



MALDIVES VISITOR SURVEY

FEBRUARY 2015



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01

INTRODUCTION

LANGUAGES

7

English
Italian
German
French
Japanese
Chinese
Russian

TOTAL FORMS DISTRIBUTED

2,116

TOTAL FORMS COLLECTED

2,116

COMPLETE	INCOMPLETE
1,925	191

This is the report of the Maldives Visitor Survey February 2015.

The purpose of the survey is to better understand the profile of the international visitors to the Maldives and their satisfaction levels. This study represents a snapshot of a specific time of the year, which needs to be taken into account when considering the results.

This is the tenth survey of a series of studies conducted by the Ministry of Tourism. Previous reports of the survey were published in 1999, 2004, 2008, 2011, 2012, February 2013,

October 2013, February 2014 and June 2014. This report presents the findings of the survey undertaken in February 2015 to capture the opinions of the international visitors to the Maldives during the peak season.

The survey was conducted as an exit survey at Ibrahim Nasir International Airport. The survey was conducted for a period of 14 days between 14th February and 28th February 2015 at the International Departure Terminal of the airport.

The questionnaire was distributed in seven different languages.

The selected languages for the survey were English, Italian, German, French, Japanese, Chinese and Russian. The sample for the survey was selected based on 5-year averages of the top ten inbound markets to the Maldives between 2010 and 2014. By the end of the survey period, the number of questionnaires distributed was 1,221. Total number of questionnaires collected was 2116. All 2116 questionnaires were deemed fit for data analysis.

The survey respondents represent all the international visitors to the Maldives during the survey period. Proportions of survey respondents are: Chinese (15%), British (14%), German (10%), Italian (9%), French (7%), Indian (7%), Swiss (5%), Russian (3%), Japanese (3%) and respondents from all other nationalities (25%). Hence, for the purpose of data analysis, those nationalities above 2% survey representation, with a minimum of 30 respondents from the same nationality have been used. The following chapter outlines the summary of key findings.

02

SUMMARY OF
KEY FINDINGS

Natural beauty is the main motivator for travel to the Maldives.

Rest and relaxation (63%) is the main purpose of visit to the Maldives for international visitors.

Internet is the most important source of information to discover the Maldives.

One out of ten international visitors to the Maldives use 'Visit Maldives' as their travel guide to Maldives.

One out of three international visitors to the Maldives refer to 'TripAdvisor'.

More than half of the international visitors to the Maldives book their holiday through Internet.

Booking.com is the most common OTA used by international visitors for booking their holiday to the Maldives.

Of the international visitors to the Maldives, 46% book their trip more than 3 months in advance.

Of the international visitors to the Maldives, 34% are between the ages of 25 to 34 years of age.

Of every three international visitors to the Maldives one is a repeat visitor.

Repeat visitors are highest amongst visitors from Europe.

Repeat visitors travel more during the peak season

Majority of the international visitors to the Maldives (56%) stay for 4-7 nights in the Maldives.

Length of stay is shortest for visitors from China, while German and Russian visitors stay the longest

Majority of the international visitors to the Maldives (49%) have to wait at the airport for less than half an hour to get a hotel transfer

Waiting time at the airport was highest for visitors travelling via domestic flights

The waiting time at airport is shortest for visitors travelling by speedboats.

On quality of transport to hotel, 'service' was ranked highest with 86% of visitors ranking excellent or very good

One out of four visitors who stayed in guesthouses chose the Maldives because of quality of beach

Of the services at place of stay, in-room entertainment was ranked lowest at place of stay

International visitors to the Maldives rate shopping as the poorest activity

Souvenirs are perceived to be expensive in the Maldives

Maldives is a popular destination for couples and families.

Of the international visitors who stay in resorts, 92%, travel with partner or family

Customs service, immigration and check-in services are ranked the best from services at INIA.

One out of every two international visitor to the Maldives use speedboat transfer to get to their place of stay.

Of the international visitors to the Maldives, 77% took less than an hour to reach their place of stay.

Four out of five international visitors to the Maldives stay in the tourist resorts.

Of the international visitors to the Maldives, 37% choose all-inclusive meal plans during their stay in the Maldives

Quality of dining experience at place of stay is ranked very highly

Of the international visitors who have visited a similar destination to the Maldives, 35% rank the food quality in the Maldives higher than similar destinations

Snorkelling and diving are rated highest amongst the activities enjoyed in the Maldives.

29% of international visitors to the Maldives visited a local island during their stay in the Maldives.

The beaches, underwater beauty and privacy in the Maldives are rated higher than other similar destinations.

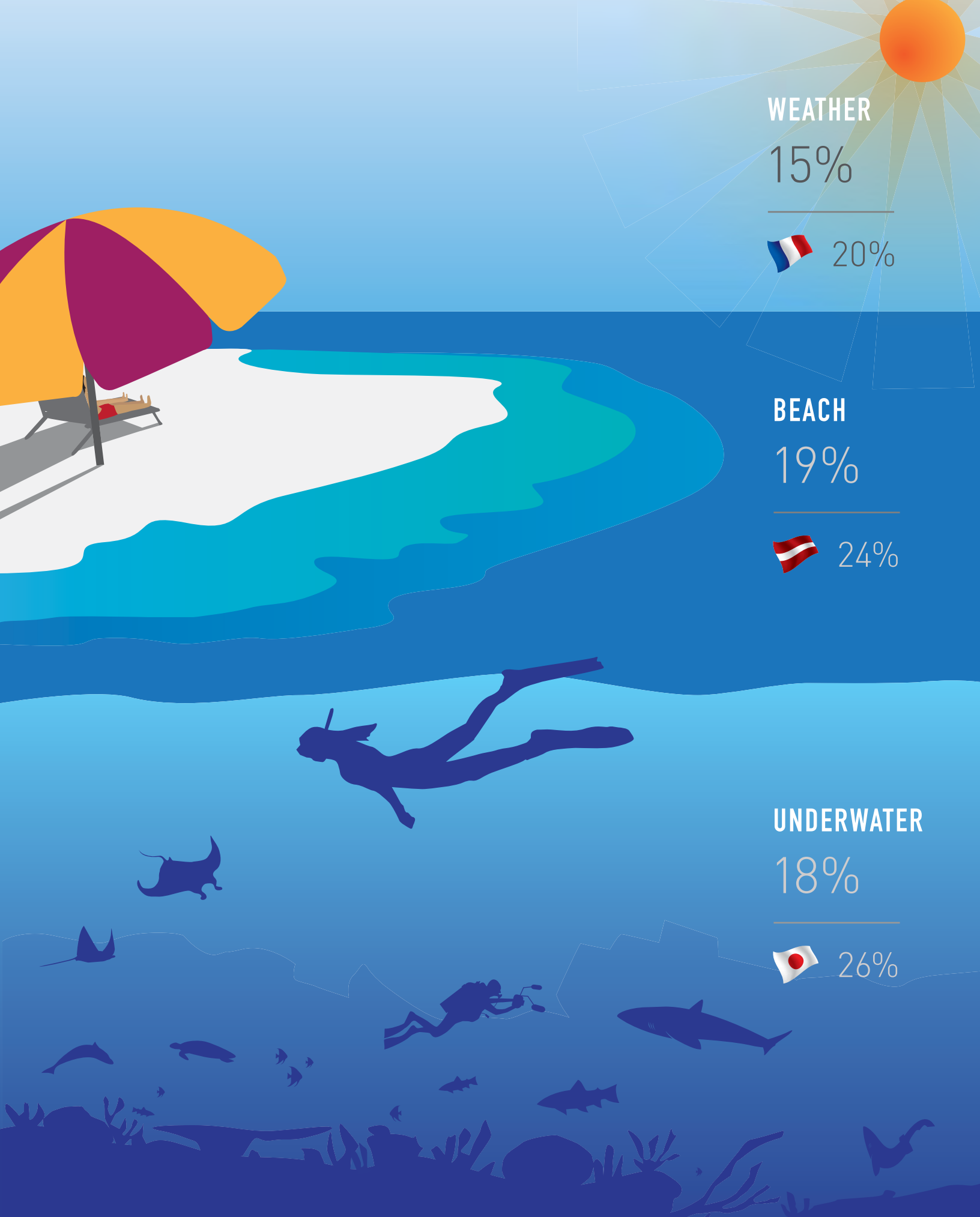
About 32% of the respondents stated that they spent between USD 1000 to 5,000 for their holiday visit to the Maldives

According to the responses received from this survey, Russians and Chinese visitors spend the most in the Maldives.

Nine out of ten visitors to the Maldives stated that the holiday met their expectations.

03

MOTIVATION



Motivators to Visit

Natural beauty is the main motivator for travel to the Maldives.

48% of international visitors stated they were motivated to visit by the natural beauty of the Maldives. Almost 19% of the international visitors affirmed they are motivated to visit the Maldives by its beaches, while 18% of the visitors are motivated by the underwater beauty and 11% by the small islands.

48%

**MOTIVATED BY BEAUTY
OF THE MALDIVES**

International visitors stated that weather (15%), peacefulness (13%) and uniqueness (11%) were also important motivating factors to visit the Maldives.



PEACEFULNESS

13%

 23%



REPUTATION

08%

 13%



SMALL ISLANDS

11%

 14%



PRIVACY

07%

 14%



UNIQUENESS

11%

 15%

International visitors from different nationalities appreciate the natural beauty of the Maldives equally. Japanese visitors show a high preference for underwater beauty (26%) and peacefulness (23%). Amongst Indian visitors, peacefulness (18%) and privacy (14%) are important motivating factors. Weather (17%) and privacy (14%)

(13%) are the two important factors for Russian visitors other than natural beauty. The French (20%), British (18%) and Swiss (18%) visitors stated weather as an important motivating factor for them.

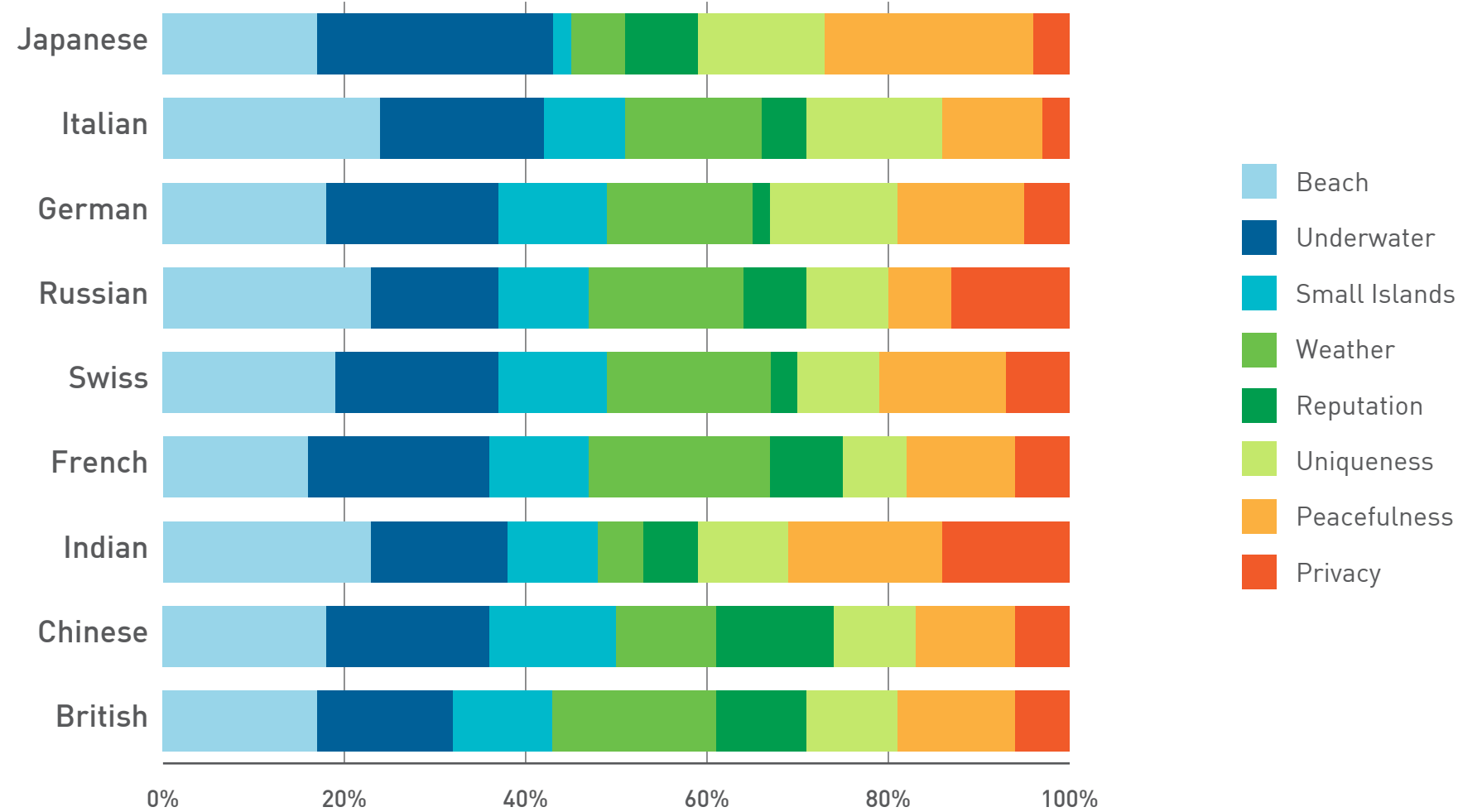


Figure 1. Motivators for choosing the Maldives by nationalities

63%

FOR REST AND RELAXTION

Purpose of Visit

Rest and relaxation (63%) is the main purpose of visit to the Maldives for international visitors

The second most popular reason to visit the Maldives is honeymoon (15%), followed by snorkelling (11%) and diving (8%).

Across all nationalities (except India), rest and relaxation is the most common reason to visit the Maldives. Amongst the Russian and Chinese visitors, more than 75% visit the Maldives for rest and relaxation. However, for Indian visitors, honeymoon (61%) is the most common reason to visit the Maldives.



HONEYMOON

15%



55%



DIVING

07%



23%



SNORKELLING

10%



20%

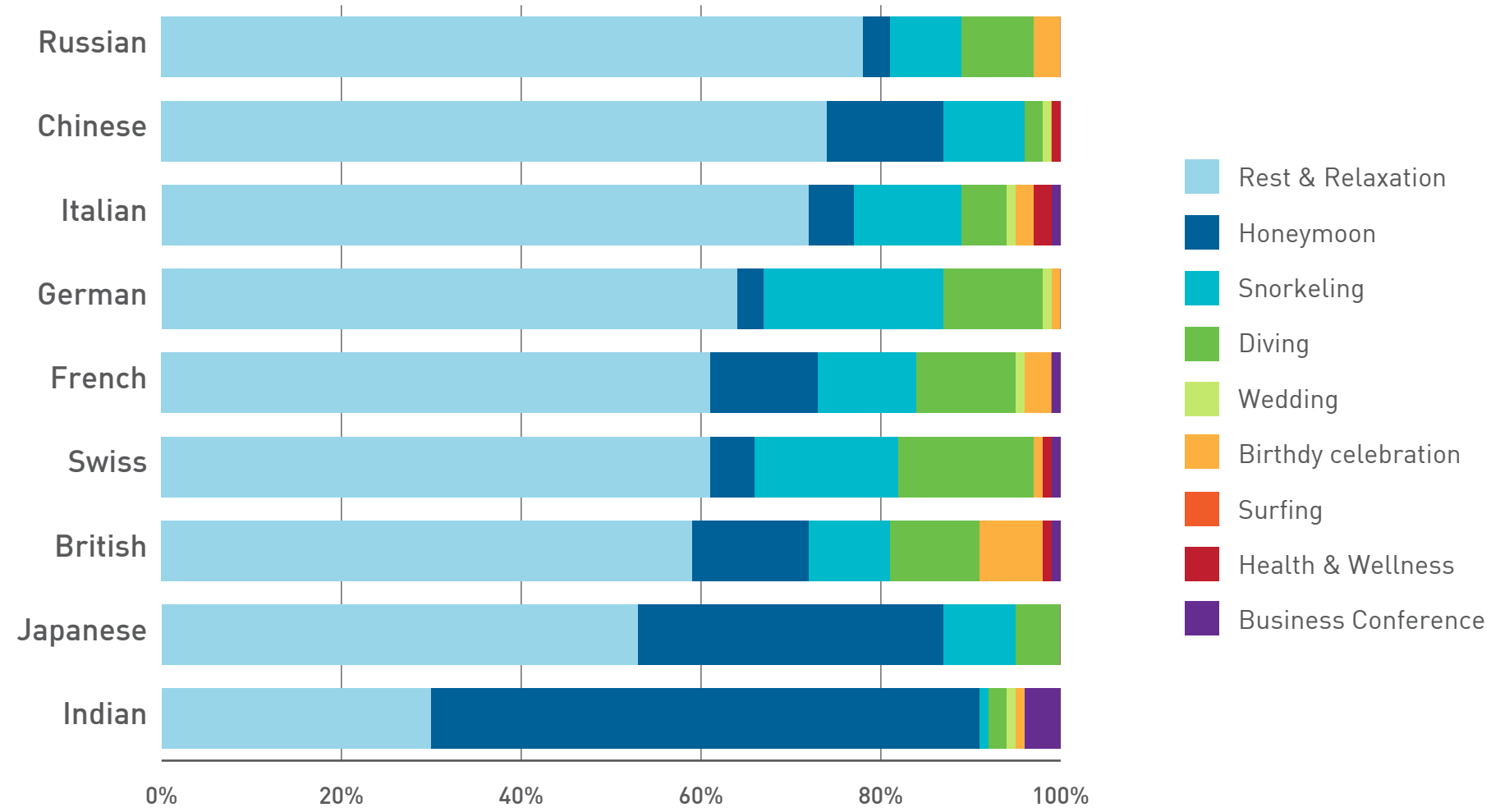


Figure 2. Motivators for choosing the Maldives by nationalities

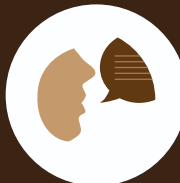
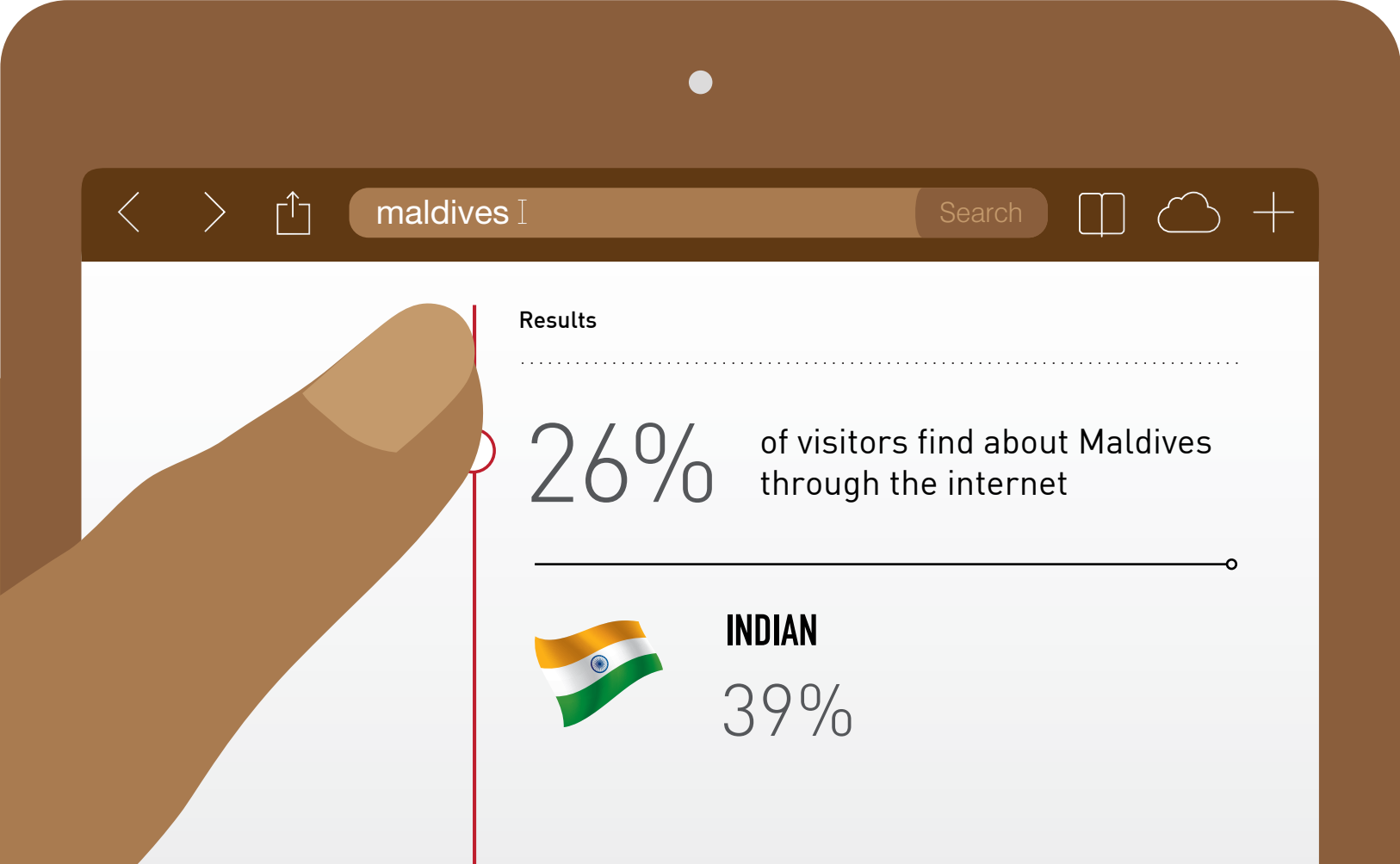
04

TRIP
PLANNING

Source of Information

Internet is the most important source of information to discover the Maldives.

26% of the international visitors to the Maldives obtained pre-arrival information about the Maldives via Internet while 22% of the respondents discovered Maldives through word of mouth and 14% learned through travel agents.



WORD OF MOUTH
23%



30%



MAGAZINES
11%



13%



TRAVEL AGENT
13%



17%



TV
11%



16%

Internet and word of mouth are the most important sources of information about the Maldives especially for Indian, Chinese, Russian and British visitors. Internet is the main source of information for visitors from India (39%) and Russia (37%) visitors, Indian (30%), Chinese (27%) and British (26%) stated that word of mouth was their main source of information. Travel agency

as a source of information is important for visitors from Western Europe (French 17% and German 16%). Swiss, British, and Italian visitors stated having visited Maldives before as a key source of information.

