 3.3: Motivation by Travel Companion

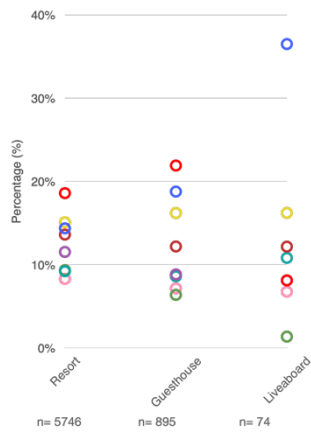


Figure 3.4: Motivation by Place of Stay

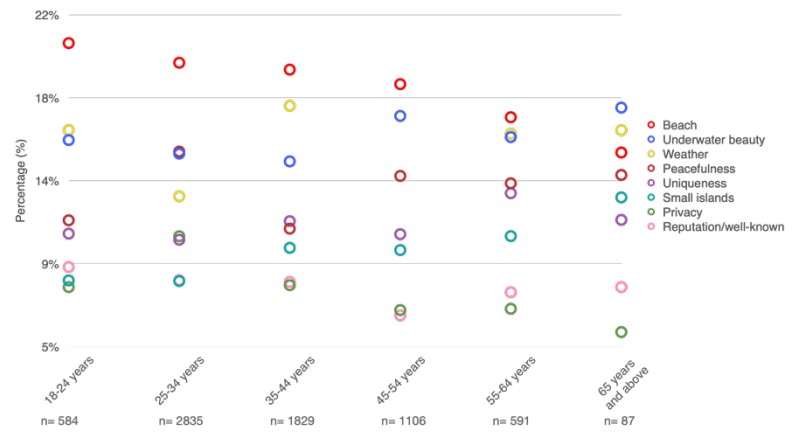


Figure 3.5: Motivation by Age Group

The beach was the biggest motivator to visit the Maldives for most nationalities, except French, German and Austrian respondents who cited the weather as their main motivation for visiting. Peacefulness was cited as the second most important motivator for Indian and Saudi Arabian visitors while French, Italian and Americans cited underwater beauty as the second most important motivator for their visit.

The beach was also the biggest motivator for respondents who travelled with partners, family, and friends, while underwater beauty was the main motivator for those who travelled alone.

Similarly, the beach was the biggest motivator for respondents who stayed at resorts and guesthouses, while it was underwater beauty for those who stayed aboard liveaboards.

Beaches were the main motivating factor for most age groups, except for the 65 years and over age group who were more motivated by underwater beauty.

## 4.2. Purpose of visit

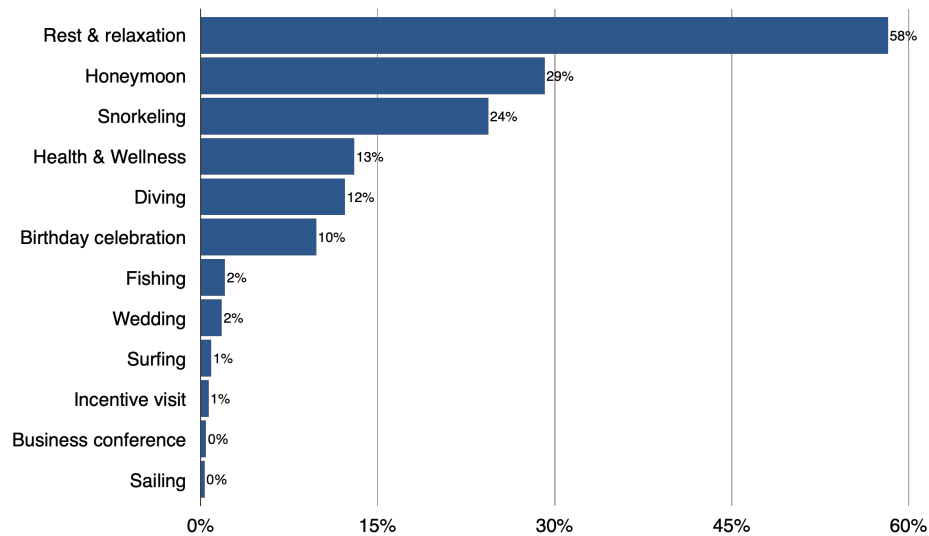


Figure 3.6: Purpose of visit

\*Multiple response question

Rest and relaxation (58%), honeymoon (29%) and snorkelling (24%) were the main reasons cited as to why respondents visited the Maldives. 13% visited for health and wellness, 12% visited for diving, and 10% visited for a birthday celebration. Other reasons for visiting included fishing (2%) and weddings (2%).

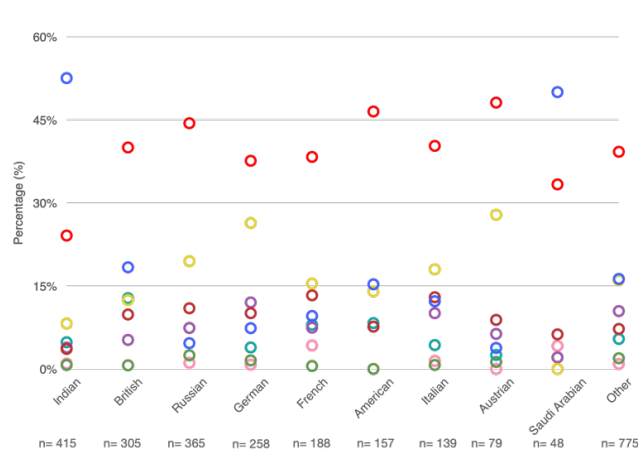


Figure 3.7: Purpose by nationality

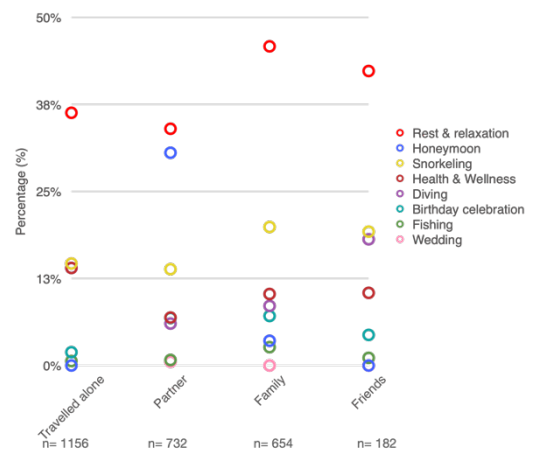


Figure 3.8: Purpose by travel companion



Figure 3.9: Purpose by place of stay

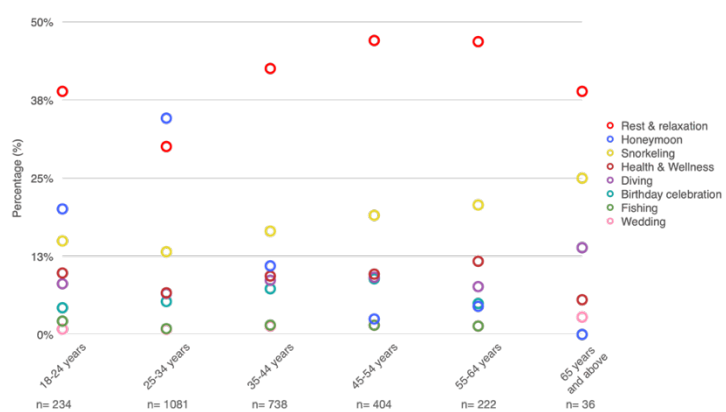


Figure 3.10: Purpose by age group

Respondents from most nationalities visited the Maldives for rest and relaxation purposes, though most Indians and Saudi Arabians visited for honeymoon.

All respondents chose rest and relaxation as their main purpose of visit regardless of their travel companion. However, for those who travelled with their partner, honeymoon was a close second.

Rest and relaxation was also the main purpose of visit for respondents who stayed at resorts and guesthouses, while it was diving for those who stayed aboard liveaboards.

For all age groups except those between 25-34 years, rest and relaxation was the main purpose of visit, while honeymoon was the main purpose for those aged between 25-34 years.

# 5. Information and Booking

## 5.1. Source of information about the Maldives

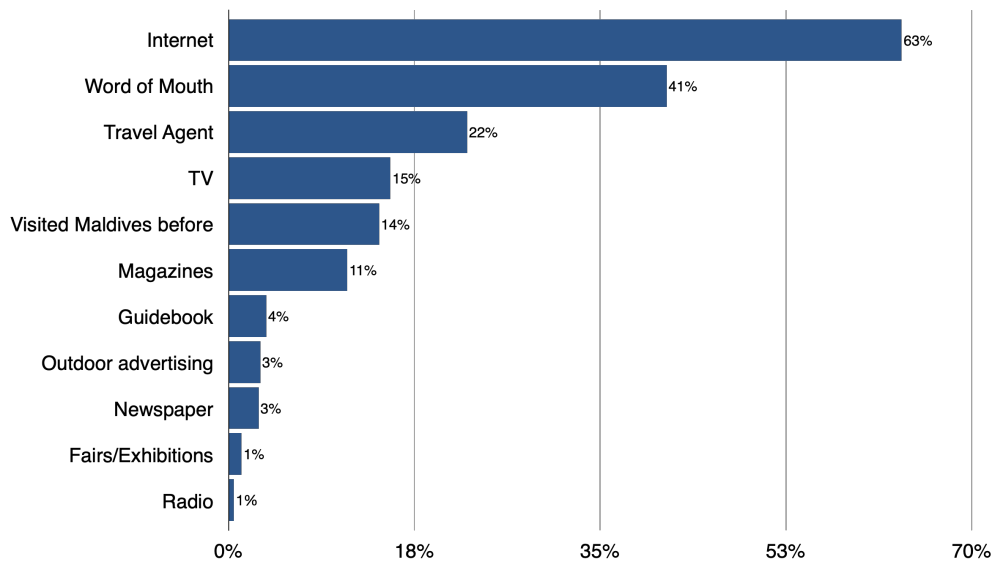


Figure 4.1: Source of information about the Maldives

\*Multiple response question

Most respondents heard about the Maldives through the internet (63%) and word of mouth (41%). 22% heard of the Maldives through a travel agent, while 15% heard of it on TV. 14% of respondents had visited the Maldives before while 11% read about it in magazines. Other sources of information included guidebooks (4%), outdoor advertising (3%), newspaper (3%), fairs and exhibitions (1%) and over the radio (1%).

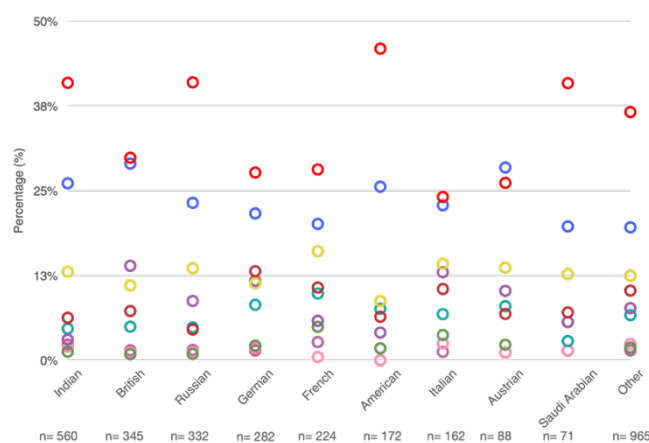


Figure 4.2: Source of Information by Nationality

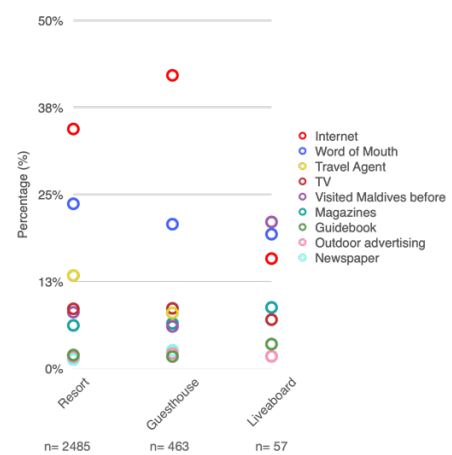


Figure 4.3: Source of Information by Place of Stay

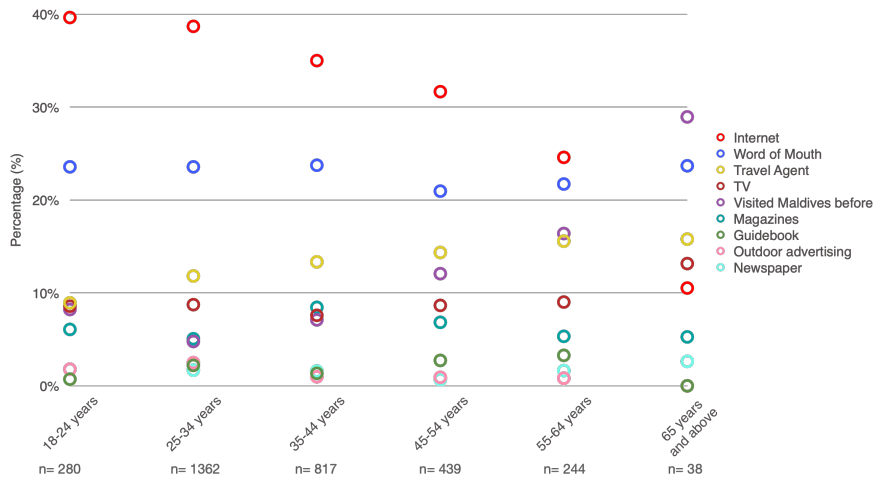


Figure 4.4: Source of Information about the Maldives by age group

Respondents from most nationalities heard of the Maldives on the internet, except for Austrians who mainly heard of Maldives through word of mouth. British and Italian also said words of mouth as a close second after internet.

Internet was also the main source of information for respondents who stayed at resorts and guesthouses, while it was visited Maldives before for those who stayed on liveaboards.

Internet was also the main source of information for most age groups, except for the 65 years and over age group whose main source of information was having visited the Maldives before. Internet as a main source was observed to decrease as age group increased, and travel agent as a main source increased as age group increased.

## 5.2. Airline Reservations



Figure 4.5: Airline Reservations (N=1,779)

A majority of respondents (56%) booked airline reservation through travel agents, while 29% of respondents booked their travel directly through airlines and 13% booked through a flight search engine. Only 1% booked through a travel club/corporate travel.

