

Maldives Visitor Survey 2013 February

Ministry of Tourism, Arts and Culture

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Prepared by: CDE Consulting Pvt Ltd

Table of Contents

1	SUMMARY OF KEY FINDINGS.....	1
2	INTRODUCTION.....	6
2.1	Goals and Objectives.....	6
3	VISITOR PROFILE, TRENDS AND OPINIONS.....	7
3.1	GEOGRAPHIC PROFILE.....	7
3.1.1	Nationality and Place of Residence.....	7
3.2	DEMOGRAPHIC PROFILE.....	8
3.2.1	Age and Gender.....	8
3.3	PURPOSE OF VISIT.....	11
3.3.1	Purpose.....	11
3.3.2	Maldives as a Holiday Destination.....	13
3.4	SOCIO-ECONOMIC PROFILE.....	15
3.4.1	Professions of International Visitors.....	15
3.5	TRAVEL ORGANIZATION.....	15
3.5.1	Source of Information.....	15
3.5.2	Mode of Trip Organization.....	17
3.5.3	Traveling Companion.....	18
3.5.4	Frequency of Visit.....	20
3.5.5	Length of Advance Booking Period.....	21
3.6	EXPERIENCES AND ACTIVITIES.....	22
3.6.1	Place of Stay.....	22
3.6.2	Duration of Stay.....	24
3.6.3	Activities Enjoyed by International Visitors.....	26
3.7	EXPENDITURE.....	27
3.7.1	Expenditure within Maldives excluding Tour Package Price.....	27
3.7.2	Expenditure on Tour Package.....	29
3.8	VISITOR SATISFACTION.....	31

3.8.1	Services at the Ibrahim Nasir International Airport.....	31
3.8.2	Quality of Hotel Transfer.....	32
3.8.3	Services at the Place of Stay.....	32
3.8.4	Perception of Prices.....	33
3.9	OVERALL PERCEPTION OF THE HOLIDAY.....	35
3.9.1	Overall Satisfaction.....	35
3.9.2	Comparison with Similar Destinations.....	35
3.9.3	Intention to Visit Again.....	37
4	METHODOLOGY.....	38

List of Figures

Figure 1:	Participants of Maldives Visitor Survey 2013 February by region.....	7
Figure 2:	Top ten nationalities of survey participants of Maldives Visitor Survey 2013 February.....	8
Figure 3:	Place of residence of top ten nationalities.....	8
Figure 4:	International visitor arrivals by age group.....	9
Figure 5:	International visitor arrivals by age group and region.....	9
Figure 6:	International visitor arrivals by age group and nationality.....	10
Figure 7:	International visitors by gender.....	10
Figure 8:	Visitors of top ten nationalities by gender.....	11
Figure 9:	Purpose of visit to the Maldives.....	12
Figure 10:	Main purpose of visit by top ten nationalities.....	12
Figure 11:	Motivators for choosing the Maldives.....	13
Figure 12:	Motivators for choosing the Maldives by top ten nationalities.....	14
Figure 13:	International visitors to the Maldives by occupational categories.....	15
Figure 14:	Source of pre-arrival information about the Maldives.....	16
Figure 15:	Sources of information by top ten nationalities.....	16
Figure 16:	Mode of trip organization used by international visitors.....	17
Figure 17:	Mode of trip organization by top ten nationalities.....	17
Figure 18:	Type of travel companion.....	18
Figure 19:	Type of travel companion by nationality.....	19
Figure 20:	Size of the travel group by adult companions.....	19
Figure 21:	Number of visits to the Maldives.....	20

Figure 22: First time visitors and repeat visitors by top ten nationalities.....	20
Figure 23: Duration of advance booking of holiday by visitors.....	21
Figure 24: Duration of advance booking of holiday by top ten nationalities	21
Figure 25: Type of accommodation selected by international visitors.....	22
Figure 26: Type of accommodation selected by international visitors of top ten nationalities	22
Figure 27: Types of meal-plan chosen by international visitors.....	23
Figure 28: Type of meal plan chosen by top ten nationalities.....	23
Figure 29: Number of nights spent in the Maldives	24
Figure 30: Trends in duration of stay among visitors of top ten nationalities.....	25
Figure 31: Activities most enjoyed by international visitors.....	26
Figure 32: Activities most enjoyed by top ten nationalities	26
Figure 33: Expenditure per trip by visitors in the Maldives (excluding tour package).....	27
Figure 34 Expenditure within Maldives by top five nationalities	28
Figure 35: Percentage of visitors travelling on a package tour.....	29
Figure 36: Expenditure on tour package to the Maldives.....	29
Figure 37: Expenditure on tour package to the Maldives by top five nationalities	30
Figure 38: Ratings on services provided at the Ibrahim Nasir International Airport	31
Figure 39: Ratings on quality of transportation services and comfort at hotel.....	32
Figure 40: Service ratings for place of stay in the Maldives	33
Figure 41: Perception of prices charged for the services.....	34
Figure 42: Holiday met with expectations.....	35
Figure 43: Rating of the Maldives compared to similar destinations.....	37
Figure 44 Intention to visit the Maldives again	37

List of Tables

Table 1 Similar destinations experienced by visitors	36
Table 2 Derivation of sample size	38
Table 3 Questionnaires printed, distributed and completed in different languages.....	39
Table 4 Comparison of Tourist arrivals in 2012, February 2013 and Surveyed	40

1 SUMMARY OF KEY FINDINGS

Maldives Visitor Survey of February 2013 was conducted in the Departure Terminal of Ibrahim Nasir International Airport. The survey was conducted for a period of 13 days between 3 and 20 February 2013. The questionnaire was distributed in seven different languages of English, Italian, German, French, Japanese, Chinese and Russian. Sample size by language was based on the top ten nationalities of 2012 arrivals. By the end of the survey period the number of questionnaires distributed was 1,548 and 1,507 questionnaires were collected. Results presented are based on 1,456 questionnaires that were fit for analysis.

Visitor arrivals

Europe remains as the largest source of visitors to the Maldives, 56.4% in 2012 and 51.6% in February 2013, by region. The second largest regional group was Asia and The Pacific (Tourism Statistics 2013). Chinese arrivals continue to be the largest inbound market for Maldives.

Majority of the participants of Maldives Visitor Survey in February 2013 were from Europe (71%) followed by Asia & the Pacific (21%). French is the top nationality among participants of the survey.

Demographics

Majority of international visitors (55%) who responded to the survey are in the 25 to 44 years age group.

Purpose of visit

The main reason visitors came to Maldives was honeymoon (23%). The second most popular reason was health & wellness (22%) closely followed by diving (19%). Holiday/relaxation (17%) is stated as the fourth most popular reason for visiting Maldives.

Indian (80%), Japanese (55%) and Chinese (33%) visited Maldives for honeymoon. Of the visitors, 39% of Germans, 35% Italians and 33% stated Health & Wellness as their main purpose of visit to Maldives.

The main reasons for choosing the Maldives as a holiday destination were the beach (21%), underwater beauty (21%) and the weather (15%).

Socio-economic profile

Manager, Director and Senior Officials (20%) account for the largest proportion of international visitors to the Maldives followed professionals (15%).

Trip planning

Of the international visitors, 65% visited a travel agency to book their visit to Maldives. Direct booking with a tour operator via internet were made by 20% of the visitors while 11% made direct booking with the resort via internet.

Information sources and internet usage

Word of mouth (26%) and Internet (26%) were equally the two most popular sources of information about Maldives for international visitors. Travel agents (18%) were the third most widely used source, followed by magazines (10%).

Travel party

Of all international visitors to the Maldives, 57% travelled with a partner; while 29% travelled as a group of family, 9% with friends; and 3% as along/single traveler.

In terms of size of travel group, 74% of visitors travelled in a group of two while 7% travelled in groups of six or more. Most of the international visitors (74%) travelled without children.

Repeat visitors

Among the visitors, 70% came to Maldives for the first time visitors while 29% were repeat visitors.

First time visitors were highest among Chinese (95%), Indians (90%) and Japanese (78%). Repeat visitors were highest among Swiss (53%), Italians (49%) and Germans (44%).

Advance booking period

Equal percentage of International visitors booked their holiday 1 to 2 months (27%) and 3 to 5 months (27%) months in advance. Bookings were made 3 to 12 months in advance by 15% and 2 to 4 weeks by 19%.

Place of stay

At 79% resorts were the most popular place of stay while 11% stayed in hotels and 9% stayed on yacht (safari vessels). Only 1% stayed in guesthouses.

Meal plan

Of the international visitors, 41% chose all-inclusive while 23% opted for full board, 21% chose half board and 12% chose bed and breakfast.

Length of stay

Majority of international visitors (91%) stayed between 1 to 4 nights in Maldives. The average number of nights spent by international visitors (23%) was 7 nights.

Activities

Snorkeling is the most popular activity with 40% of visitors enjoying the activity. Of all the international visitors, 17% enjoyed diving, 14% spa treatments and 10% water sports.

Snorkelling is enjoyed most by Italians (49%), Chinese (45%) and British(43%) while diving is the most popular activity among Italians (23%) and Japanese (22%). Only 4% of the responding visitors took part in island visits.

Expenditures

Majority of responding visitors spent over USD 5,000 within Maldives during their visit. Except for British, majority of top five nationalities Chinese, Germans, Russians and Italians spent more than USD5000 within Maldives.

Among the responding visitors, 54% traveled on a packaged tour and majority of the visitors (25%) spent over USD 5000 for the package tour. Across all five top nationalities, expenditure on tour package by majority of visitors was greater than USD5000.

Quality of airport services

All services at the airport except for services at cafés/restaurants and shopping are rated at 70% or above.

Immigration services is rated the highest including quality of services delivered at passport clearance and customs clearance. The majority of the visitors rated friendliness of staff including friendliness of staffs at immigration and customs excellent and good.

Quality of hotel transfer

International visitors are mostly happy with service quality of hotel transfers, rated at 83% and above with 47% rated as 'excellent'. Waiting time for hotel transfer is rated 'excellent' by 41%, 'good' by 33% and 'satisfactory' by 14%. Comfort of hotel transfer is rated 'excellent' by 42%, 'good' by 34% and 'satisfactory' by 11%. While 5% rated waiting time for hotel as 'poor', 2% rated service quality of hotel transfer and comfort of hotel transfer as 'poor'.

Quality of place of stay

On average, 56% of international visitors rated their place of stay as 'excellent' in all five categories consisting of recreational facilities, friendliness of staff, beverages, food and accommodation evaluated in the 2012 survey.

Overall, all services at their place of stay except for recreational facilities is rated 80% and above. Recreational facilities is rated as 'excellent' by 48% of international visitors, Friendliness of staff is rated 'excellent' by 70% of visitors and accommodation is rated 'excellent' by 58%. Food and beverages is rated as 'excellent' by 53% and 48% visitors respectively.

Price perceptions

Of the international visitors to the Maldives 48% consider accommodation prices as 'value for money' while 39% perceive the prices to be 'expensive'. Of the visitors, 43% consider food prices as 'value for money' while 39% consider them to be 'expensive'. The prices charged for drinking water in the resorts of the Maldives are also considered 'value for money' by 39% while it is perceived to be 'expensive' by 37% of the visitors. Alcoholic beverages considered 'expensive' by 41% of the international visitors while 32% of the visitors feel that it 'value for money'.

Souvenir items are considered 'expensive' by 43% of visitors. In case of transportation, 41% of visitors perceive air transport prices to be 'value for money' while 22% consider them to be expensive. Sea transportation prices are seen as 'value for money' by 42% of the visitors and 19% of them thought prices as generally expensive.

With respect to recreational activities; sports activities are perceived as ‘value for money’ by 36%, diving by 35% and excursions by 32%. On the other hand, sports activities are perceived as ‘expensive’ by 25%, diving by 25% and excursions by 27% of the visitors.

Meeting expectations

An overwhelming majority of international visitors (94%) stated that the holiday met their expectations. Four per cent of visitors felt that the holiday did not meet their expectations.

Among the international visitors who had visited similar destinations to the Maldives, the top five most popular countries are Mauritius, Thailand, Seychelles, Indonesia and French Polynesia.

From the 40% international visitors who have visited similar destination, most (56%) rated the natural environment of Maldives better than other similar destinations. Recreational activities and value for money are considered the same in other destinations by most respondents. Value for money of the holiday is considered the weakest aspect (22%) of the Maldives in comparison to other similar destinations.

2 INTRODUCTION

This is the fifth report in the series Maldives Visitor Survey conducted by Ministry of Tourism, Arts and Culture. This survey is undertaken as part of the efforts to improve the quality of tourism services in the Maldives. These reports are published with the aim of providing a useful resource for decision-making by industry managers as well as policy makers.

Previous reports of the series were published in 1999, 2004, 2008, 2011 and 2012. Two surveys are intended for 2013. This report provides findings of the survey undertaken in February 2013 to capture peak season. The second survey is planned to be conducted in May 2013 as survey for off-peak season.

Conducting the Maldives Visitor Survey, processing the data and compilation of the report has been outsourced to Commerce, Development and Environment Pvt Ltd (CDE Pvt Ltd) through a public tender process. Hence, this report is compiled and prepared by CDE Pvt Ltd based on the data collected and with the guidance of Ministry of Tourism, Arts and Culture.

2.1 Goals and Objectives

The primary goal of the Maldives Visitor Survey 2013 is to contribute to the efforts to enhance the tourism industry in the Maldives by providing those in industry and government with a resource which details the characteristics, preferences and expectations of tourists who visit the Maldives. This report will also seek to identify deviations from previous survey reports published in 2008, 2011 and 2012 wherever possible. In addition, the report will provide breakdown of responses of the top ten nationalities of the survey where possible. The key areas studied in this report are:

- Demographic, economic, social, and geographic profile of tourists who visit the Maldives;
- Opinions of tourists about their place of stay in the Maldives; services and facilities; modes of travel to the Maldives;
- Sources of information about the Maldives as a tourist destination;
- Patterns of visit; perceptions of value for money; holiday preferences and interests;
- Tourist expenditure in the Maldives.

3 VISITOR PROFILE, TRENDS AND OPINIONS

3.1 GEOGRAPHIC PROFILE

3.1.1 Nationality and Place of Residence

Europe remains as the largest source of visitors to the Maldives, 56.4% in 2012. The second largest regional group was Asia & the Pacific (Tourism Statistics 2013). Chinese arrivals continue to be the largest inbound market for Maldives with a 15.6 percent increase from 198,655 in 2011 to 229,551 in 2012.

In February 2013, when the Maldives Visitor Survey was conducted, 51.6% of arrivals were from Europe and 43.7% of arrivals were from Asia and the Pacific (Tourism Yearbook 2013). China was the largest inbound market with 32.1% in the month of February 2013. Italy (7.5%) was the second largest market of international visitors followed by Germany (7.4%), United Kingdom (7.4%), France (7.3%) and Russia (6.4%).

Majority of the participants of Maldives Visitor Survey in February 2013 were from Europe (71%) followed by Asia & the Pacific (21%).