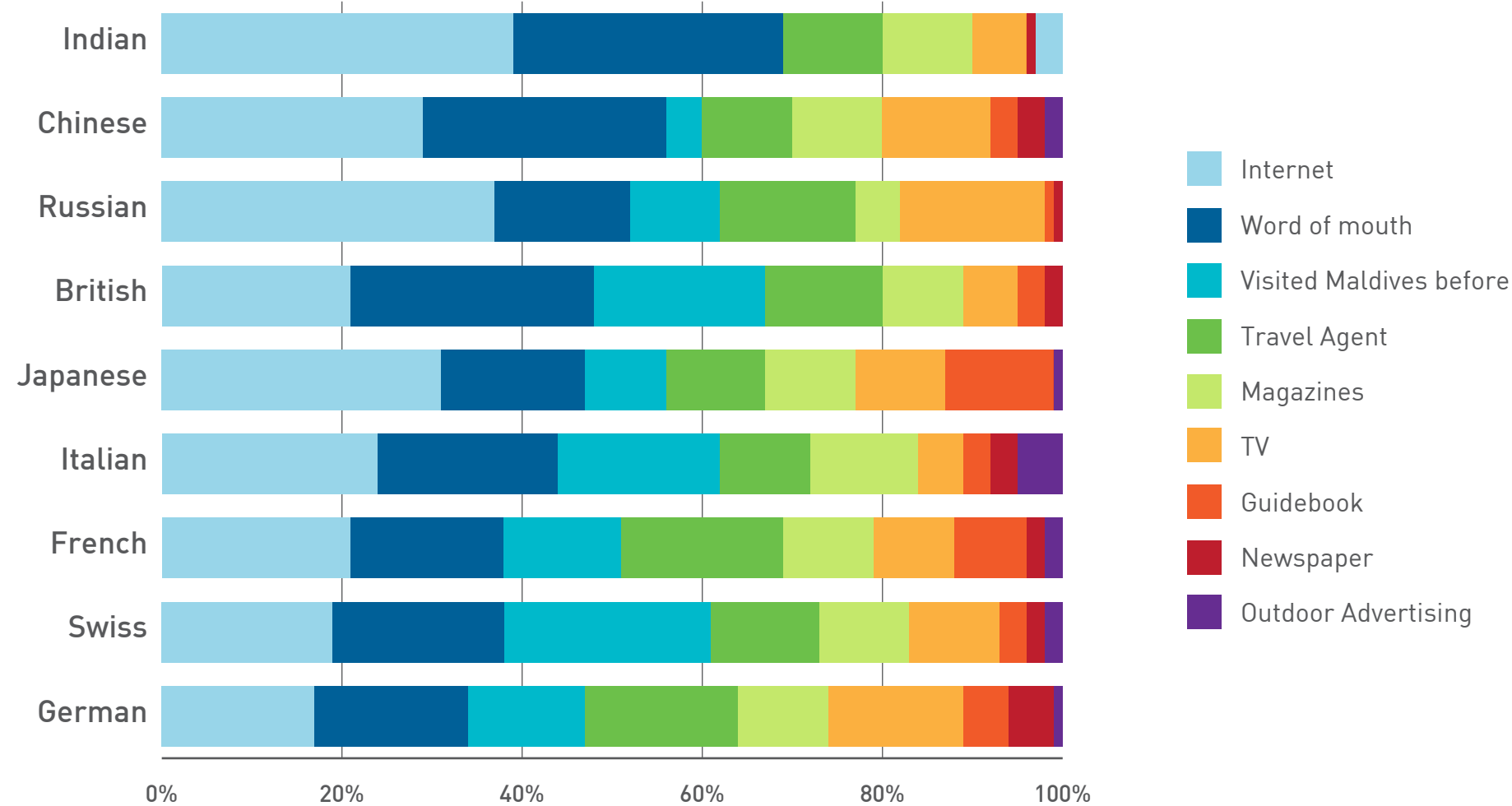


Figure 3. Source of pre-arrival information about Maldives by nationalities

Internet as a source of information is growing in importance over the last five years. On the other hand, time trend analysis of word of mouth as a source of information between April 2011 and February 2015 show a decrease of 7 percentage points from 28.4%

in April 2011 to 21.6% in February 2015. Internet use is becoming more widespread and is a plausible reason for the decline in word of mouth as a source of information.

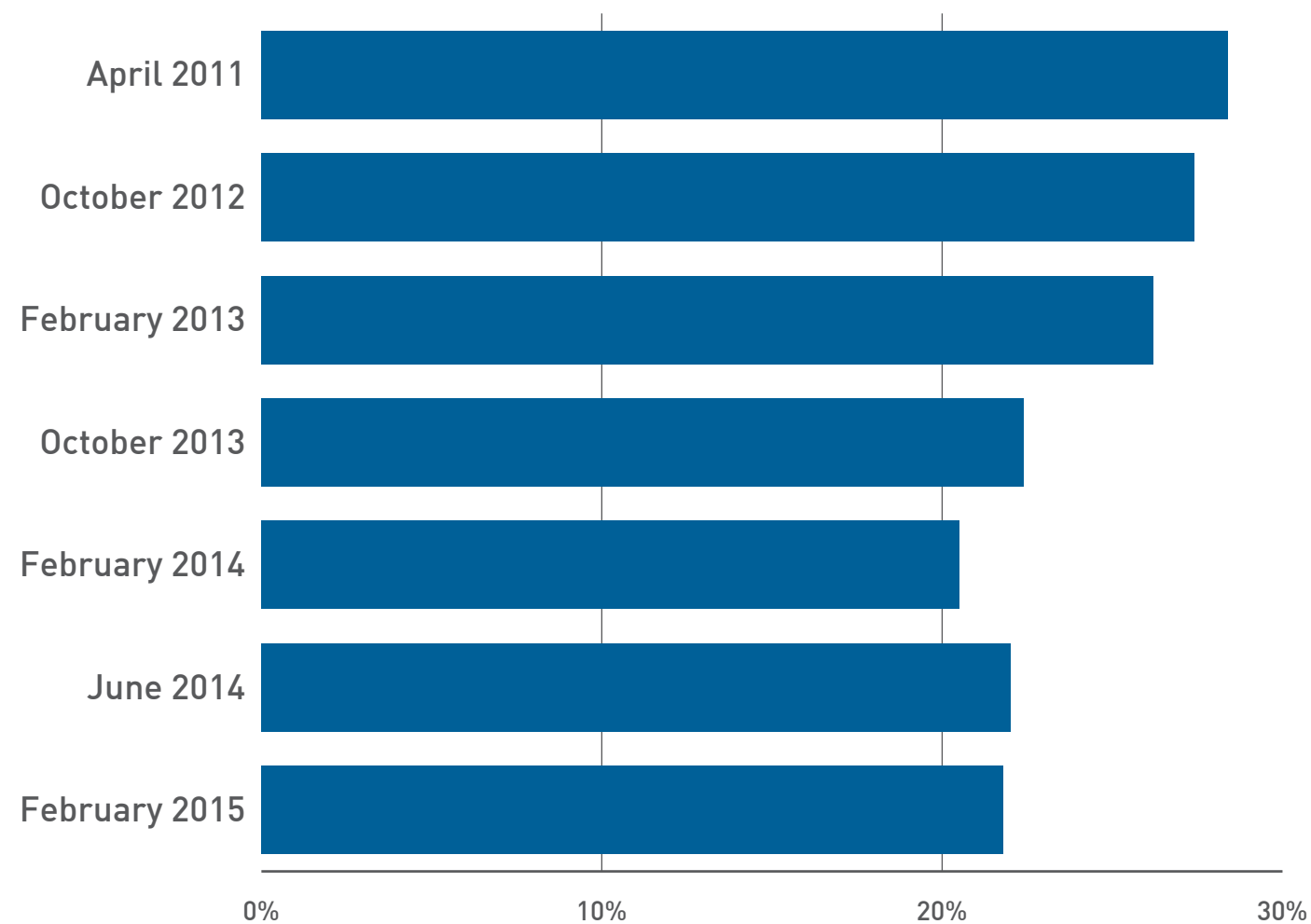


Figure 4. Time trend of word of mouth as a source of information

VISIT MALDIVES

One out of ten international visitors to the Maldives use 'Visit Maldives' as their travel guide to Maldives.

www.visitmaldives.com is a website managed by the Maldives Marketing & Public Relations Corporation (MMPRC) and is recognized as the official travel guide to the Maldives. The website provides useful information on the Maldives with information on its history and culture, getting around the Maldives with activities to try while in the Maldives. The website also provides information on places to stay with listed resorts, hotels, safaris and guesthouses. The 'Visit Maldives' is more popular amongst German (17%), Swiss (16%) and Italians (16%) compared to other nationalities.

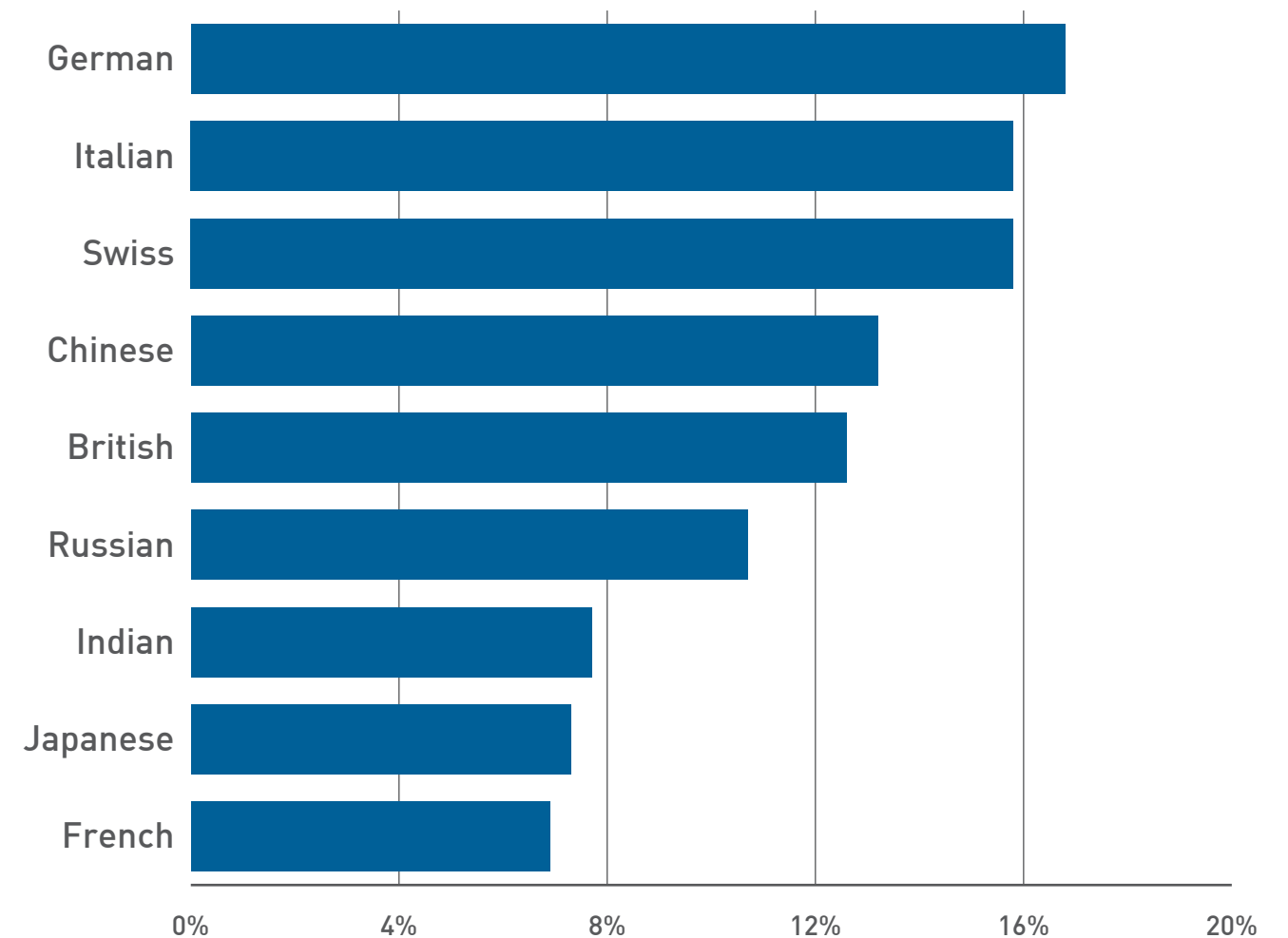


Figure 5. 'Visit Maldives' to plan their trip to Maldives by nationality

TRIPADVISOR

One out of three international visitors to the Maldives refer to 'TripAdvisor'.

The most common use of TripAdvisor is by British (56%), Swiss (51%), French (47%), and Italians (45%). On the other hand less than 5% of Chinese stated they refer to TripAdvisor. The low popularity of TripAdvisor for the Chinese could be due to the presence of DaoDao, the local imprint of TripAdvisor in China. TripAdvisor has maintained the same level of popularity across surveys conducted for the last five years.

TripAdvisor is the world's largest travel site*, enabling travelers to plan and book trips. TripAdvisor offers advice from travelers and a wide variety of travel choices and planning features with links to booking tools linking to websites to find the best hotel prices. TripAdvisor branded sites make up the largest travel community in the world, reaching 340 million unique monthly visitors**, and more than 225 million reviews and opinions covering more than 4.9 million accommodations, restaurants

and attractions. The sites operate in 45 countries worldwide. TripAdvisor also includes TripAdvisor for business, a dedicated division that provides the tourism industry access to millions of monthly TripAdvisor visitors.

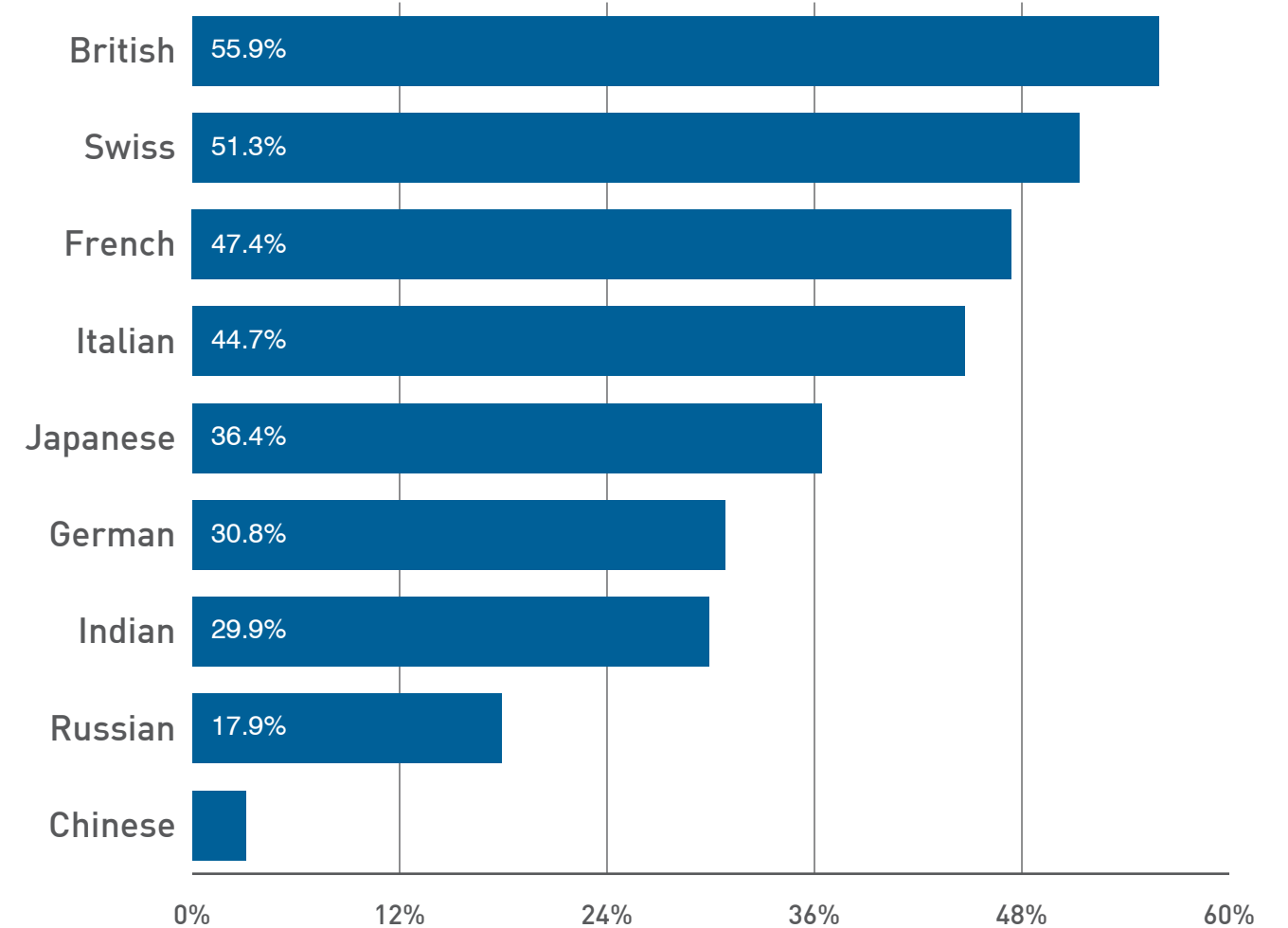
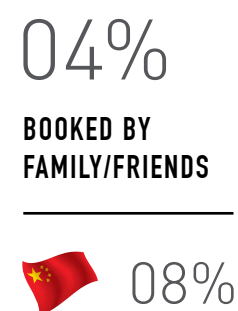
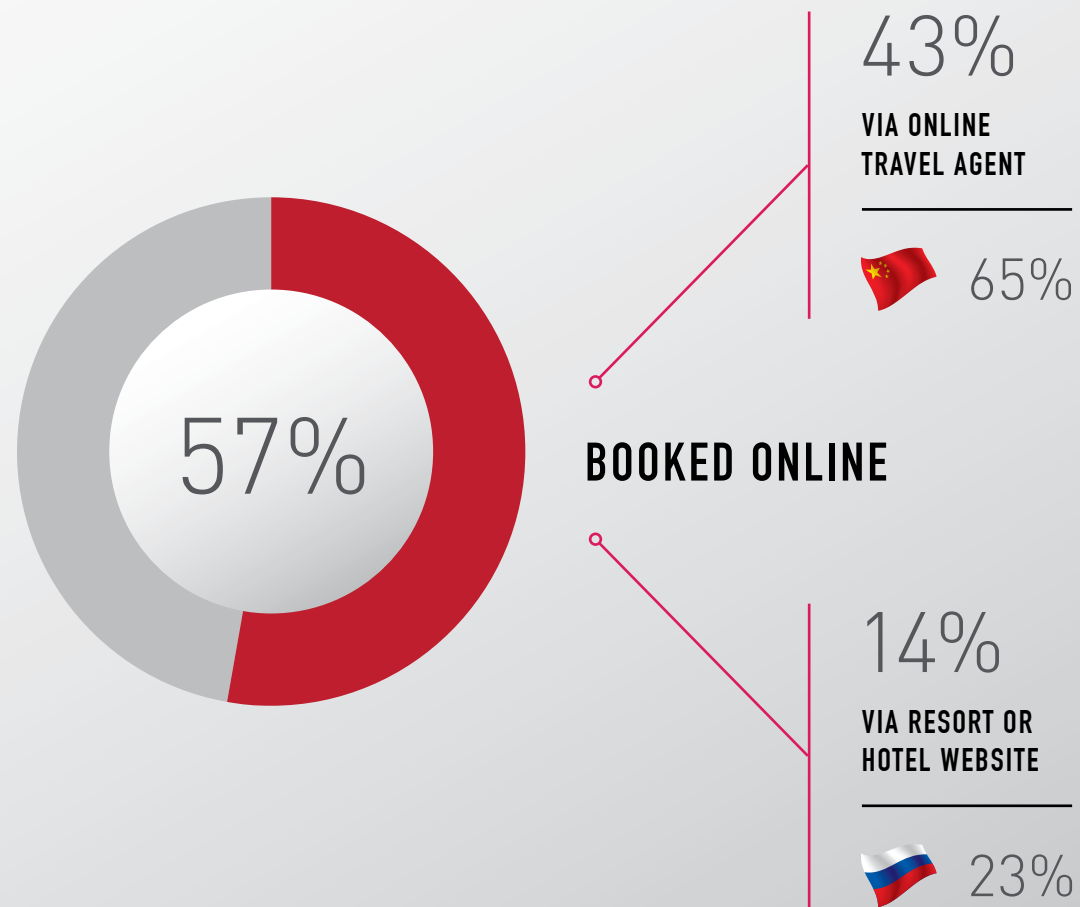


Figure 6. TripAdvisor used to plan their trip to Maldives by nationality



Booking method

More than half of the international visitors to the Maldives book their holiday through Internet.

Of the international visitors, 43% used Online Travel Agencies (OTA) websites to book their trip, and 14% organised their trip using the resort or hotel website. In contrast, 37% of the international visitors stated that they visited a travel agency to organize the trip.

The preferred booking method varies across nationalities. OTA websites are most preferred by Chinese (64%) and Japanese (50%) visitors closely followed by British (49%) and Indians (43%). One out of three Russian visitors appear to book their holidays to the Maldives direct via resort websites. The Western European and Southern European visitors prefer visiting a travel agency to book their trip. Of the German visitors, 73% stated they booked their holiday by visiting a travel agency, while 61% of Italian visitors, and 52% of Swiss visitors chose the visit to travel agency.

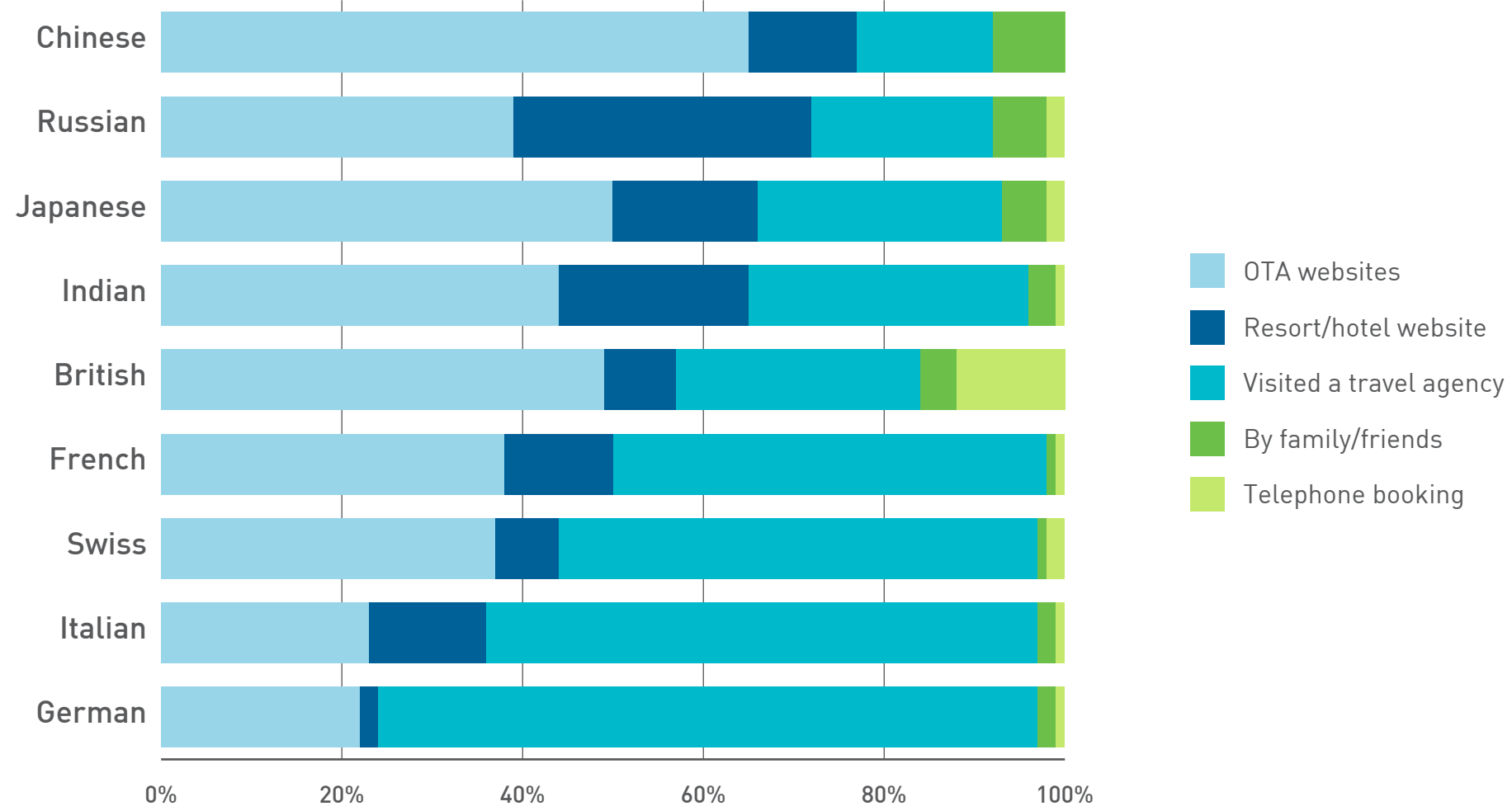


Figure 7. Mode of trip organization used by international visitors by nationalities

OTAs USED FOR BOOKING

Booking.com is the most common OTA used by international visitors for booking their holiday to the Maldives. The next most popular five OTAs are Ctrip, Expedia, Agoda, Hotel.com and Lonely Planet.