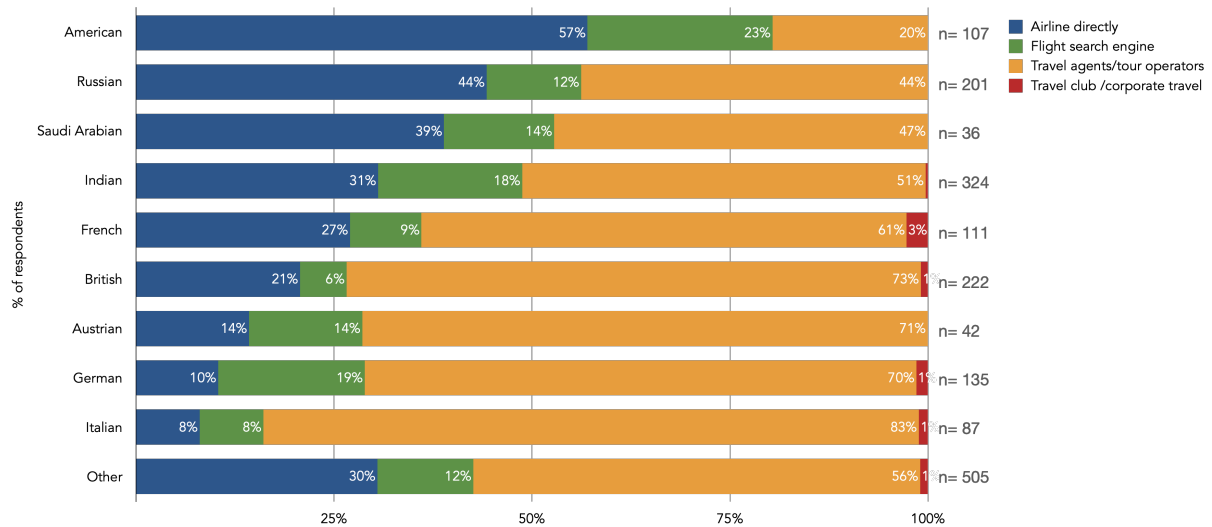


Figure 4.6: Airline Reservations by Nationality (N=1,770)

The most common method of booking was through travel agents/tour groups with 83% of Italians, 73% of British, 71% of Austrians and 70% Germans choosing to book their travel this way. 51% Indians and 47% Saudis also booked via travel agents/tour groups. Americans (57%) and Russians (44%) were most likely to book with the airline directly, while 23% of Americans and 19% of Germans booked through flight search engines. 3% of French respondents booked through travel clubs/corporate travel.

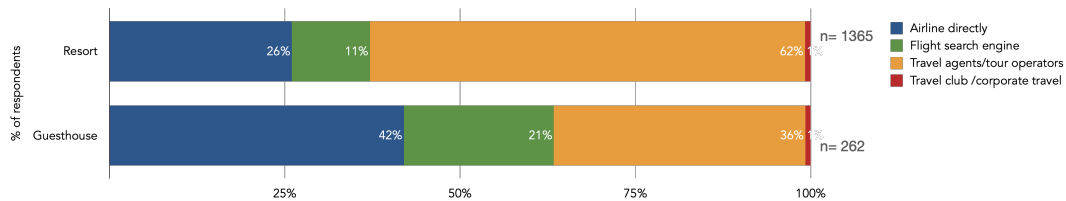


Figure 4.7: Airline Reservations by Place of Stay (N=1,656)

Majority of visitors who stayed at resorts booked flights through travel agents and tour groups (62%), while most respondents who stayed at guesthouses booked travel directly through the airline (42%).

### 5.3. Accommodation Reservations

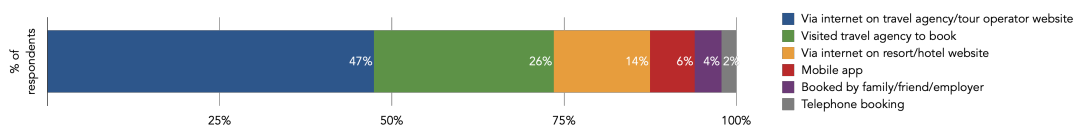


Figure 4.8: Accommodation Reservations (N=1,774)

47% of guests booked their accommodations on the internet via a travel agency or tour operator website, while 14% booked via a resort or hotel website. 26% of guests visited a travel agency to book their accommodation while 6% had their accommodation booked through a mobile app. Other methods of booking were booked by a family member, friend, or employer (4%) or a telephone booking (2%).

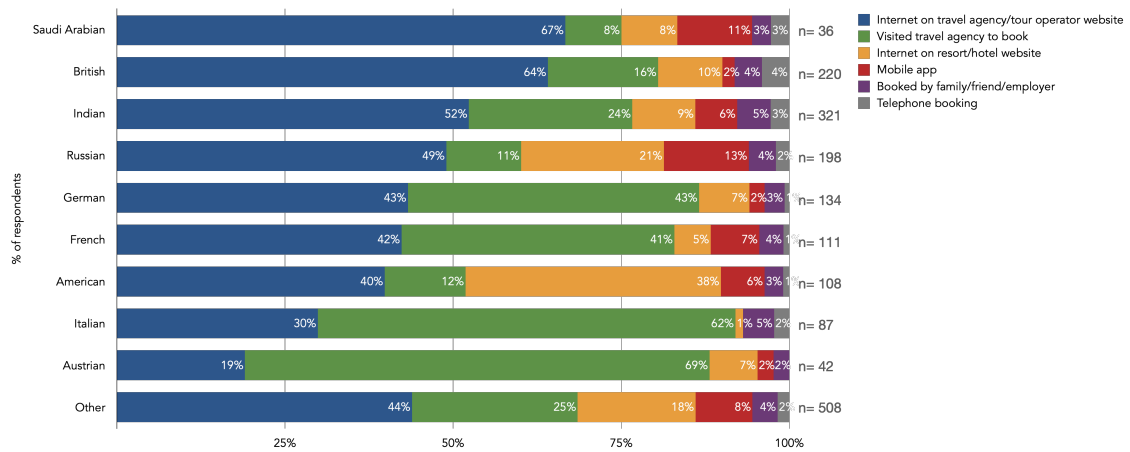


Figure 4.9: Accommodation Reservations by Nationality (N=1,765)

Saudi Arabian (67%), British (64%), and Indian (52%) respondents were most likely to book accommodation through a travel agency/tour operator website while American respondents (38%) were most likely to book directly through a resort or hotel website. Austrian (69%) and Italian (62%) visitors commonly booked by visiting a travel agency or tour operator. Russian (13%) and Saudi (11%) also tended to book accommodation through a mobile app. Amongst the nationalities, British respondents (4%) were most likely to have made a telephone booking.

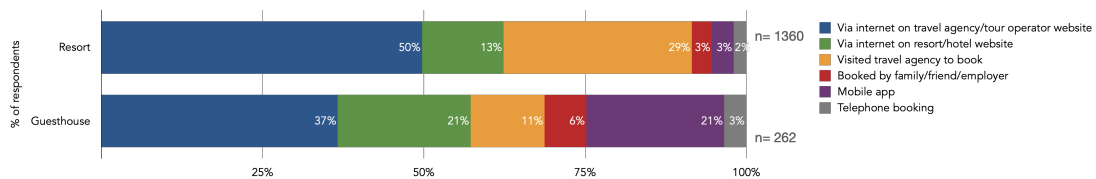


Figure 4.10: Accommodation Reservations by Place of Stay (N=1,684)

A majority of respondents who stayed in resorts (50%) and guesthouses (37%) booked through a travel agency or tour operator website, while 21% of those who stayed in guesthouses only booked directly via the hotel website. 29% of those who stayed in resorts only visited a travel agency to book, and 21% of those who stayed in guesthouses only booked through a mobile app.

## 5.4. Websites used to plan/organise trip

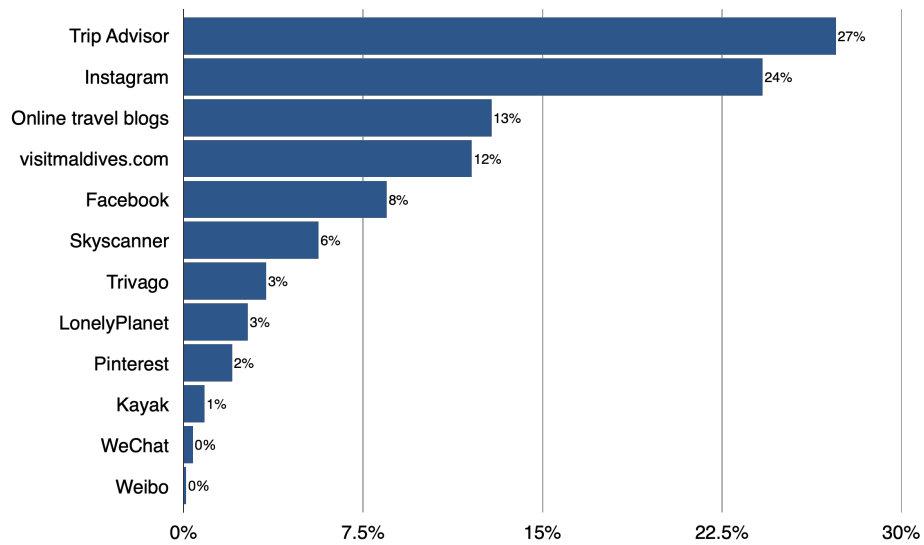


Figure 4.11: Websites used to plan/organise trip

\* Multiple response question

TripAdvisor was the most common website used to plan trips (27%) while Instagram (24%), online travel blogs (13%) and visitmaldives.com (12%) were also commonly used.

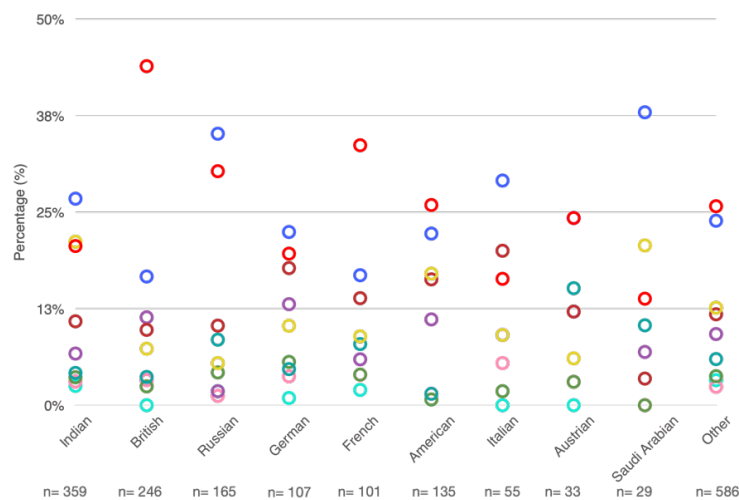


Figure 4.12: Websites by Nationality

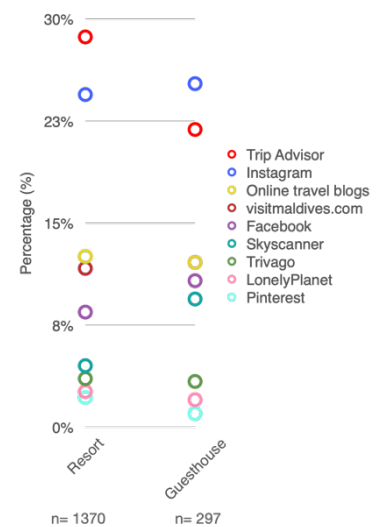


Figure 4.13: Websites by Place of Stay

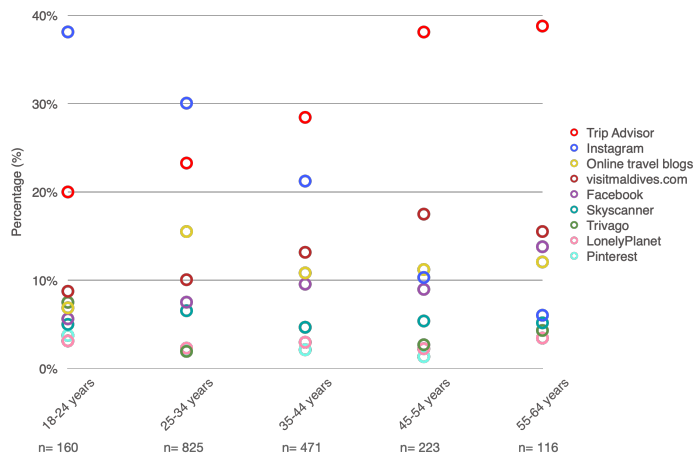


Figure 4.14: Websites Used to Plan/Organise Trip by Age Group

Instagram was the most commonly used website across the board for most nationalities except British, French, American, and Austrian nationalities amongst whom TripAdvisor was more popular. Online travel blogs were most common amongst Indian and Saudi Arabian nationalities. Visitmaldives.com was most commonly used by Italian visitors.

TripAdvisor was more commonly used by respondents staying at resorts while Instagram was more commonly used by respondents staying at guesthouses.

Younger respondents (18-24 years and 25-34 years) commonly used Instagram to plan and organise their trips, while respondents in all other age groups most commonly used TripAdvisor. The trends with Instagram as a key source to plan/organise trip is observed to decrease as age group increased, while Trip Advisor use is observed to increase as age group increased.

## 5.5. Websites used to book trip

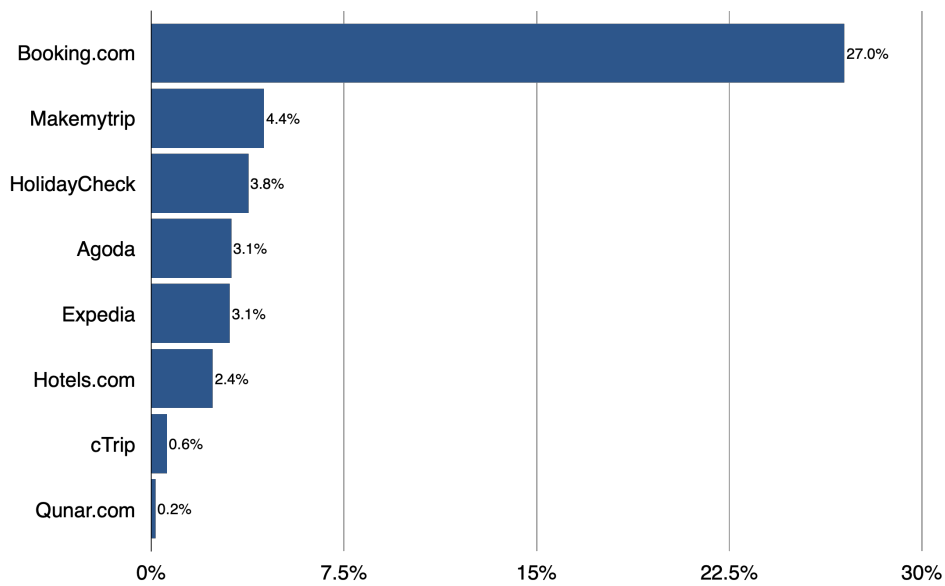


Figure 4.15: Websites used to book trip

\*Multiple response question

Booking.com (27%) was the most commonly used website when it came to booking a trip. Other websites used include Makemytrip (4.4%), HolidayCheck (3.8%), Agoda (3.1%), Expedia (3.1%) and Hotels.com (2.4%).