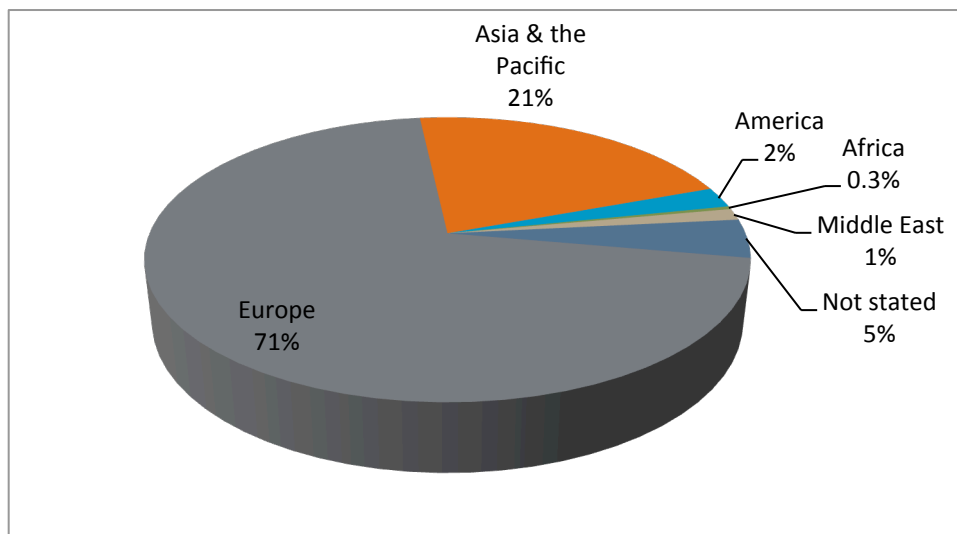


Figure 1: Participants of Maldives Visitor Survey 2013 February by region

Figure 2 shows the top ten nationalities of survey. The largest number of participants was French (15.3%) followed by Chinese (11.8%) and Italian (9.8%). Top ten nationalities represent 78.6 per cent of the total number of survey participants.

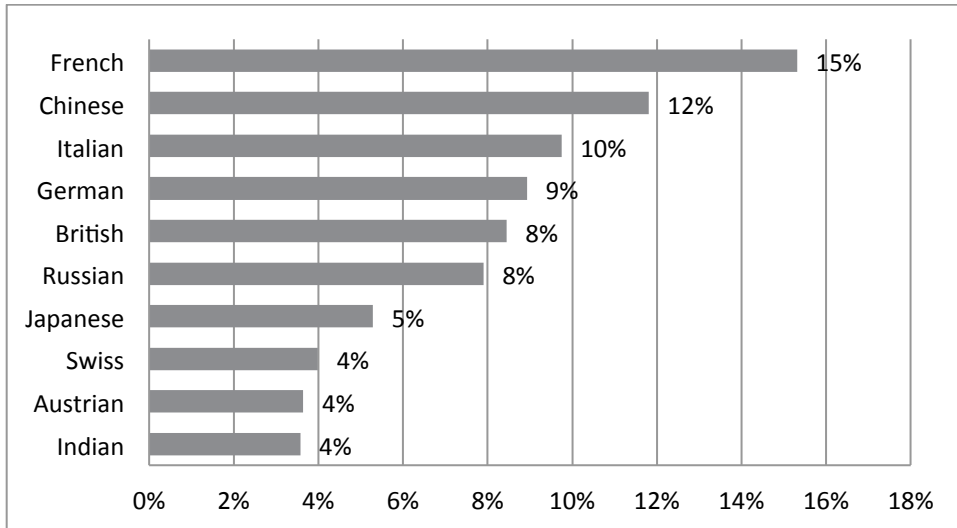


Figure 2: Top ten nationalities of survey participants of Maldives Visitor Survey 2013 February

Majority of top ten nationalities resided in their country of nationality (Figure 3).

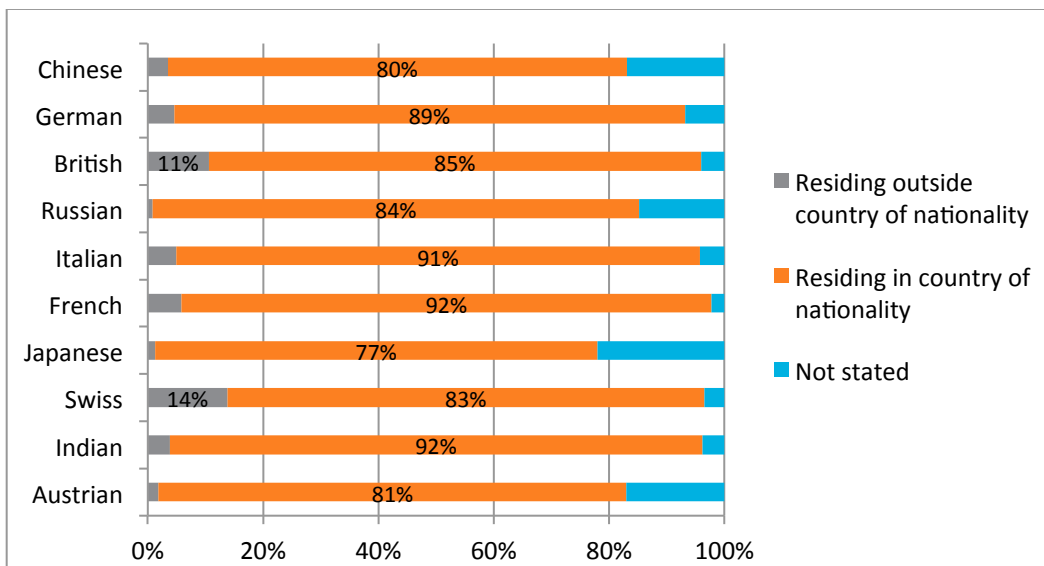


Figure 3: Place of residence of top ten nationalities

3.2 DEMOGRAPHIC PROFILE

3.2.1 Age and Gender

Majority of international visitors (34%) who responded to the survey are in the 25 to 34 years age group (Figure 4). The second highest age group is 35-44 years (21%), closely followed by 45-54 years (18%) age group.

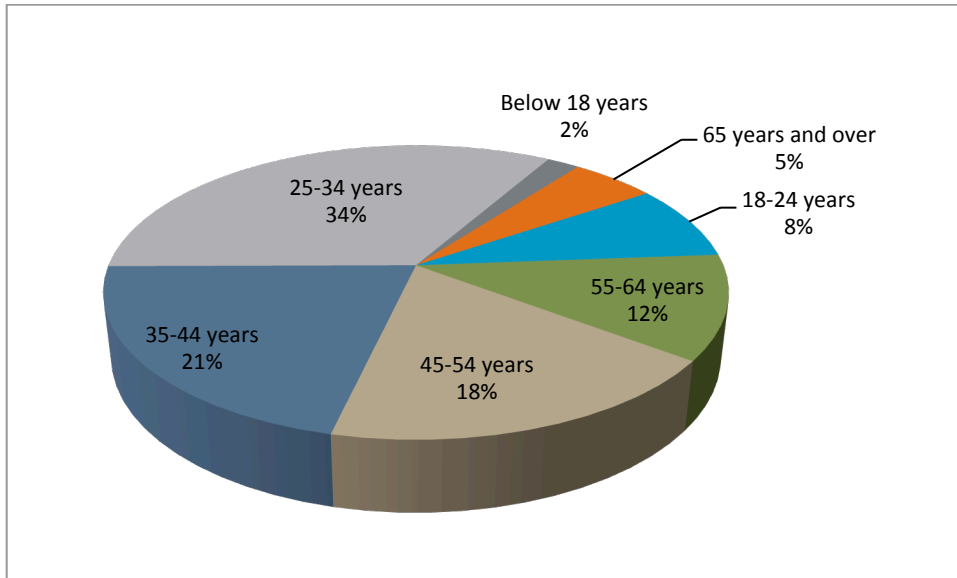


Figure 4: International visitor arrivals by age group

In the 25-34 years age group, majority of visitors are from Africa region (57%) followed by Middle East (53%) and Asia & the Pacific (53%) (Figure 5). Most of the 35-44 years age group is from Europe (22%). In the 45-54 years age group, most visitors are from Europe (21%) and America (21%).

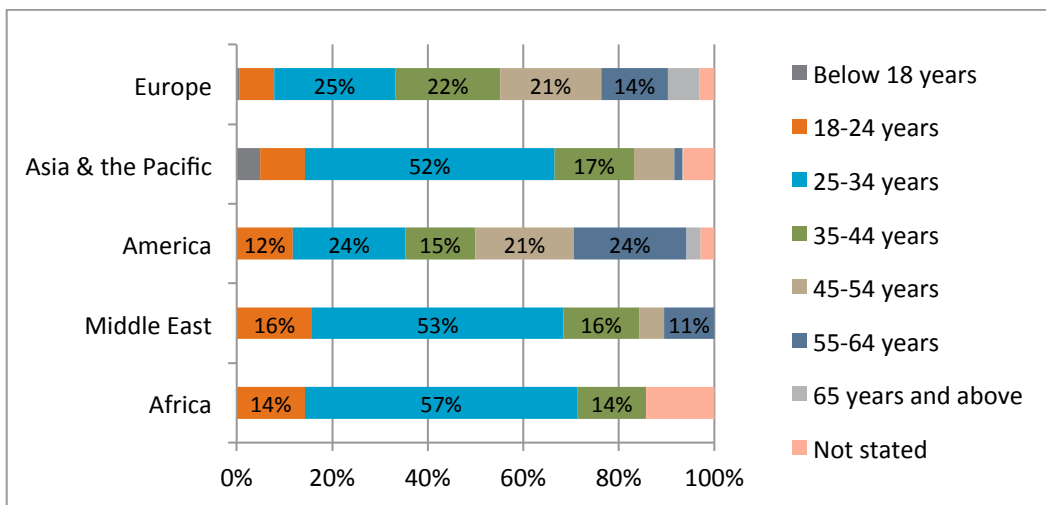


Figure 5: International visitor arrivals by age group and region

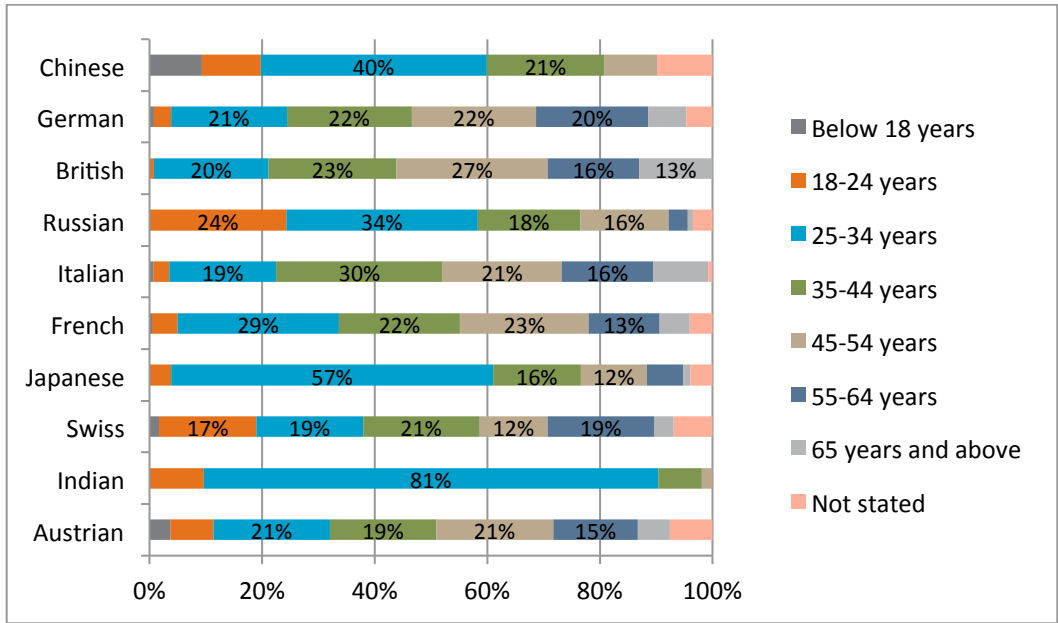


Figure 6: International visitor arrivals by age group and nationality

In the top ten nationalities of the survey, majority of visitors are in the 25-34 years age group among Indians (81%), Japanese (57%) and Chinese (40%). Most visitors are in the 35-44 years age group among Italian (30%), British (23%) and German and French (22%) nationalities.

The number of male tourists (48%) who participated in the survey is greater than females (43%) (Figure 7).

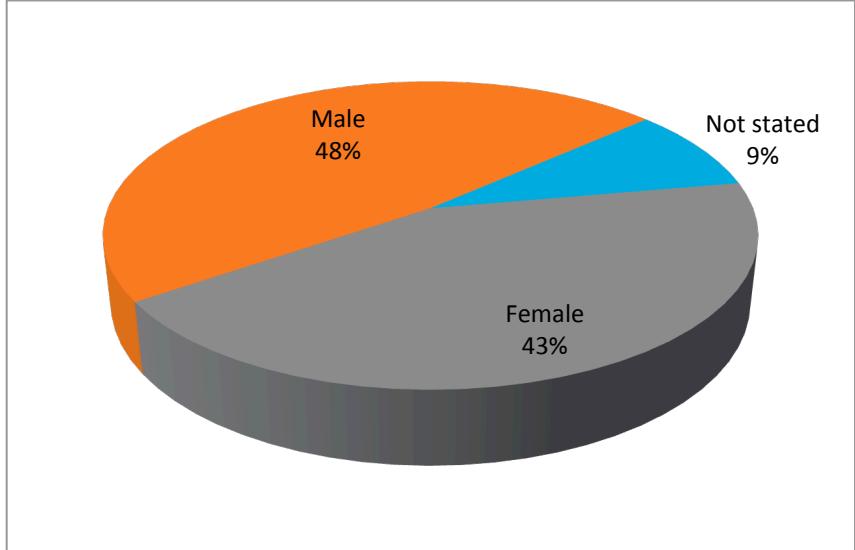


Figure 7: International visitors by gender

Figure 8 provides visitors from top ten nationalities by gender.

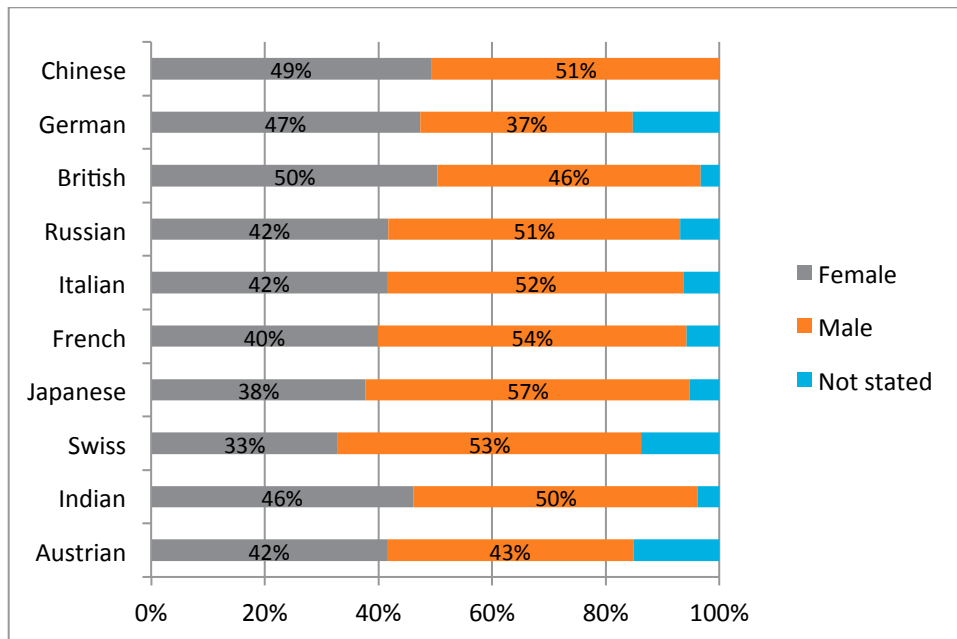


Figure 8 Visitors of top ten nationalities by gender

Male visitors are higher than females among Chinese, Russian, Italian, French, Japanese, Swiss and Indians (Figure 8). While female visitors are higher than male visitors among German and British

3.3 PURPOSE OF VISIT

3.3.1 Purpose

The main reason visitors come to Maldives is honeymoon (23%). The second most popular reason is health & wellness (22%) closely followed by diving (19%) (Figure 9). About 17% of participants stated that their main reason for visiting the Maldives is for holiday and/or rest and relaxation. Other reasons include snorkeling, birthday celebration and anniversary.