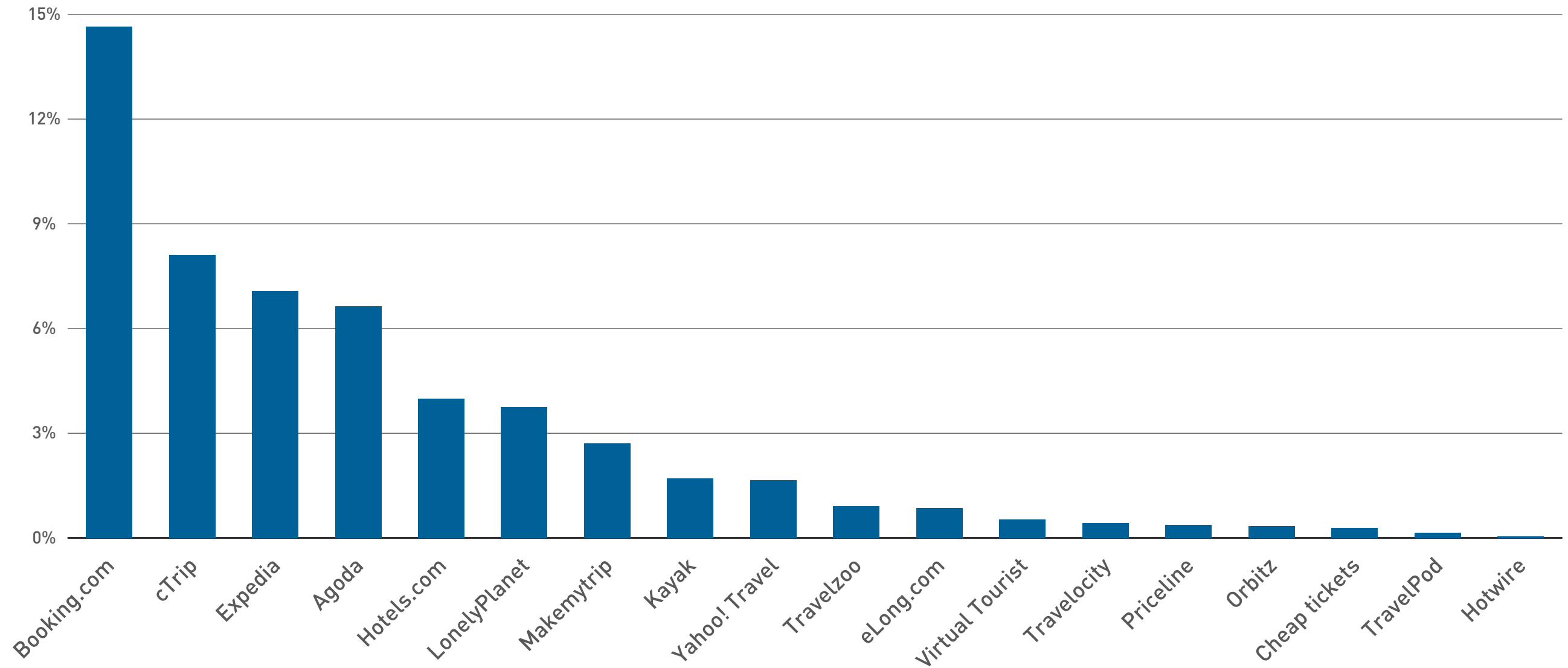


Figure 8. OTAs used to book trip

There is variation in the OTAs preferred by different nationalities.

Booking.com is the most popular OTA among Russian (65%); French (58%); Italian (58%); Swiss (48%) German (39%) and who book holidays via OTAs. Of the Chinese visitors who used OTA websites, 47% used Ctrip while 23% preferred Qunar.com. Of the

Japanese OTA website users, 32% stated they relied on Agoda while 29% chose 'Yahoo! Travel'. The preferred OTA of Indian visitors (40%) is 'Makemytrip'. Most common OTA used by British (31%) is 'Expedia'.

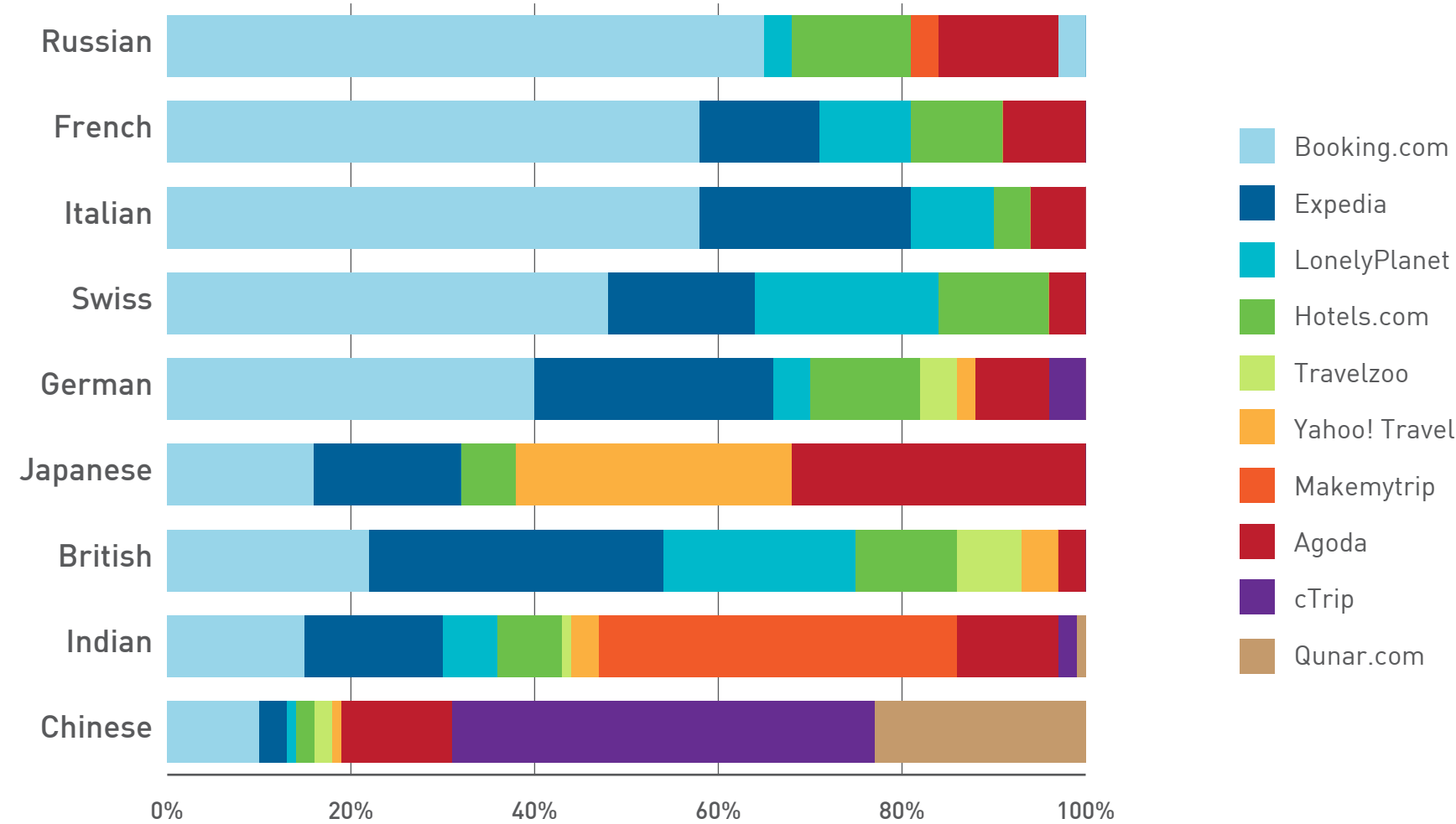


Figure 9. OTAs used to book trip by nationalities

Booking Period

Of the international visitors to the Maldives, 46% book their trip more than 3 months in advance.

It is noteworthy that 19% book their holiday 6 to 12 months in advance while 25% book their holiday 3 to 5 months in advance. One out of four visitors appear to book their holidays 1 to 2 months in advance. In contrast, 27% of visitors book their holiday last minute in less than 4 weeks.

46%

BOOK MORE THAN 3 MONTHS IN ADVANCE



19%

BOOK 6 - 12 MONTHS IN ADVANCE

44%

07%

BOOK LESS THAN A WEEK IN ADVANCE

15%

06%

BOOK 1 WEEK IN ADVANCE

13%

02%

BOOK MORE THAN 1 YEAR IN ADVANCE

04%

International visitors from most European countries book their holiday more than three months prior to travel to the Maldives.

More than 60% of visitors from Western Europe and Northern Europe book more than 3 months in advance. More significantly, half of the international visitors from Britain and Germany book their holiday more than six months prior to travel to the Maldives.

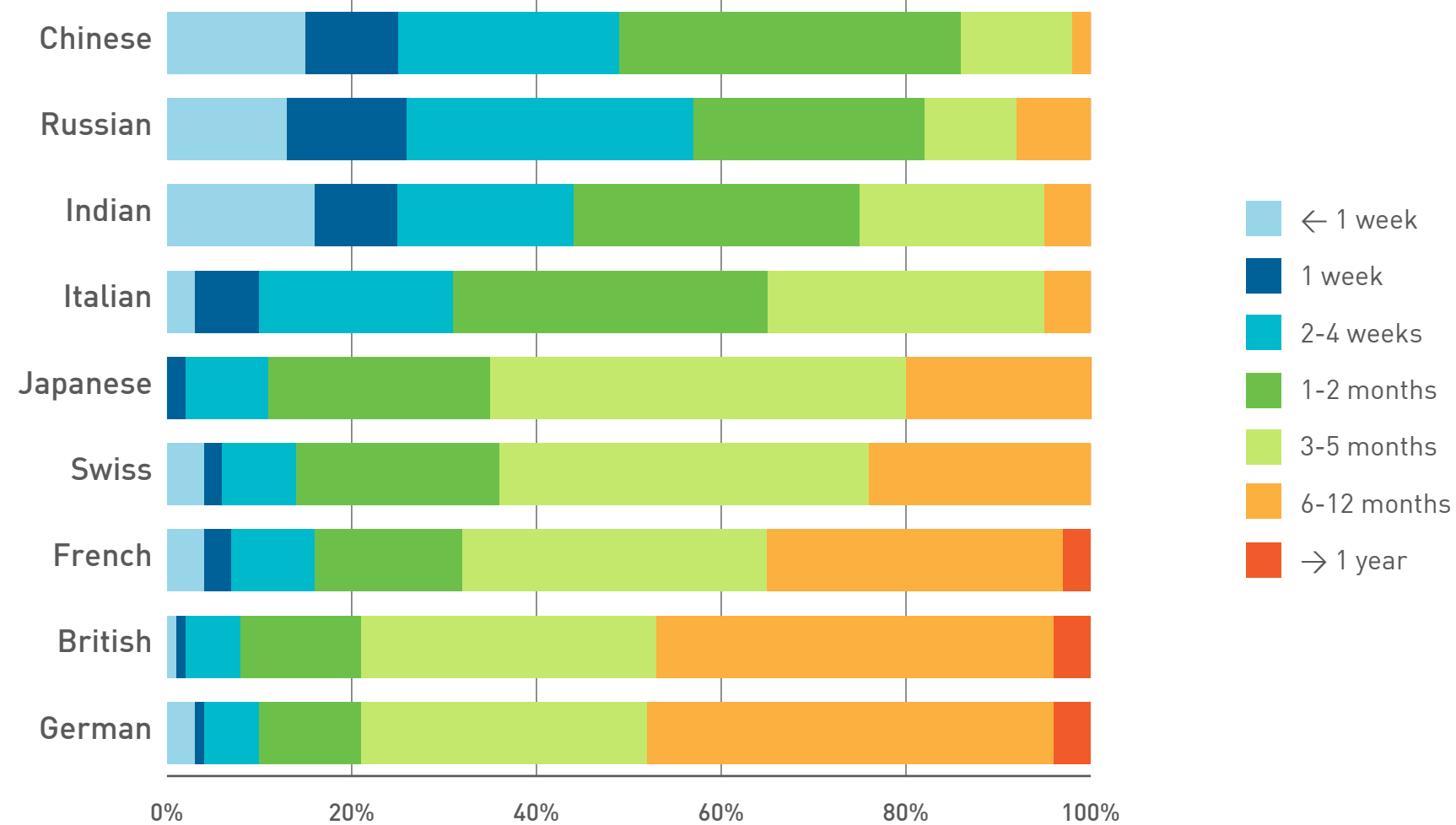


Figure 10. Duration of advance booking of holiday by nationalities

From Southern Europe, more than 65% of Italian visitors book their holiday less than two months prior to travel to the Maldives. On the other hand, from Eastern Europe, more than 50% of visitors from Russia book their holiday within 2 weeks prior to travel to the Maldives.

Most international visitors from Asia book their holiday less than 3 months prior to travel to the Maldives. Of Chinese visitors, 86% booked their holiday in less than two months prior to travel. Similarly, 75% of Indian visitors, booked their holiday less than two months prior to travel.

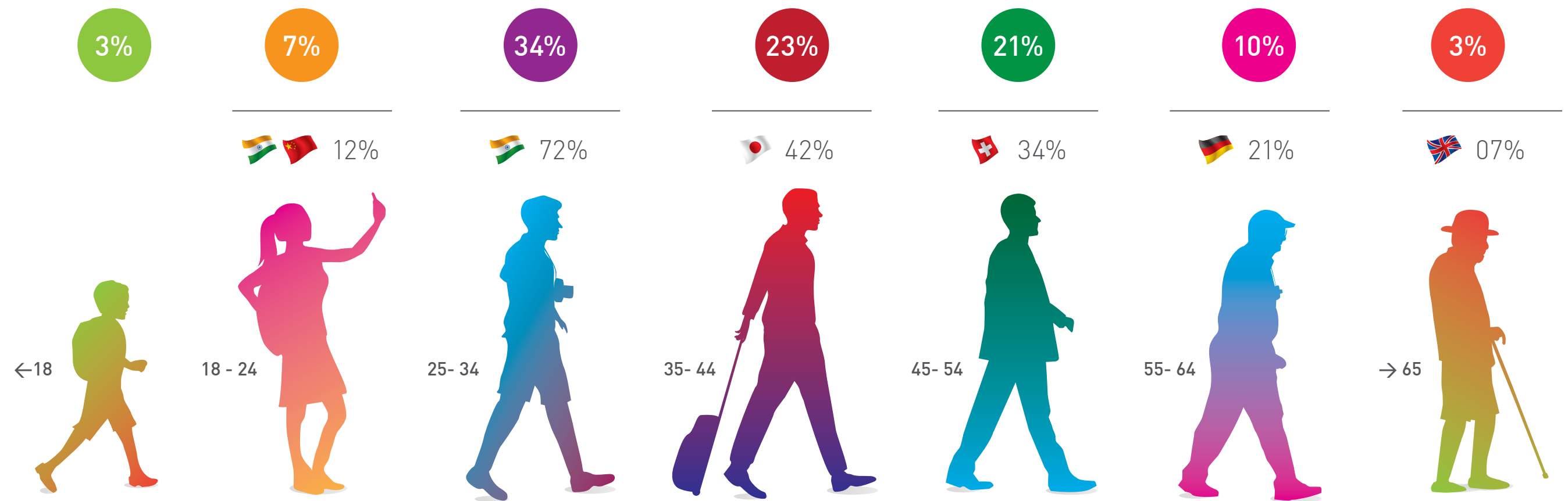
05

VISITOR
PROFILE

Age Profile

Of the international visitors to the Maldives, 34% are between the ages of 25 to 34 years of age.

The second highest number (23%) of international visitors to the Maldives is between 35-44 years of age while 21% of visitors belong to the 45- 54 years age group.



The highest numbers of international visitors to the Maldives between the ages 25 to 34 are from Asia (Figure 17). Of the visitors from India, 72% are between the ages of 25 to 34 years. Similarly, 50% of the Chinese visitors and 43% of the Japanese visitors belong to the 25 to 34 years age group. Of the visitors from Russia, 43% are also between 25 to 34 years of age. Majority of the visitors

from Australia (71%), France (56%) and Britain (53%) are over 35 years of age.

Majority of the visitors from Britain (77%), Germany (77%), Italy (75%), Swiss (71%) and France (65%) are over 35 years of age.

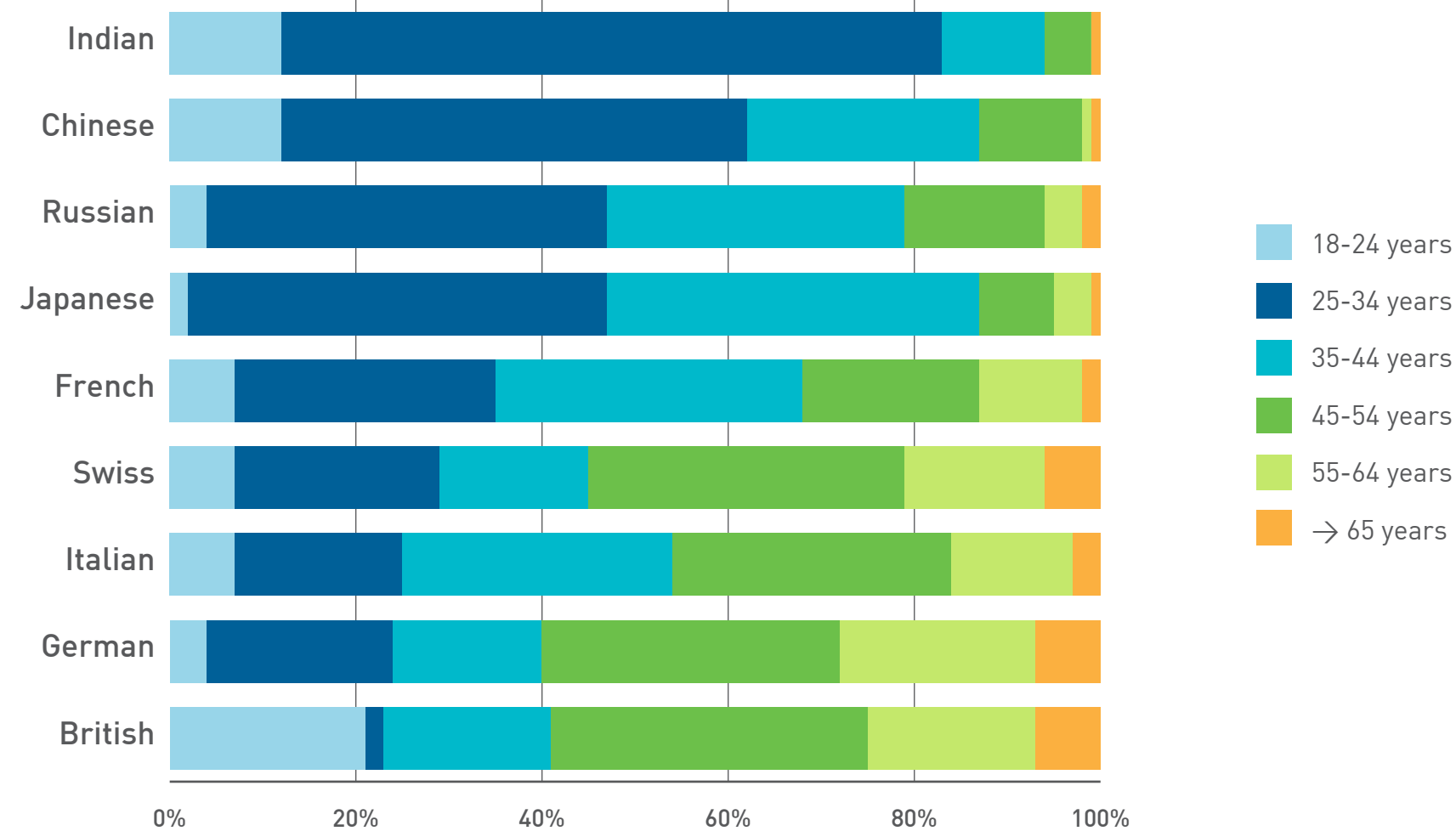


Figure 11. International visitor arrival age groups by nationalities

Time trends analysis of age of visitors between October 2012 survey and June 2014 survey shows that more young visitors travel during the off peak season in comparison to the peak season.

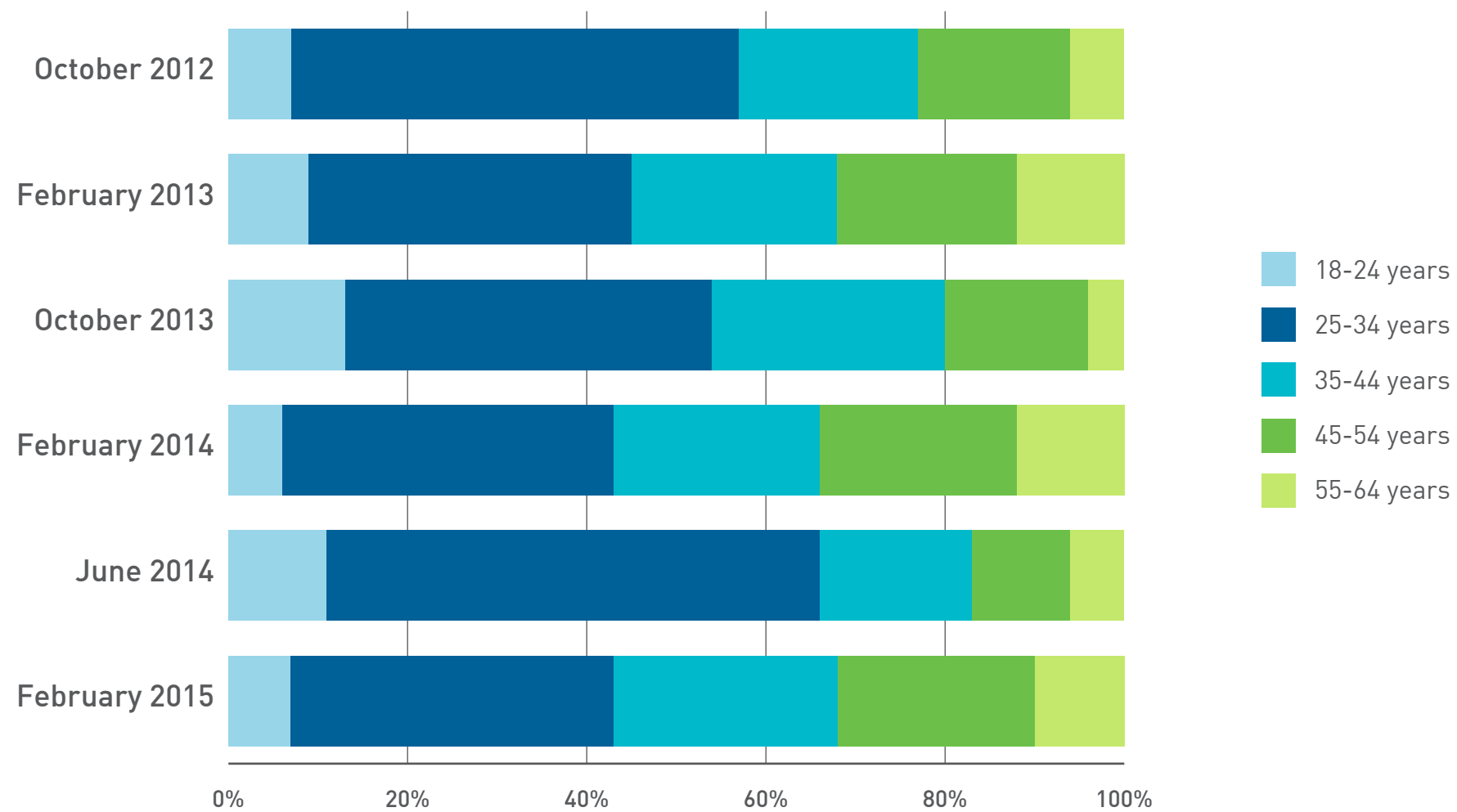
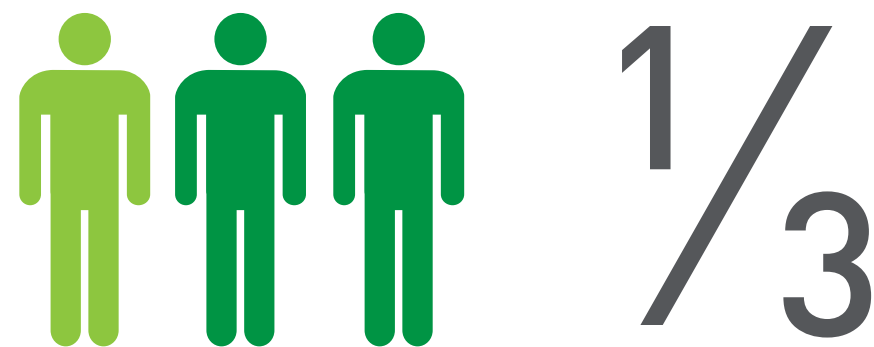


Figure 12. Time trend of International visitor arrival age groups

Repeat visitors

Of every three international visitors to the Maldives one is a repeat visitor.