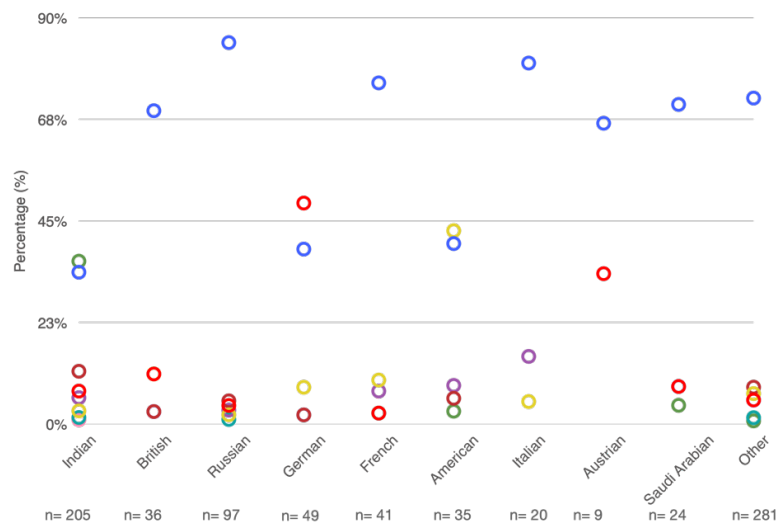


Figure 4.16: Websites by Nationality

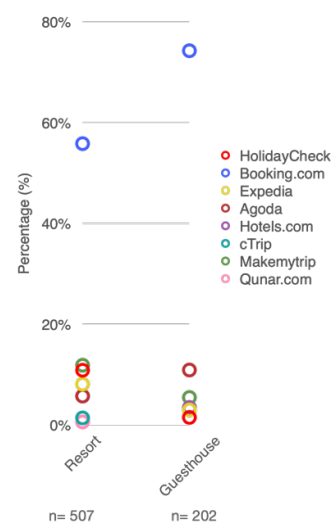


Figure 4.17: Websites by place of stay

Booking.com was the website used by most nationalities to book their trip except for Indian, German and American respondents, with Indian respondents using Makemytrip, German respondents using HolidayCheck and American respondents most commonly using Expedia.

Booking.com was also most commonly used by respondents staying in resorts and guesthouses.

## 5.6. Booking Period

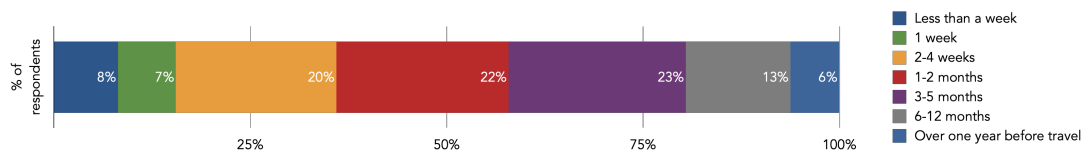


Figure 4.18: Booking period (N=1,750)

Most respondents booked their trip to the Maldives 3-5 months (23%) or 1-2 months (22%) in advance, with a further 20% booking 2-4 weeks in advance. 13% booked 6-12 months in advance while 6% booked over a year in advance. 8% booked less than 1 week and 7% booked 1 week in advance.

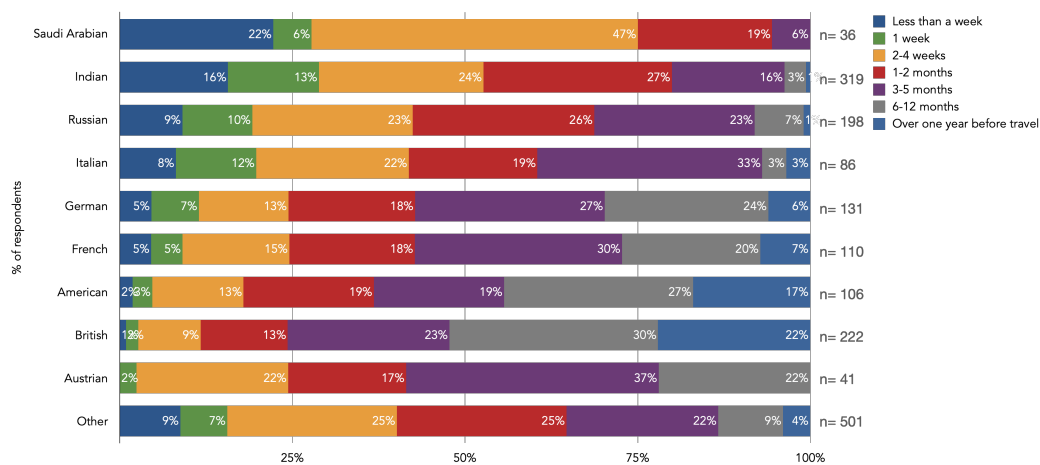


Figure 4.19: Booking period by Nationality (N=1,750)

Of all the nationalities, Saudi Arabians (22%) and Indians (16%) were most likely to book accommodation less than one week before travel. Saudi Arabian (47%), Indian (24%) and Russian (23%) respondents were likely to book 2-4 weeks ahead of travel. Austrians (37%) and Italians (33%) were most likely to book 3-5 months ahead, while British (30%) were most likely to book 6-12 months in advance, as well as a year in advance (22%). American mostly booked 6-12 months in advance (27%) or a year in advance (17%).

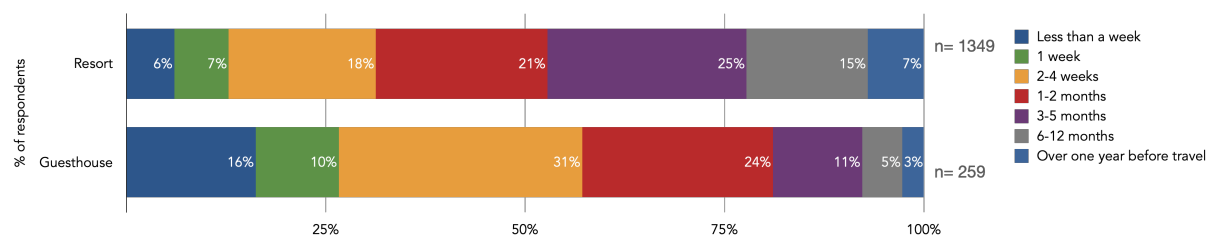


Figure 4.20: Booking period by place of stay (N=1,670).

Nearly half (47%) of visitors who stayed in resorts booked their travel 3 months or more in advance while 19% of those in guesthouses booked 3 or more months in advance

26% of guests who stayed in guesthouses only booked their trip in 1 week or less than 1 week in advance, while 31% booked of guests who stayed in guesthouses booked their trips 2-4 weeks in advance and 24% booked 1-2 months in advance.

## 6. Transportation to place of stay

### 6.1. Main method of transportation

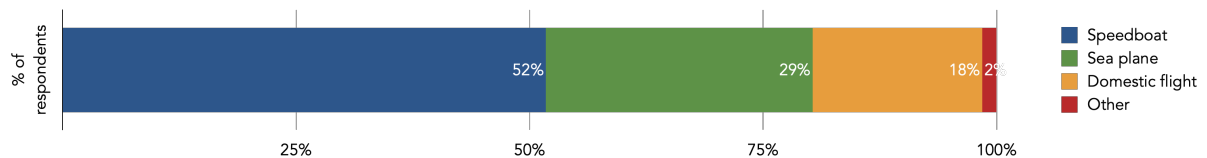


Figure 5.1: Main method of transport (N=1,745)

The most common method of transportation within Maldives by visitors was by speedboat (52%), followed by seaplanes (29%) while domestic flights were the least common (18%). Other methods of transport included taxis.

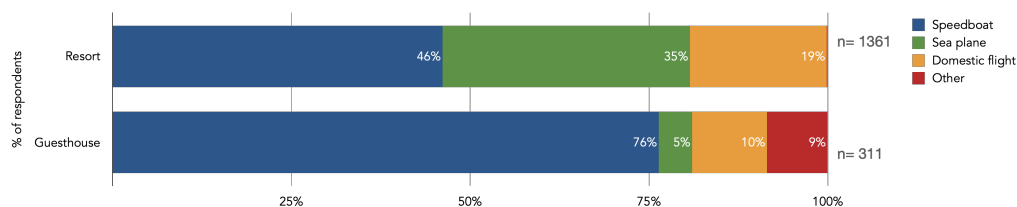


Figure 5.2: Main method of transport by place of stay (N=1,685).

Guests who stayed in resorts only were transported by speedboat 46% of the time. 35% of resort guests travelled by seaplane, and 19% by domestic flight. Guesthouse only transfers were also most commonly done through speedboats (76%), with domestic flights (10%) and seaplanes (5%) being less common.

### 6.2. Wait time at airport

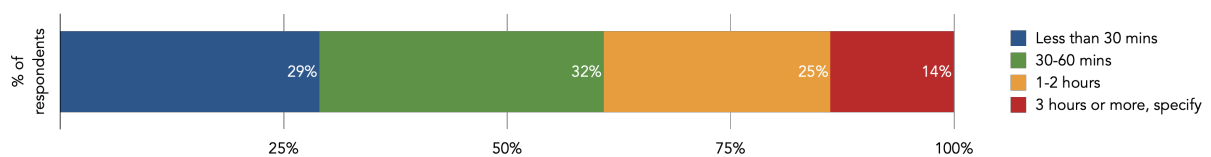


Figure 5.3: Wait time at airport (N=1,770)

The most common wait times at the airport were less than 30 minutes (29%) and 30-60 minutes (32%). 25% of guests had to wait 1-2 hours, whilst 14% waited 3 hours or more for a transfer.

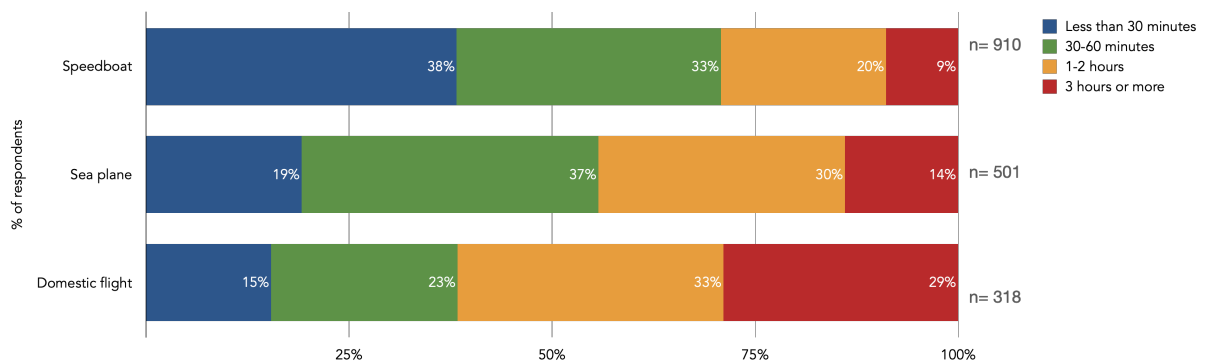


Figure 5.4: Wait time at airport by method of transport (N=1,729)

Guests who had a speedboat transfer, on average, had shorter airport wait time, with 38% waiting less than 30 minutes and another 33% waiting 30-60 minutes. Guests with seaplane transfers commonly waited 30-60 minutes (37%) or 1-2 hours (30%) or 3 hours or more (14%), while guests with domestic flight transfers had the longest wait time. These respondents tended to wait 1-2 hours (33%) or more than 3 hours (29%).

### 6.3. Transfer time from airport to place of stay

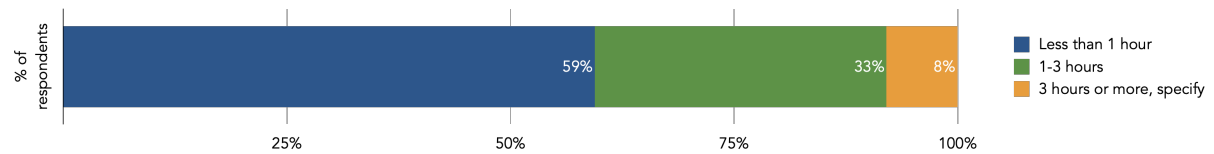


Figure 5.5: Transfer time (N=1,718)

Transfer time from the airport to place of stay was less than 1 hour for most guests (59%), 1-3 hours for 33% of respondents and 3 or more hours for 8%.

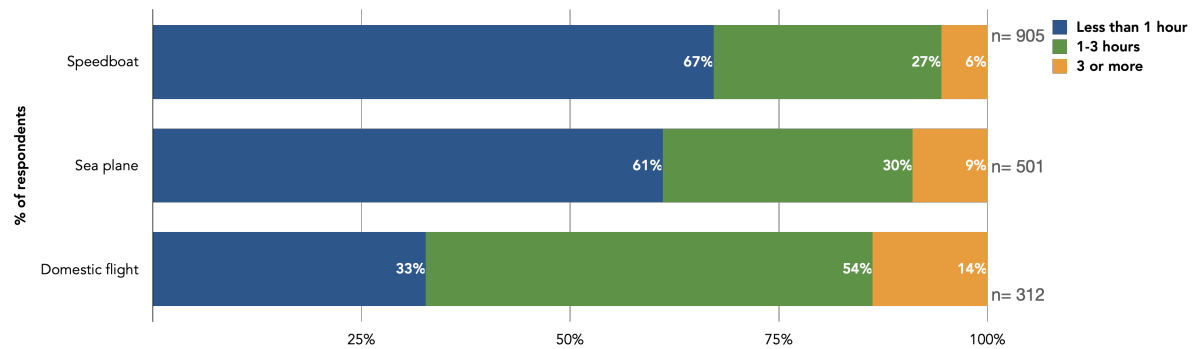


Figure 5.6: Transfer time by method of transport (N=1,718)

\*Speedboat and public ferry have been used interchangeably

Most guests who had speedboat (67%) or seaplane (61%) transfers had less than an hour of transfer time, while those taking a domestic flight were more likely to have longer transfers, with 54% taking 1-3 hours to arrive at their final destination, and 14% having a transfer time of 3 or more hours.

### 6.4. Satisfaction with transfer

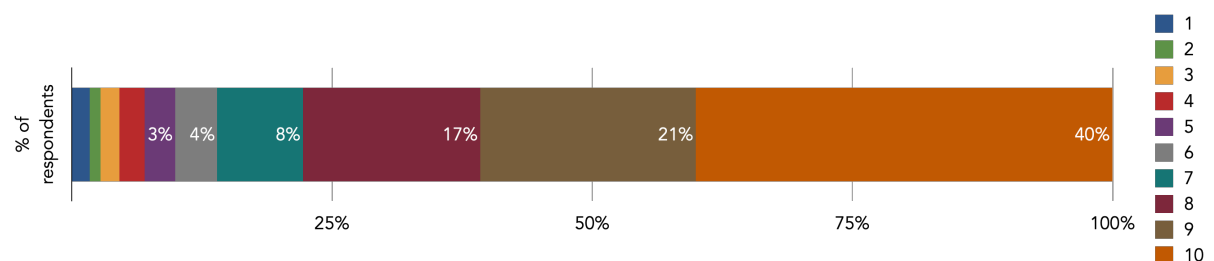


Figure 5.7: Satisfaction with transfer (N=1,747)

Most visitors (86%) were satisfied with their transfers. When rated on a scale from 1-10, with 10 being the highest score, 40% rated transfers 10/10, while 21% rated 9/10, 17% rated 8/10 and 8% rated 7/10.