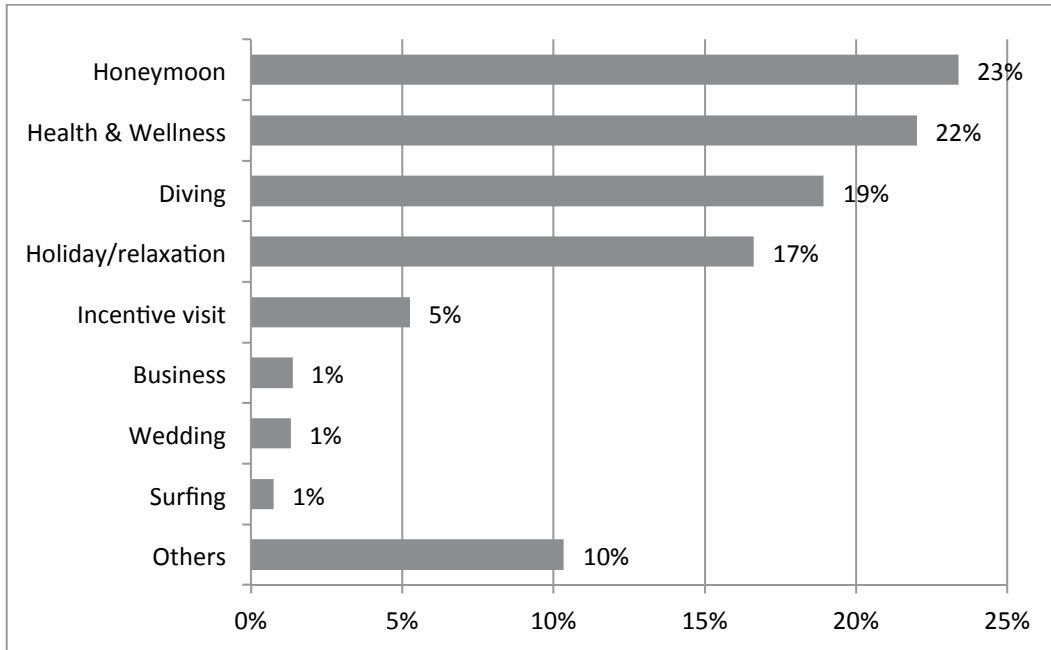


Figure 9: Purpose of visit to the Maldives

Honeymoon is the most popular purpose of visit among Indians (80%), Japanese (55%) and Chinese (33%) shown in Figure 10. Germans (39%), Italians (35%) and Austrians (33%) visit Maldives for health and wellness. Diving is the main purpose of visit to Maldives among Swiss (38%) visitors.

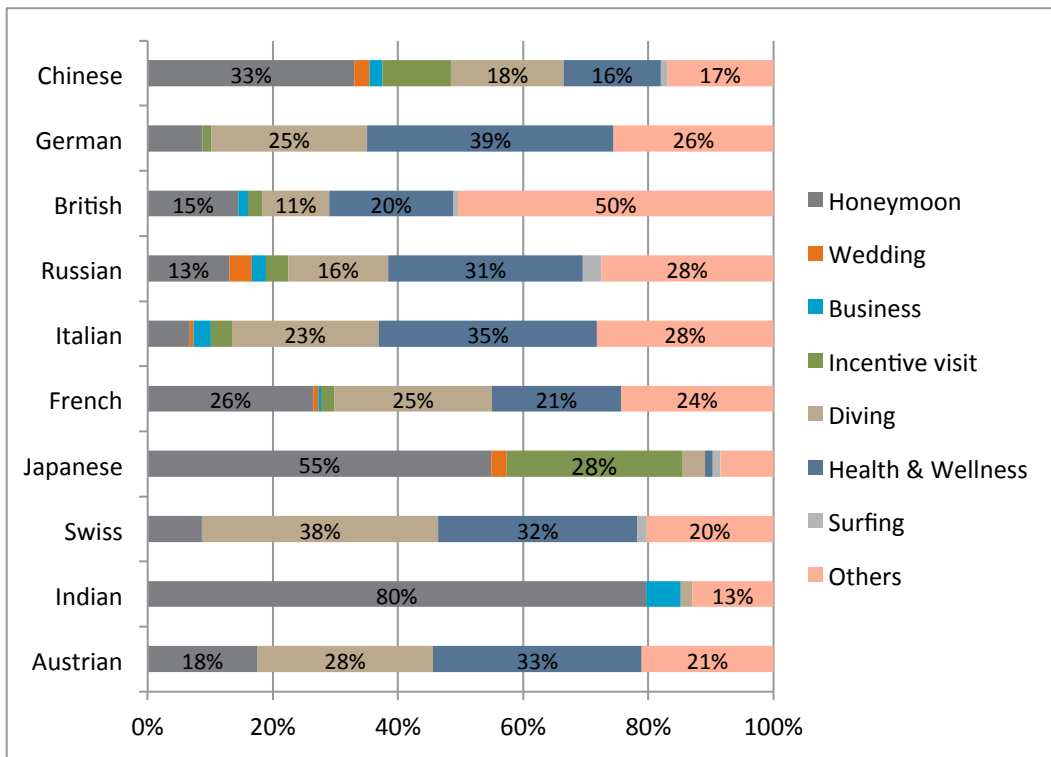


Figure 10: Main purpose of visit by top ten nationalities

3.3.2 Maldives as a Holiday Destination

The main reason for choosing the Maldives as a holiday destination is the natural environment. As depicted in Figure 11, a total of 42% stated underwater beauty and the beach as the motivators for choosing Maldives. Weather was selected by 15% of participants followed by uniqueness (12%) and peacefulness (12%).

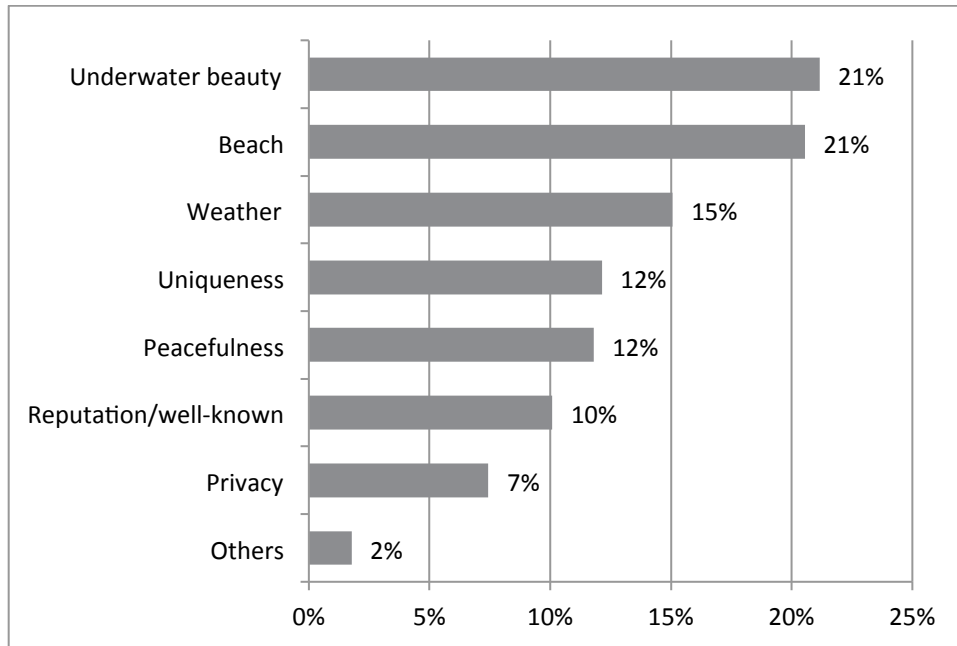


Figure 11: Motivators for choosing the Maldives

Figure 12 details the main reasons why Maldives is chosen as a holiday destination for the top ten nationalities.

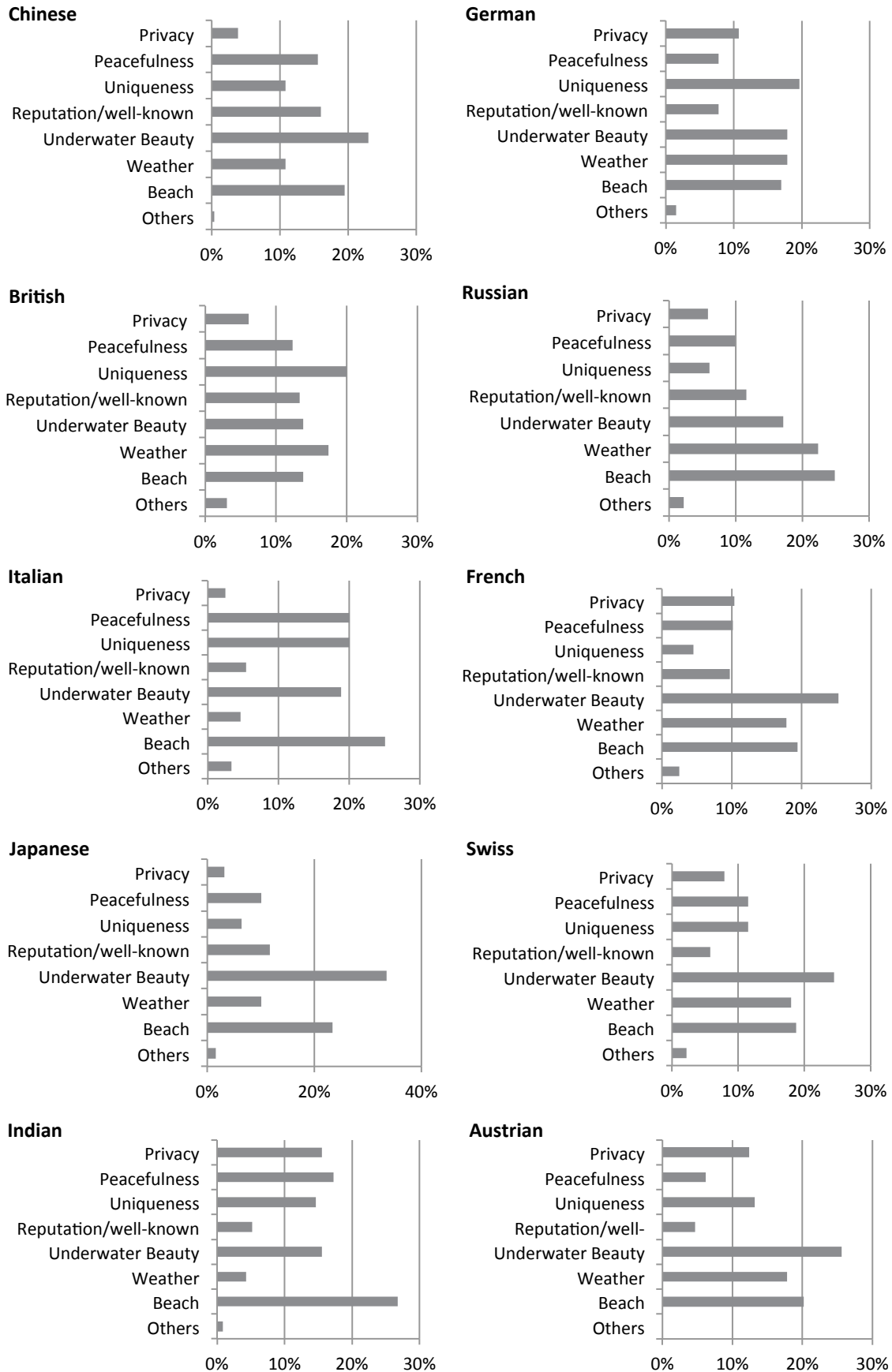


Figure 12 Motivators for choosing the Maldives by top ten nationalities

3.4 SOCIO-ECONOMIC PROFILE

3.4.1 Professions of International Visitors

Majority of international visitors (58%) were employed while 20% were self-employed.

Out of the 58% of visitors that stated their occupation, the top two categories were Manager, Director and Senior Official (20%) and Professionals (15%) (Figure 13). Out of the participants 42% did not state their occupation.

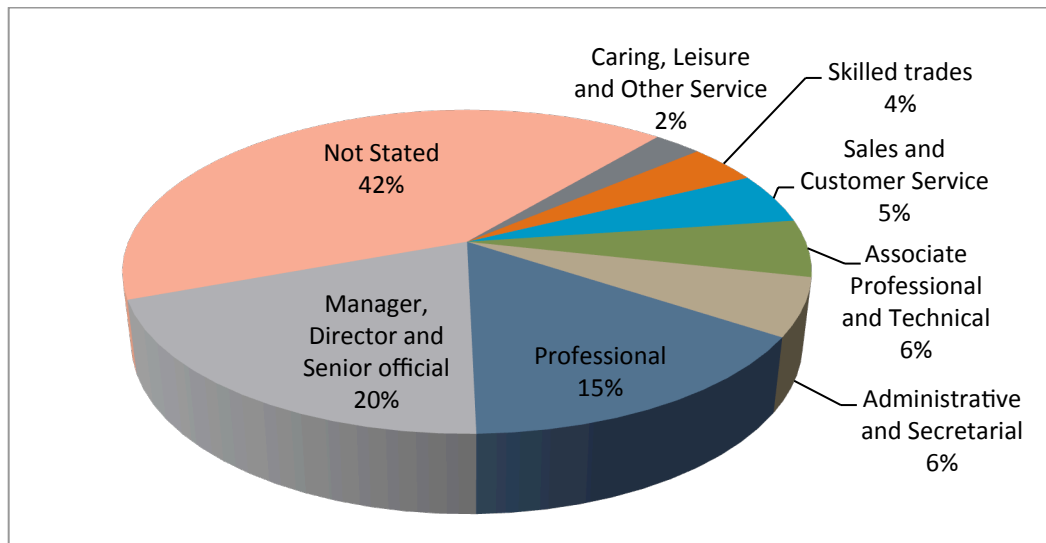


Figure 13: International visitors to the Maldives by occupational categories

3.5 TRAVEL ORGANIZATION

3.5.1 Source of Information

Word of mouth (26%) and internet (26%) are the two key sources of information that visitors learn about the Maldives from (Figure 14). The third most popular source of information is travel agents (18%).

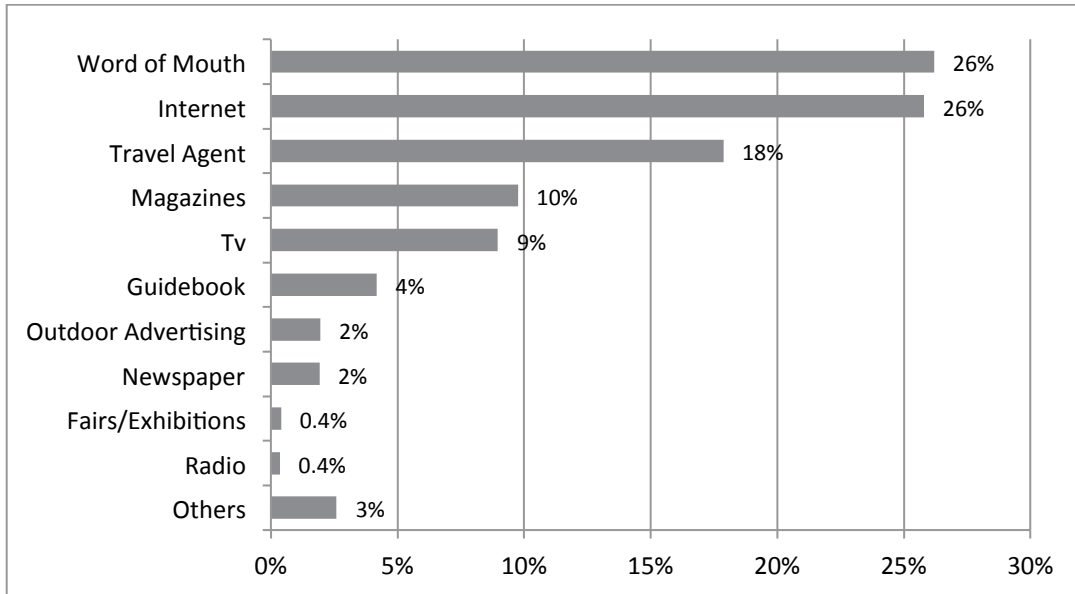


Figure 14: Source of pre-arrival information about the Maldives

Figure 15 shows the sources of information about the Maldives for the top ten nationalities of visitors.