First time visitors account for 71% of international visitors to the Maldives. Of the repeat visitors, 20% stated that they have visited the Maldives between two to five times while 5% have visited between 6 to 10 times and 3% have visited more than 10 times.



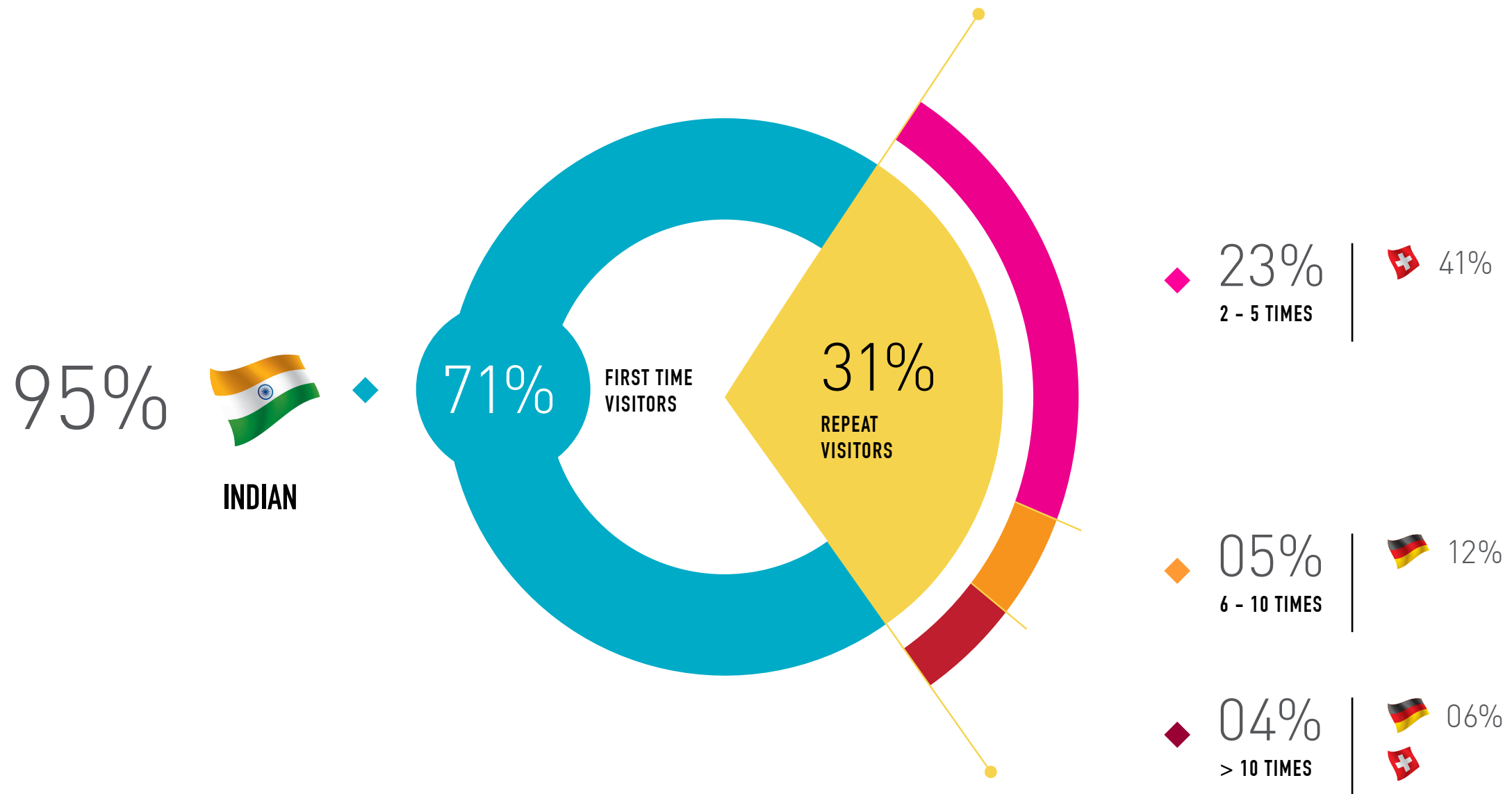
PERSONS HAVE VISITED THE MALDIVES BEFORE

// FEB 2015

28% ▲

// JUN 2014

20%



Repeat visitors are highest amongst visitors from Europe. Of the Swiss visitors, 58% are repeat visitors, while 50% of the visitors from Italy have visited the Maldives more than once. About 45% of the visitors from Germany, 40% of Britain and 35% from France

have visited the Maldives repeatedly. It is also noteworthy that 10% of the visitors from China during the February survey are repeat visitors to the Maldives.

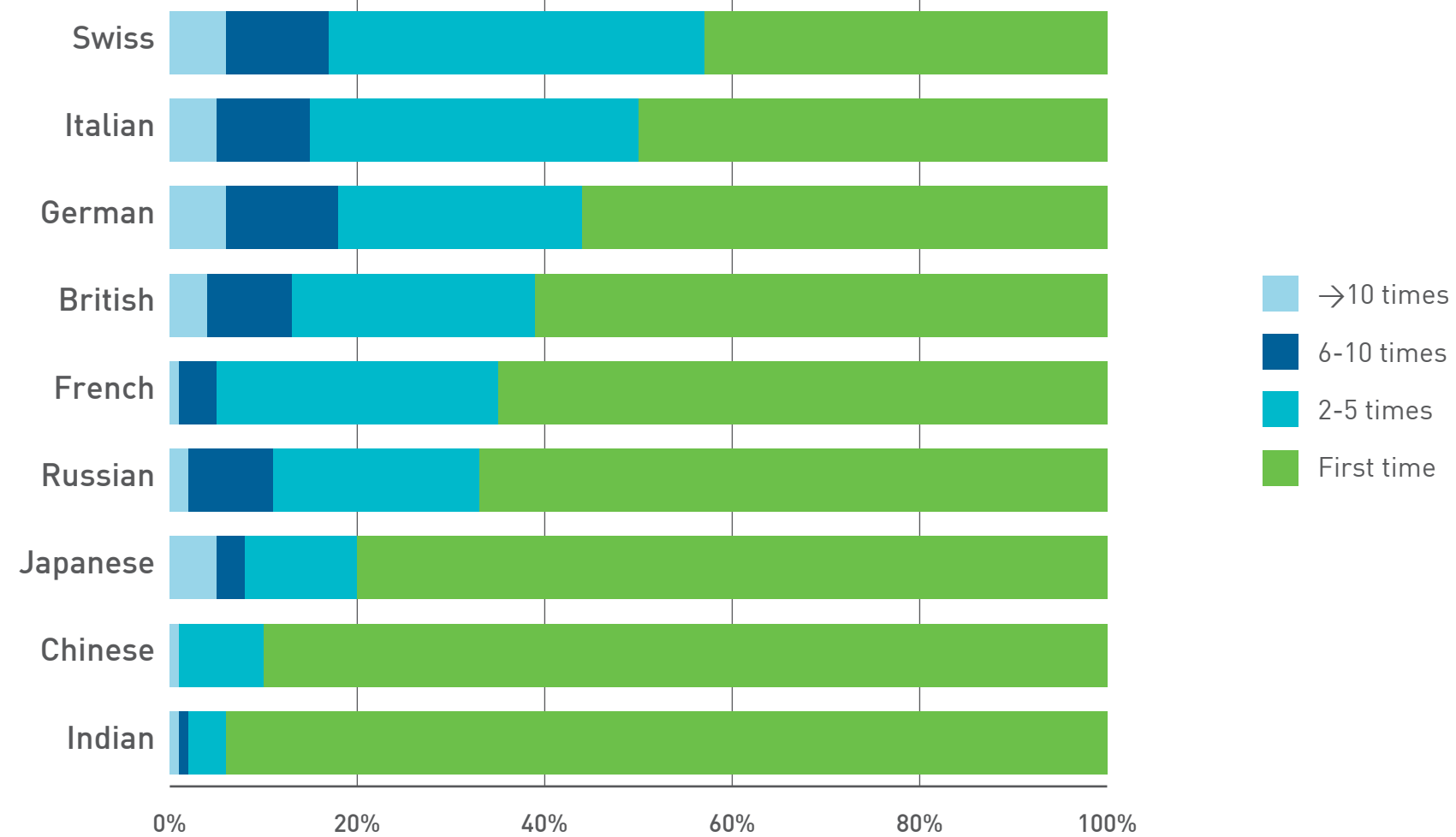


Figure 13. First time visitors and repeat visitors by nationality

Repeat visitors travel more during the peak season. Time trend analysis of the data gathered between April 2011 and Feb 2015 show that more repeat visitors travel to the Maldives during the peak season in comparison to the off peak season.

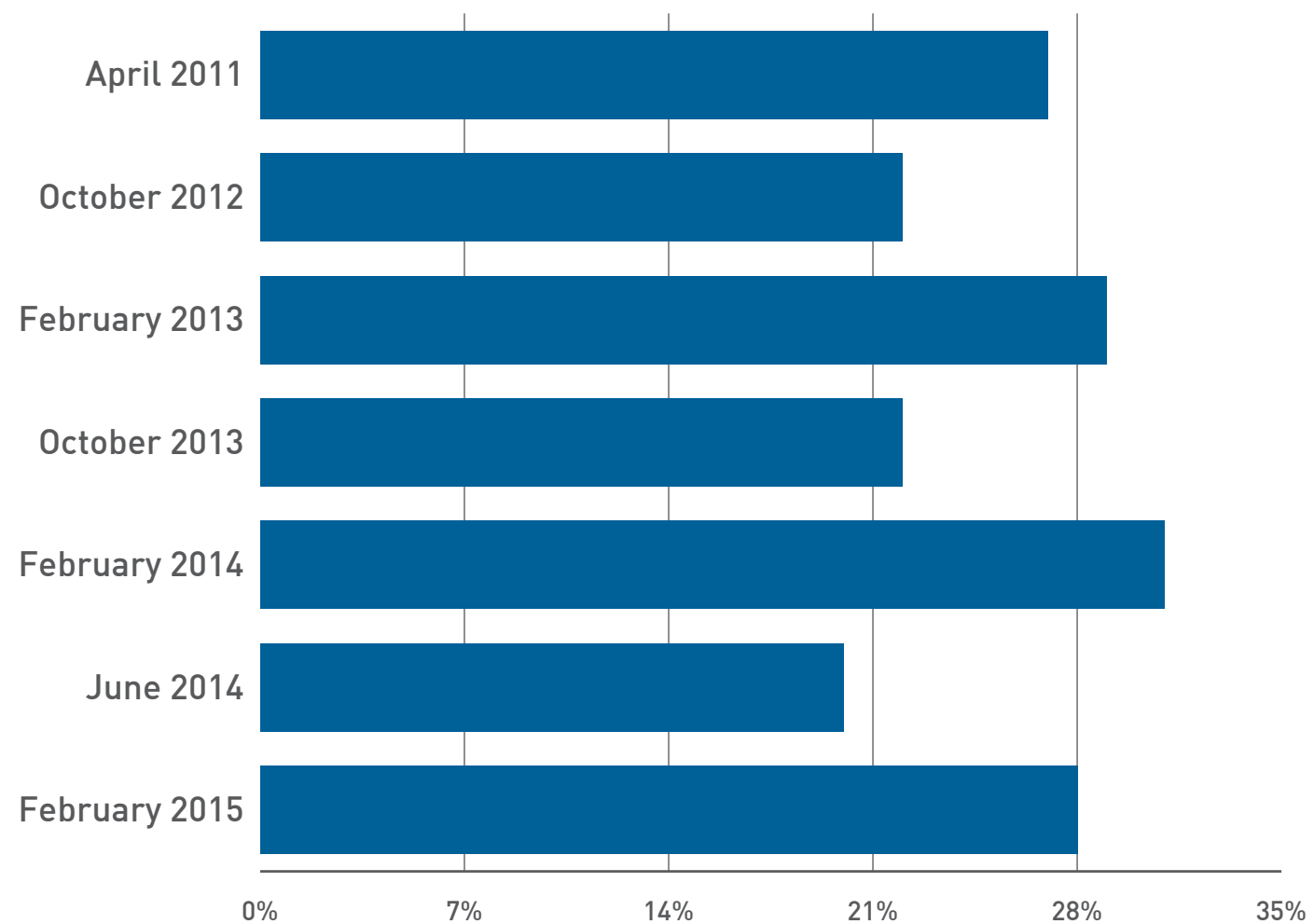
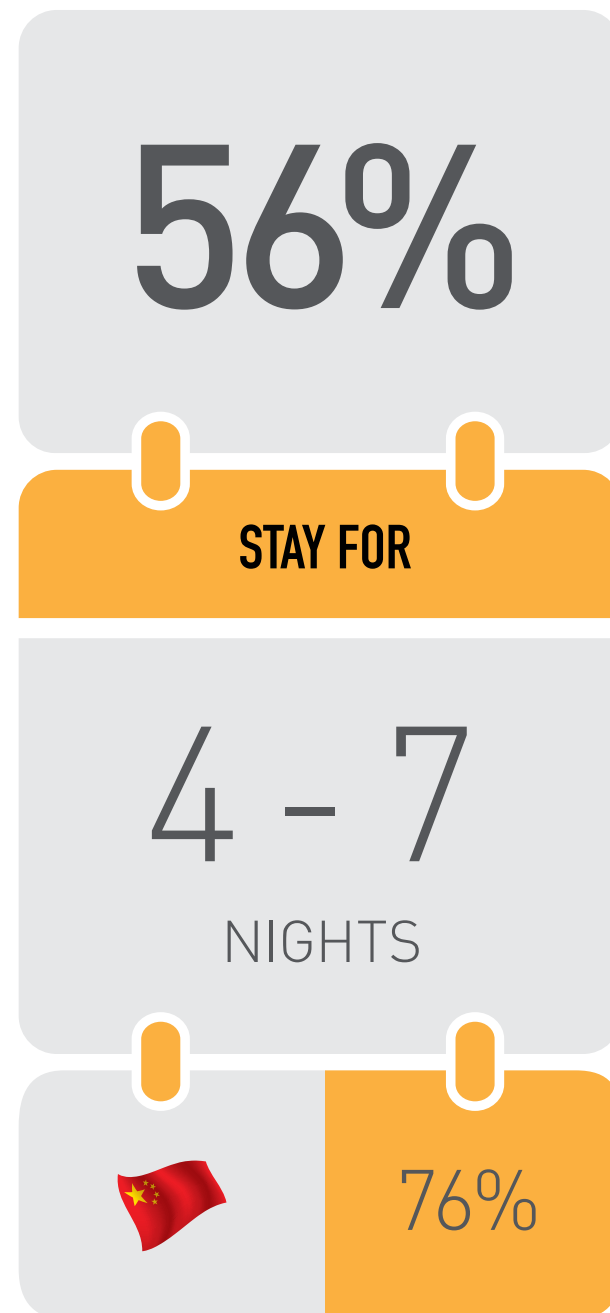


Figure 14. Time trend analysis of repeat visitors



STAY FOR 0-3 NIGHTS

19%

 43%

STAY FOR 8-11 NIGHTS

17%

 38%

STAY FOR 12-15 NIGHTS

13%

 38%

Length of Stay

Majority of the international visitors to the Maldives (56%) stay for 4-7 nights in the Maldives.

Of the visitors to the Maldives, 16% stayed for 8-11 nights while 13% stayed for 12 to 15 nights.

Length of stay is shortest for visitors from China, while German and Russian visitors stay the longest. Of the visitors from China, 89% stayed for 4 to 7 nights and 10% stayed for 1 to 3 nights. In contrast, 71% of German visitors stayed for 8 nights or more in the Maldives. Similarly, 57% of visitors from Russia also stayed in the Maldives for 8 nights or more.

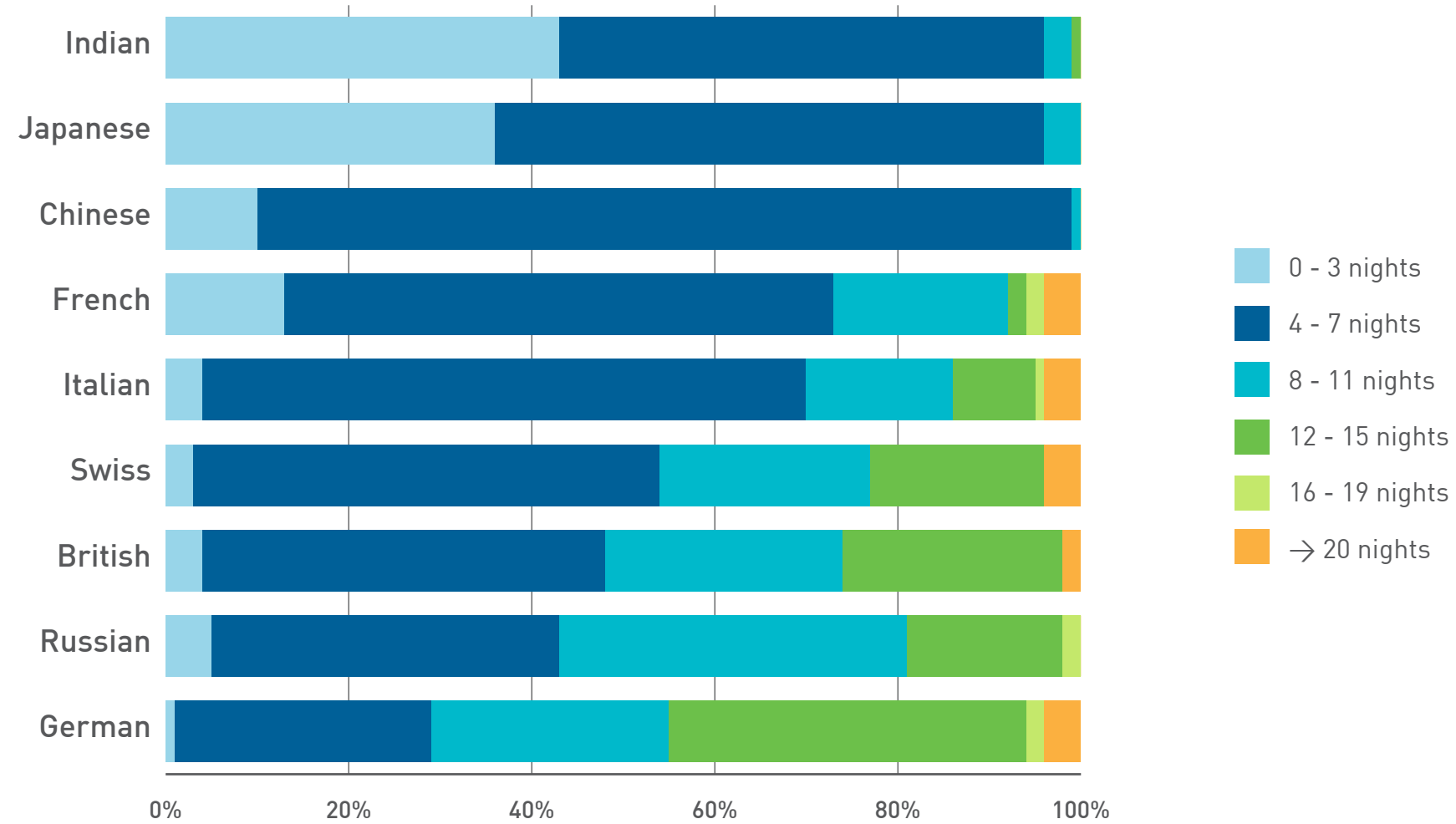


Figure 15. Number of nights spent in the Maldives by nationality

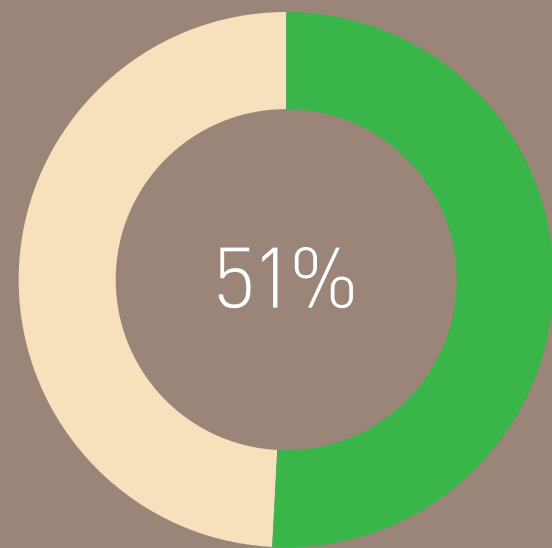
Travel companion

Maldives is a popular destination for couples and families.

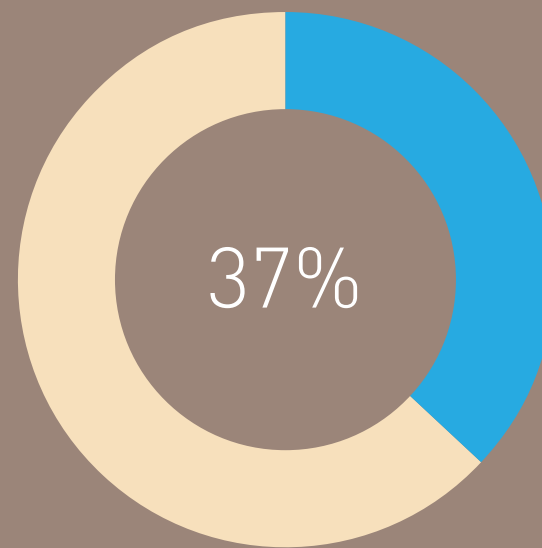
Of the international visitors to the Maldives, 88% travelled with partner or family. More than half of the visitors (51%) travelled with a partner, while 37% travelled as a group or family. About 6% of the visitors travelled with friends.

88%

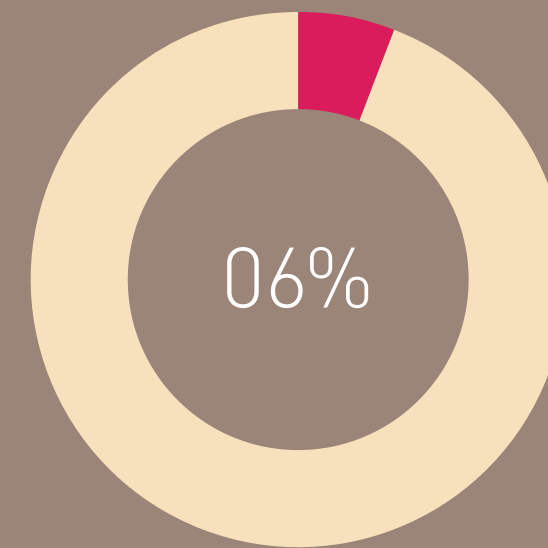
**TRAVELLED WITH FAMILY
OR PARTNER**



PARTNER



FAMILY



FRIENDS

International visitors travelling as a family group to the Maldives is increasing.

Time trend analysis of travel companion data between April 2011 and February 2015 show an increasing trend in the visitors travelling as family group to the Maldives. The visitors travelling as family to the Maldives have increased from 18.2% in April 2011 to 36.6% by February 2015.