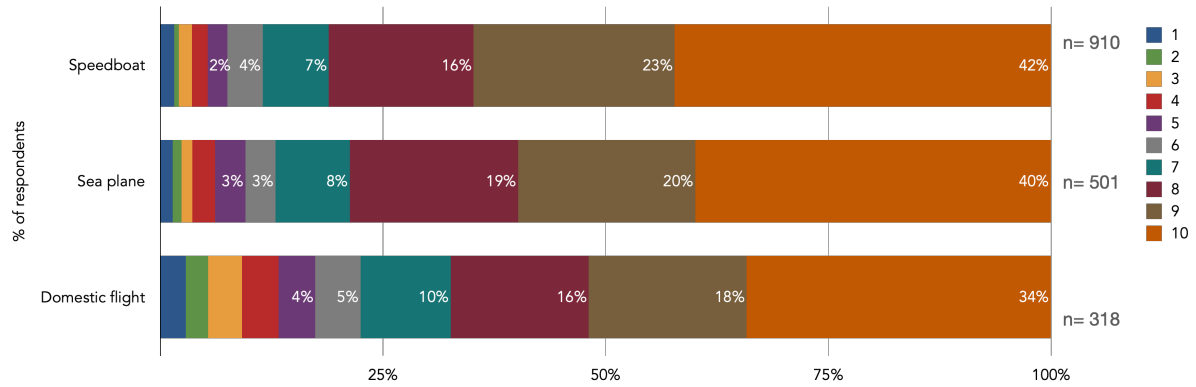


Figure 5.8: Satisfaction with transfer by method of transport (N=1,747)

The most common score given to all three types of transfers was a 10/10. Generally, respondents favoured speedboats with 42% rating them a 10/10, 23% rating a 9, 16% rating an 8 and 7% rating a 7. 4% rated them a 6/10 and 2% rated 5/10.

Respondents also had a positive view on seaplanes with 40% giving seaplanes a perfect score, 20% rating them a 9, 19% rating them an 8 and 8% rated them a 7. 3% rated speedboat transfers a 6, and 3% rated them a 5.

Domestic flights were also seen favourably with 34% rating them a 10, 18% a 9, 16% an 8 and 10% of respondents rating them a 7. These were, however, the least popular option, with 5% rating them a 6. 4% of respondents gave domestic flights a score of 1/10.

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

# 7. Accommodation Experience

## 7.1. Ratings for place of stay

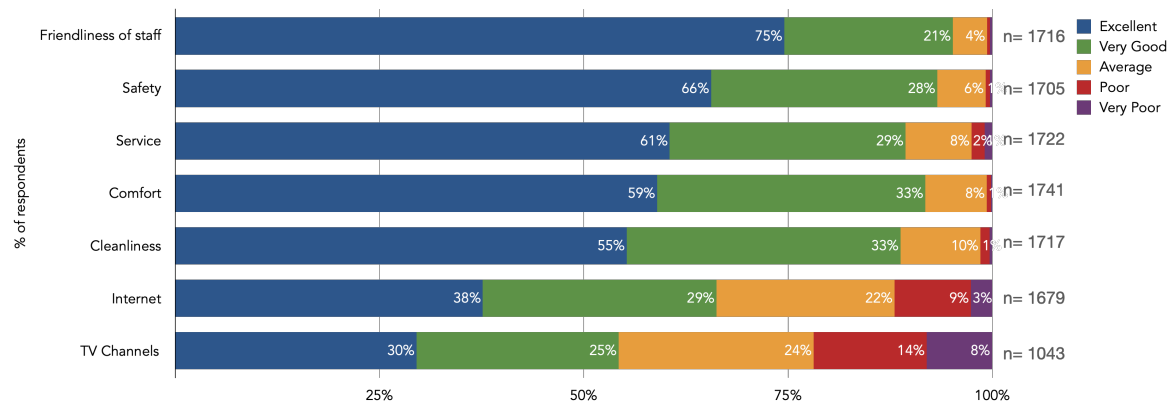


Figure 6.1: Ratings for place of stay (N=9,607)

Generally, respondents gave excellent ratings to the friendliness of staff (75%), safety (66%), service (61%), comfort (59%) and cleanliness (55%) of their place of stay. However, internet (22%) and TV channel options (24%) were rated as average, with 14% rating TV channels as poor and 8% rating as very poor.

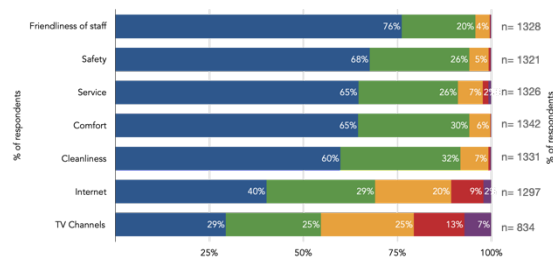


Figure 6.2: Ratings for place of stay for resort

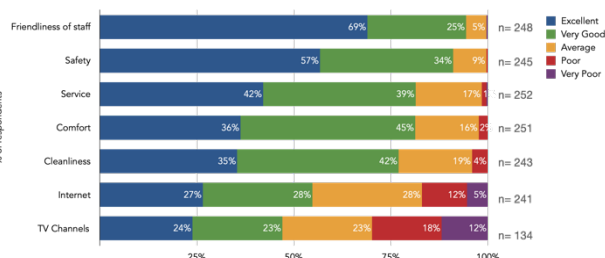


Figure 6.3: Ratings for place of stay for guesthouses

Respondents who stayed at resorts rated friendliness of staff as excellent (76%) or very good (20%), with safety being rated excellent (68%) or very good (26%), service as excellent (65%) or very good (26%), comfort as excellent (65%) or very good (30%), and cleanliness also being rated as excellent (60%) or very good (32%). Internet was viewed as excellent by 40% very good by 29% and average by 20% of respondents. TV channels were not as impressive, with 13% rating them as poor and 7% rating it very poor.

Respondents who stayed at guesthouses generally rated friendliness of staff as excellent (69%) or very good (25%), safety as excellent (57%) or very good (34%), service as excellent (42%) or very good (39%), comfort as excellent (36%) or very good (45%), with cleanliness also commonly being rated as excellent (35%) or very good (42%). Internet was rated as excellent by 27%, very good by 28% and average by 28%. TV channel options were regarded unfavourably, with 18% rating it as poor and 12% rating it as very poor.

## 7.2. Perception of prices of room and services

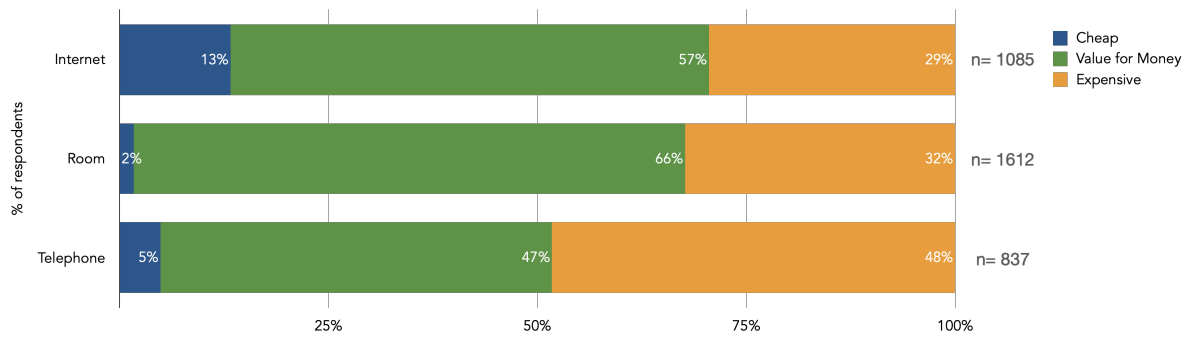


Figure 6.4: Perception of price charged for Room & Services (N=3,534)

66% of respondents believed room prices were value for money, with 57% rating internet as value for money and 13% rating internet as cheap. 47% rated telephones as value for money, with 48% rating them as expensive.

# 8. Dining Experience

## 8.1. Meal plan at place of stay

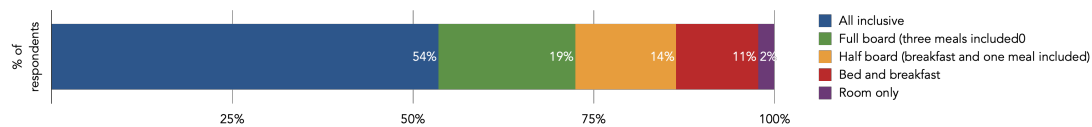


Figure 7.1: Meal plan (N=1,770)

Most guests chose an all-inclusive meal plan (54%), while an additional 19% chose full board dining. 14% opted for half board and 11% chose bed and breakfast. 2% of respondents took the room only option.

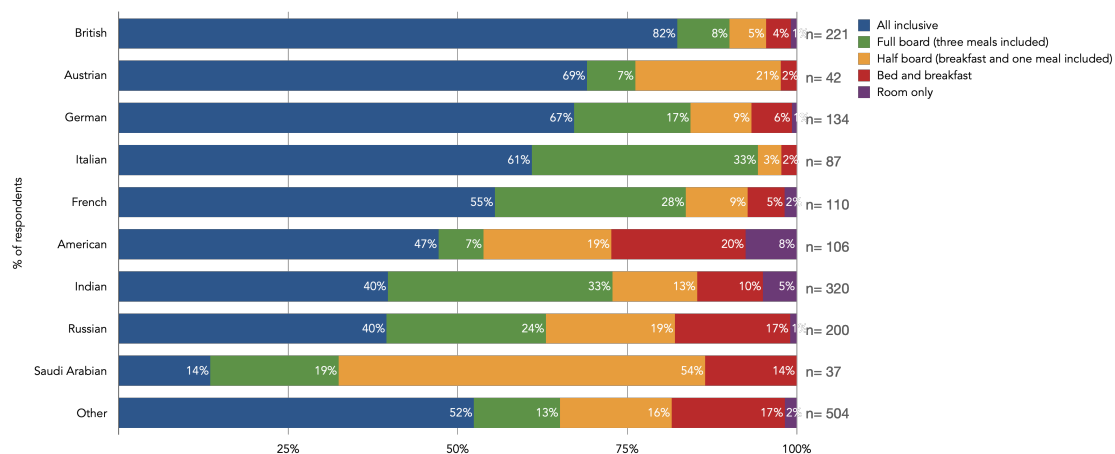


Figure 7.2: Meal plan by nationality (N=1,761)

Respondents from all nationalities most commonly opted for the all-inclusive meal plan, with this being most popular among British (82%), Austrian (69%), German (67%) and Italian (61%) respondents. Indian (33%) and Italian (33%) respondents opted for full board, while Saudi Arabian (54%) and Austrian (21%) favoured half board. 20% of American respondents, 17% of Russians and 14% Saudi respondents chose the bed and breakfast. 8% of respondents from the United States and 5% from India opted for room only.

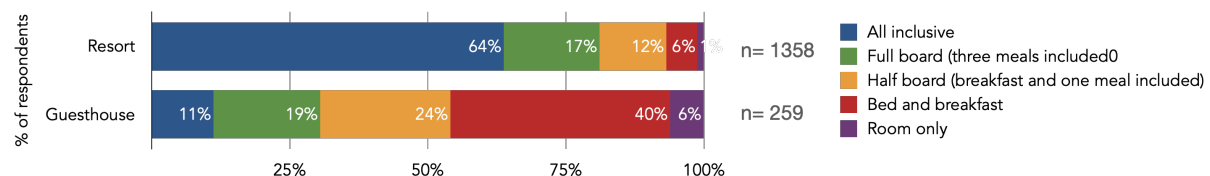


Figure 7.3: Meal plan by place of stay (N=1617)

Respondents who stayed at resorts only were most likely to take the all-inclusive meal plan (64%) or the full board option (17%), while those who stayed in guesthouses only commonly opted for bed and breakfast (40%) or half board (24%). 6% of those who stayed in guesthouses opted for room only.

## 8.2. Perception of prices for food and beverages

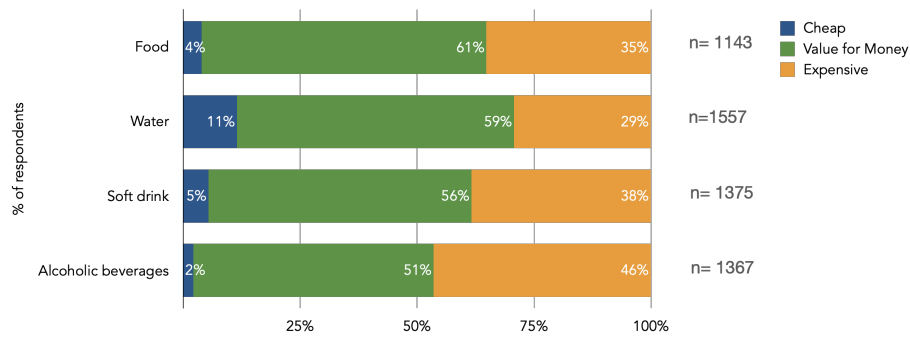


Figure 7.4: Perception of prices charged for food and beverages (N=5,442)

Food (61%), water (59%), and soft drinks (56%) were commonly seen as value for money. 51% of respondents believed alcoholic beverages were also value for money, while another 46% believed they were expensive.

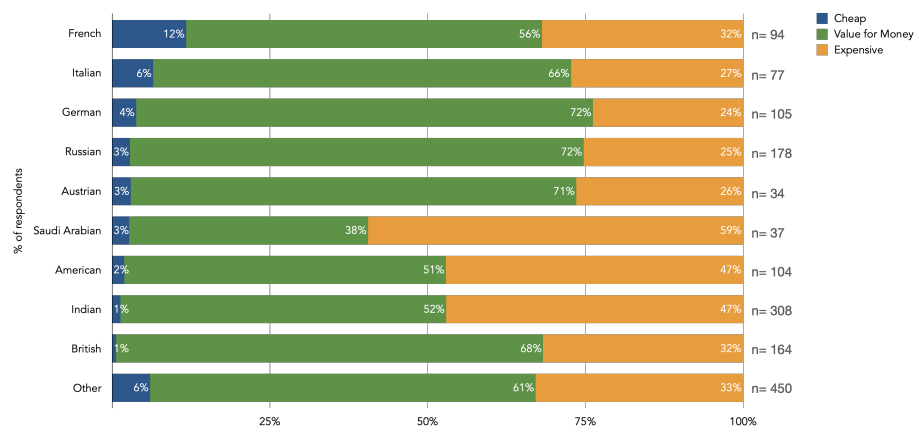


Figure 7.4: Perception of prices charged for food by nationality (N=1,551)

Generally, respondents of all nationalities except the Saudis viewed food prices as value for money. 12% of French respondents and 6% of Italian respondents believed food to be cheap, while 72% of both German and Russian respondents, 71% Austrians, 68% British believed it as value for money. Saudi Arabian (59%), American (47%) and Indian (47%) respondents cited food as being expensive.