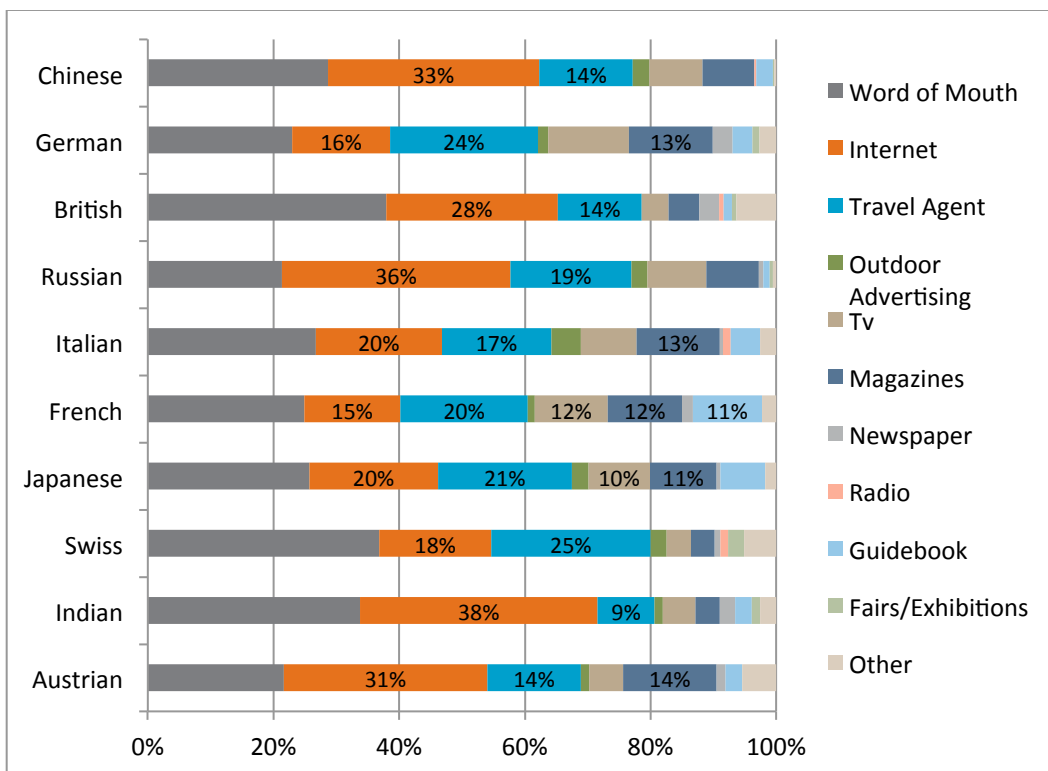


Figure 15: Sources of information by top ten nationalities

Word of mouth is the main source of information for French (25%), Italians (26%), British (39%) and Swiss (36%) (Figure15). Internet is the key source of information for Chinese (33%), Russians (36%), Austrians (31%) and Indians (38%).

3.5.2 Mode of Trip Organization

Majority of the international visitors (65%) visited a travel agency to organize their trip to the Maldives (Figure 16). A total of 20% directly booked with tour operator via the internet while 11% directly booked with the resort via internet.

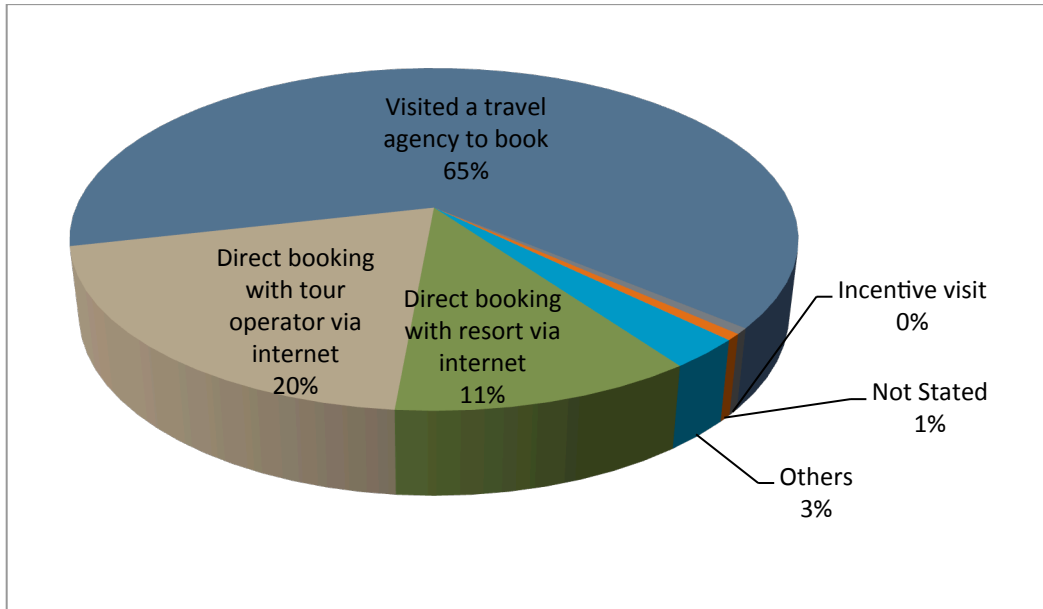


Figure 16: Mode of trip organization used by international visitors

Figure 17 shows how visitors of the top ten nationalities organized their trip to the Maldives.

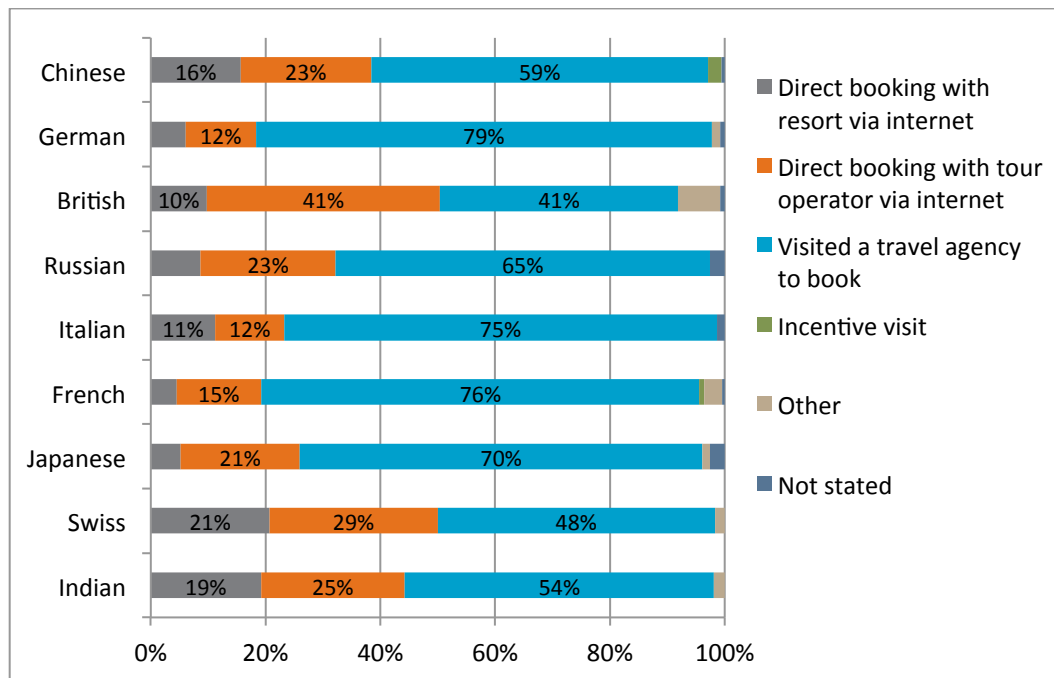


Figure 17: Mode of trip organization by top ten nationalities

Of the top ten nationalities, visiting a travel agency to organize their holiday was most popular amongst Austrians (81%), Germans (79%), French (76%) and Italians (75%). Direct booking with tour operator via the internet was the most preferred by British (41%), Swiss (29%) and Indians (25%). Bookings were made directly with the resort via internet mostly by Swiss (21%), Indians (19%) and Chinese (16%).

3.5.3 Traveling Companion

Of the international visitors to the Maldives, majority (57%) travelled with a partner. Second largest category is visitors that travelled as a family (29%) (Figure 18). About nine per cent of visitors traveled with their friends.

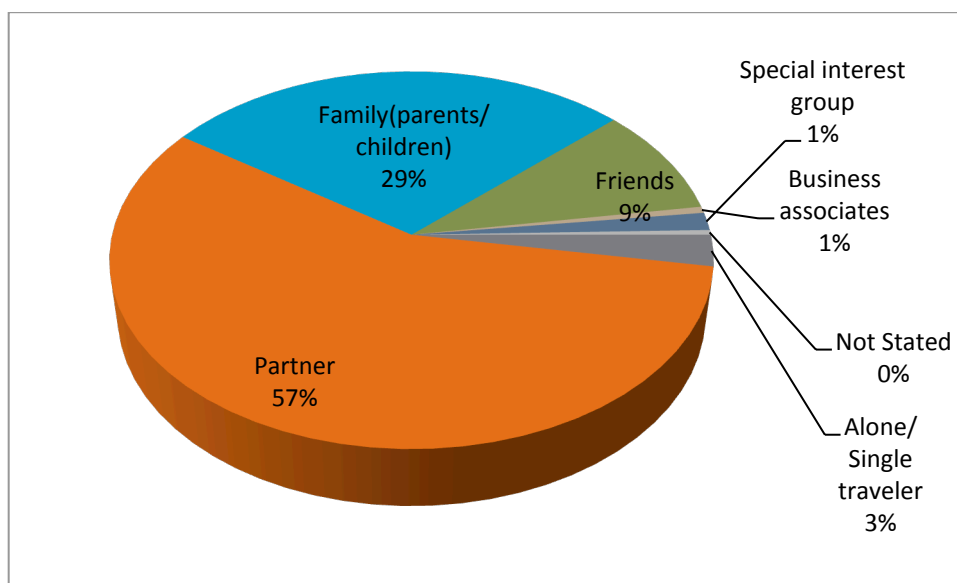


Figure 18: Type of travel companion

Travel companions of the top ten nationalities are detailed in Figure 19.

Except for Russians, Chinese and Japanese visitors of top ten nationalities travel mostly with their partner. Russians (76%), Chinese (49%) and Japanese (40%) traveled mostly with family members. Friends were chosen as travel partner by Japanese (16%), Swiss (12%) and Italians (12%).

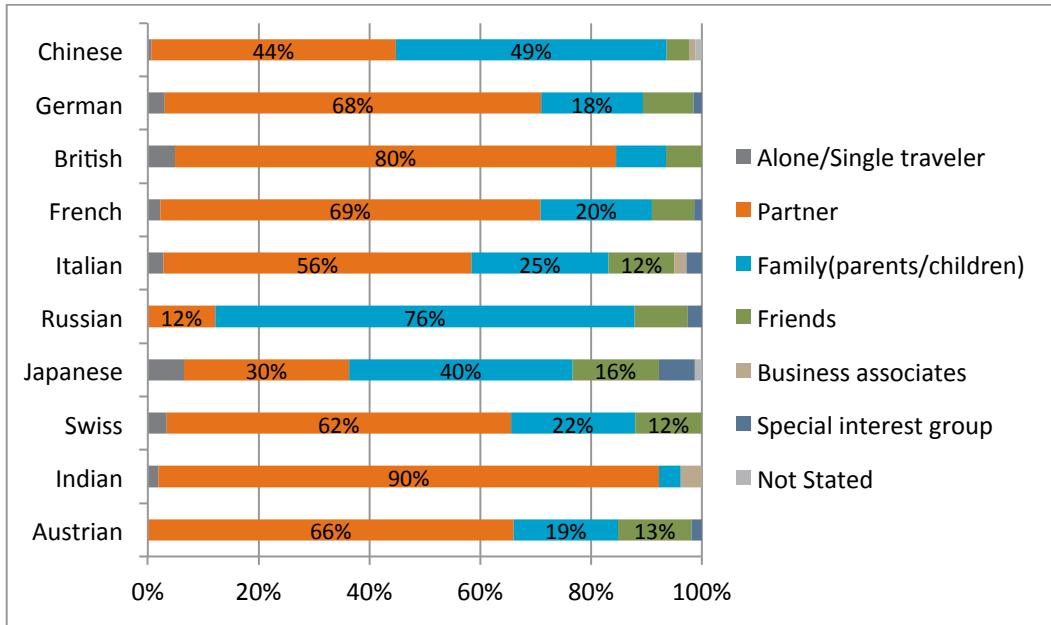


Figure 19: Type of travel companion by nationality

In terms of size of travel group, 74% travelled in a group of two. While 11% travelled in a group of 3-5 people 7% of visitors travelled in groups of more than 6 people each (Figure 20). Majority (88%) of visitors traveled without children.

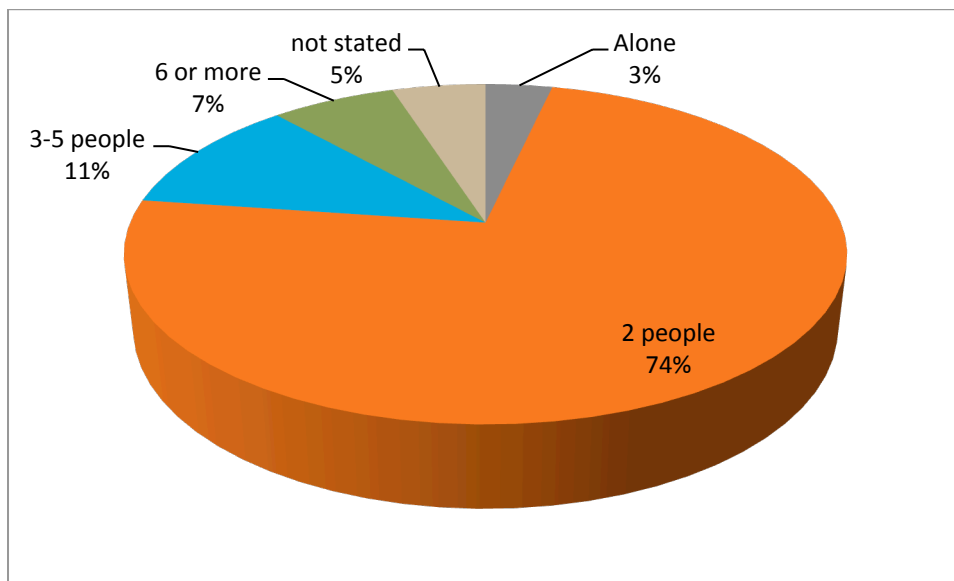


Figure 20: Size of the travel group by adult companions

3.5.4 Frequency of Visit

Of the international visitors, 70% identified themselves as a first time visitor while 29% were repeat visitors (Figure 21).