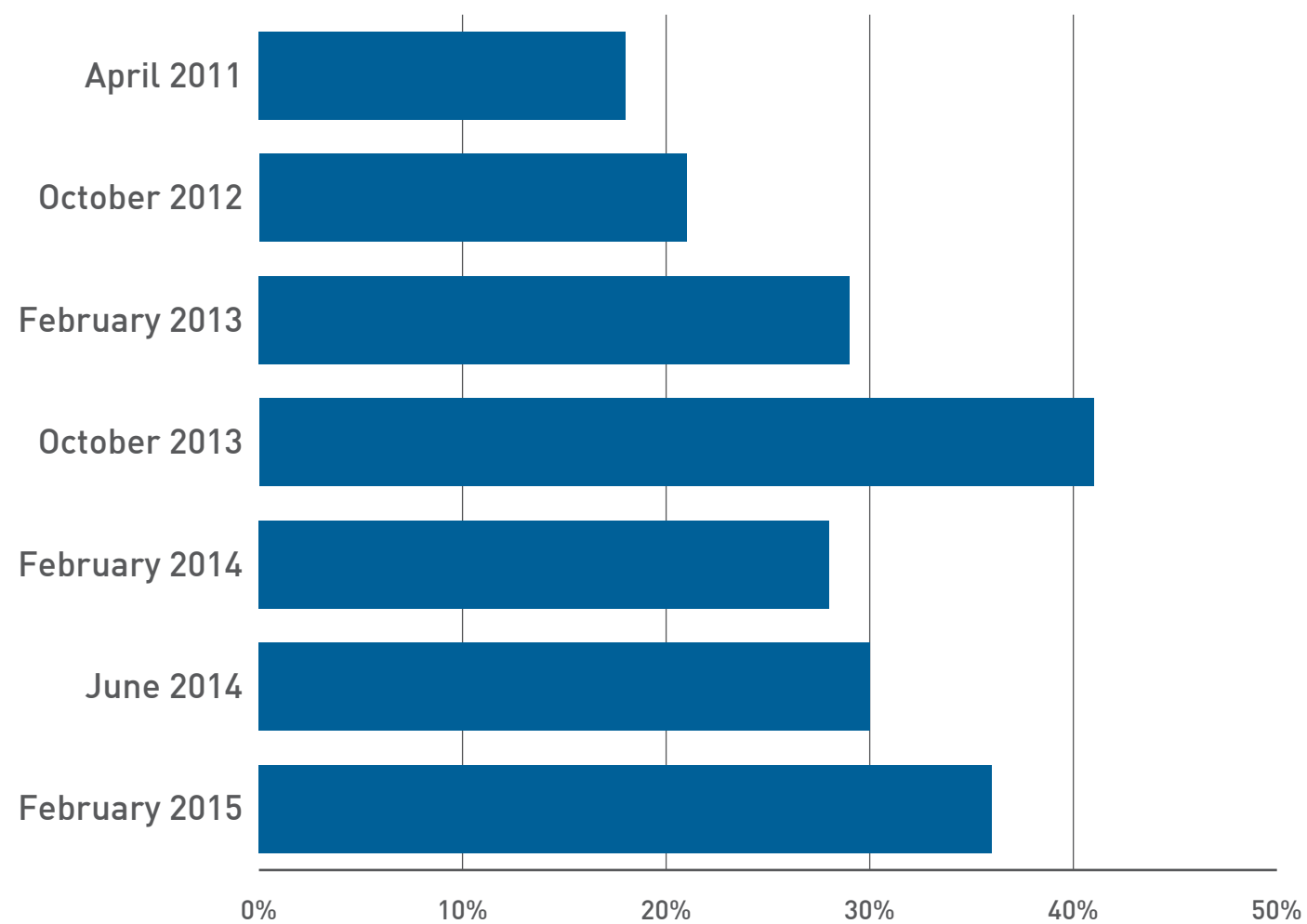


Figure 16. Time trends of visitors travelling as family

06

SATISFACTION

Ibrahim Nasir International Airport (INIA)

Customs service, immigration and check-in services are ranked the best from services at INIA.

Over 80% of visitors ranked these services as very good or excellent. Cafés and restaurants, shopping, lounge and banking services at the international airport are evaluated as poor or very poor by 7% of the visitors to the Maldives.

Ratings for shopping experience at INIA when analysed by nationality shows that Chinese rate the experience highest. Of the Chinese visitors, 55% rated shopping experience excellent or very good. In contrast, the French, Swiss and Italian found the shopping experience poor. One out of every three visitors from France ranked the shopping experience at INIA as poor or very poor. Of the Swiss and Italian visitors, 28% stated the shopping experience as poor or very poor.

80%

**RANKED WITH COMBINATIONS OF
EXCELLENT & VERY GOOD FOR**



CHECK-IN SERVICES

80%



CUSTOMS

79%



IMMIGRATION & SECURITY

79%

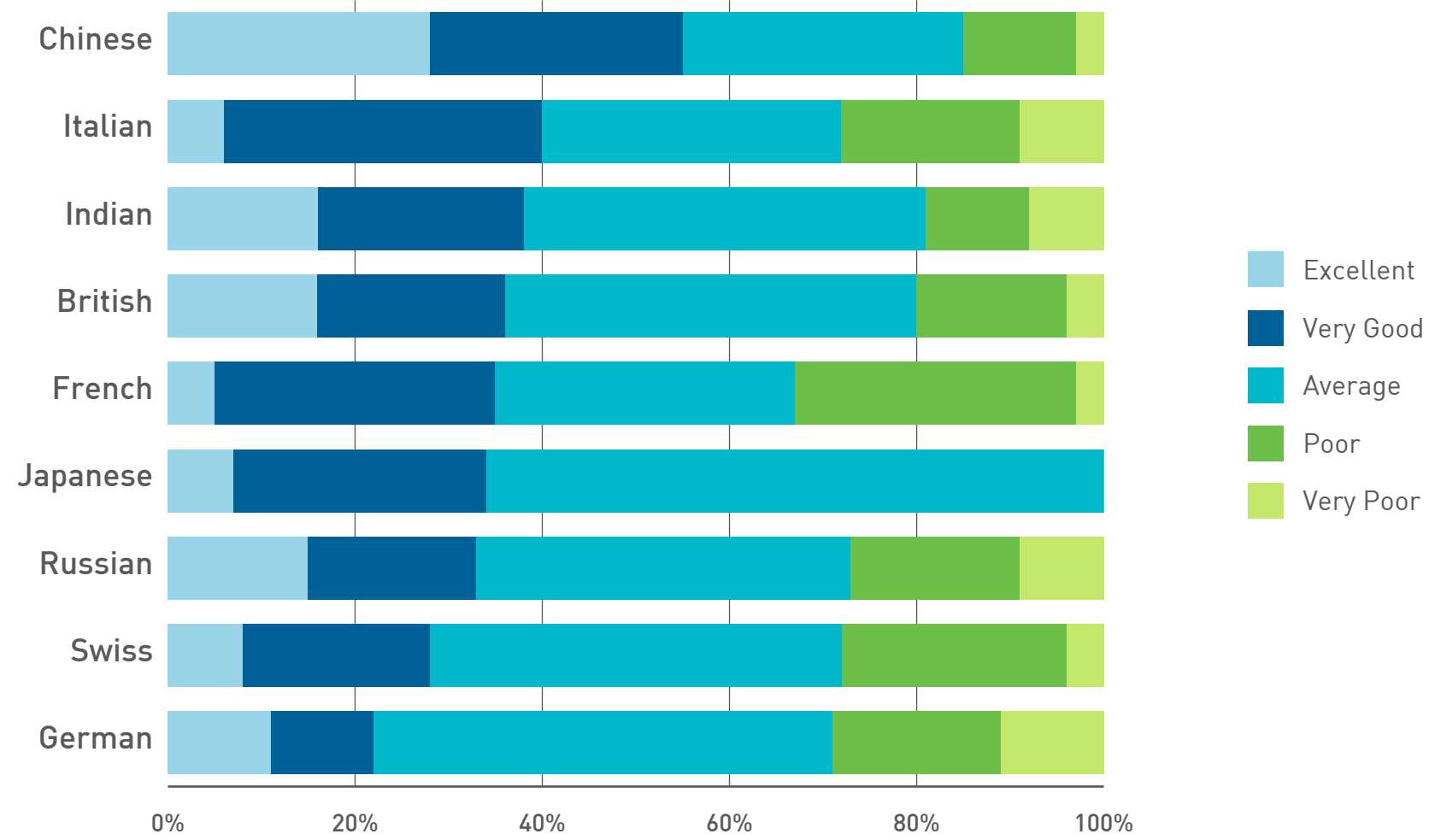
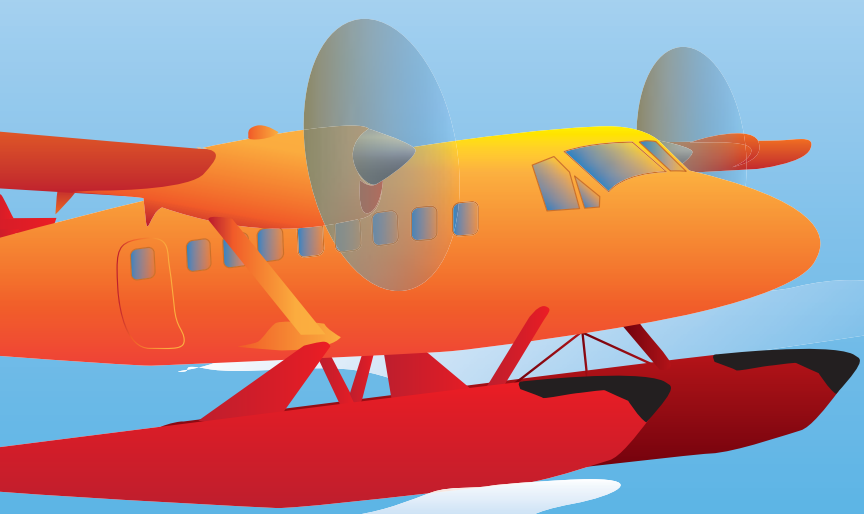


Figure 17. Shopping experience at INIA by nationality



SEA PLANE
31%

SPEEDBOAT
50%

Transport

MODE OF TRANSPORT

One out of every two international visitor to the Maldives use speedboat transfer to get to their place of stay.

Of the other international visitors, 31% travelled by seaplanes while 14% took domestic flights to get their place of stay. About 5% of the respondents stated they used public ferries as the mode of transport from the airport to the place of stay.



WAITING TIME AT AIRPORT

Majority of the international visitors to the Maldives (49%) have to wait at the airport for less than half an hour to get a hotel transfer.

One out of four international visitors stated they spent 15 minute or less at the airport. About 26% of the visitors stayed at the airport for 15 to 30 minutes.

Waiting time at the airport was highest for visitors travelling via domestic flights. For 61% of the visitors travelling by domestic flight, waiting time at airport was more than an hour. About 21% of those who travelled by domestic flight stated that waiting time was 1 to 2 hours, while 19% said they had to wait 2 to 3 hours and 16% stated they waited for more than 3 hours at airport.

The waiting time at airport is shortest for visitors travelling by speedboats. Of the international visitors travelling by speedboat to hotel, 76% stated that the waiting time at airport was 30 minutes or less.



**30 MINUTES OR LESS
WAITING TIME FOR**

49%

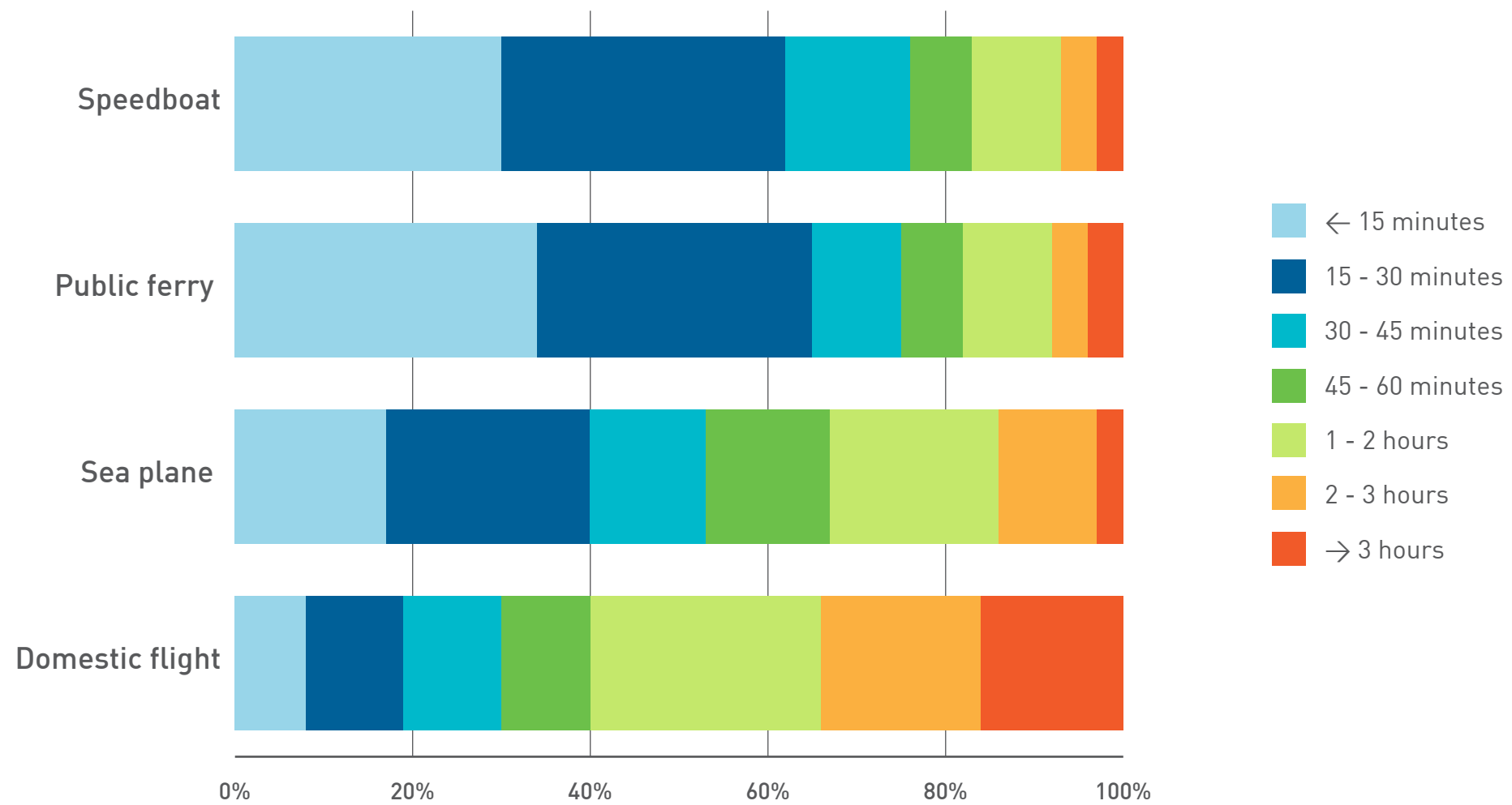


Figure 18. Waiting time at airport by method of transport

TIME TO REACH PLACE OF STAY

Of the international visitors to the Maldives, 77% took less than an hour to reach their place of stay

About 31% of visitors took less than 30 minutes to reach their destination while 46% took between 30 to 60 minutes. For 23% of the international visitors, it took more than an hour to reach their place of stay.

77%

**REACH THEIR
PLACE OF STAY IN LESS
THAN 60 MINUTES**



QUALITY OF HOTEL TRANSFER

On quality of transport to hotel, 'service' was ranked highest with 86% of visitors ranking excellent or very good.

Similarly, safety aspect was ranked excellent by 81% of visitors to the Maldives. The poorest ranking was for information briefing with 30% of visitors stating information briefing was average or poor. However, it is noteworthy that all aspects of quality of hotel transfer were ranked higher in this survey.

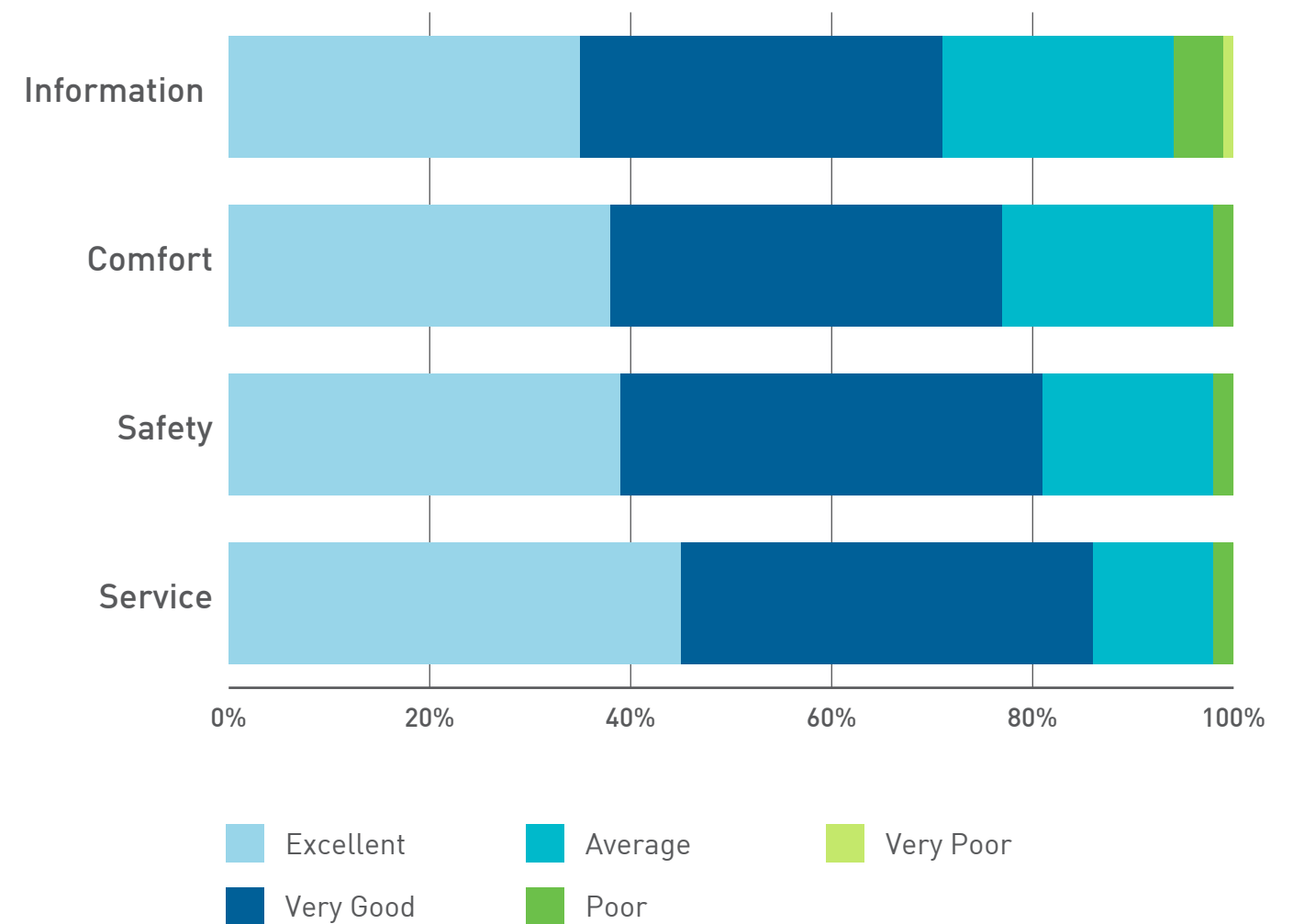


Figure 19. Rating on quality of transport services to hotel

PRICE PERCEPTION OF HOTEL TRANSFER

Majority of the international visitors found the prices of their hotel transfer as value for money.

About 63% of those who travelled by speedboats, 61% of those who travelled by domestic flights and 54% of those who travelled by seaplanes found the hotel transfer prices 'value for money'. In contrast, 39% of who travelled by seaplane found it expensive.

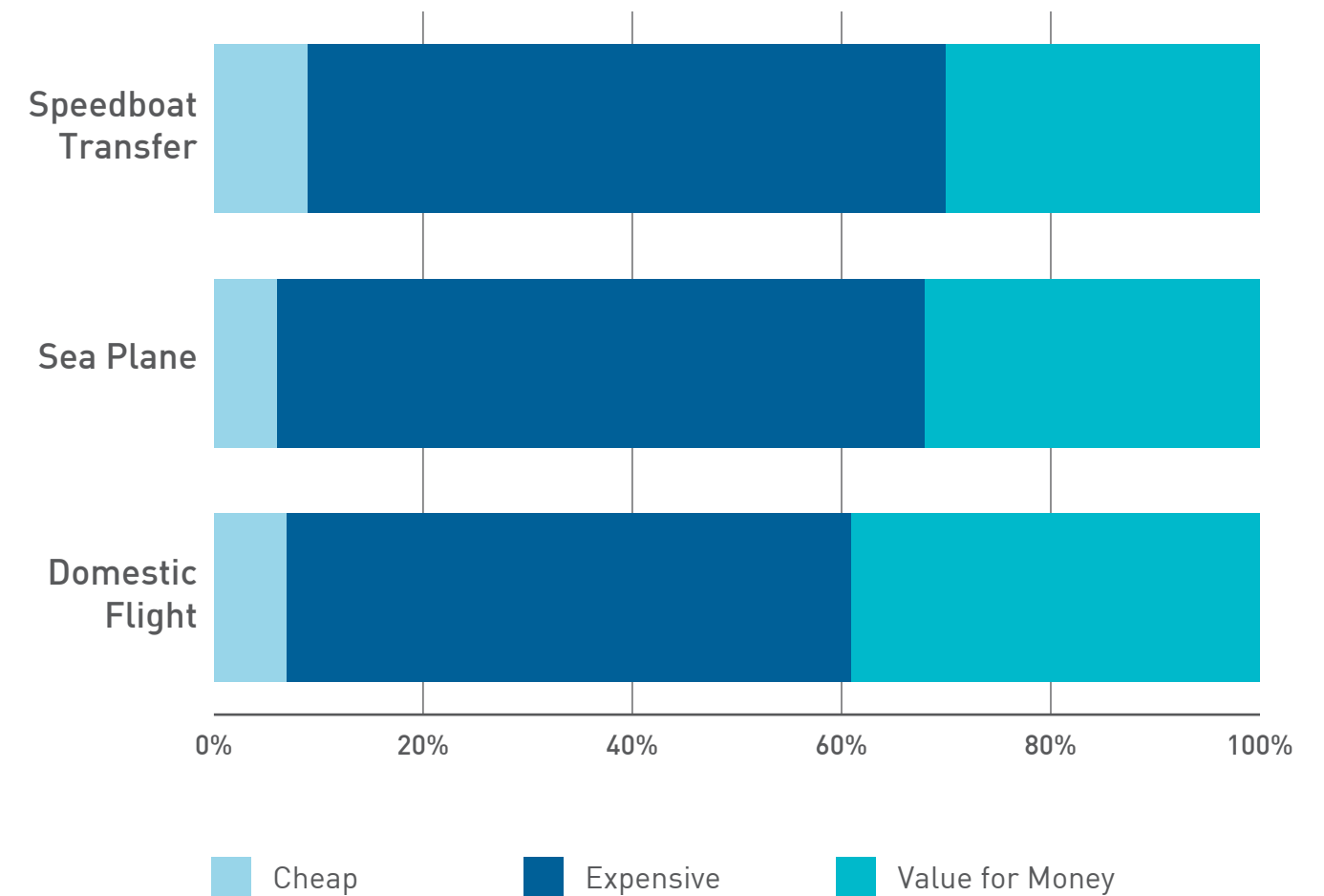


Figure 20. Price perception of hotel transfer

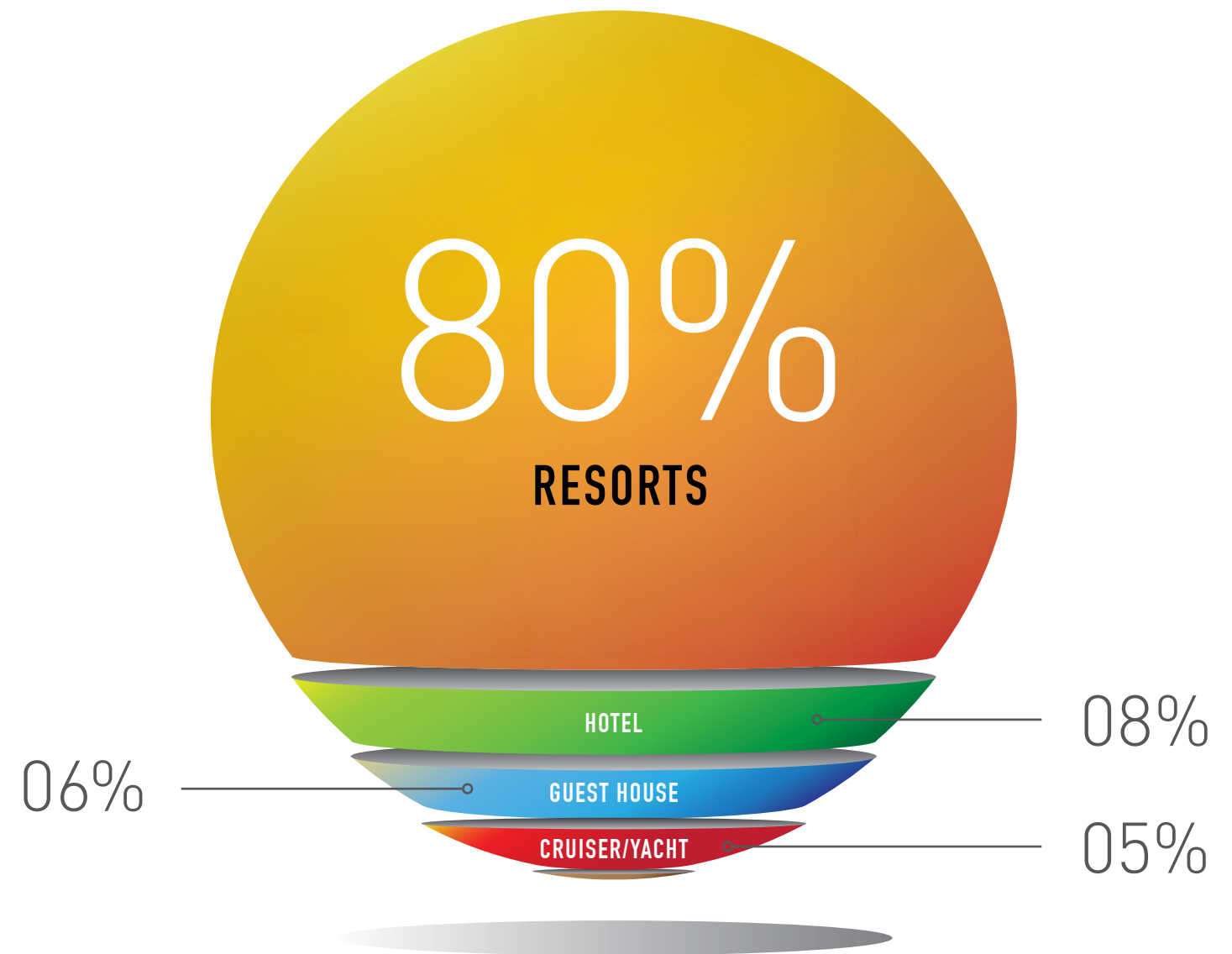
Place of Stay

Four out of five international visitors to the Maldives stay in the tourist resorts

Out of the 20% who did not stay in resorts, 8% stayed in hotels, 6% in guesthouses while 4% stayed on boat or safari vessels.