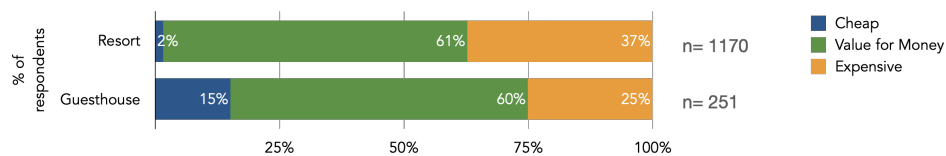


Figure 7.5: Perception of prices charged for food by place of stay (N=1,421)

61% of respondents staying at resorts only believed food to be value for money, while 37% found it expensive and only 2% found it cheap. Of those staying in guesthouses only, 15% believed food to be cheap, 60% cited it as value for money, with 25% considering it expensive.

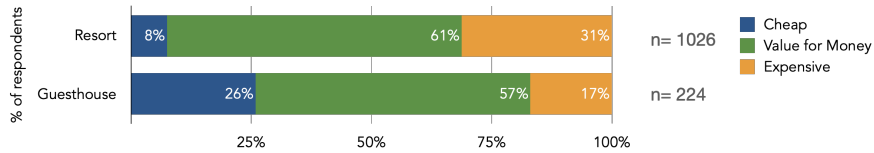


Figure 7.6: Perception of prices charged for water by place of stay (N=1,250)

61% of respondents staying at resorts only rated water as value for money, while 31% found it expensive and 8% found it cheap. 26% of guests staying in guesthouses rated water to be cheap, 57% cited it as value for money, with 17% considering it expensive.

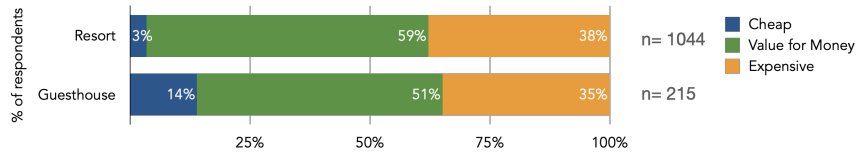


Figure 7.7: Perception of prices charged for soft drinks by place of stay (N=1,259)

59% of respondents staying at resorts only believed soft drinks to be value for money, while 30% found it expensive and only 3% found it cheap. Of those staying in guesthouses, 14% believed soft drinks to be cheap, 51% cited it as value for money, with 35% considering it expensive.

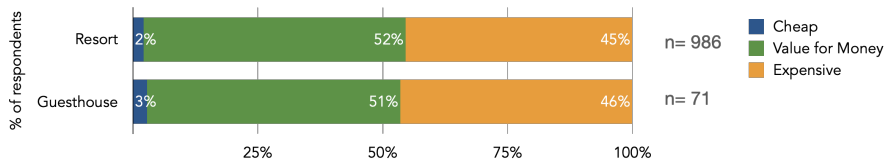


Figure 7.8: Perception of prices charged for alcoholic beverages by place of stay (N=1,057)

52% of respondents staying at resorts only rated alcoholic beverages as value for money, while 45% found it expensive and only 2% found it cheap. 3% of guests staying in guesthouses only believed alcoholic beverages were cheap, 51% cited it as value for money, and 46% considered it expensive.

### 8.3. Ratings for dining at place of stay

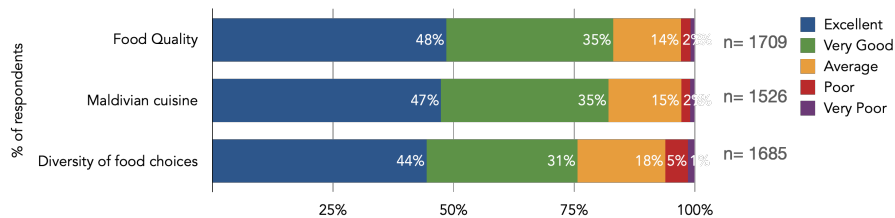


Figure 7.9: Ratings for dining experience at place of stay (N=4,920)

Dining was commonly rated as excellent, with 48% rating quality of food, 47% rating Maldivian cuisine and 44% rating diversity of food choices as excellent. 35% rated quality of food and 35% rated Maldivian cuisine as very good, while 18% rated diversity of food choices as average, with 6% rating it poor or very poor.

# 9. Activity Ratings

## 9.1. Perception of prices for activities

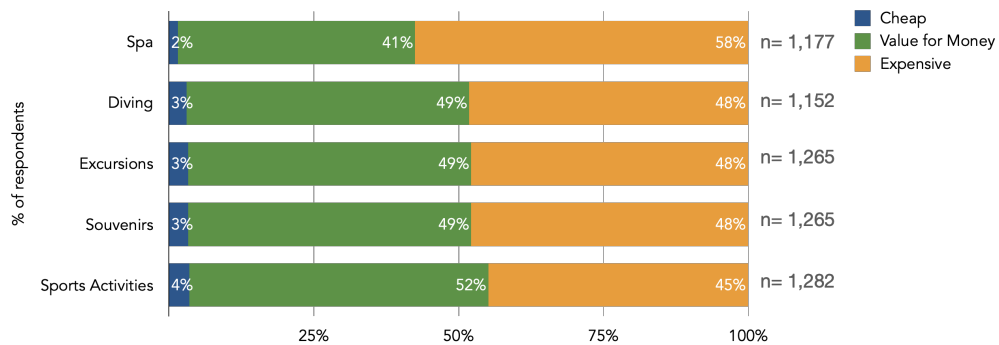


Figure 8.1: Ratings for price charged for activities (N=6,141)

Activities were generally rated as being expensive or value for money. 58% of respondents believed spa treatments to be expensive, while 48% thought diving was expensive and 48% believed excursions to be so. 49% of respondents rated souvenirs as value for money while 48% believed it to be expensive. 52% rated sports activities as value for money, while another 45% believed them expensive.

## 9.2. Ratings for activities at place of stay

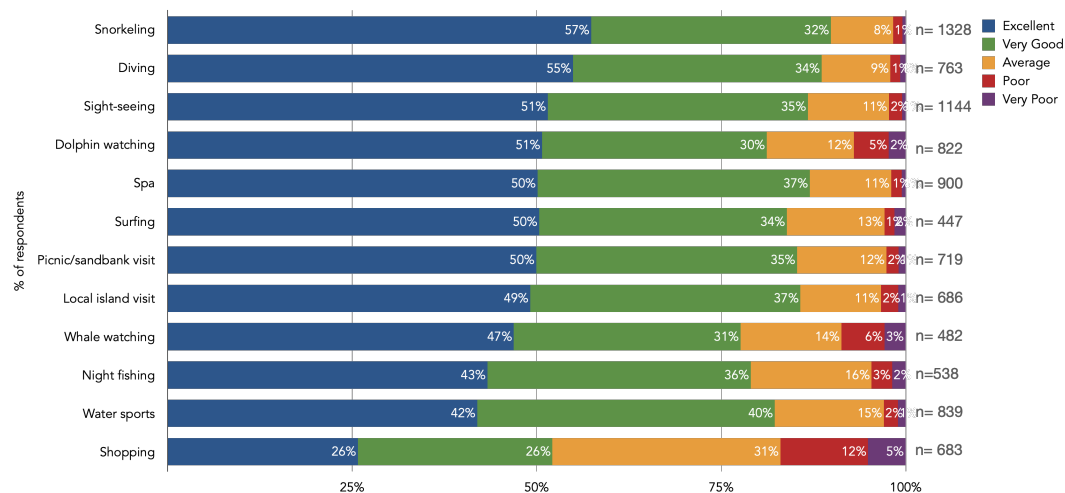
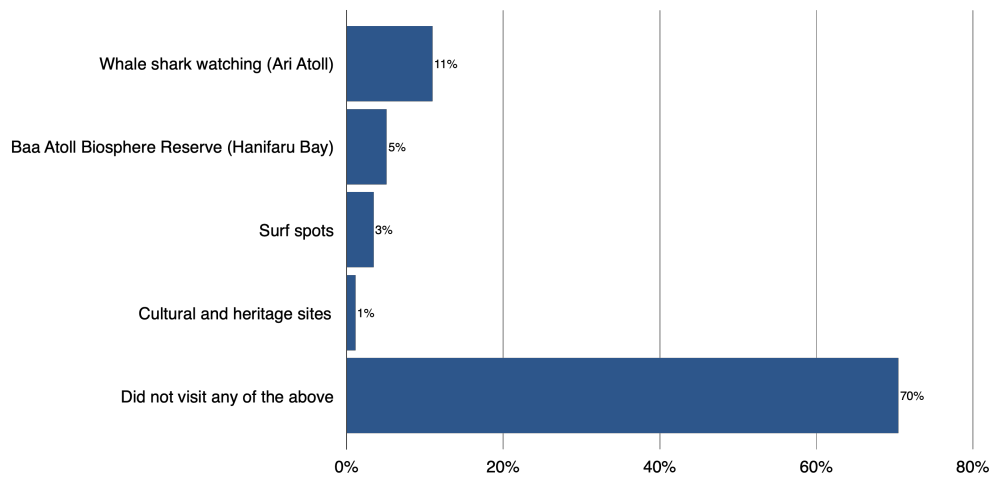


Figure 8.2: Ratings for activities at place of stay (N=9,351)

Snorkelling (57%), diving (55%), sight-seeing (51%), dolphin watching (51%), spa (50%), surfing (50%) and picnic/sandbank visits (50%) were most commonly rated as excellent, while water sports (40%), spa treatments (37%), and local island visits (37%) were rated as very good. Shopping was generally rated the lowest with 31% rating it average, 12% citing it as poor, and 5% believing it was very poor.

### 9.3. Places visited during the holiday



*\*Multiple response question*

*Figure 8.3: Places visited while in the Maldives*

Over the course of their holidays, 11% of respondents went whale watching at Ari Atoll, 5% visited Hanifaru bay, 3% visited surf spots and 1% visited cultural and heritage sites.

# 10. Travel During the COVID-19 Pandemic

## 10.1. Travel Plan and Choosing Maldives

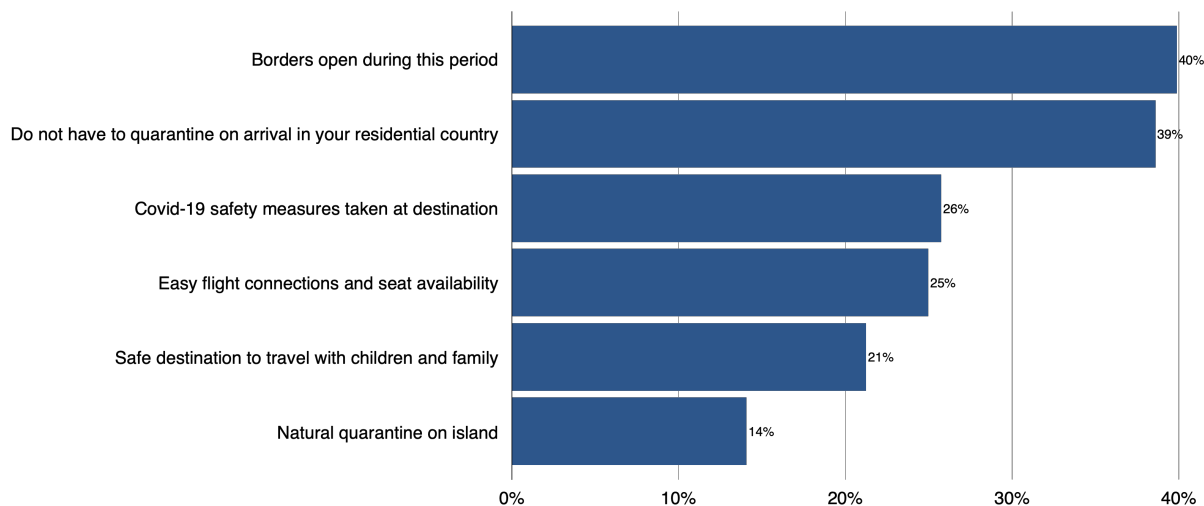


Figure 9.1: Factors Considered in Choosing Maldives

*\*Multiple response question*

This survey was conducted during the COVID-19 pandemic, which presented unprecedented challenges to the travel and tourism industry. Respondents were asked what COVID-19 related factors they considered when choosing the Maldives as a travel destination. 40% of respondents stated that they travelled to the Maldives as the borders were open during this period, while 39% stated that they chose it as there was no quarantine upon arrival. 26% cited the COVID-19 safety measures taken at their destination and 25% chose it for easy flight connections and seat availability. 21% said they believed the Maldives was a safe destination to travel with children and family while 14% of respondents liked the natural quarantine conditions that presented themselves on an island.

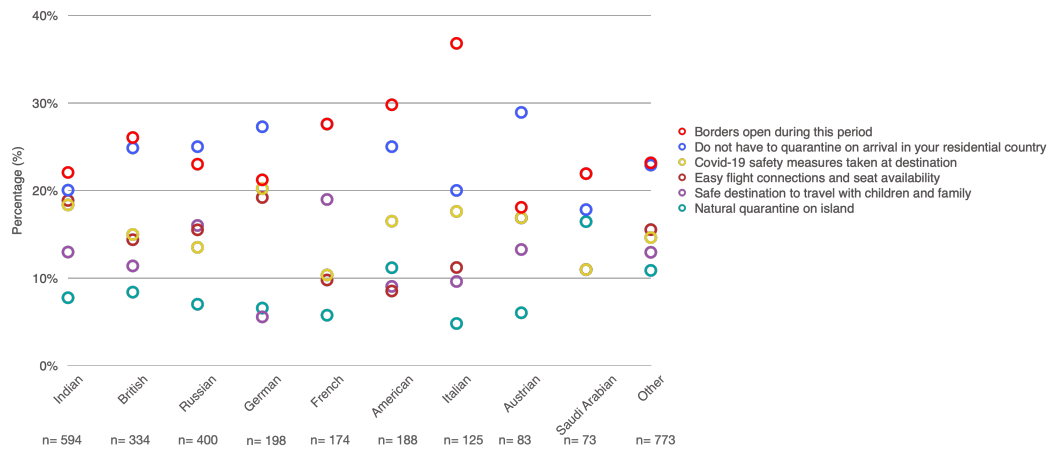


Figure 9.2: Factors Considered in Choosing Maldives by Nationality

Majority of nationalities chose Maldives as borders were open during this period. This included Indian, British, French, American, Italian, and Saudi Arabian nationalities. Majority of Russian, German and Austrian chose Maldives as they do not have to quarantine on arrival in their residential country.

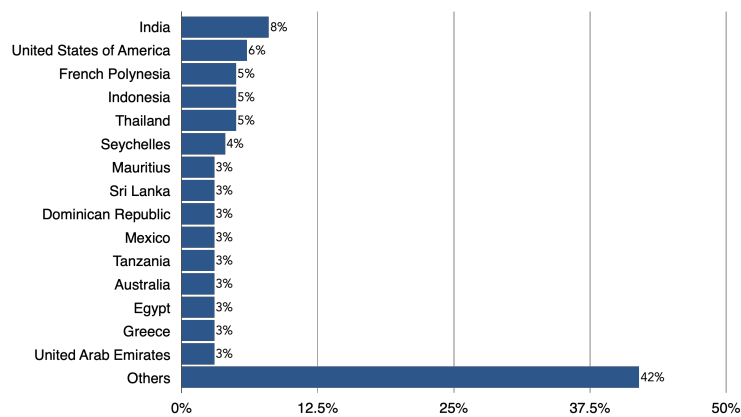


Figure 9.3: Other Destinations Considered for Travel

Other destinations that were considered for travel by respondents were India (8%), USA (6%), French Polynesia (5%), Indonesia (5%) and the Thailand (4%) (5%).