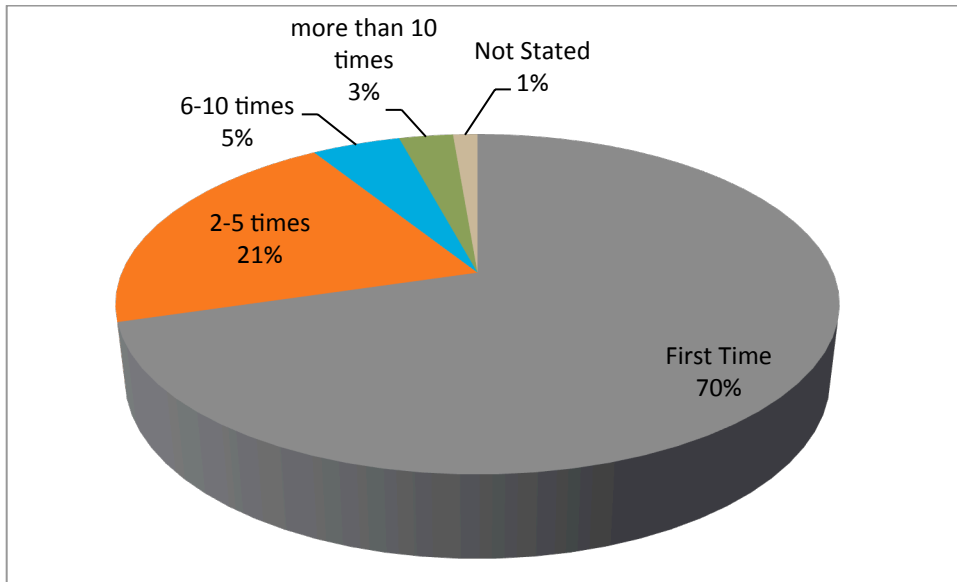


Figure 21: Number of visits to the Maldives

Figure 22 shows the proportion of first time and repeat visitors among the top ten nationalities. Almost all Chinese (95%) and Indian (90%) are first timers. Visitors coming for the first time are also high among Japanese (78%), Russians (74%) and French (74%). Italians have an equal proportion of first time and repeat visitors. Only Swiss visitors have more repeaters (53%) than first timers (45%). Repeaters are also high among Germans (44%) and British (36%).

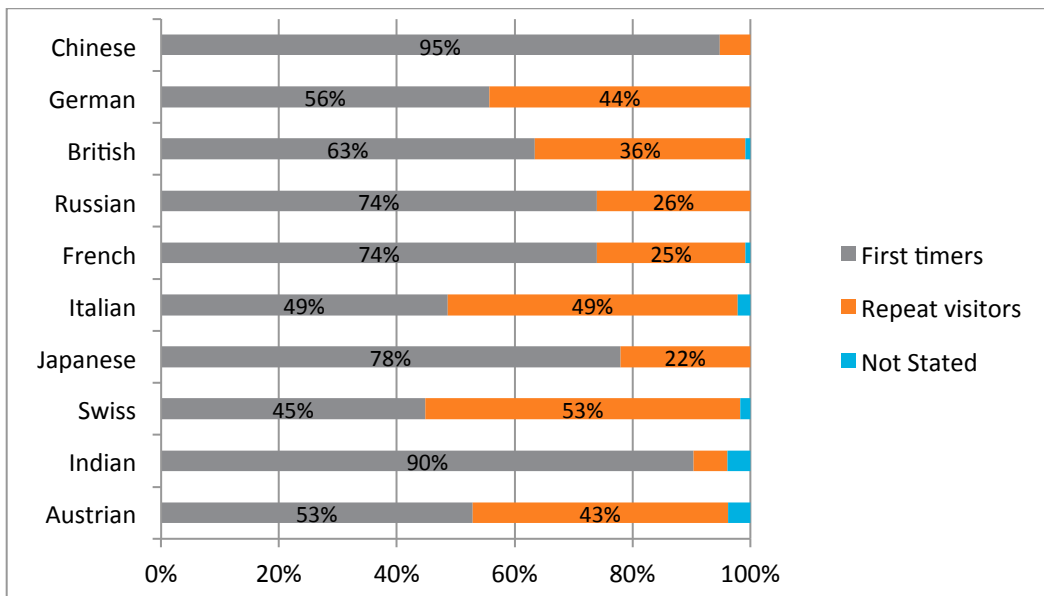


Figure 22: First time visitors and repeat visitors by top ten nationalities

3.5.5 Length of Advance Booking Period

Most of the international visitors booked their holiday to the Maldives 3 to 5 months (27%) and 1 to 2 months (27%) in advance (Figure 23). Holiday was booked 6 to 12 months in advance by 15% and 2 to 4 weeks by 19% of the international visitors.

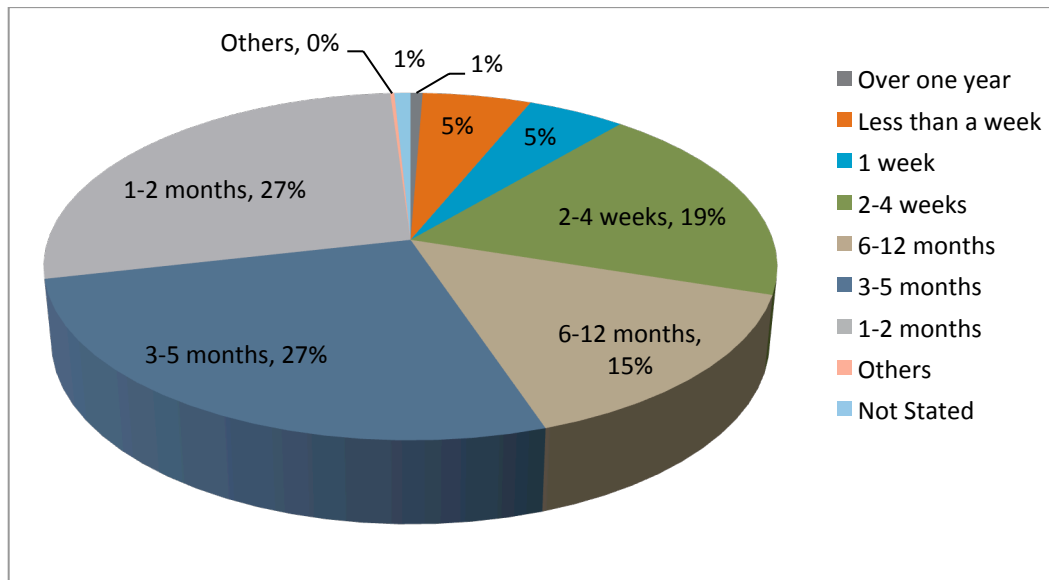


Figure 23: Duration of advance booking of holiday by visitors

Figure 24 gives the duration of advanced booking for the top ten nationalities. Holidays were booked 3 to 5 months in advance mostly by Austrian (40%), Japanese (38%) and Swiss (36%). Booking was made within 1 to 2 months by majority of Chinese (46%), Indians (42%) and Japanese (31%). British (28%) and Germans (33%) booked their holidays 6-12 months in advance.

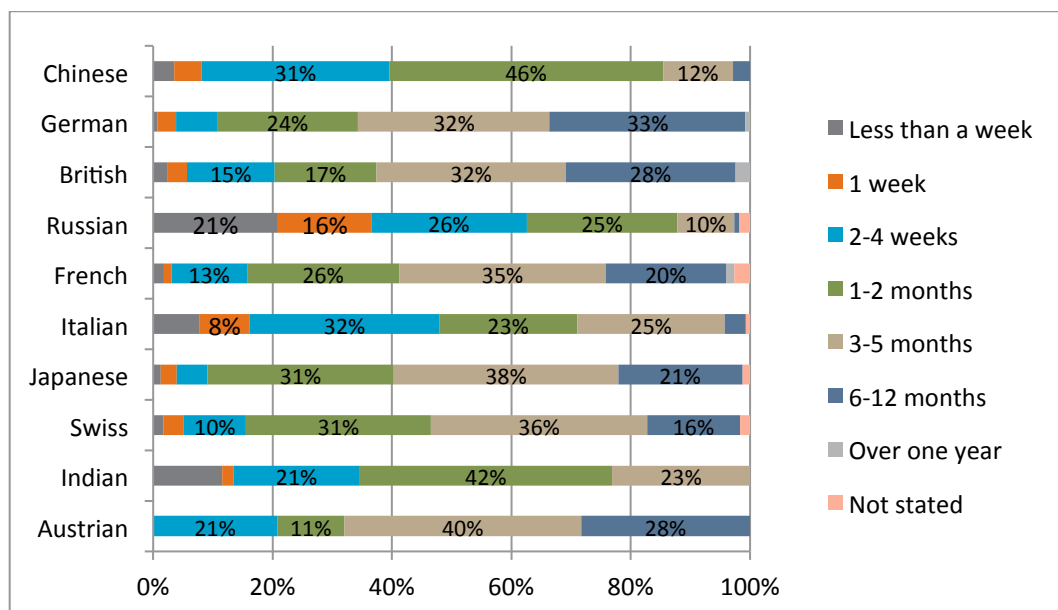


Figure 24: Duration of advance booking of holiday by top ten nationalities

3.6 EXPERIENCES AND ACTIVITIES

3.6.1 Place of Stay

The most popular type of accommodation was resort with 85% of visitors staying at a resort for the whole or part of their holiday in the Maldives (Figure 25). Hotel accommodation (8%) was the second most chosen type of accommodation followed by yacht (safari vessels) at four per cent. Only 2% of visitors stayed in guesthouses.

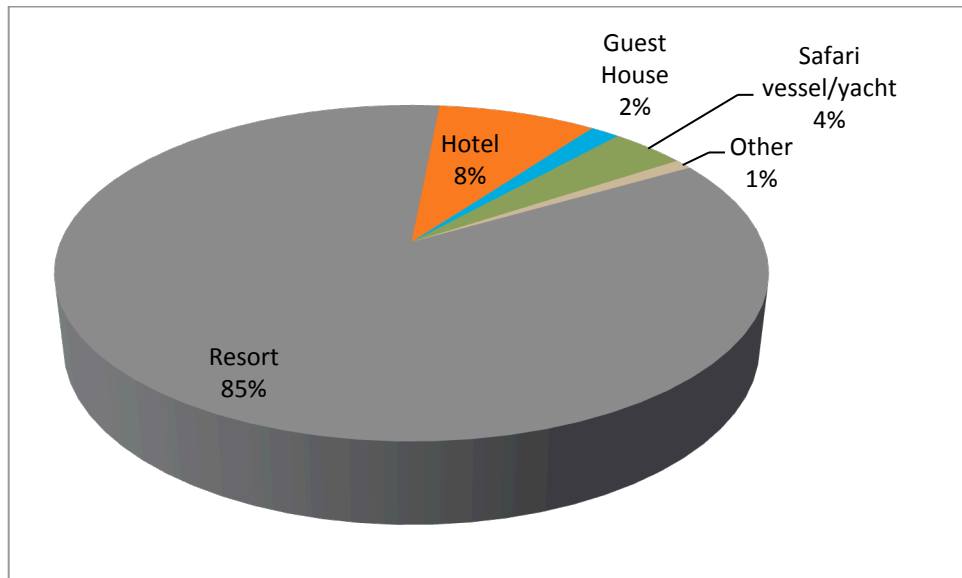


Figure 25: Type of accommodation selected by international visitors

Figure 26 provides choice of accommodation for the top ten nationalities.

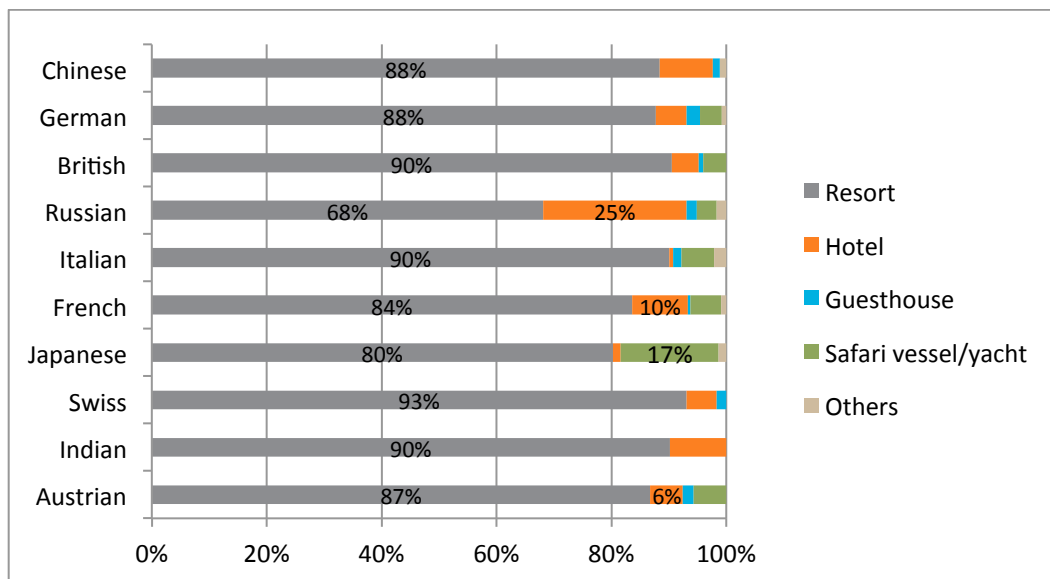


Figure 26: Type of accommodation selected by international visitors of top ten nationalities

Main type of accommodation for all top ten nationalities was resort. Hotels were most popular among Russians (25%) followed by French (10%) and Indians (10%).

Five different meal plans are offered in Maldives to international visitors. Out of the total respondents to the survey, 41% chose all-inclusive (Figure 27). Full-board was chosen by 23% and half-board was preferred by 21%. About 12% selected bed and breakfast while only 2% chose the room only plan.

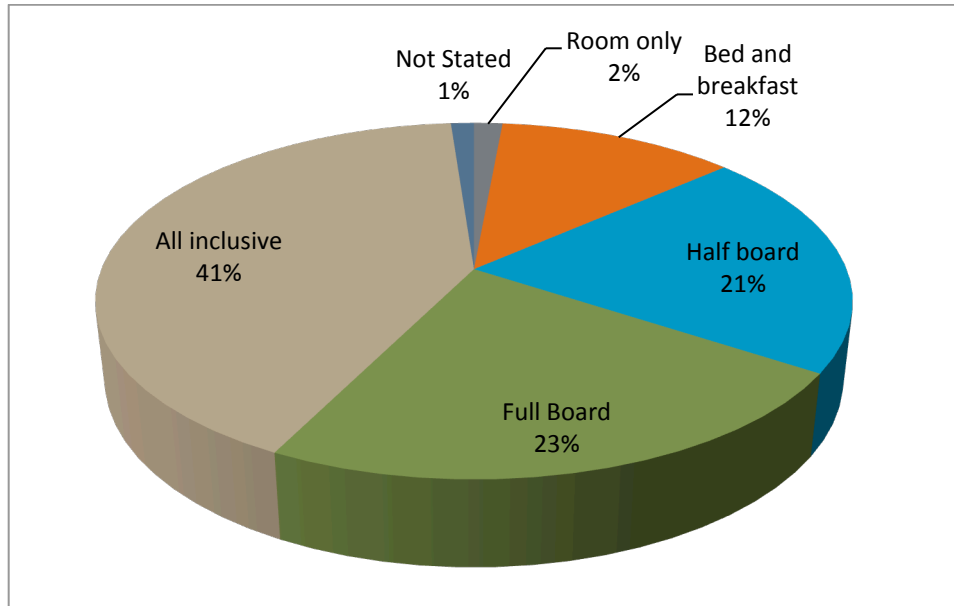


Figure 27: Types of meal-plan chosen by international visitors

Meal plans selected by visitors of the top ten nationalities are given in Figure 28.