Of the international visitors who stay in resorts, 92% travel with partner or family. Similarly for hotels and guesthouses, 82% and 75% of those who stay travel with partner or family respectively. However, of those who stay in safari vessels and luxury yachts, 17% travel with tour groups. And 17% of those who stayed in safari vessels travelled alone.

One out of four visitors who stayed in guesthouses chose the Maldives because of quality of beach. The underwater beauty of the Maldives motivated one out of five visitors who stayed in safari vessels.



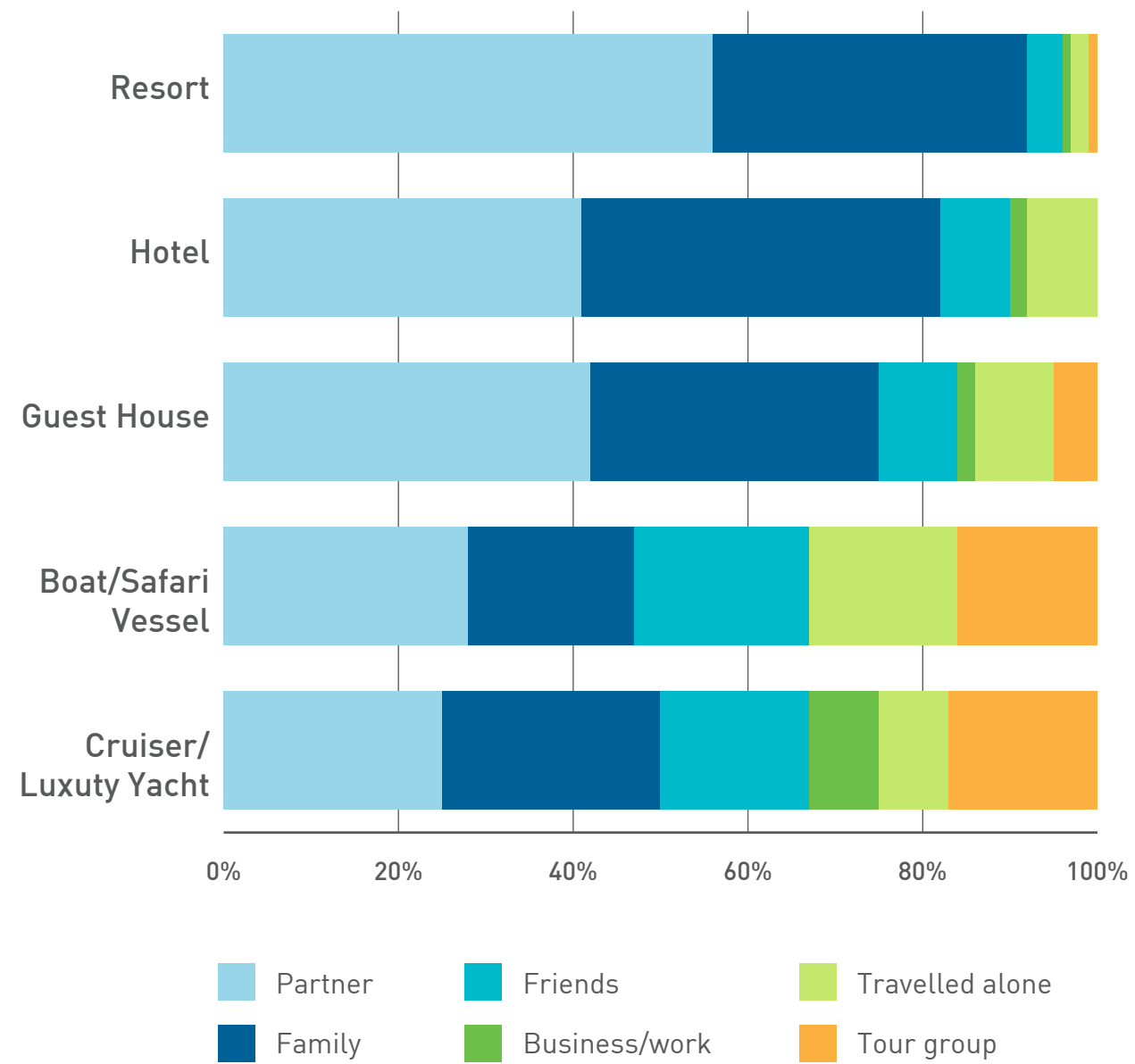


Figure 21. Type of accommodation selected by travel companion

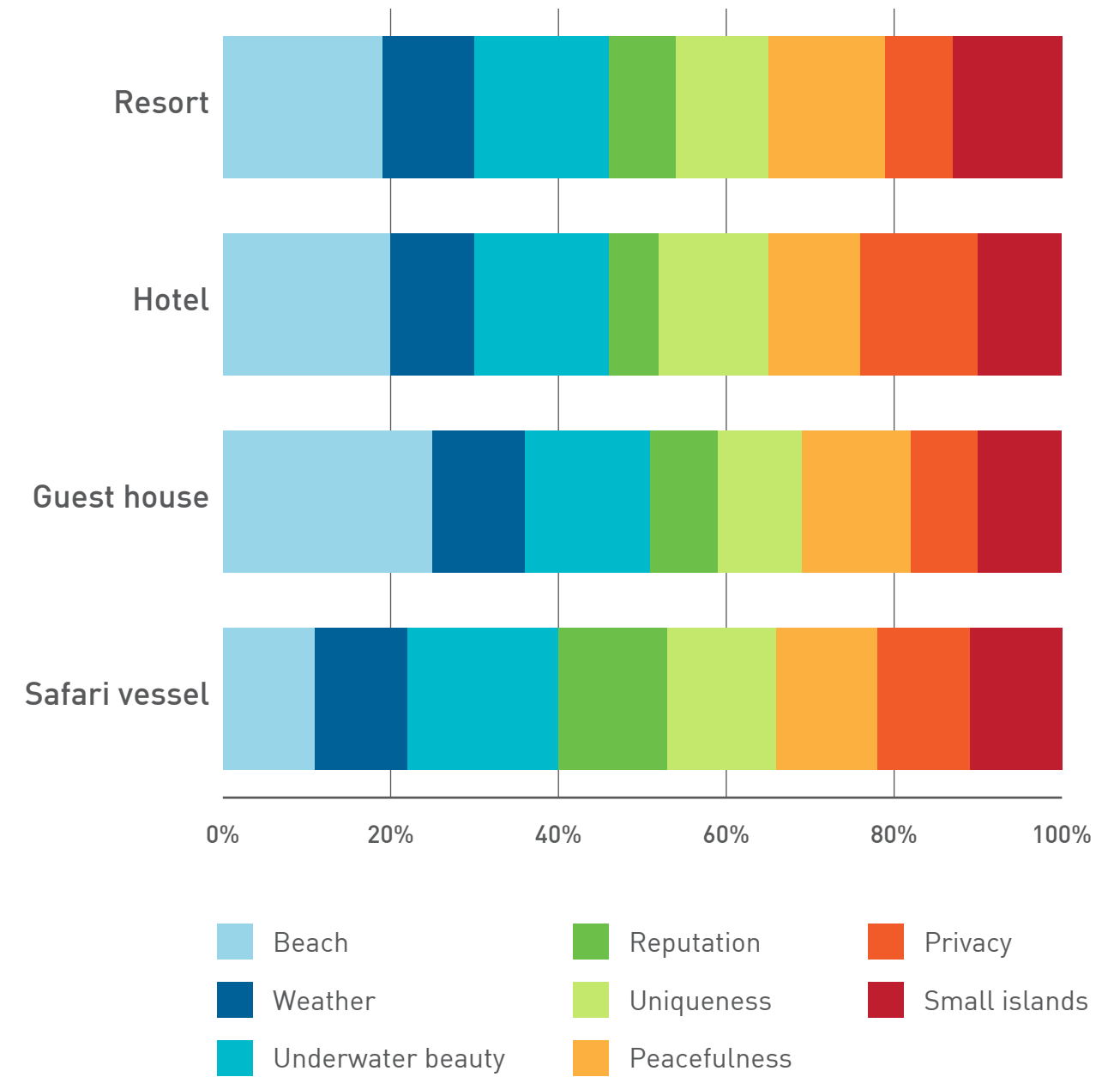


Figure 22. Motivators for choosing the Maldives by place of stay

QUALITY OF SERVICES

Of the services at place of stay, in-room entertainment was ranked lowest at place of stay.

Of those who ranked in-room entertainment 68% ranked it at as average or poor, with 8% stating it as poor. In contrast, guest services and management are ranked highest at place of stay. Of those who ranked guest services and management 86% ranked it as excellent or very good.

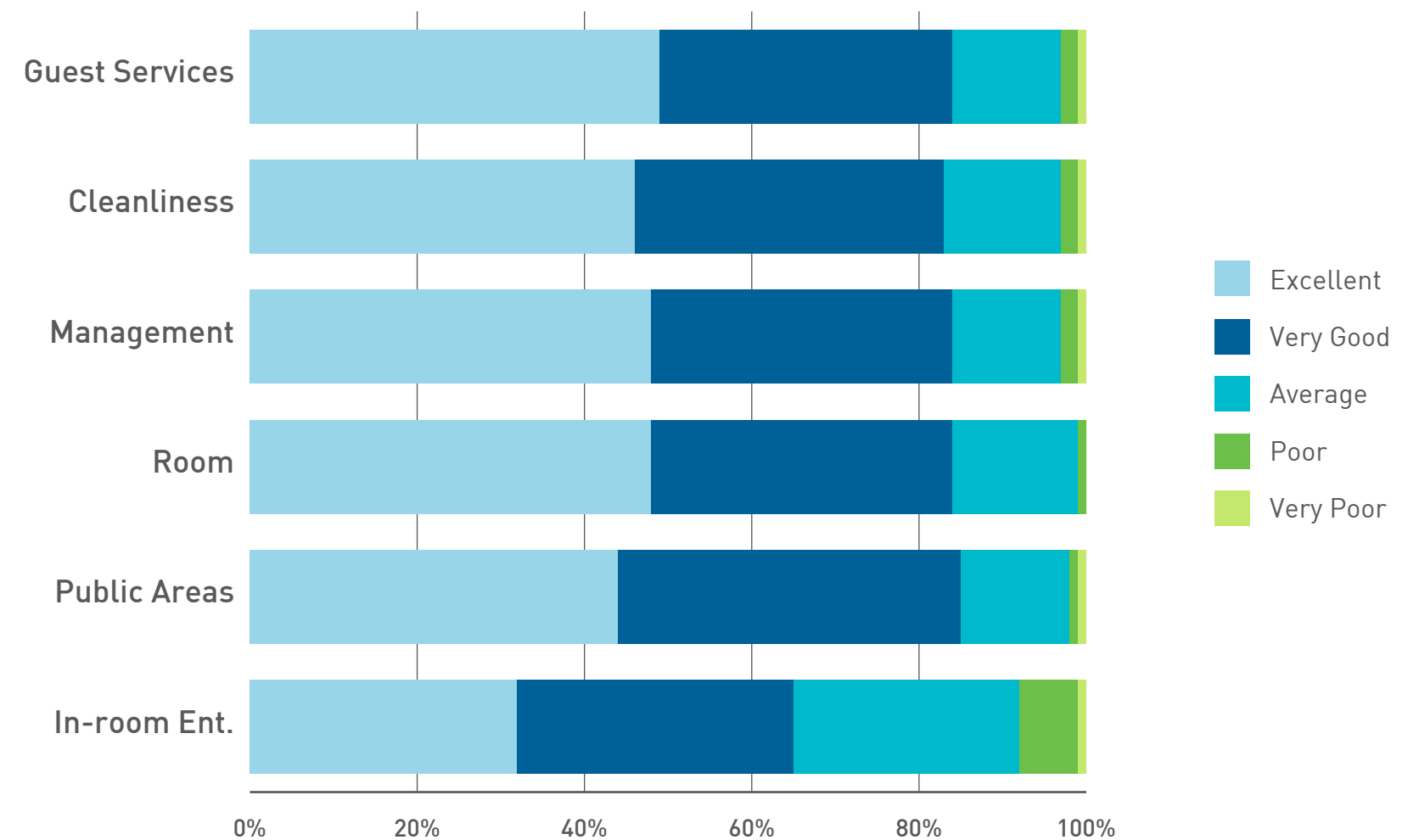


Figure 23. Services at place of stay

PRICE PERCEPTION OF SERVICES AT PLACE OF STAY

The prices charged for Internet in the place of stay are considered 'value for money' or 'cheap' by 67% of the international visitors.

Internet is perceived cheap by 17% of the visitors. However, 49% of the international visitors perceive telephone call prices to be expensive.

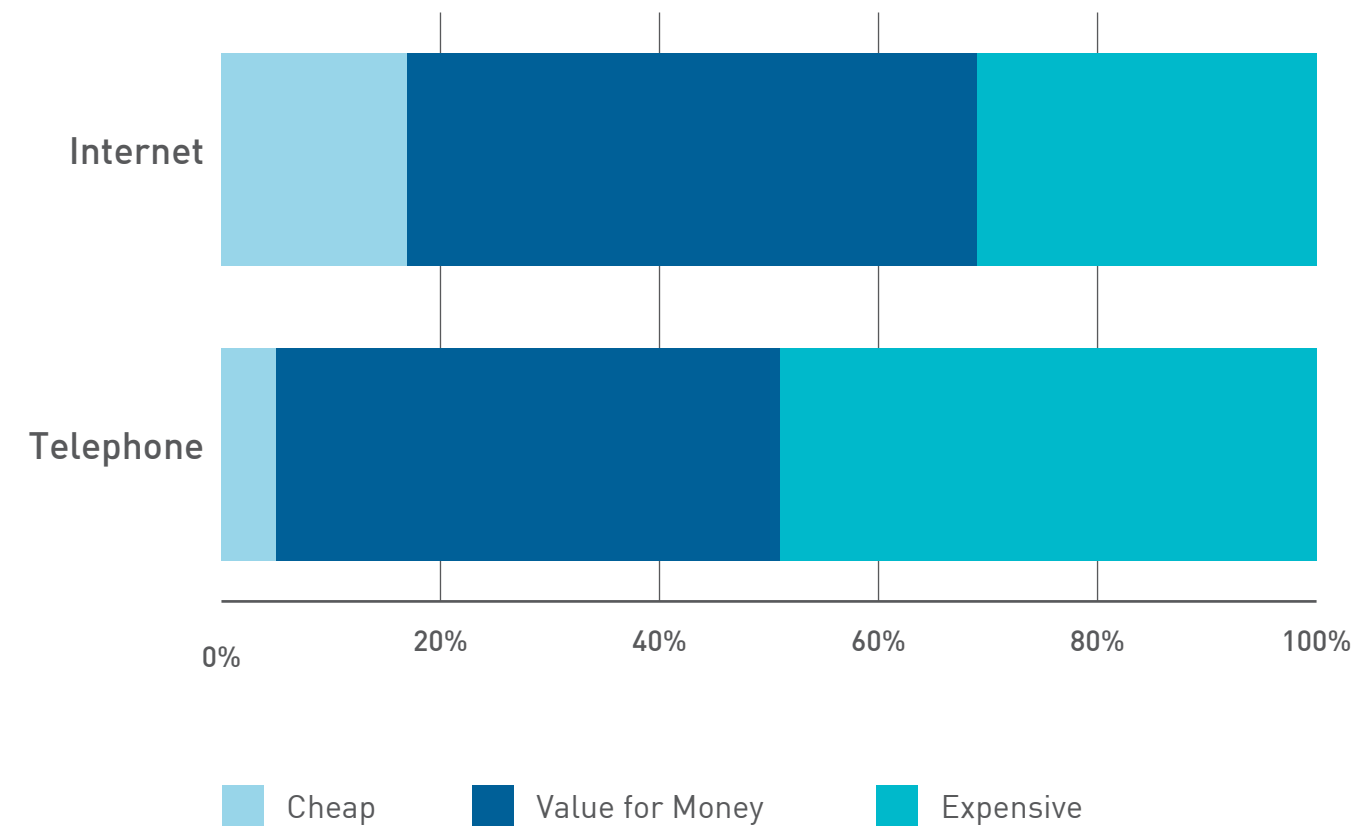


Figure 24. Perception of prices for communication

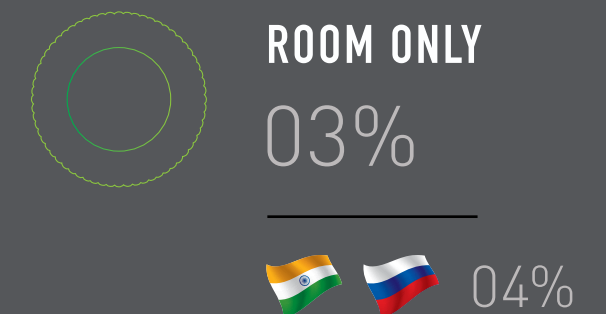
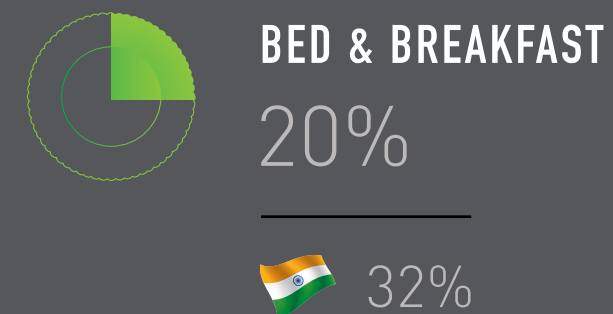
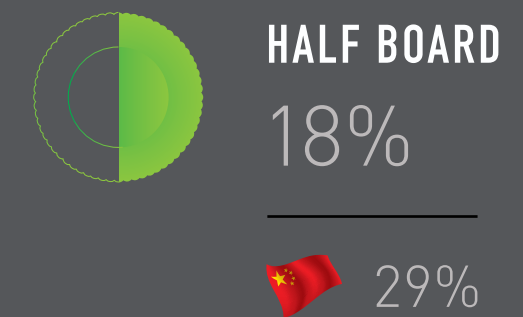
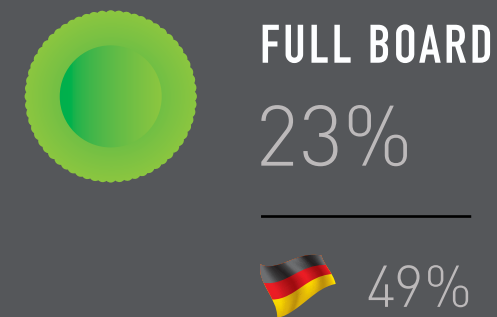
Dining

MEAL PLAN

Of the international visitors to the Maldives, 37% choose all-inclusive meal plans during their stay in the Maldives.

About 23% opted for full board while 18% chose half board meal options.

More than 65% of the British choose all-inclusive meal plans. Likewise, 54% Italians, 45% Japanese and 43% French opt for all-inclusive meal plans. Half of the German visitors opt for full board meal option. Bed and breakfast option is preferred mostly by Japanese (36%) and Indian visitors (32%).



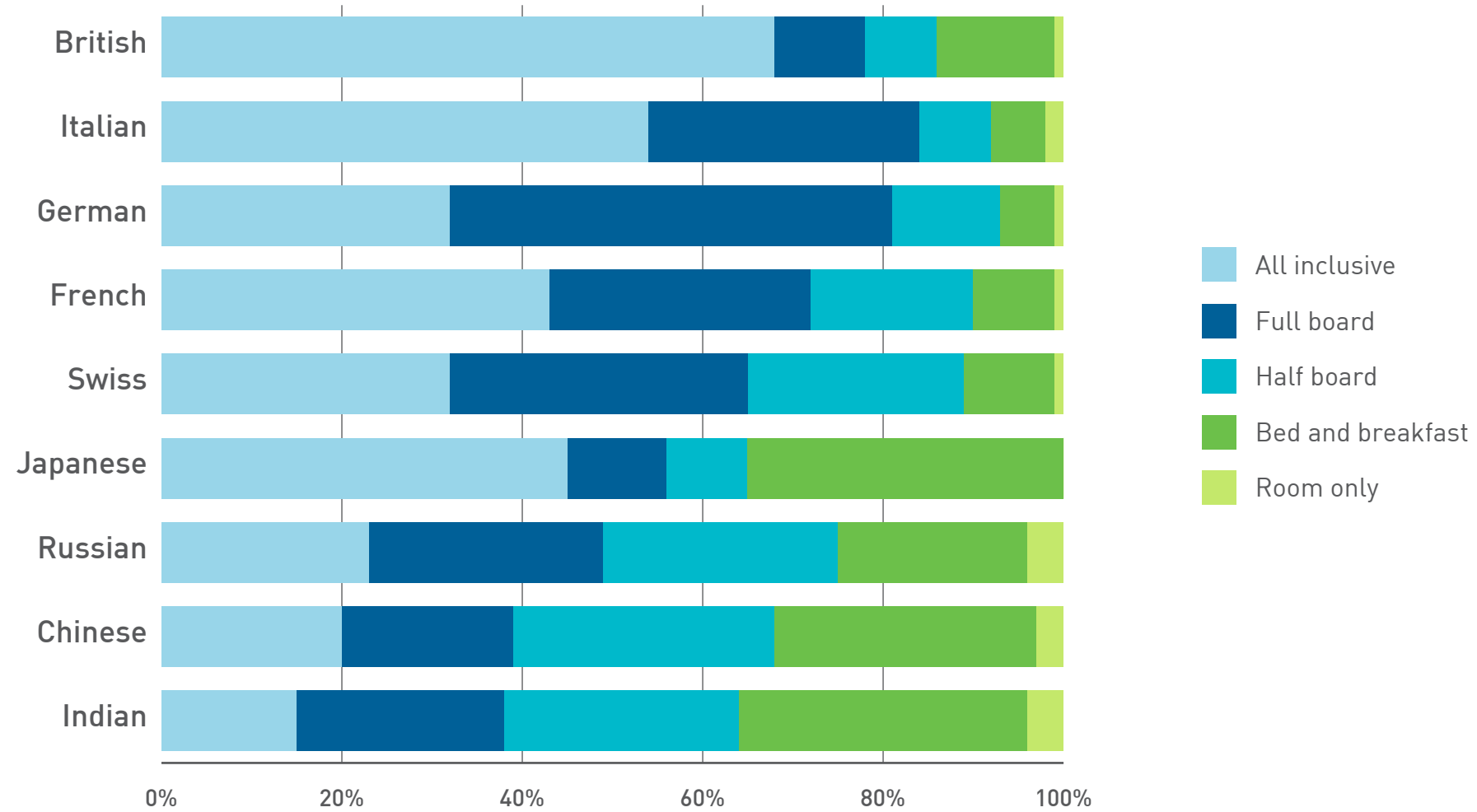


Figure 25. Meal plan preferences by nationality

QUALITY OF DINING

Quality of dining experience at place of stay is ranked very highly.