## 10.2. Source of Information and Changes to Trip

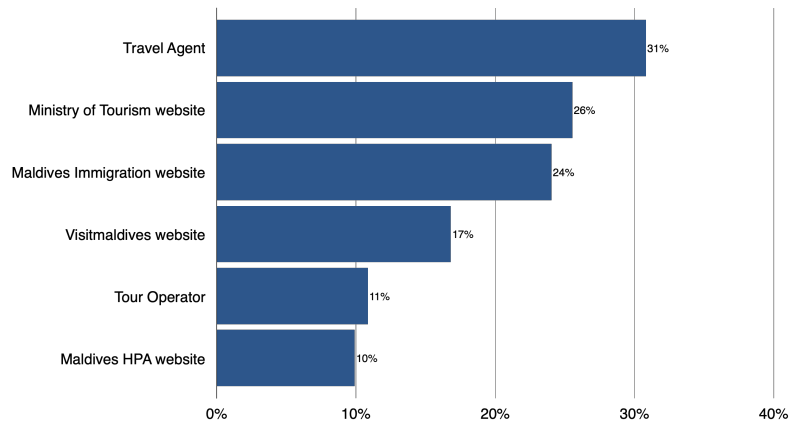


Figure 9.4: Source of Information about Covid-19

\*Multiple response question

Due to the rapidly evolving nature of the COVID-19 pandemic, respondents were questioned on where they received their information regarding COVID-19 measures and potential changes to their trip. 31% of respondents got this information from their travel agent, while 26% visited tourism.gov.mv. An additional 24% received information from immigration.gov.mv and 17% from visitmaldives.com. 11% received information from their tour operator and 10% visited hpa.gov.mv.

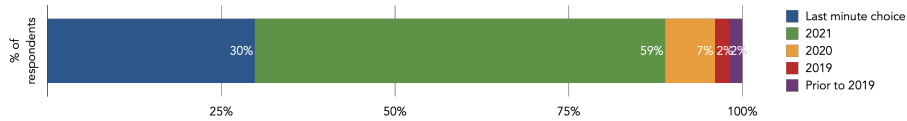


Figure 9.5: When trip to Maldives was planned (N=1,546)

Most respondents planned their trip to the Maldives during 2021 (59%) while 30% stated it was a last-minute choice, and a further 7% planned it during 2020. 2% planned this trip in 2019, and another 2% planned prior to 2019.

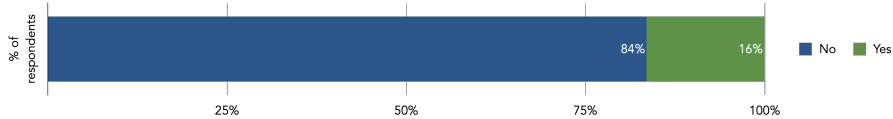


Figure 9.6: Any Changes were made to the Booking (N=1,493)

84% of respondents did not have to make any changes to their booking due to the COVID-19 pandemic, while 16% had to make changes.

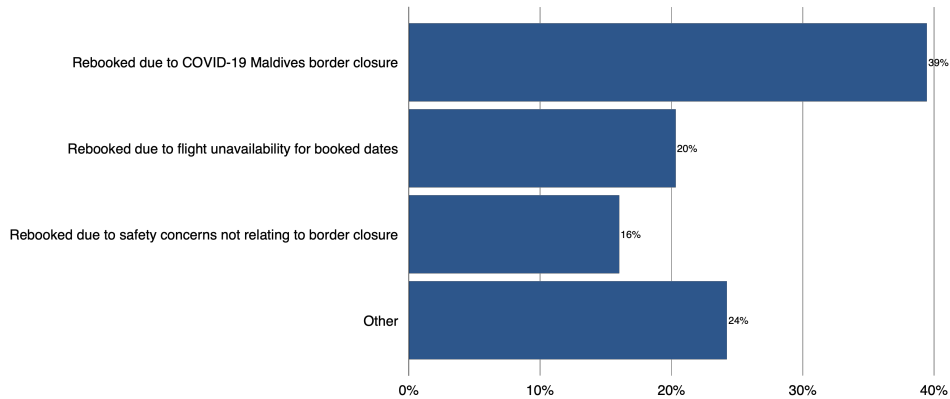


Figure 9.7: Reasons for changes to the booking (N=256)

Of those who said a change had to be made to their booking, these changes included rebooking travel due to the Maldives border closure (39%), flight unavailability (20%) and safety concerns (19%).

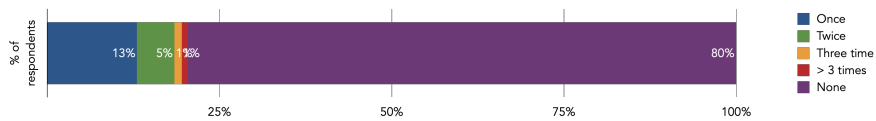


Figure 9.8: Number of Times Changes to Booking was Made (N=1,491)

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

### 10.3. Covid-19 Safety & Satisfaction



Figure 9.9: Concerns of Personally contracting Covid-19 (N=1,470)

When asked about concerns of personally contracting COVID-19 on their trip, 47% of respondents stated that they were not at all concerned. 39% of respondents were somewhat concerned, and 14% of respondents were very concerned at the possibility of contracting COVID-19.

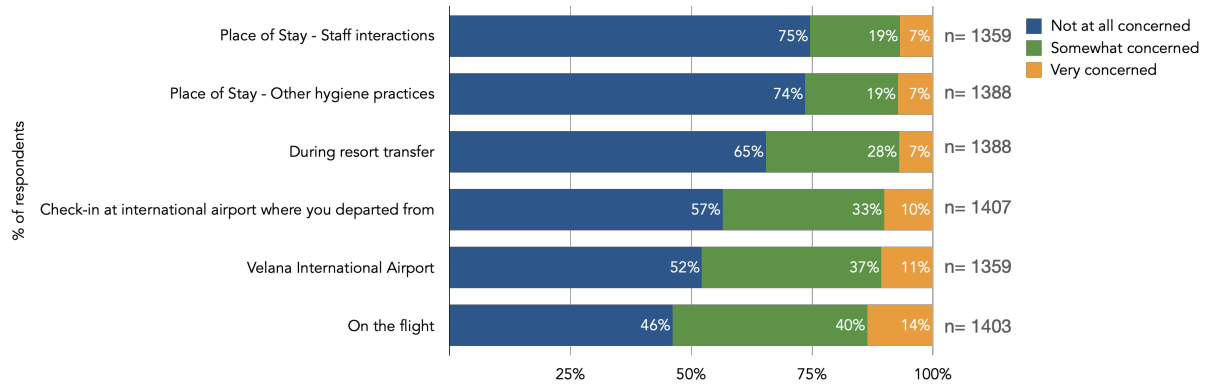


Figure 9.10: Concerns of contracting Covid-19 During the travel period (N=8,378)

Respondents were least concerned about COVID-19 at their place of stay, with 75% stating that staff interactions at their place of stay and 74% saying hygiene practices at their place of stay made them not at all concerned about contracting COVID-19. 65% of respondents were also unconcerned during their resort transfers. Places where respondents felt somewhat concerned included on their flight (40%), Velana International Airport (37%) and during check-in at the international airport they departed from (33%).

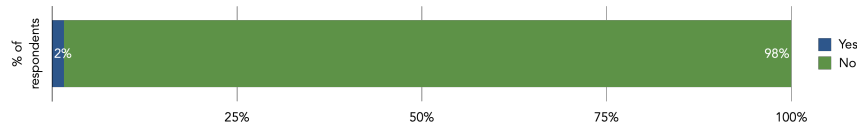


Figure 9.11: Trip Extension while in Maldives due to a family member testing positive to Covid-19 (N=1,454)

98% of respondents did not have to extend their trip in the Maldives due to a family member testing positive to COVID-19.

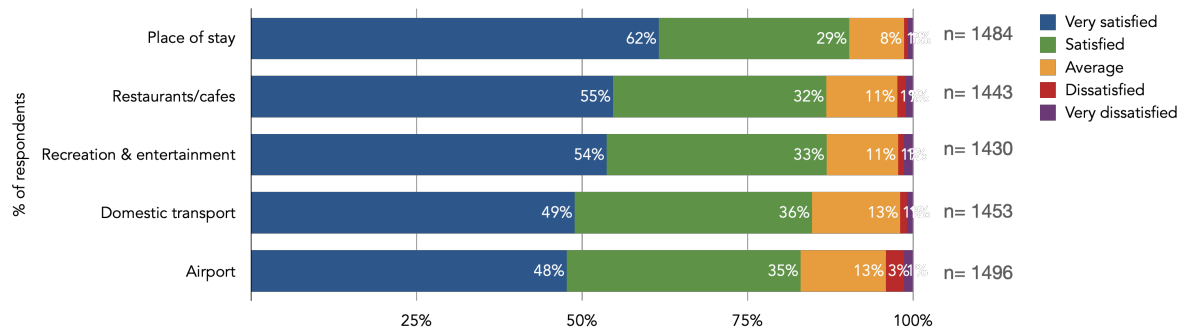


Figure 9.12: Satisfaction with Covid-19 preparations (N=7,306)

Overall, respondents were very satisfied with COVID-19 preparations in their place of stay (62%), restaurants and cafés (55%), and recreation and entertainment settings (54%). 48% of guests were satisfied with preparations in the airport, and 49% were satisfied with preparation in domestic transport. 13% of guests rated COVID-19 preparations in the airport and in the domestic transport as average.

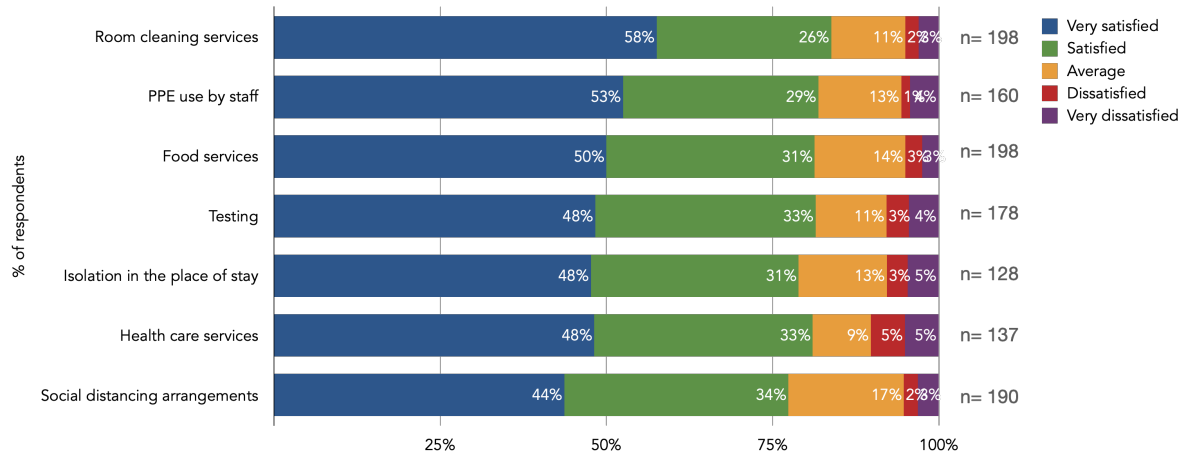


Figure 9.13: Satisfaction with Covid-19 Preparation in Maldives (N=1,189)

A majority of respondents were very satisfied by the room cleaning services (58%), PPE used by staff (53%) food services (50%), COVID testing (48%), isolation in the place of stay (48%) and health care services (48%) in the Maldives. Guests were also very satisfied by social distancing arrangements (44%). Social distancing was rated average by 17% of guests, while food services (14%), PPE use by staff (13%), and isolation in place of stay (13%) were rated as average. Generally, guests staying at resorts only were very satisfied by COVID-19 protocols, while guests staying in guesthouses only were satisfied with protocols.



### 11.3. Sharing on Social Media

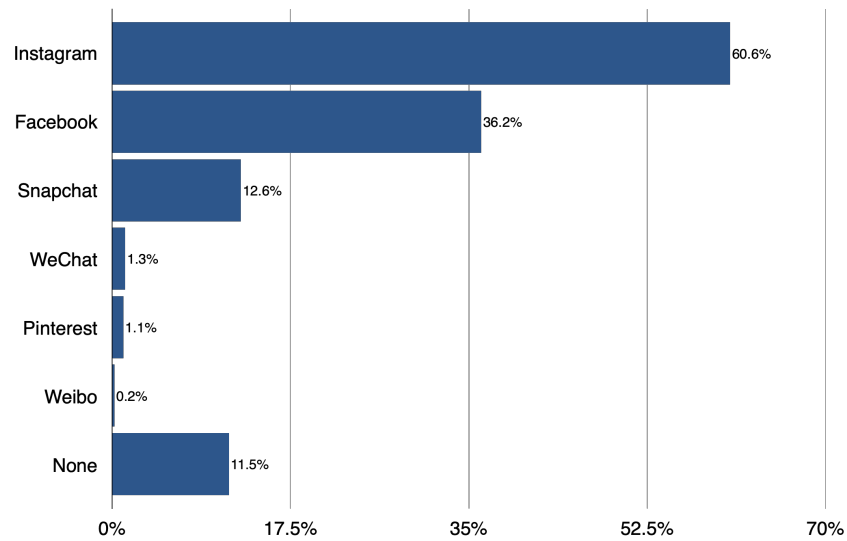


Figure 10.3: Sharing on social media

*\*Multiple response question*

Several different social media sites were used to share the respondents' experiences in the Maldives, the most common being Instagram, used by 60.6% of respondents. Facebook was used by 36.2% of guests while Snapchat was used by 12.6%. 11.5% of guests went social media free, while 1% shared their experiences on both Pinterest and WeChat.

## 11.4. Satisfaction

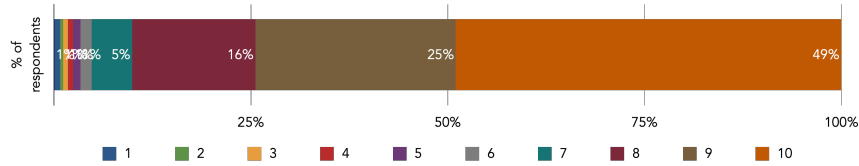


Figure 10.4: Satisfaction with holiday (N=1,674)

Most respondents were satisfied with their trip to the Maldives, with 95% rating it as excellent or very good. This included 49% rating their satisfaction as 10/10, 25% rating it a 9/10, 16% rating it an 8/10 and 5% rating it as 7/10.