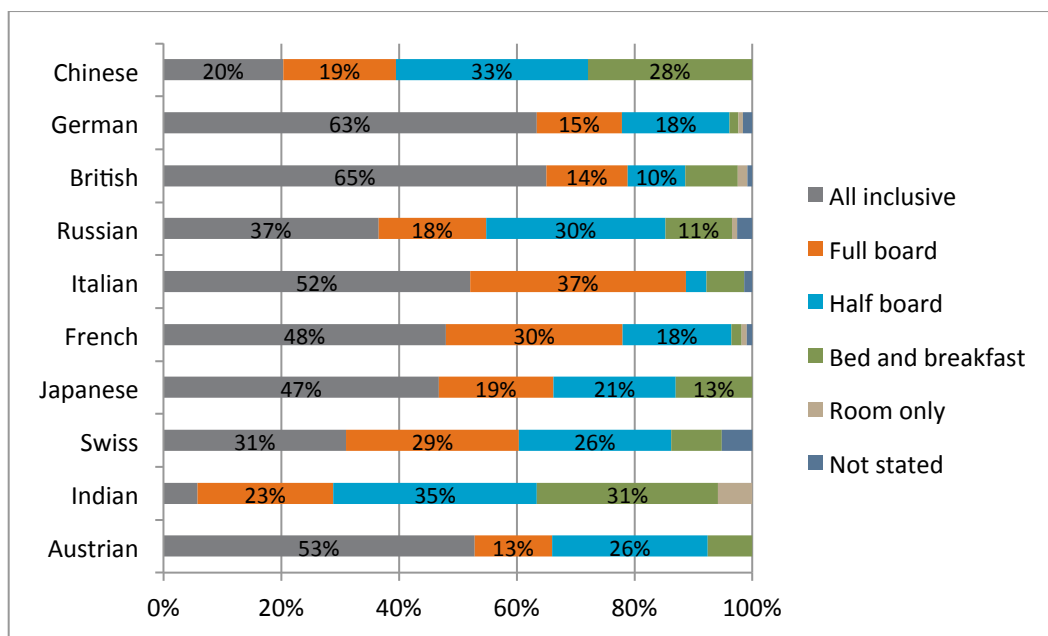


Figure 28: Type of meal plan chosen by top ten nationalities

All inclusive was selected by majority of visitors of all top ten nationalities except Chinese and Indians. Both Chinese (33%) and Indians (35%) preferred half board most out of the five options.

3.6.2 Duration of Stay

Visitors stayed between one and 29 nights in Maldives. Out of the respondents, 91% of visitors stayed between 1 and 14 nights. Most visitors stayed seven nights (23.5%) and four nights (16%).

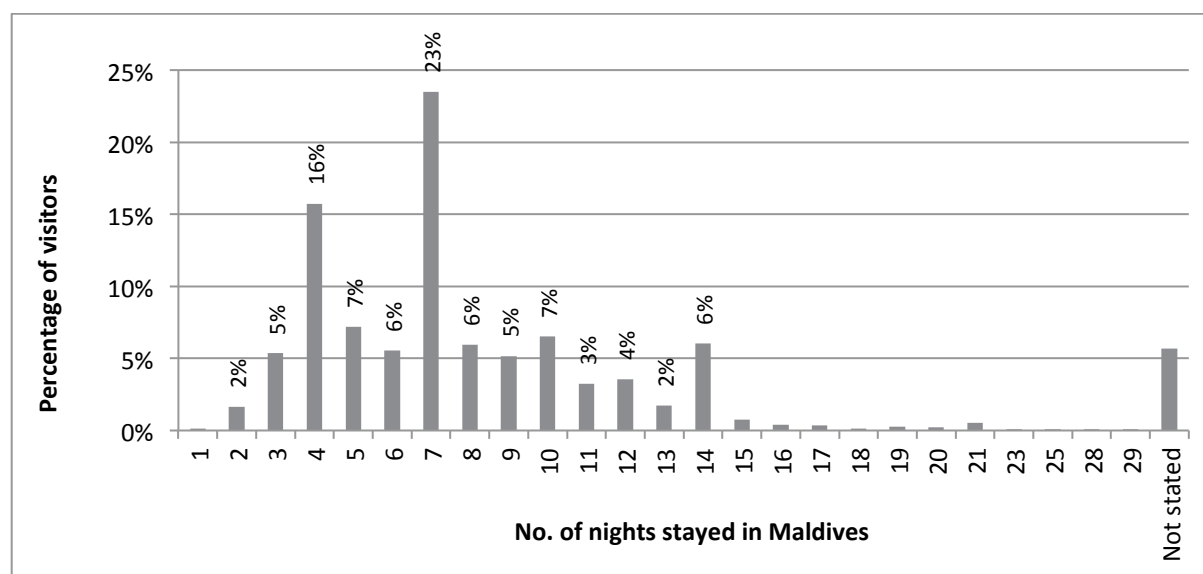


Figure 29: Number of nights spent in the Maldives

Figure 30 shows duration of stay for top ten nationalities.

Majority of French visitors (42%) and Italian visitors (54%) spend seven nights in Maldives (Figure 30). Most Chinese visitors (72%) stay for four nights. Duration of stay of German visitors vary between 2 to 15 nights with majority staying up to 7 nights (13%) and 14 nights (15%). Similarly, most British visitors stay 7 nights (28%) or 14 nights (18%). Russians prefer to stay 7 nights (25%) and 11 nights (20%). Majority of Japanese visitors (71%) spend 4 to 6 nights in Maldives. Duration of stay of Swiss visitors vary between 4 nights and 14 nights with most Swiss visitors (22%) spending 7 nights. Austrian visitors tend to stay longer with majority of Austrians (19%) spending 14 nights. Indians choose 3 to 4 nights (75%) with none of the visitors spending more than 6 nights in Maldives.

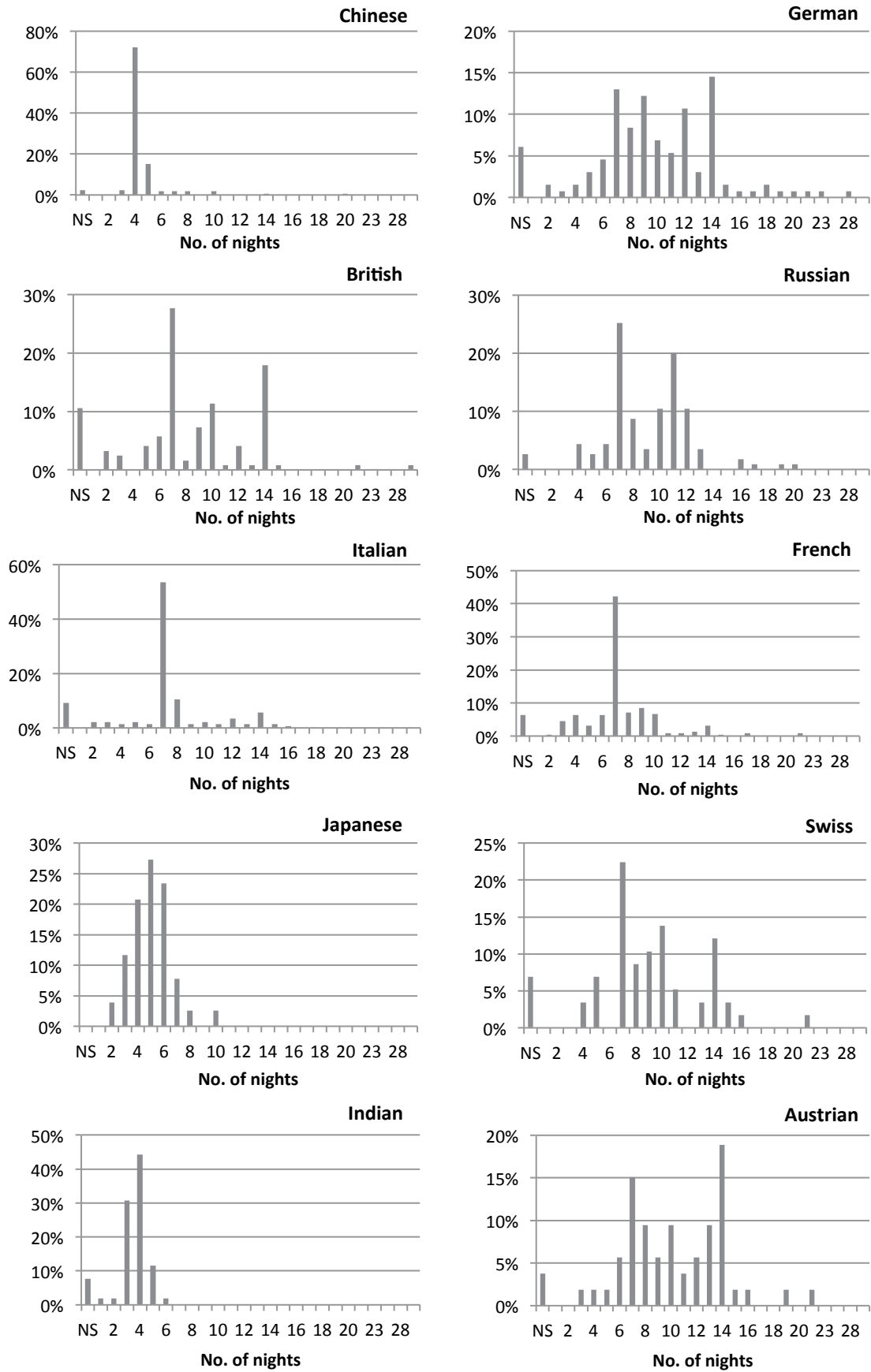


Figure 30: Trends in duration of stay among visitors of top ten nationalities

3.6.3 Activities Enjoyed by International Visitors

Snorkeling was the most popular activity with 40% of visitors enjoying the activity during their stay (Figure 31). Diving (17%) was the second most popular activity followed by spa treatments (14%). About 10% enjoyed water sports during their stay and 8% liked visit to local island. Land-based sports was enjoyed by 4% and picnics by 3% of visitors.

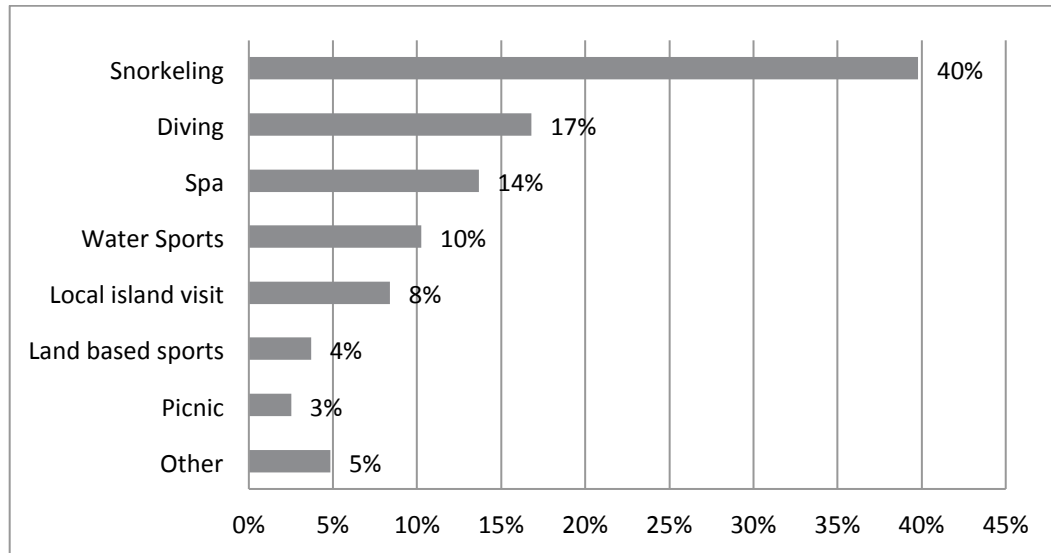


Figure 31: Activities most enjoyed by international visitors

Figure 32 shows the activities most enjoyed by visitors of the top ten nationalities.

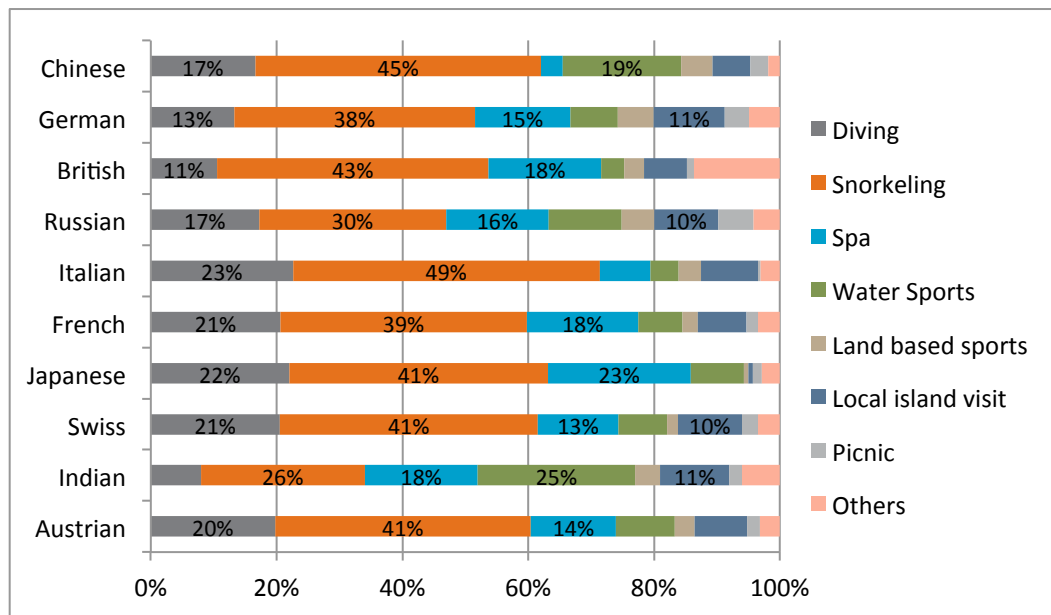


Figure 32: Activities most enjoyed by top ten nationalities

Snorkeling was the most popular activity across all top ten nationalities. Diving was most enjoyed by Italians (23%), Japanese (22%) and French and Swiss (21%). Spa was enjoyed by Japanese (23%) and French, British and Indians (18%).

3.7 EXPENDITURE

All the amounts have been converted to USD values using the most recent exchange rates for all foreign currencies.

3.7.1 Expenditure within Maldives excluding Tour Package Price

Majority of visitors spent over USD 5,000 within Maldives (Figure 33). About 29% spent below USD 3,000 during their trip. About 28% of the survey respondents did not state their expenditure for the trip.

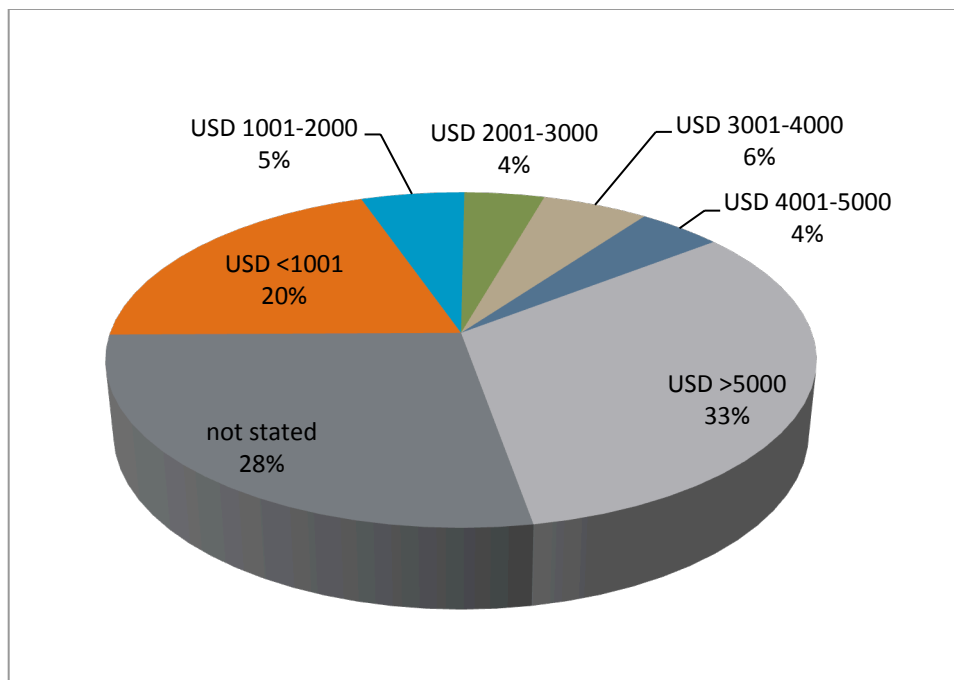


Figure 33: Expenditure per trip by visitors in the Maldives (excluding tour package)

Expenditure within Maldives by top five nationalities is shown in Figure 34. Except for British, majority of top five nationalities spent more than USD5000 within Maldives. Majority of British (26%) spent less than USD1000 during their stay.