More than 82% of the visitors rank the dining experience at place of stay as excellent or very good. About one fourth of the visitors rank dining as average.

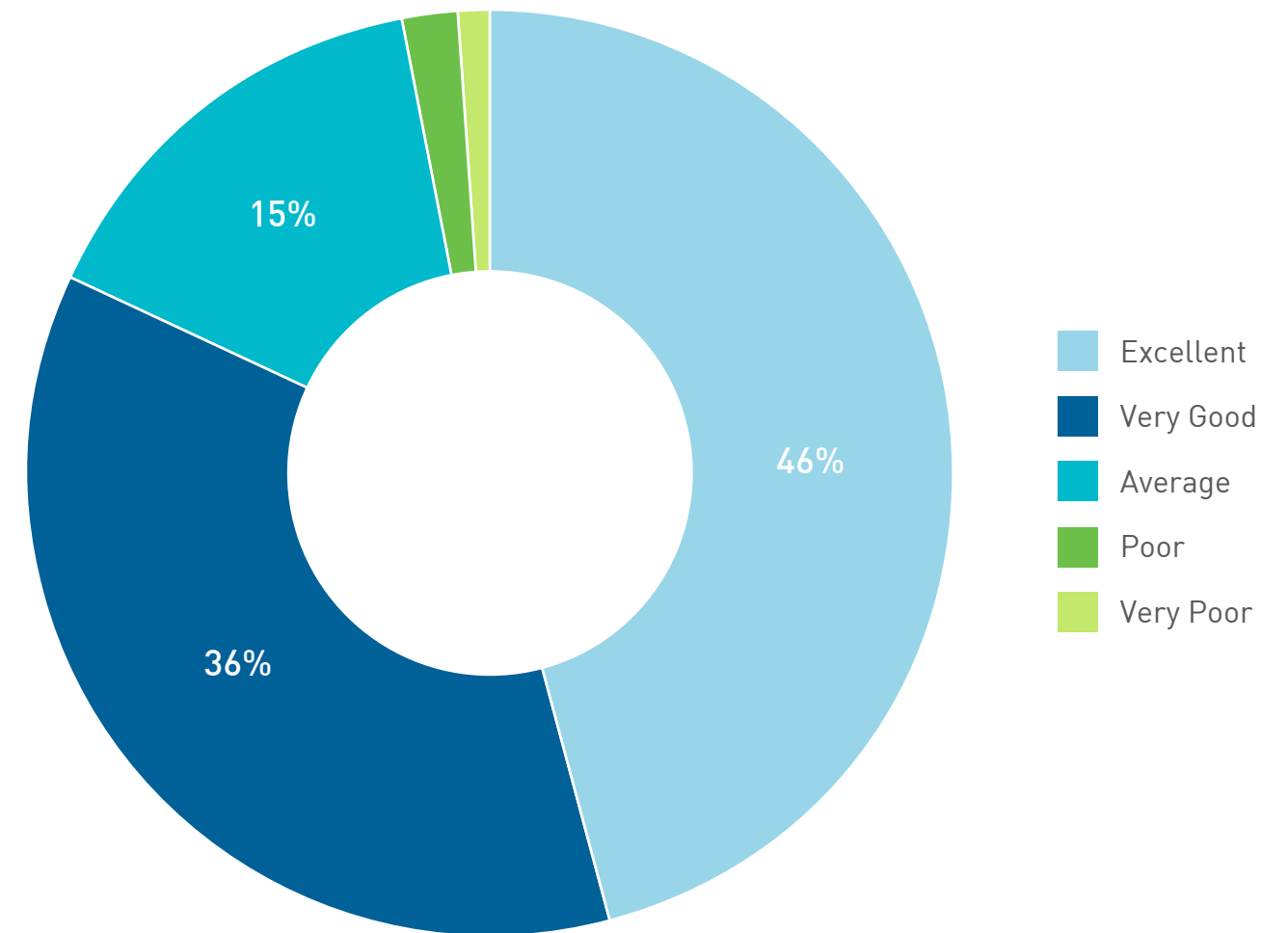


Figure 26. Dining experience at place of stay

PRICE PERCEPTION OF FOOD AND BEVERAGES

Of the international visitors, 57% rank food prices in the Maldives as 'value for money'.

However, 52% of respondents perceived alcohol as expensive, while 45% perceived soft drinks as expensive. About 40% of visitors still perceive water to be expensive in the Maldives. It is noteworthy that the proportion of visitors who considered water to be expensive has declined significantly during the last five years.

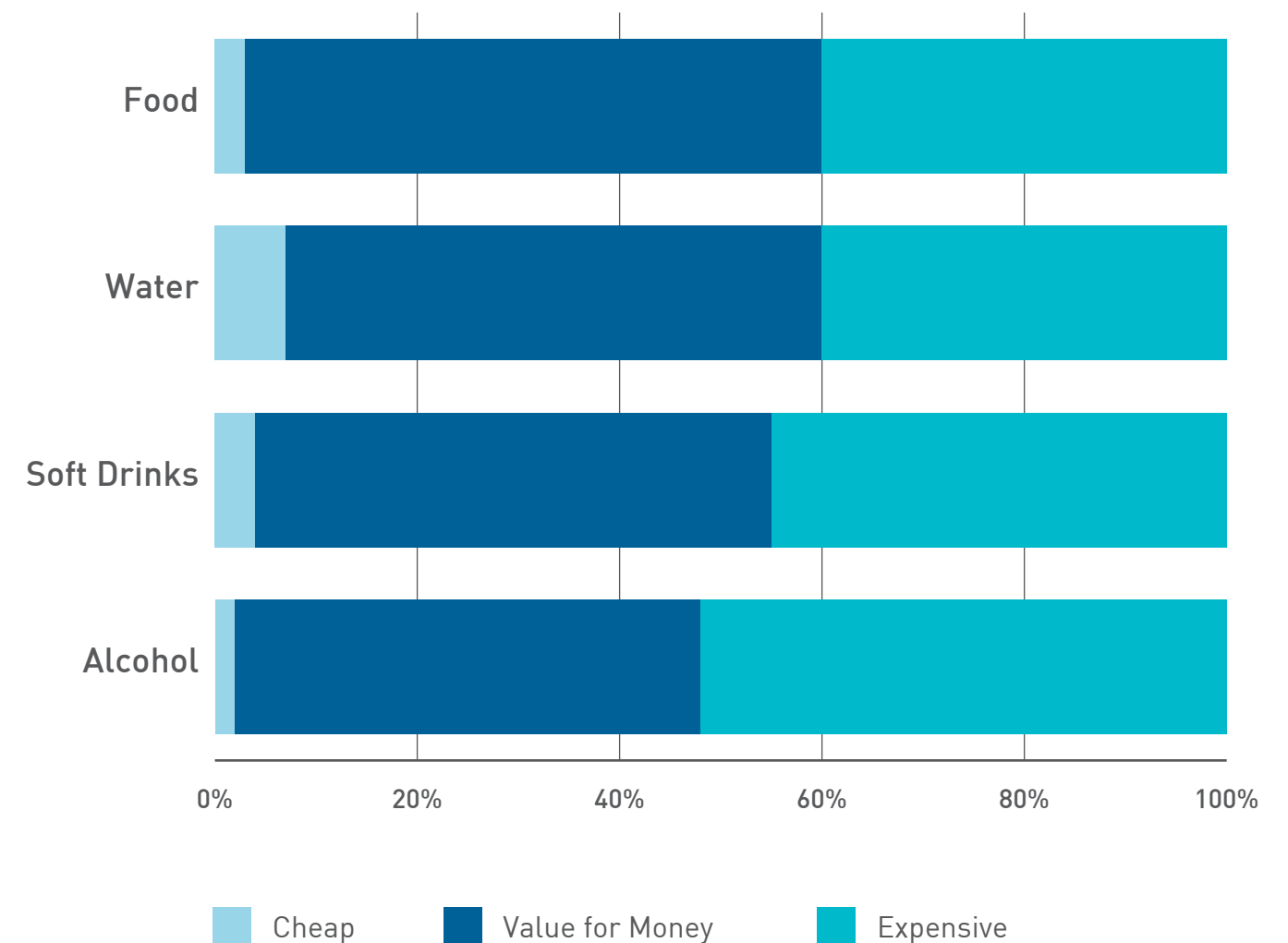


Figure 27. Perception of food and beverage prices

COMPARISON OF FOOD QUALITY WITH SIMILAR DESTINATIONS

Of the international visitors who have visited a similar destination to the Maldives, 35% rank the food quality in the Maldives higher than similar destinations.

On the other hand, the food quality is ranked lower by 24% of those had visited similar destinations while 42% perceived food quality in the Maldives is same as other similar destinations.

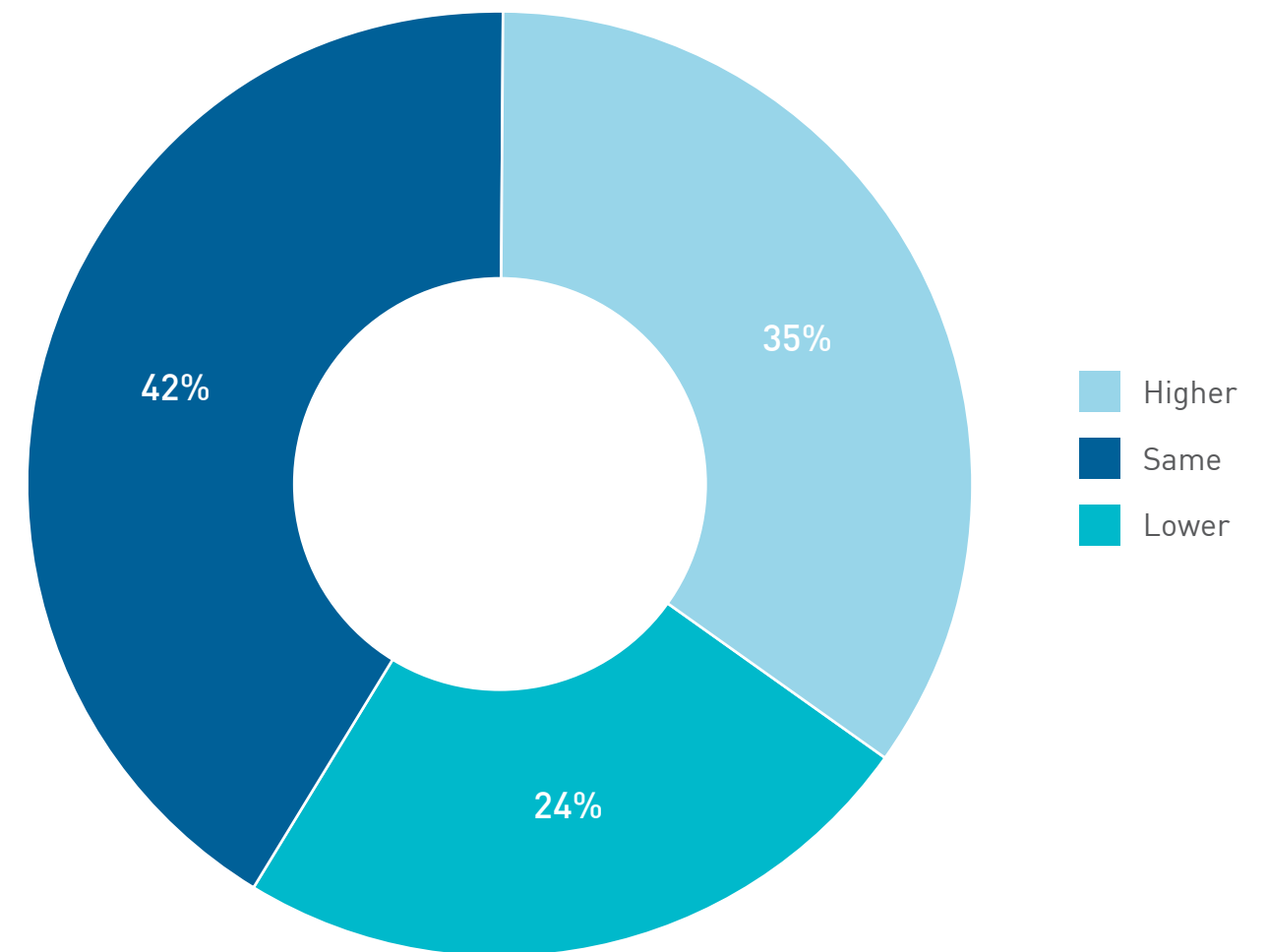


Figure 28. Food quality comparison with similar destinations

Activities and Attractions

ACTIVITIES MOST ENJOYED

Snorkelling and diving are rated highest amongst the activities enjoyed in the Maldives.

More than 90% of the respondents of the survey rated snorkelling and diving as either 'excellent' or 'very good'. The other highly rated activities are spa (84%), sightseeing (84%) and surfing (83%).



SNORKELLING

90%

RATED EXCELLENT & VERY GOOD



DIVING

90%

RATED EXCELLENT & VERY GOOD

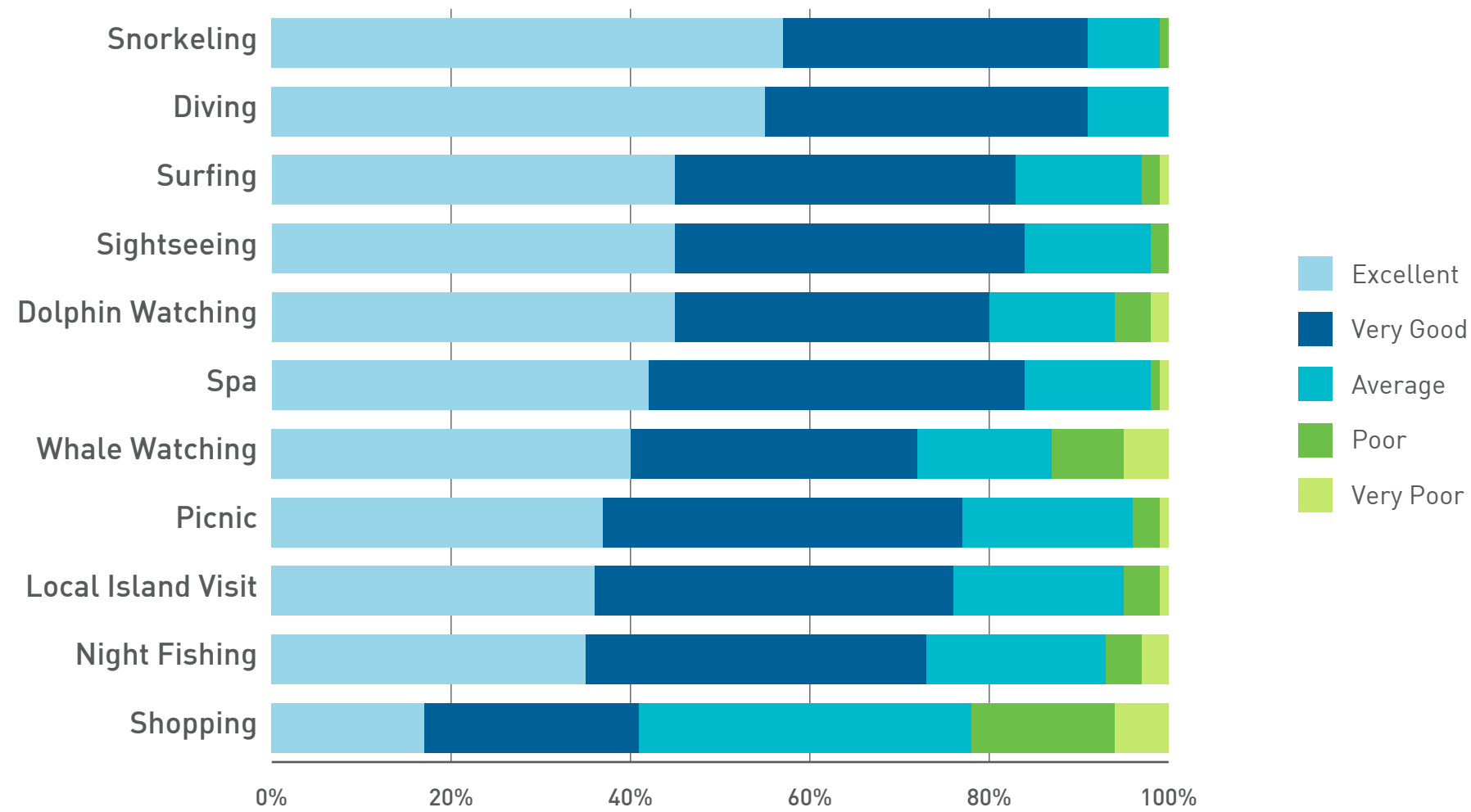


Figure 29. Activities most enjoyed by international visitors

International visitors to the Maldives rate shopping as the poorest activity. Of the survey respondents, 37% perceived shopping as average, 16% perceive it as poor while 6% perceive shopping to be very poor. The figure below shows the shopping experience at place of stay.

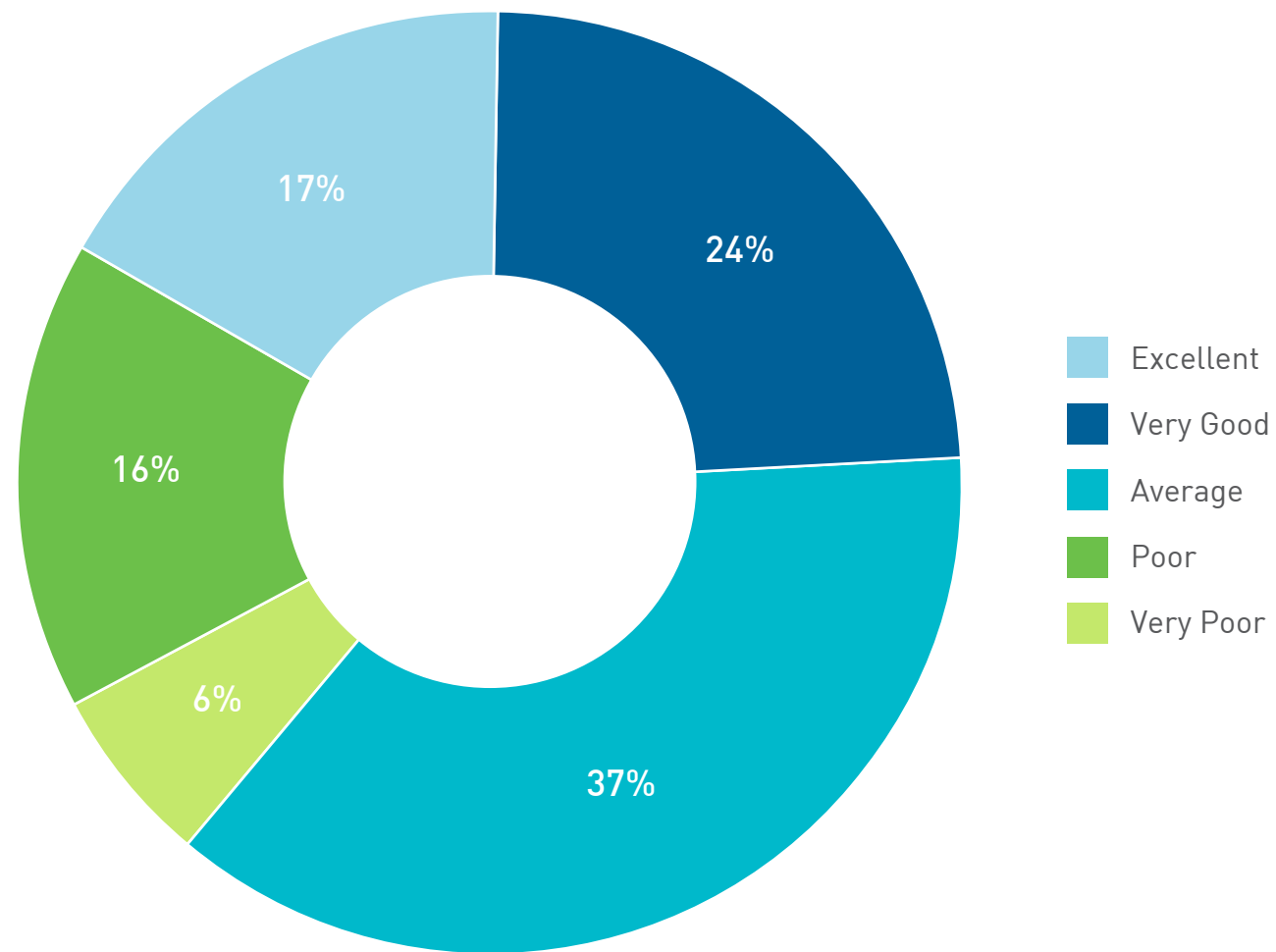


Figure 30. Shopping experience in the Maldives

PERCEPTION OF PRICE OF ACTIVITIES

Spa is perceived as most expensive activity at place of stay.

More than 54% of the respondents perceived spa to be expensive. Overall, activities at place of stay are ranked mostly as 'value for money'. Sports activities is perceived as value for money by 61% of the respondents while 6% perceived them to be cheap.