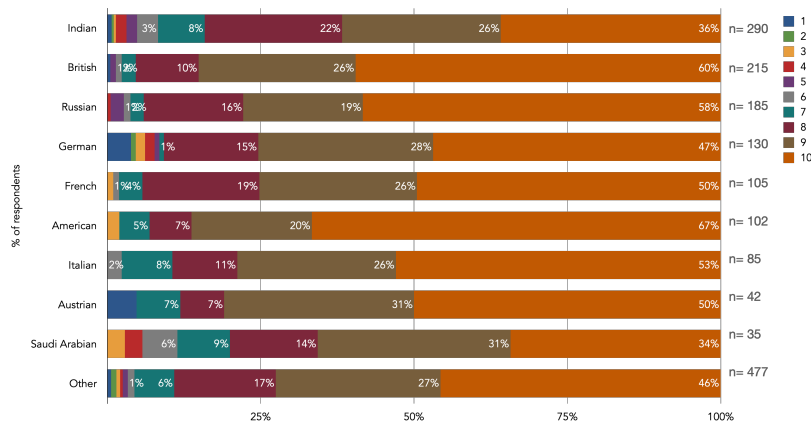


Figure 10.5: Satisfaction with holiday by nationality (N=1,666)

By nationality, Americans were most satisfied with their trips, with 67% rating their satisfaction as 10/10. This was followed by 60% British, 58% Russian, and 53% of Italians rating a fully satisfied 10/10. Similarly, 50% of French and 50% of Austrian guests also rated their satisfaction as 10/10. 31% of Saudi Arabian respondents rated their satisfaction a 9, as did 31% of Austrian respondents. Saudi and Indian respondents were the least fully satisfied with their holiday experience, with only 34% and 36% rating it a 10/10 respectively. 14% of Saudi Arabian respondents rated it an 8/10 and 9% rated it a 7/10.

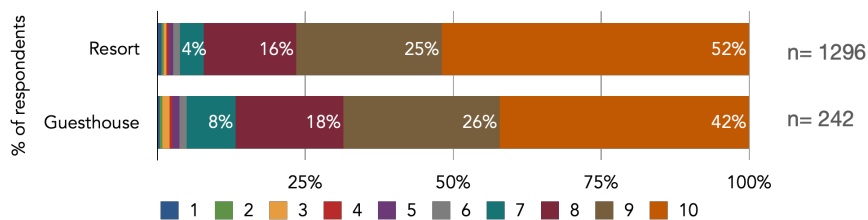


Figure 10.6: Satisfaction with holiday by place of stay (N=1,538)

Guests generally were more satisfied with their holiday if they stayed in resorts as opposed to guesthouses. 52% of respondents who stayed in resorts gave their satisfaction a 10/10, while only 42% of those who stayed in guesthouses did the same.

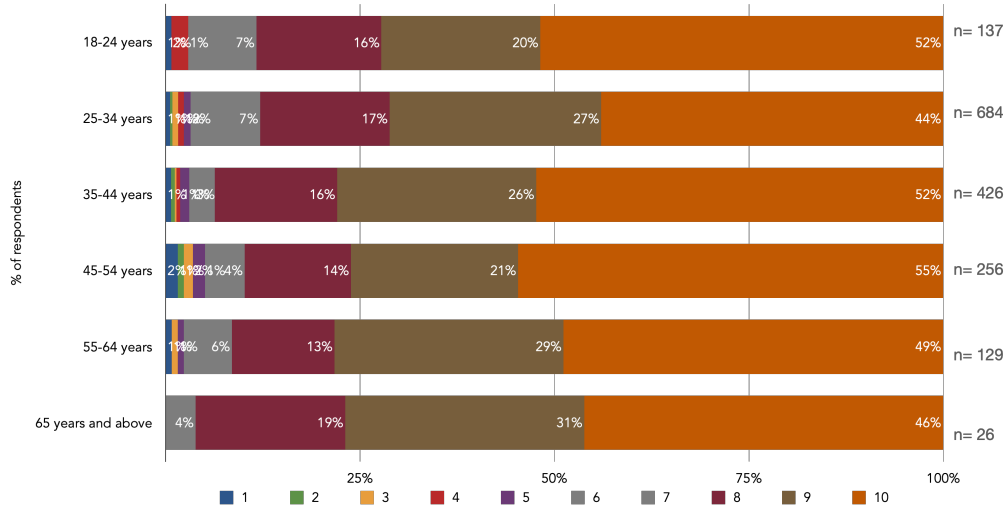


Figure 10.7: Satisfaction with holiday by age group (N=1,658)

By age groups, those aged 45-54 (55%), 18-24 (52%) and 35-44 (52%) were most likely to rate their satisfaction a 10/10. 49% of those aged 55-64 and 46% aged 65 years and above rated it a 10/10.

### 11.5. Intention to return

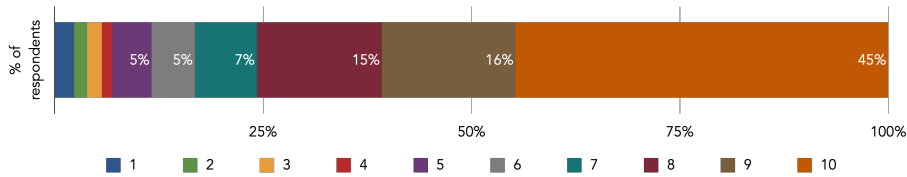


Figure 10.8: Intention to return to Maldives (N=1,672)

83% respondents were extremely likely or very likely to return to the Maldives again. 2% stated that they were extremely unlikely to return.

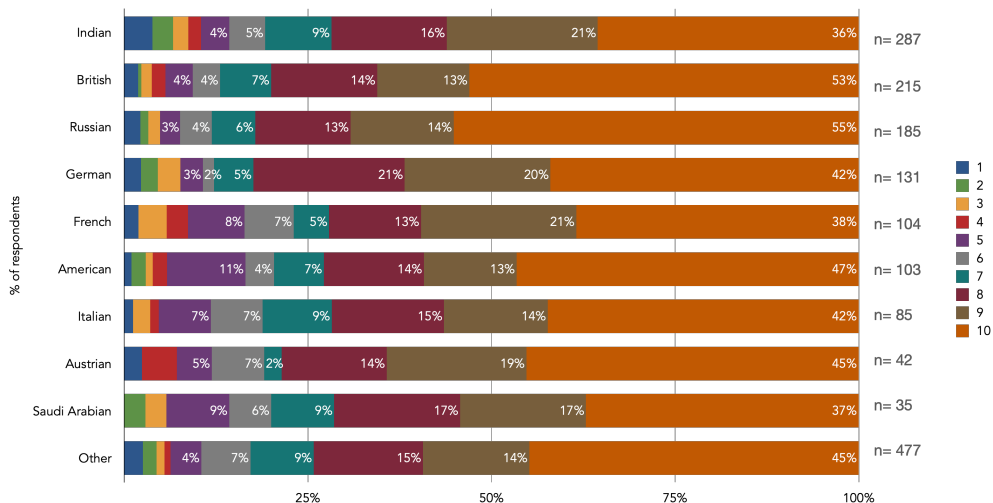


Figure 10.9: Intention to Return to Maldives by Nationality (N=1,664)

Russian (55%), British (53%), American (47%) and Austrian (45%) respondents are most likely to return to the Maldives, rating intention to return as 10/10.

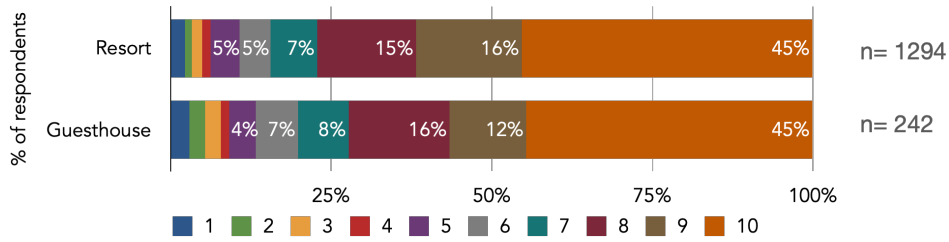


Figure 10.10: Intention to Return to Maldives by Place of Stay (N=1,536)

Respondents who stayed at resorts are slightly more likely to return to Maldives, with over 83% of them having rated intention to return as 7/10 or higher. Similarly, 81% of tourists who stayed at guesthouses rated intention as 7/10 or higher.

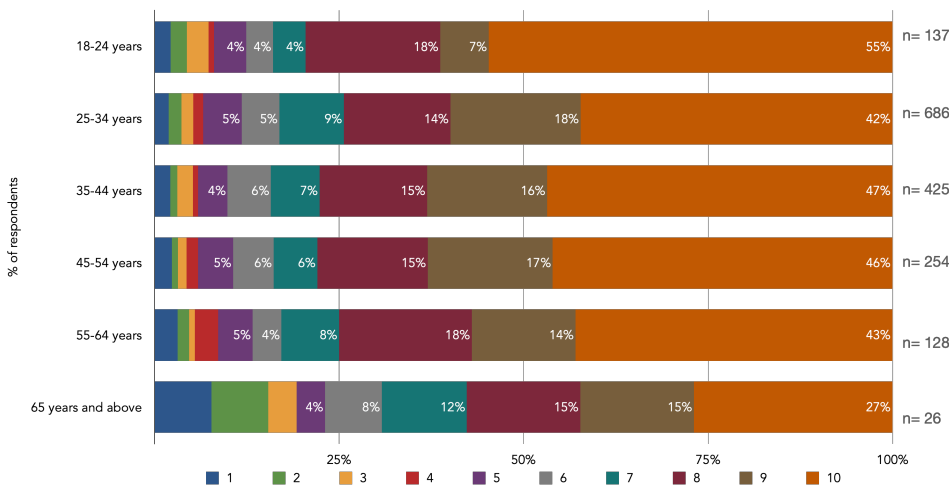


Figure 10.11: Intention to return to Maldives by age group (N=1,656)

Majority of respondents (over 75%) in all age groups except 65 years and over, rated intention to return as 7/10 or higher, while the same is true for 69% of those 65 years of age or over.

### 11.6. Recommend Maldives

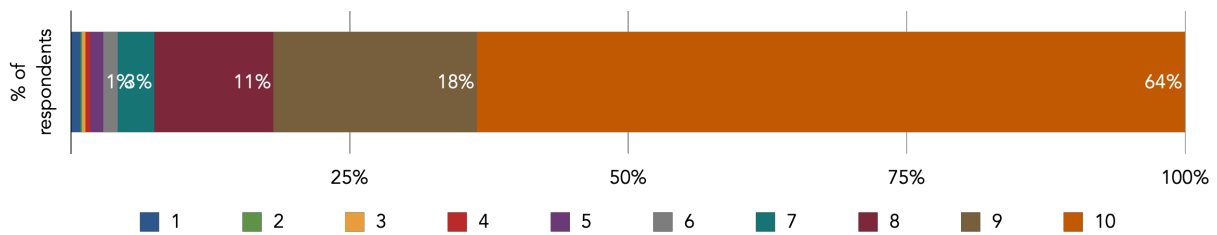


Figure 10.12: Recommend Maldives (N=1,658)

Most respondents would recommend the Maldives to others, with 96% stating they are extremely likely or very likely to recommend the Maldives with ratings 7/10 or higher. 64% said they would absolutely recommend the Maldives by rating 10/10.

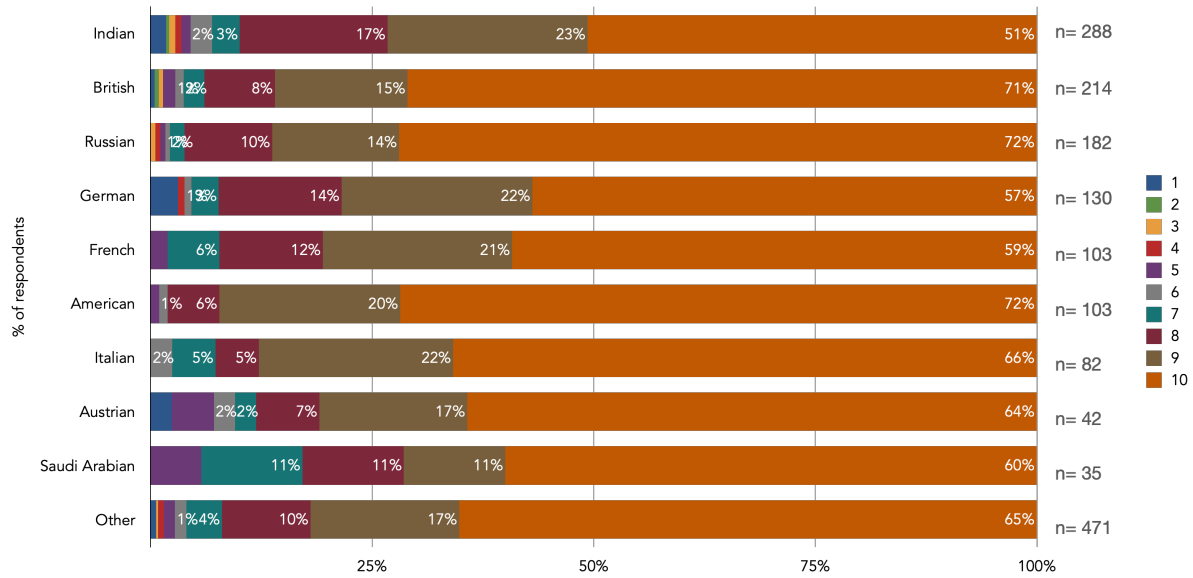


Figure 10.13: Recommend Maldives by Nationality (N=1,650)

Russian (72%), American (72%) and British (71%) respondents were most likely to recommend the Maldives to other people with a 10/10.

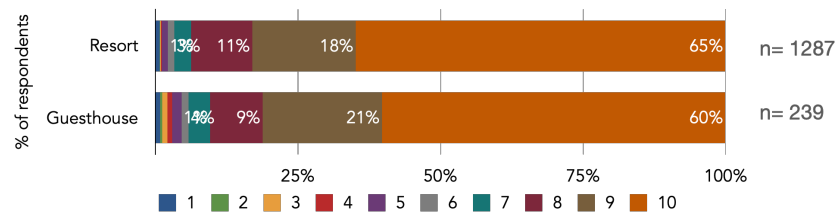


Figure 10.14: Recommend Maldives by place of stay (N=1,526)

65% of guests who stayed in resorts would definitely recommend the Maldives while 60% of those who stayed in guesthouses would with a 10/10 score.