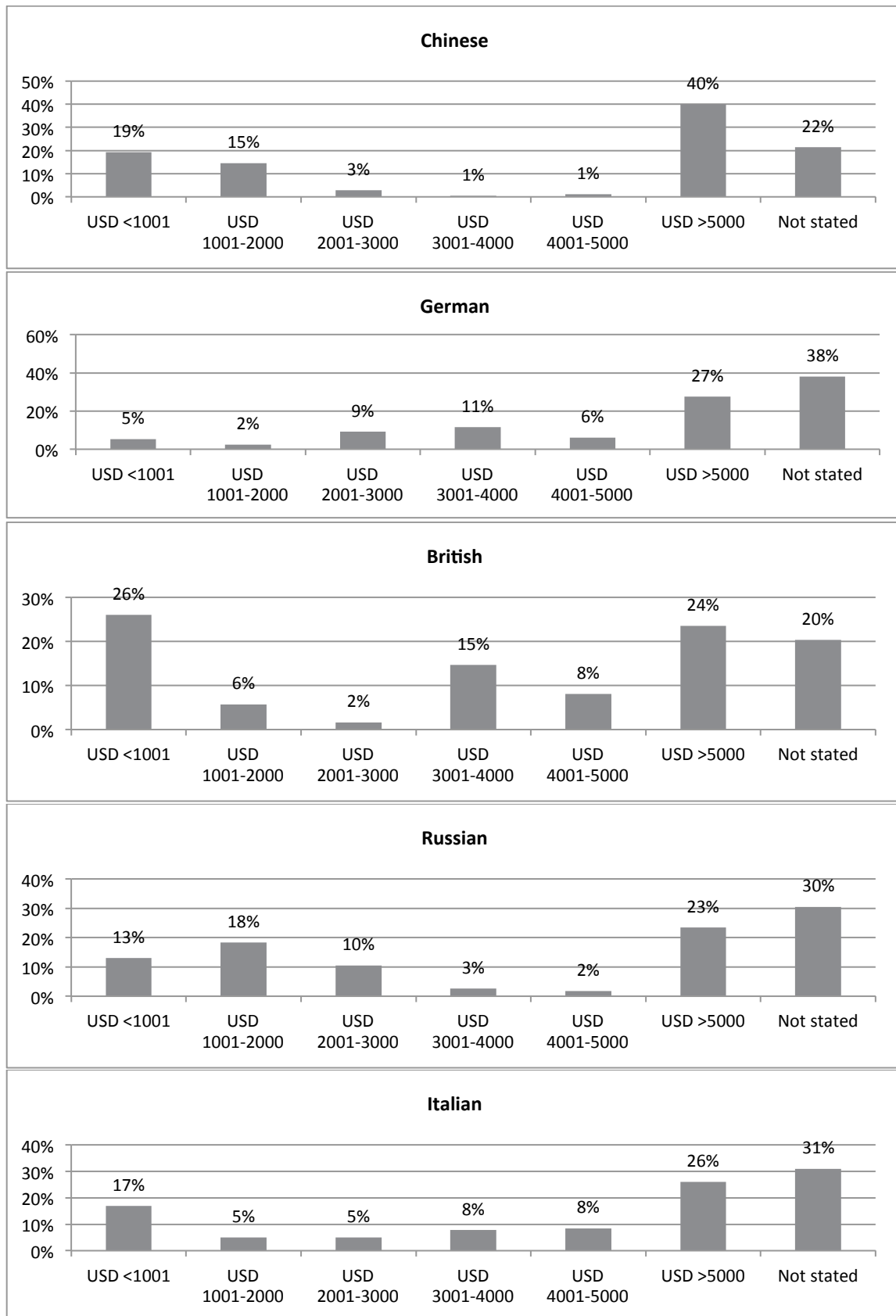


Figure 34 Expenditure within Maldives by top five nationalities

3.7.2 Expenditure on Tour Package

Among the visitors, 54% traveled on a packaged tour (Figure 35).

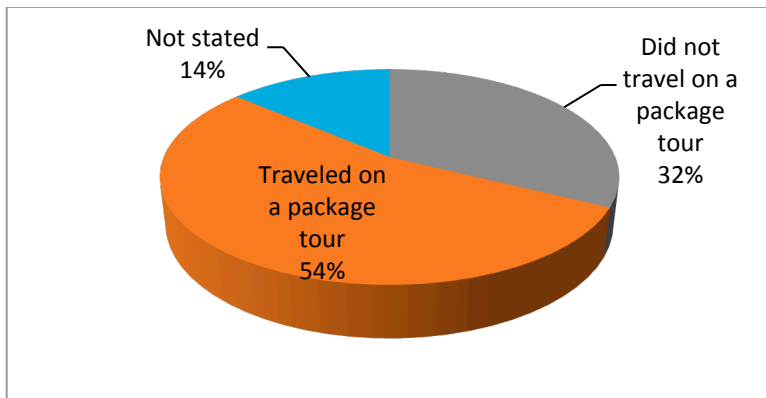


Figure 35: Percentage of visitors travelling on a package tour

Of those who traveled on a packaged, 53% opted not to state their expenditure on the package tour (Figure 36). From the international visitors who disclosed their expenditure 12% spent less than USD 3,000 for the tour package while 10% spent between USD 3000 and USD 5000. Majority of the visitors (25%) who participated in the survey spent over USD 5000 for travelling on a package tour.

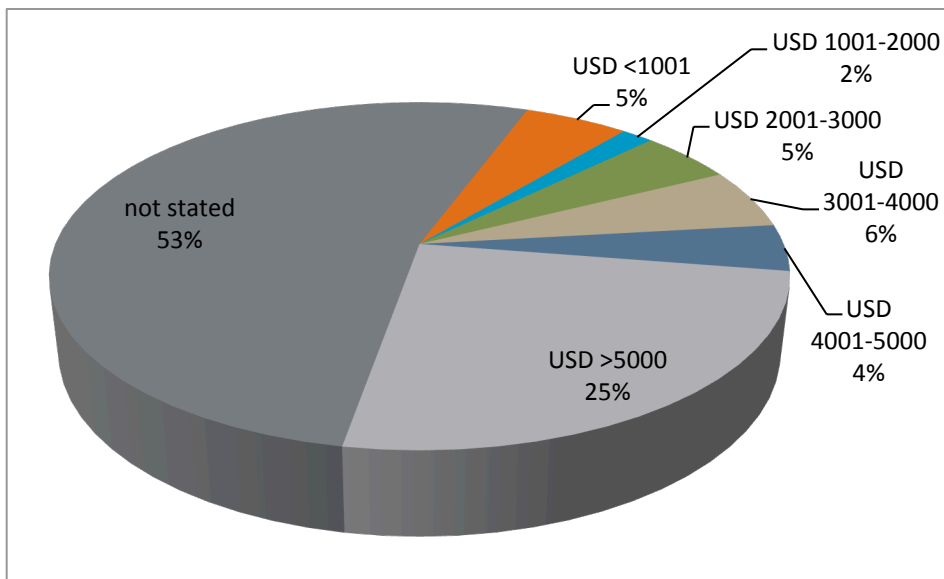


Figure 36: Expenditure on tour package to the Maldives

Figure 37 details the expenditure pattern of the top five nationalities on the tour package. Across all five top nationalities, expenditure on tour package by majority of visitors was greater than USD5000.

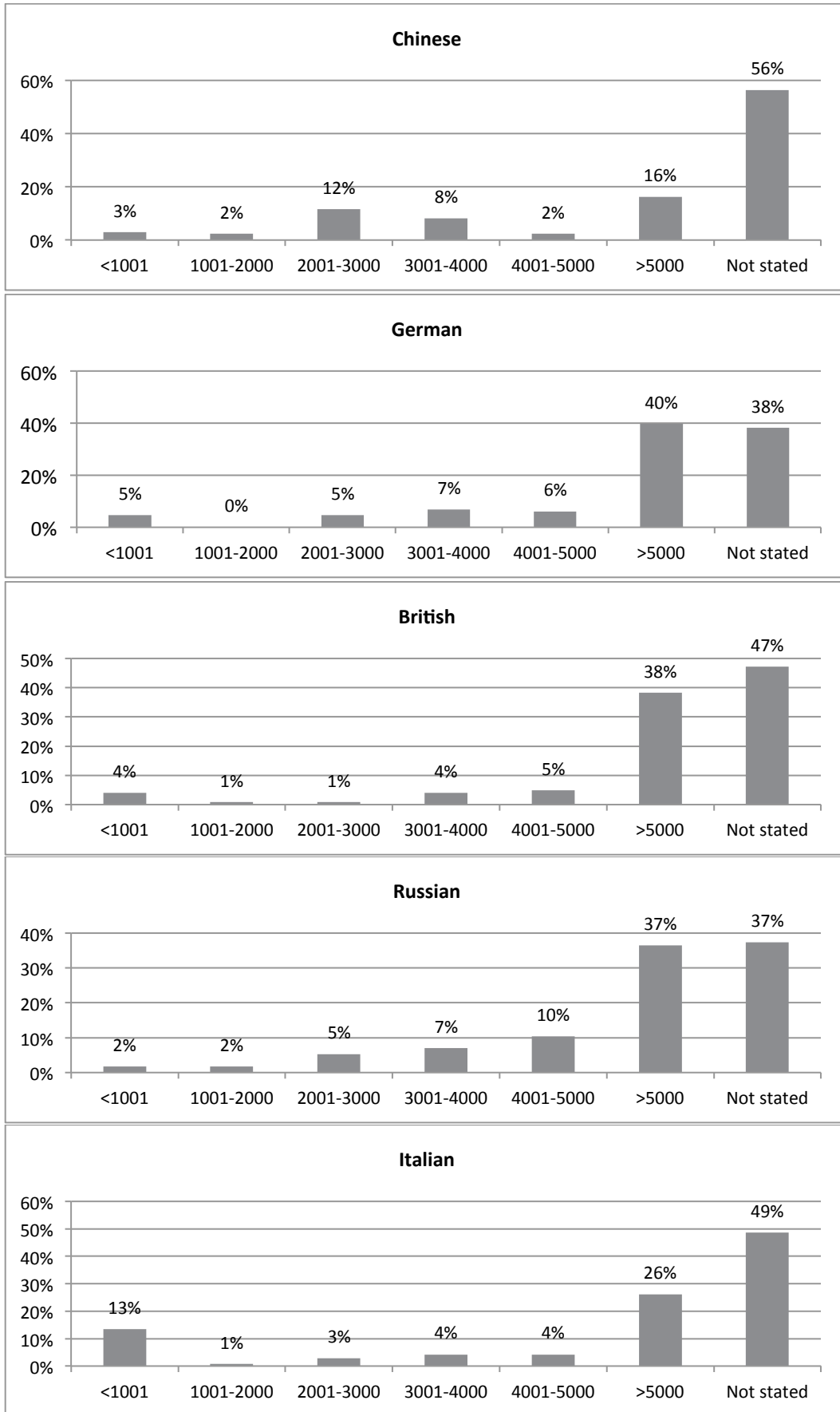


Figure 37: Expenditure on tour package to the Maldives by top five nationalities

3.8 VISITOR SATISFACTION

3.8.1 Services at the Ibrahim Nasir International Airport

At least 70% of respondents rated services at the airport as ‘excellent’ and ‘good’ except for services at cafés/restaurants and shopping (Figure 38).

For the services provided by cafés and restaurants at the airport, 8% did not state a rating while 6% stated it as not applicable.

Immigration services include services at passport clearance and customs clearance. Immigration services is rated the highest. Friendliness of staff includes friendliness of immigration and customs staff. Friendliness of staff is rated as ‘excellent’ by 40% of visitors while 42% rated it as ‘good’. Information & signage services are rated ‘excellent’ by 28% and rated ‘good’ by 45% of international visitors.

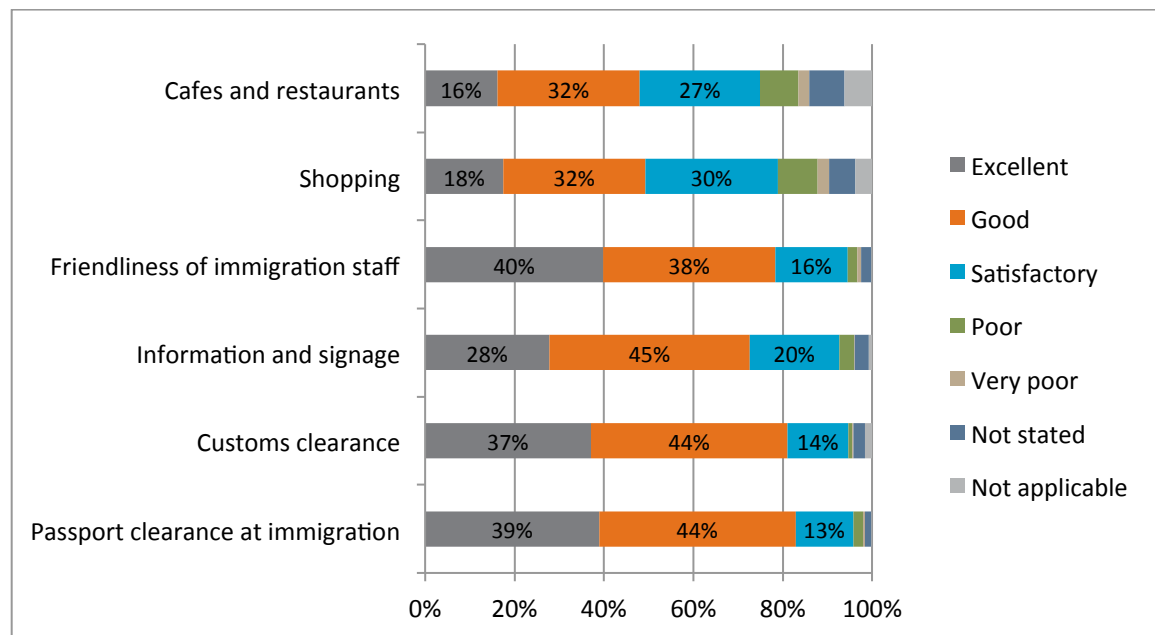


Figure 38: Ratings on services provided at the Ibrahim Nasir International Airport

Overall, 26% of the visitors rated ‘poor’ to all the services provided at the airport. Shopping is rated as ‘poor’ by 9% of the visitors and 9% of the visitors rated cafés and restaurants as ‘poor’. About 2% of the visitors rated friendliness of staff at immigrations as ‘poor’.

3.8.2 Quality of Hotel Transfer

The combination of ‘excellent’ and ‘good’ ratings for the transportation services is at 74% and above (Figure 39). International visitors are most happy with service quality of hotel transfers, rated at 83% and above with 47% rated as ‘excellent’. Waiting time for hotel transfer is rated ‘excellent’ by 41%, ‘good’ by 33% and ‘satisfactory’ by 14%. Comfort of hotel transfer is rated ‘excellent’ by 42%, ‘good’ by 34% and ‘satisfactory’ by 11%. While 5% rated waiting time for hotel as ‘poor’, 2% rated service quality of hotel transfer and comfort of hotel transfer as ‘poor’.