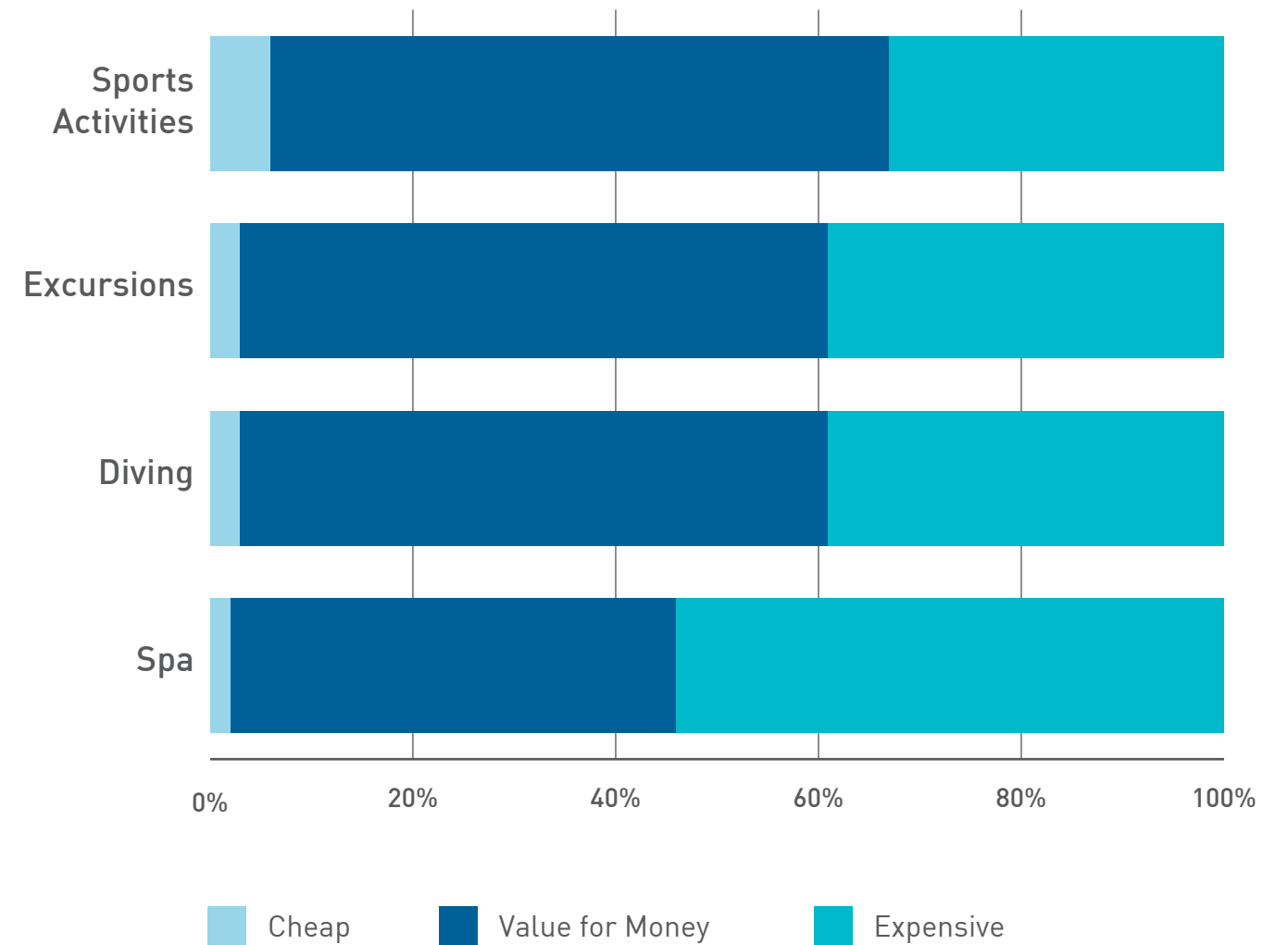


Figure 31. Perception of prices for activities

Souvenirs are perceived to be expensive in the Maldives. More than 57% of the international visitors perceive price of souvenirs to be expensive while 41 perceived souvenirs to be value for money. Only 3% of visitors perceived souvenir items to be cheap.

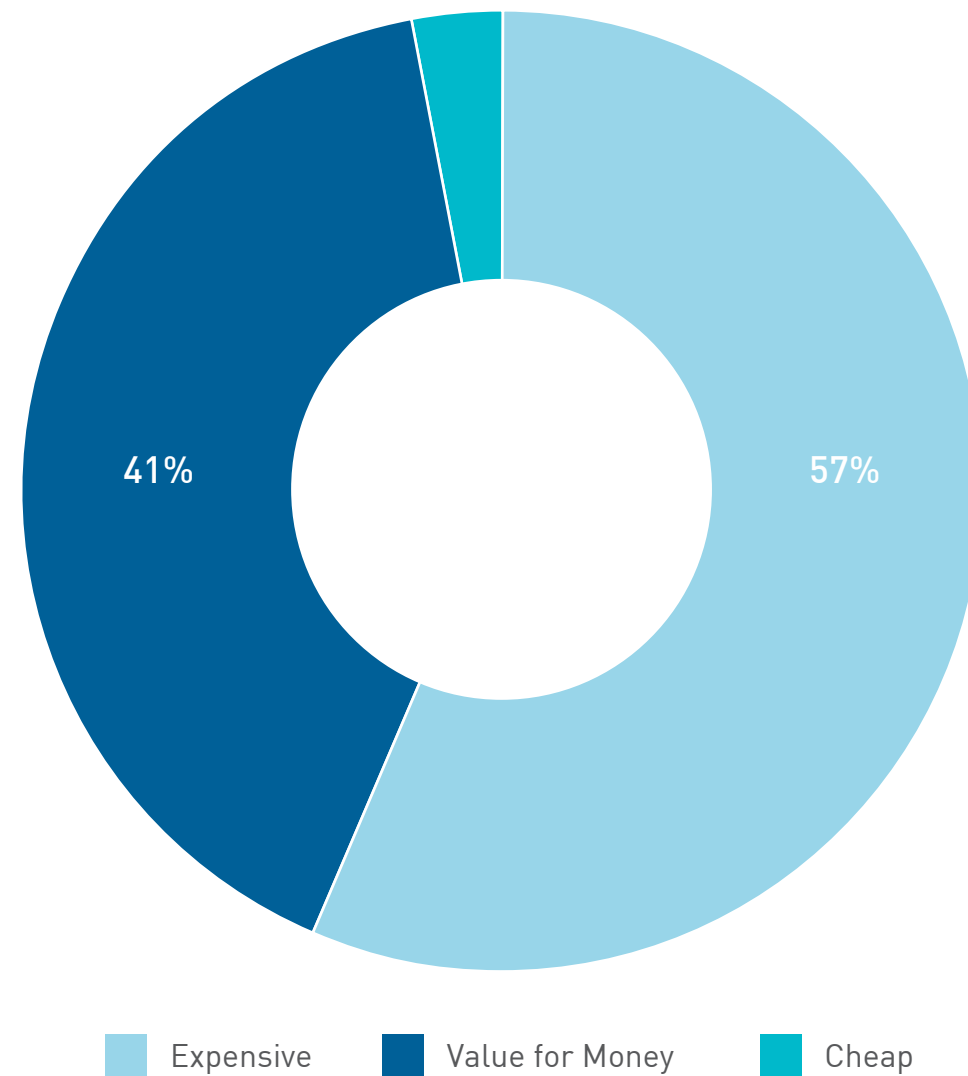


Figure 32. Perception of prices for activities

Places visited during the stay

29% of international visitors to the Maldives visited a local island during their stay in the Maldives.

Of the respondents to the question, 24% of the visitors visited the capital city Male', while 8% visited a picnic island and 1% visited the Baa Atoll Biosphere Reserve.

07

EXPENDITURE
IN THE
MALDIVES

About 32% of the respondents stated that they spent between USD 1000 to 5,000 for their holiday visit to the Maldives.

An additional 30% stated that they spent between USD 5000 and USD 10,000. Of the visitors to the Maldives, 15% said they spent between USD 10,000 and USD 20,000. About 13% of respondents spent below USD 1,000 for their visit.

According to the responses received from this survey, Russians and Chinese visitors spend the most in the Maldives. Of Russian visitors, 26% stated they spend over US\$ 30,000 for their trip and 23% stated they spend in the range US\$ 10,000 and 30,000. Of the Chinese visitors 17% stated they spend more than US\$ 30,000 and 25% spend in the range US\$ 10,000 and 30,000. Most of the respondents from Italy (41%), Germany (39%) and France (36%) spend in the range US\$5,000 and 10,000. About 33% of the British respondents and 60% of Indian respondents stated they spend between US\$ 1,000 and 5,000.

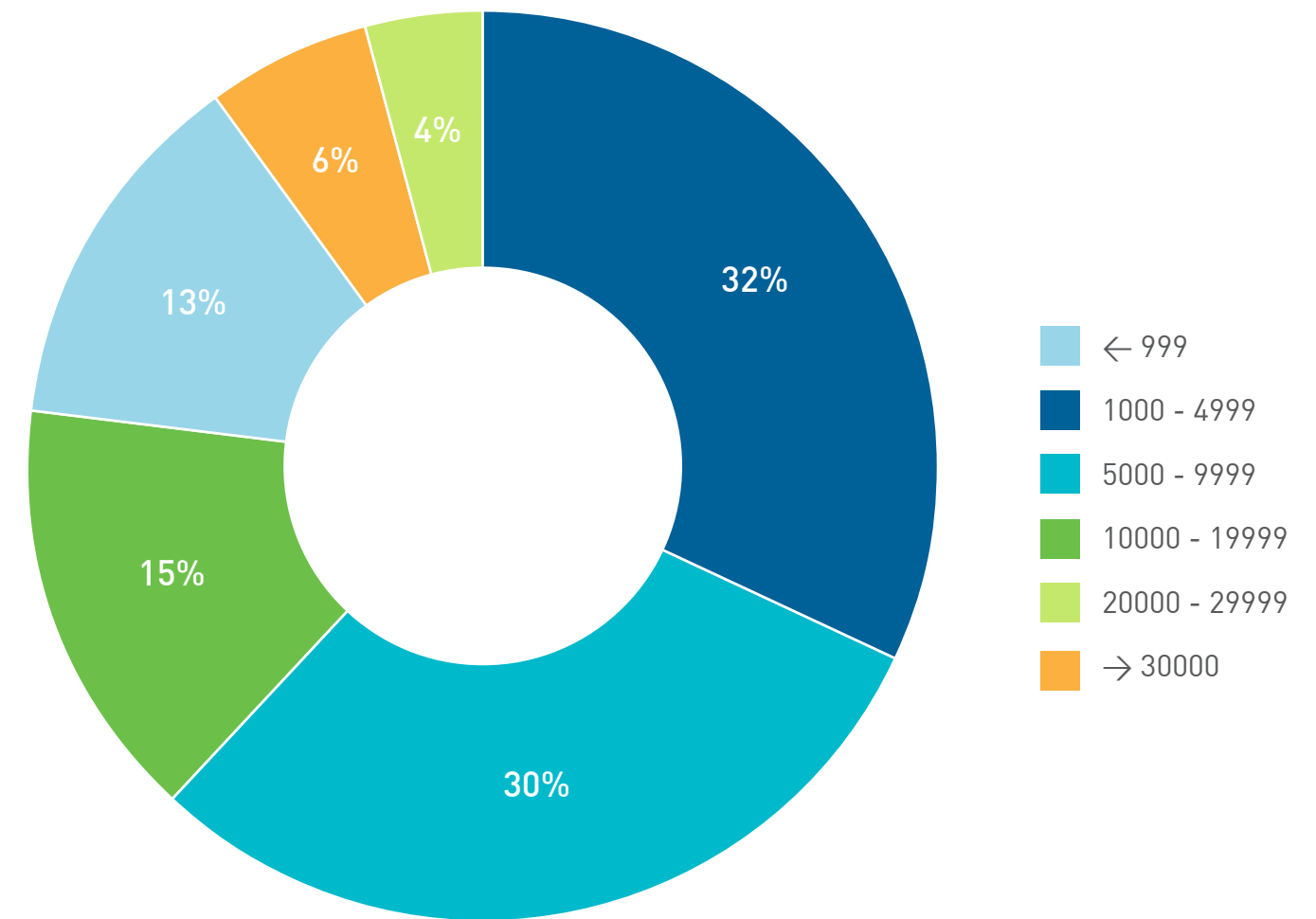


Figure 33. Expenditure by visitors in the Maldives

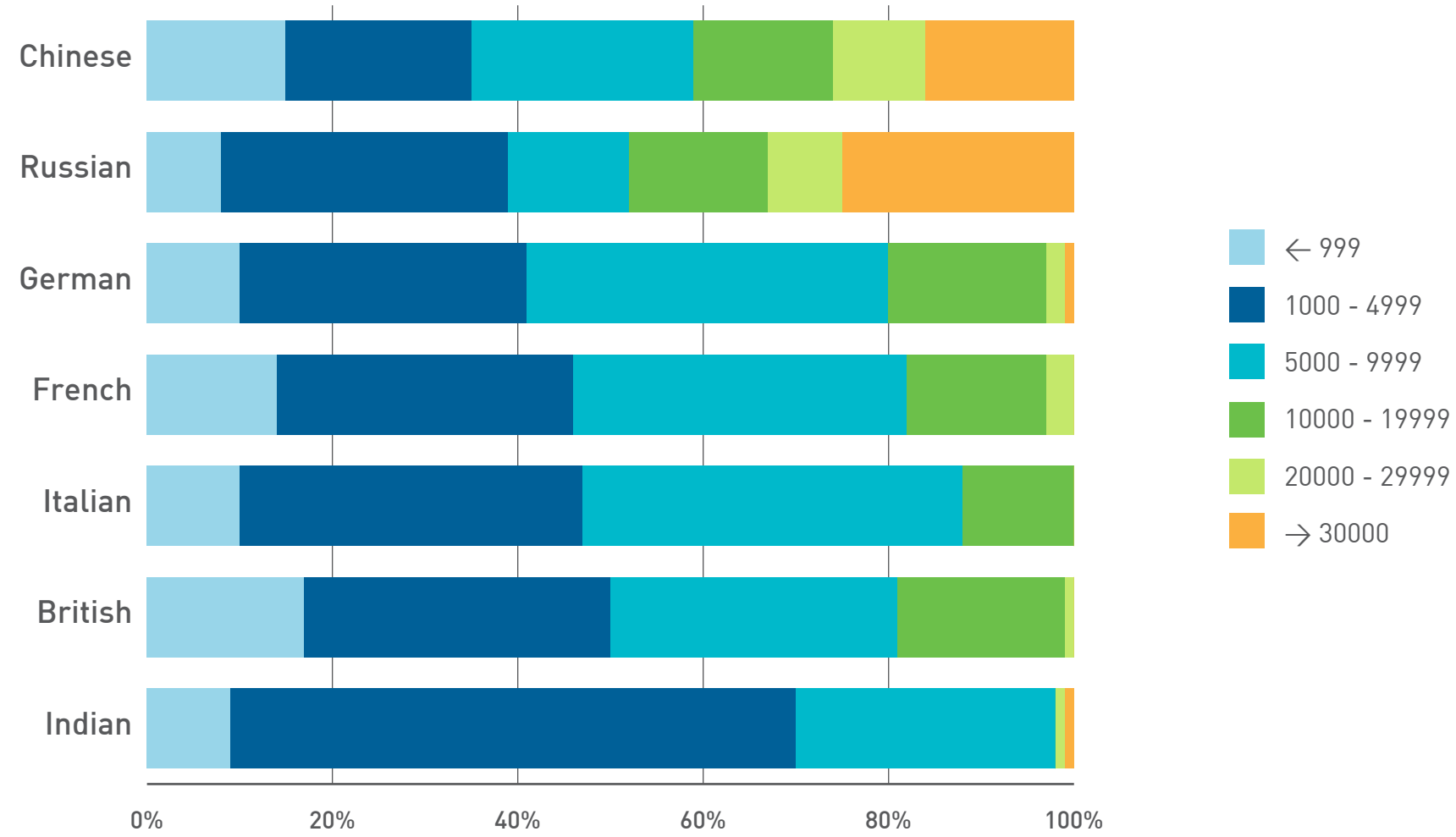


Figure 34. Visitor expenditure by nationality

08

OVERALL
VISITOR
SATISFACTION

Comparisons with Similar Destinations

The beaches, underwater beauty and privacy in the Maldives are rated higher than other similar destinations.

One out of every four international visitor to the Maldives had visited a similar destination. Other similar destinations stated by the visitors include Mauritius, Thailand, Seychelles and Polynesia. The beaches and the underwater of the Maldives are rated higher by more than 57% and 54% of visitors respectively, in comparison to other similar destinations. However, underwater also was rated lower by 21%. Friendliness of staff, safety and quality of the resorts and hotels are also rated either higher or same as other destinations. Value for money is rated same by 36% of visitors.

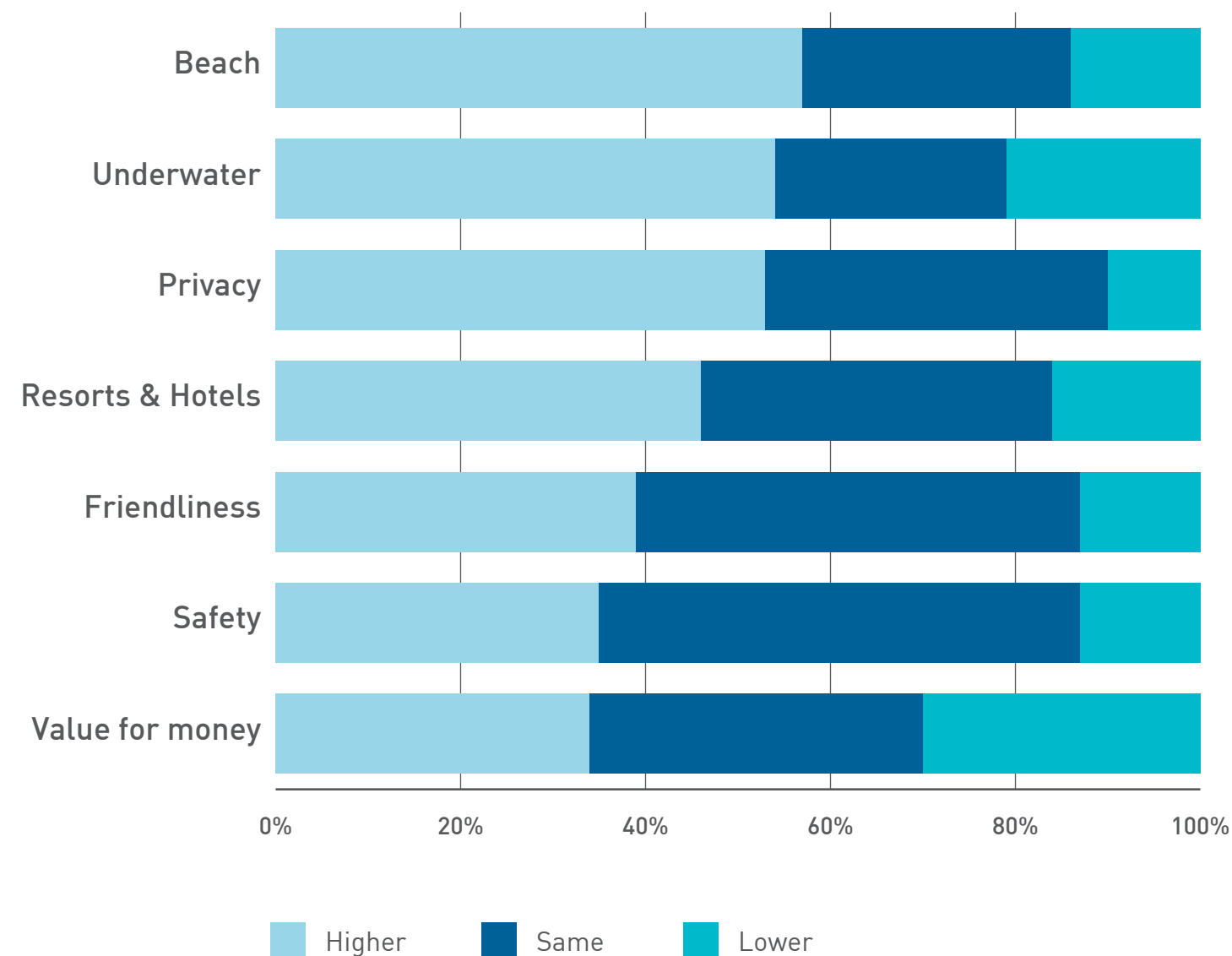


Figure 35. Rating of the Maldives compared to similar destinations

Expectation, Intention to Visit and Recommendation

Nine out of ten visitors to the Maldives stated that the holiday met their expectations.

The visitors also stated that they intend to visit again and would recommend the Maldives to other.

94%

MET THEIR HOLIDAY EXPECTATION

91%

**INTEND TO VISIT
THE MALDIVES AGAIN**

98%

**WOULD RECOMMEND
THE MALDIVES TO OTHERS**

09

CONCLUSION

Through the series of MVS conducted over the last five years, it is now well established that natural beauty (beach, underwater, small islands) is the motivating factor for international visitors to visit the Maldives.

Snorkelling and diving are the activities most enjoyed and rated highest by visitors. It is also noteworthy that visitors to the Maldives rate the beaches and underwater beauty in the Maldives higher than other similar destinations. Hence, it is very important that white sandy beaches, colourful coral reef, myriad of fishes, and swaying healthy coconut palms be maintained as the key tourism assets of the Maldives. The marketing messages of the Maldives need to be tailored to the interests and priorities of the visitors.

Peacefulness, uniqueness, reputation, and privacy are also important motivating factors for visiting the Maldives.

It took three decades to build the excellent standing of brand Maldives in the world tourism industry. Having built a world-renowned tourism product, the image building efforts has to be boosted for the modern day 24x7 social media connected community.

Internet is the most important source of information as well as the most important mode for booking the holiday to the Maldives.

Online Travel Agents (OTAs) now play a dominant role in the tourism industry of the Maldives. The focus of marketing strategies needs to be shifted to Internet and special priority needs to be given to design and build www.visitmaldives.mv with exceptional first impression and an intuitive interface with quick and easy access to information.

Travel agencies, particularly from Western and Southern Europe continue to be important partners in the Maldives tourism industry.

More than 70% of visitors from Germany and 61% of visitors from Italy visited a travel agency to book their holiday. The partnership with travel agencies needs to be enhanced and strengthened through proper recognition and win-win strategies.

European market continues to make bookings in advance, while visitors from the new inbound markets to the Maldives travel with short-term bookings.

The significant fluctuations in arrival numbers and unpredictability in monthly arrivals present significant operational challenges to the tourism industry. There is a need to promote long term bookings in emerging and new markets.

One out of three visitors to the Maldives are repeat visitors.

The survey results showed that more repeat visitors travel to the Maldives during the peak season in comparison to the off peak season. There is a need to undertake an in depth study of the repeat visitor segment.

Through the time series data of MVS, it is also established that Maldives is a popular destination for couples and families.

International visitors travelling as a family group to the Maldives is increasing. Hence it is important for the tourism industry to maintain the values needed for this trend to continue.

Monitoring of visitor satisfaction is one of the most essential tools to gain knowledge on a destination.

The MVS was run bi-annually by Ministry of Tourism to explore via a variety of themes, key components of international visitor satisfaction. The results show that the Maldives holiday experience meets expectations, and visitors intend to visit the Maldives again and nine out of ten visitors will recommend the Maldives to family, friends and colleagues. There is a need to continue to listen carefully to visitors and understand their needs. There is also a need to identify and eliminate causes of visitor dissatisfaction.

The level of satisfaction in transport services has improved significantly.

However, tomorrow's visitors are unlikely to want more of the same. The visitor mix of the Maldives is changing and it brings challenges of changing expectations for transport services too. In addition to ease of access, and comfort levels, the safety of passengers has to be continuously improved. In this context, the clarity and quality of information provided to passengers is an area that needs specific focus. It is also important to provide transport related information in international languages such as Mandarin, Russian and Arabic.

Shopping at airport and shopping at place of stay needs significant improvement.

Souvenirs are perceived to be expensive in the Maldives. It is important for the Maldives to design a trademark souvenir and make it available at a reasonable price.

The MVS has shown that in-room entertainment is an area the tourism industry must commit to continuously improve the quality of visitor experience.

Those working in the tourism industry, in particular the tourist resorts have always recognised the importance of looking after visitors to the Maldives. With the change in visitor mix over the last five years, this is a moment to re-examine each component of the visitor experience cycle.

The industry shall focus on vigorously identifying the innovations and changes in the telecommunication landscape.

The tourism industry shall remove the causes of visitor dissatisfaction in using phone applications such as Viber, Whatsapp and Skype and social media apps such as Facebook, Twitter and Instagram. Investing in high-speed wifi is highly likely to translate into happier visitors and a better image for the resort as well as the Maldives destination.

It is important that the Maldives has good estimates of how much visitors spend in the Maldives.

The MVS attempted to collect data on visitor expenditure. However, changes are needed in the MVS questions and the approach used to collect data to ensure further accuracy of the expenditure information.

Annex 1

METHODOLOGY

Methodology

The questionnaire for the Maldives Visitor Survey undertaken in February 2015 is based on the questionnaire for the survey conducted in October 2013. The questionnaire consisted of three sections and 27 questions in total. The questionnaire was prepared and printed in seven different languages. They are English, Italian, German, French, Japanese, Chinese and Russian languages.

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

A half-day training session was held for the enumerators prior to the commencement of the survey.

The survey was conducted for a period of 14 days between 14 February 2015 and 28 February 2015 at Ibrahim Nasir International Airport (INIA).

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

Table 1 . Derivation of sample size

NATIONALITY	5 YEAR AVERAGE	MINIMUM SAMPLE
China	24.0	432
Germany	9.2	166
United Kingdom	10.0	181
Russia	6.5	116
Italy	7.3	132
France	5.6	102
India	3.4	62
Japan	3.8	69
Korea	2.8	50
Switzerland	3.3	59
Others	24.0	200
TOTAL		1800

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

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

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



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