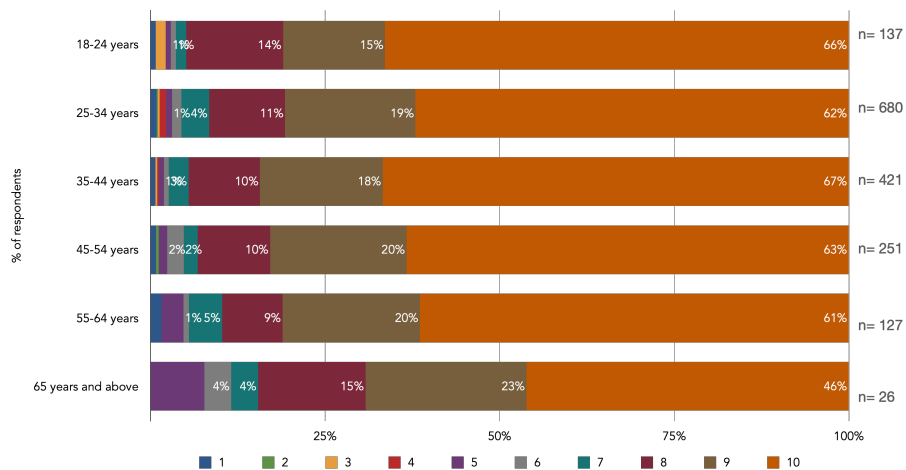


Figure 10.15: Recommend Maldives by age group (N=1,642)

Amongst the visitor age groups, 18–24-year-olds (66%), 45–54-year-olds (63%) and 35–44-year-olds (67%) were the most likely to recommend the Maldives to other people. 62% aged 25-34 also would very likely recommend the Maldives, while 61% in the 55-64 age group and 46% of those aged 65 or over would.

## 11.7. Experience at Similar Destination

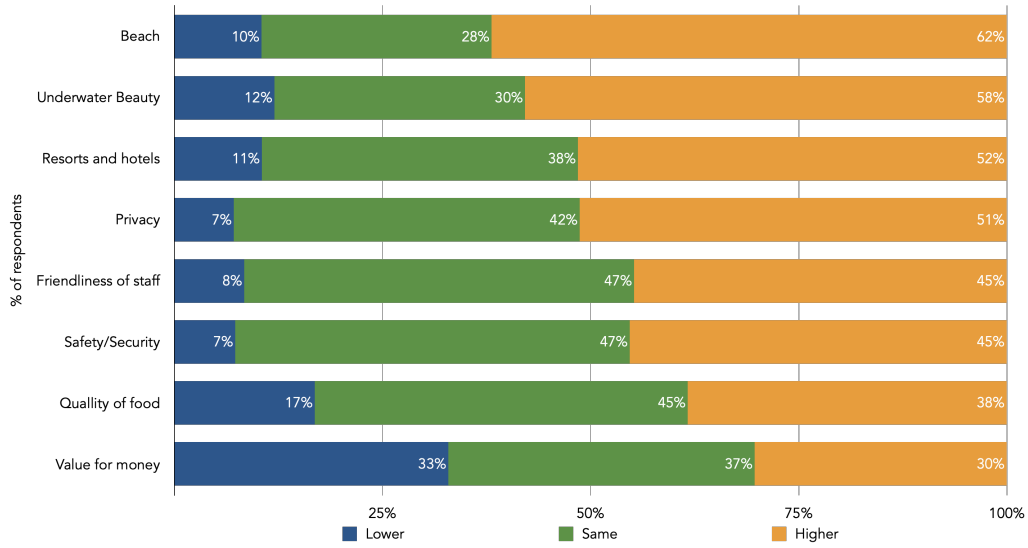


Figure 10.16: Visited a Similar destination

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

Most guests rated the Maldives beach (62%) and underwater beauty of Maldives (58%) to be higher than that of similar destinations. Other aspects of the Maldives rated higher were resorts and hotels (52%) and privacy (51%). Aspects rated the same as those at similar destinations include safety/security (47%) and friendliness of staff (47%). Value for money was rated lower than in similar countries by 33% of respondents.

# 12. Expenditure & Travel Package

## 12.1. Travel Package

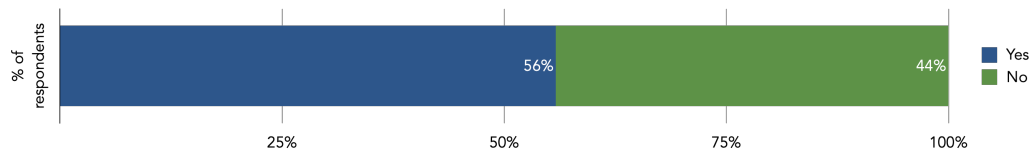


Figure 11.1: Travel Package

56% of respondents visited the Maldives as part of a travel package.

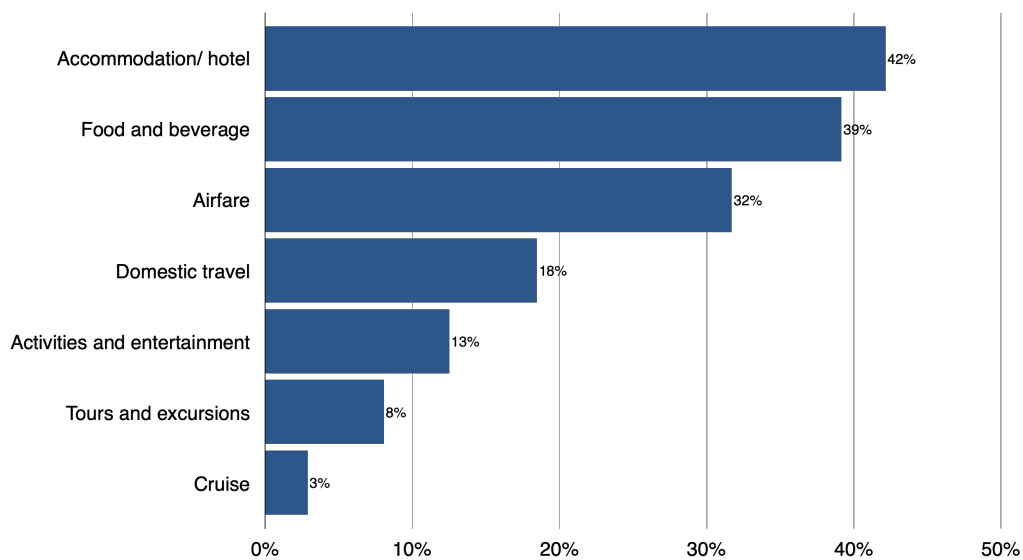


Figure 11.2: Travel Package Inclusion

\*Multiple response question

Aspects of the trip commonly included on travel packages included accommodation/hotel (42%), food and beverage (39%) and airfare (32%). 18% of respondents had domestic travel included, while 13% had activities and entertainment included. 8% of guests stated that tours and excursions were included in their travel packages.

## 12.2. Trip Expenditure



Figure 11.3: Trip Expenditure

Most respondents spent between USD1,001-5,000 (34%) and 5,001-10,000 (34%) on their trip. 19% spent USD10,001-20,000, while 4% spent USD 20,000 or more and 6% spent less than USD1,000.

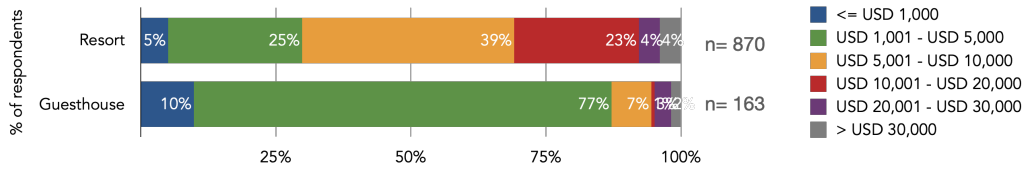


Figure 11.4: Trip Expenditure by Place Of Stay

Respondents who stayed at resorts spent more, with 39% having spent between USD 5,001 –10,000 and 23% having spent between 10,001 – 20,000. Majority of respondents who stayed at guesthouses (77%) spent between USD 1,001 – 5,000.

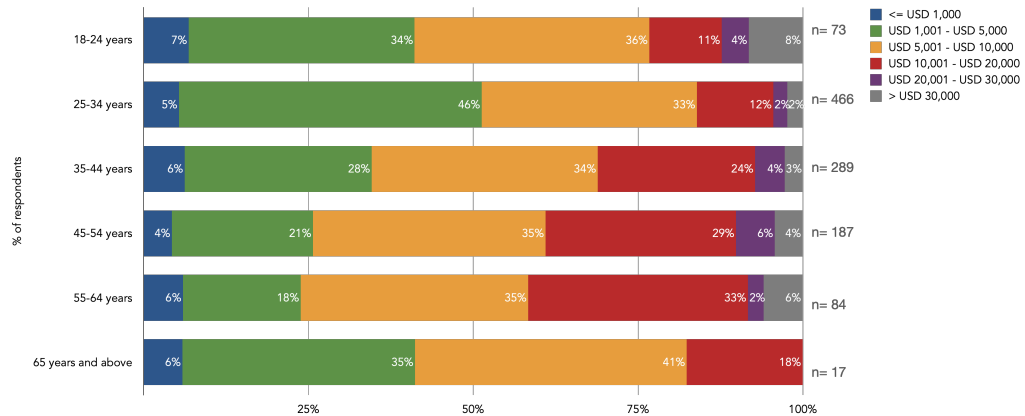


Figure 11.5: Trip Expenditure by Age Group

46% of those aged 25-34 and 35% of 65 years and over spent USD1,000-5,000. 35% of respondents aged 45-54 spent between USD5,001-10,000, and 33% of those aged 55-64 spent USD10,001-20,000. 6% of respondents aged 45-54 spent USD20,001-30,000.

### 12.3. Stops on the way to Maldives

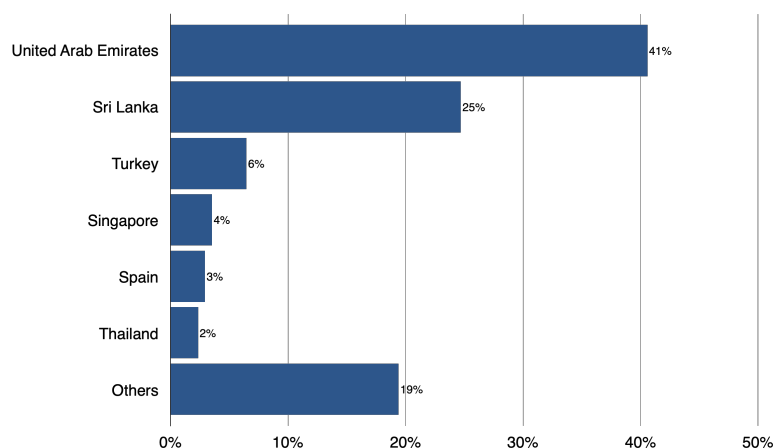


Figure 11.6: Stops on the Way to Maldives

41% of respondents stopped in UAE on their way to the Maldives, while another 25% had a layover in Sri Lanka. 6% stopped in Turkey.

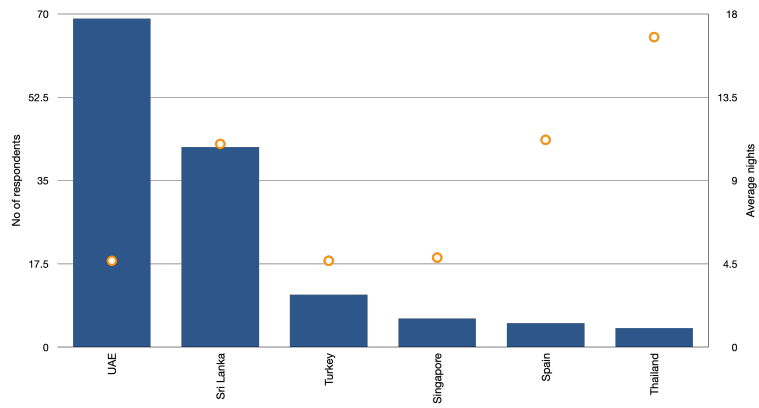


Figure 11.7: Number of Respondents and Average Nights by Stop

Respondents who stayed in UAE stayed there for an average of 4.5 nights, while those who stayed in Sri Lanka stayed for 11 nights.

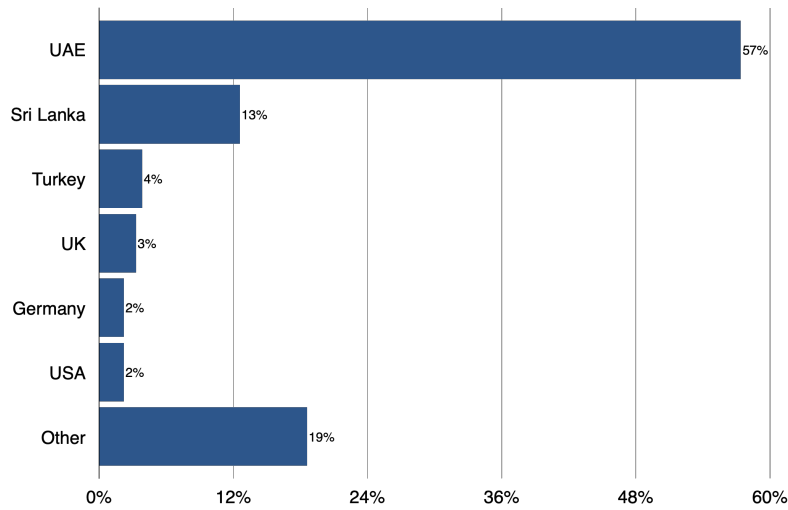


Figure 11.8: Stops on the Way from Maldives

57% of respondents had layovers in UAE on their trip home from the Maldives, while 13% had stops in Sri Lanka.

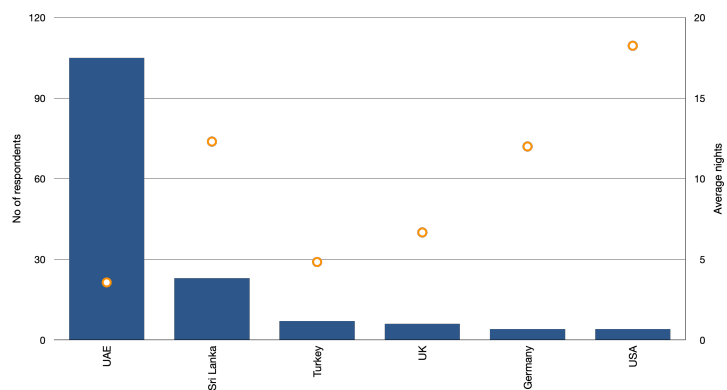


Figure 11.9: Number of Respondents and Average Nights by Stop

Respondents who had layovers in the United Arab Emirates stayed for an average of 4 nights, and in Sri Lanka for 12 nights.

## Annex 1: Methodology

The 2022 February Maldives Visitor Survey questionnaire was based on the questionnaire for the survey conducted in February 2020, with an additional section on travel during Covid-19. The questionnaire consisted of five sections and 41 questions in total. The questionnaire was prepared and printed in seven different languages. They were English, Italian, German, French, Russian and Arabic languages.

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

The survey was conducted for a period of 13 days between 19 February 2022 and 1 March 2022 at Velana International Airport (Hulhule'). The minimum target for the survey was 1500 complete responses. All airlines and all nationality of visitors traveling out of Venal International Airport (VIA) during the survey period were targeted. The number of completed questionnaires collected was 1789.

Table 1: Completed Forms by Nationalities

Nationality	Forms Collected
India	326
United Kingdom	223
Russia	201
Germany	136
France	111
United States of America	110
Italy	87
Austria	43
Saudi Arabia	39
Others	513
Total	1789

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

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