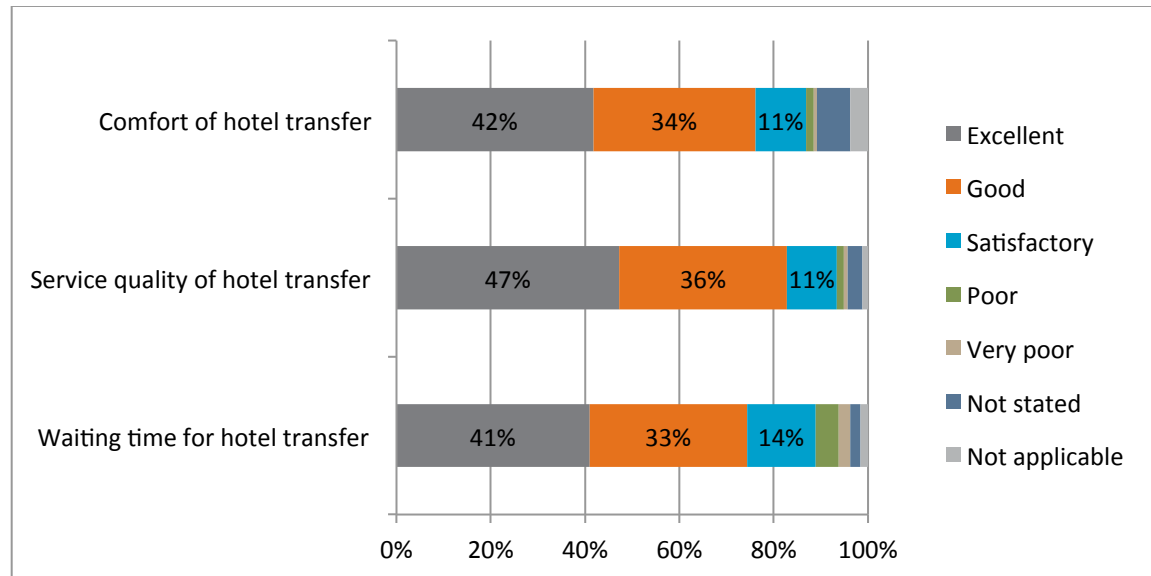


Figure 39: Ratings on quality of transportation services and comfort at hotel

3.8.3 Services at the Place of Stay

The quality of place of stay is assessed on both front-line services and facilities. The quality aspects assessed are accommodation, food, beverages, friendliness of staff and recreational facilities.

On average, 56% of international visitors rated their place of stay as ‘excellent’ in all five categories assessed while 29% rated as ‘good’ and 9% rated as ‘satisfactory’ (Figure 40). On the other hand, 2% rated the service/facilities at their place of stay as ‘poor’.

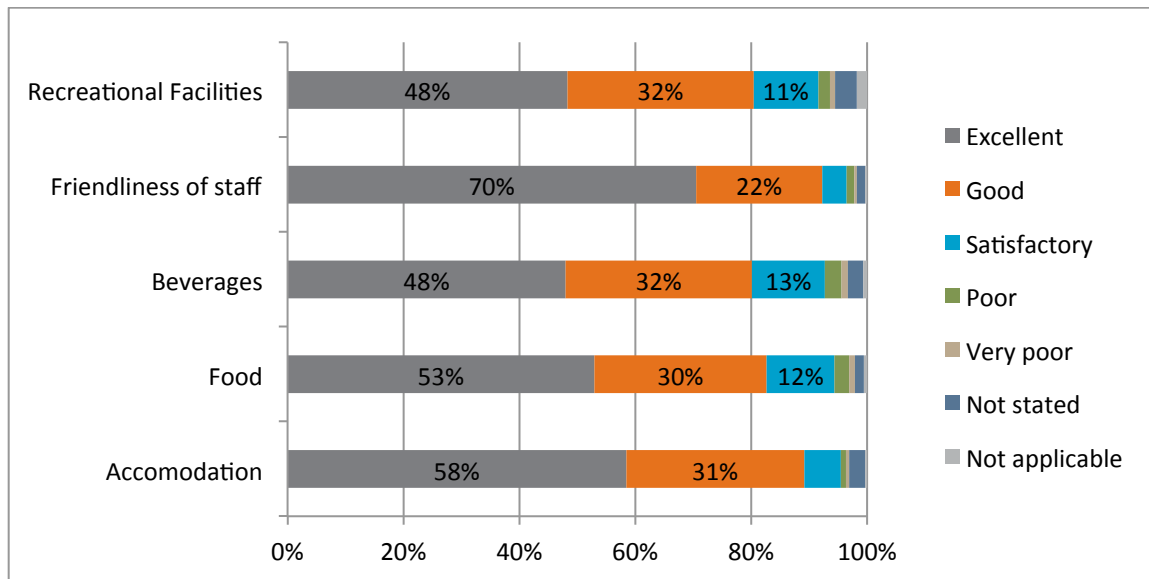


Figure 40: Service ratings for place of stay in the Maldives

Overall, all services at their place of stay except for recreational facilities is rated ‘good’ and ‘excellent’ by at least 80% of respondents. Recreational facilities are rated as ‘excellent’ by 48% of international visitors, while 32% rated it as ‘good’.

Friendliness of staff is rated ‘excellent’ by 70% of visitors while 22% rated ‘good’. Accommodation is rated ‘excellent’ by 58% and ‘good’ by 31%.

Food and beverages is rated as ‘excellent’ by 53% and 48% visitors respectively.

3.8.4 Perception of Prices

The survey also gathered visitors’ perception on the prices charged on accommodation, food and beverages, transportation, telecommunication, recreational activities and shopping.

Prices charged for accommodation, food and transportation in the Maldives is considered reasonable. Of the international visitors to the Maldives, 48% consider accommodation prices as ‘value for money’ while 39% perceive the prices to be ‘expensive’ (Figure 41). Of the visitors, 43% consider food prices as ‘value for money’ while 39% perceive prices to be ‘expensive’.

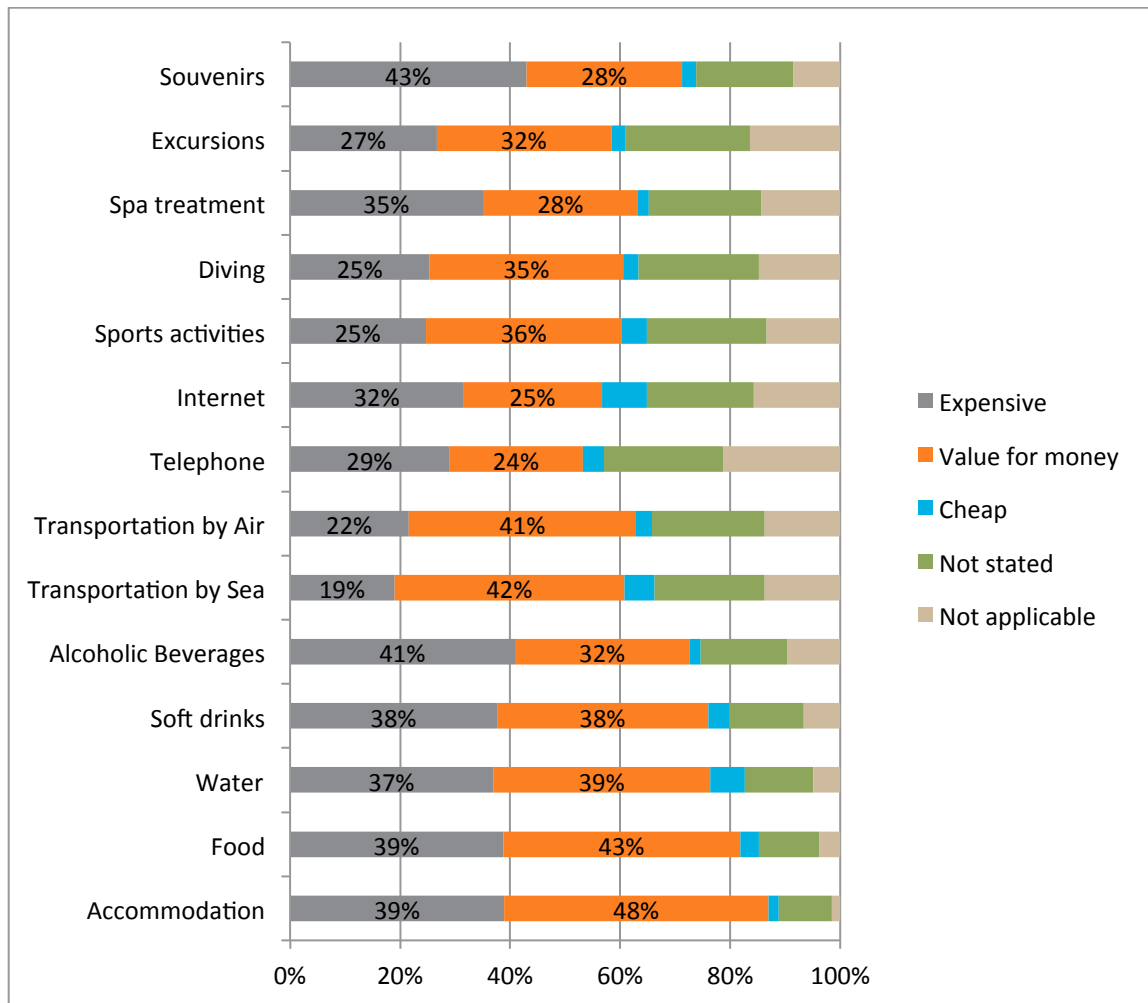


Figure 41: Perception of prices charged for the services

On average, water, soft drinks and alcoholic beverages are considered expensive by 39% of visitors while the same percentage of visitors considers them to be ‘value for money’. The prices charged for drinking water in the resorts of the Maldives is considered ‘expensive’ by 37%. Soft drinks and alcoholic beverages are considered ‘expensive’ by 38% and 41% respectively.

Prices of water are considered ‘value for money’ by 42% of visitors. About 38% perceive prices of soft drinks to be ‘value for money’ and 34% consider alcoholic beverages prices are ‘value for money’.

Overall the souvenir items are considered ‘expensive’ by 43% of visitors.

In case of transportation, 41% of visitors perceive air transport prices to be ‘value for money’ while 22% consider them to be ‘expensive’. Sea transportation prices are seen as ‘value for money’ by 42% of the visitors and 19% of them thought prices as generally expensive.

With respect to recreational activities; sports activities are perceived as ‘value for money’ by 36%, diving by 35% and excursions by 32%. On the other hand, sports activities are perceived as ‘expensive’ by 25%, diving by 25% and excursions by 27% of the visitors.

Spa treatment is perceived as ‘value for money’ by 28% of visitors, while a total of 35% consider it as ‘expensive’.

Telephone facilities are seen as ‘value for money’ by 24% and as ‘expensive’ by 29%. Internet services are considered ‘value for money’ by 25% and as ‘expensive’ by 32%.

3.9 OVERALL PERCEPTION OF THE HOLIDAY

3.9.1 Overall Satisfaction

An overwhelming majority of international visitors (94%) stated that the holiday met their expectations. Four per cent of visitors felt that the holiday did not meet their expectations (Figure 42).

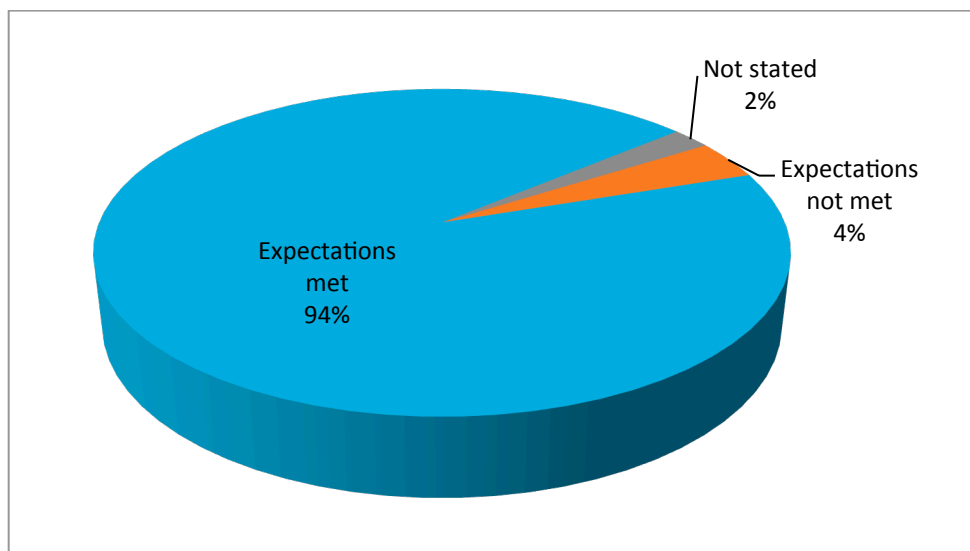


Figure 42: Holiday met with expectations

3.9.2 Comparison with Similar Destinations

From the respondents, 40% of the international visitors stated that have visited a destination similar to the Maldives. On the other hand, 55% of visitors reported that they have not visited other destinations similar to the Maldives and 5 % did not state an answer.

The top 20 similar destinations that survey respondents have been to are listed in Table 1.

Table 1 Similar destinations experienced by visitors

#	Destination	No. of visitors
1	Mauritius	78
2	Thailand	62
3	Seychelles	58
4	Indonesia	53
5	French polynesia	28
6	Polynesia	19
7	Caribbean	18
8	China	17
9	Dominican Republic	16
10	Malaysia	14
11	Egypt	13
12	Zanzibar	13
13	Hawaii	10
14	Cuba	10
15	Phillipines	9
16	Fiji	9
17	Sri lanka	9
18	Bahamas	8
19	Mexico	8
20	Australia	7
21	India	7

Figure 43 shows comparison of Maldives to similar destinations in terms of seven different aspects.

From the 40% international visitors who have visited similar destination, most (56%) rated the natural environment of Maldives better than other similar destinations.

Quality of product (41%), quality of services (3%) and safety/security (43%) are rated better in Maldives in comparison to similar destinations.

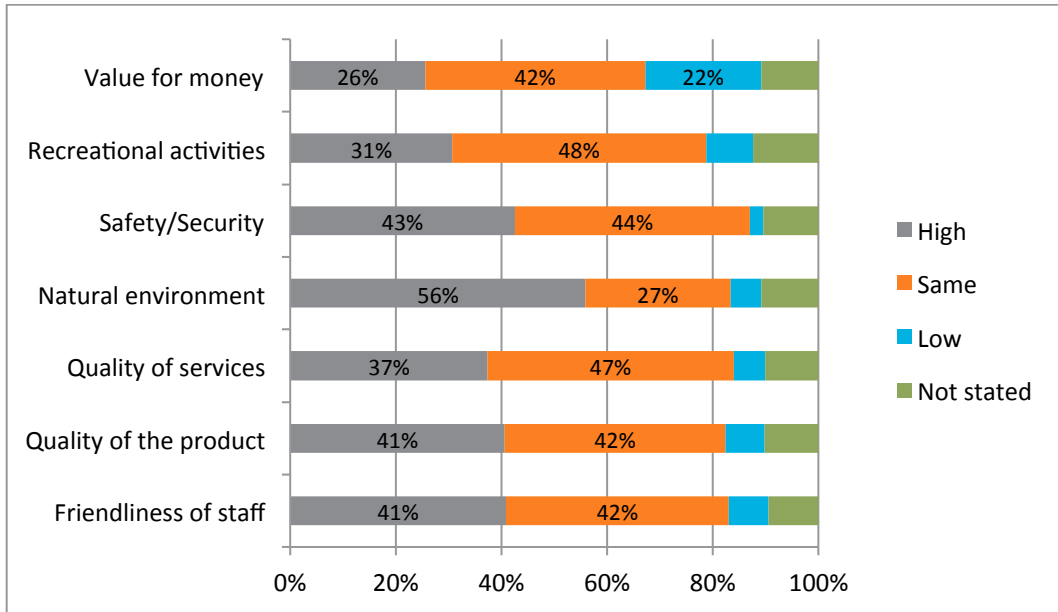


Figure 43: Rating of the Maldives compared to similar destinations

About 42% consider that value for money of their experience in Maldives is similar to other destinations while 26% rated as better. Value for money of the holiday is considered the weakest aspect (22%) of the Maldives in comparison to other similar destinations.

3.9.3 Intention to Visit Again

Of the international visitors, 94% are very happy with their holiday experience in the Maldives and 87% of them expressed that they intend to visit Maldives again (Figure 44).

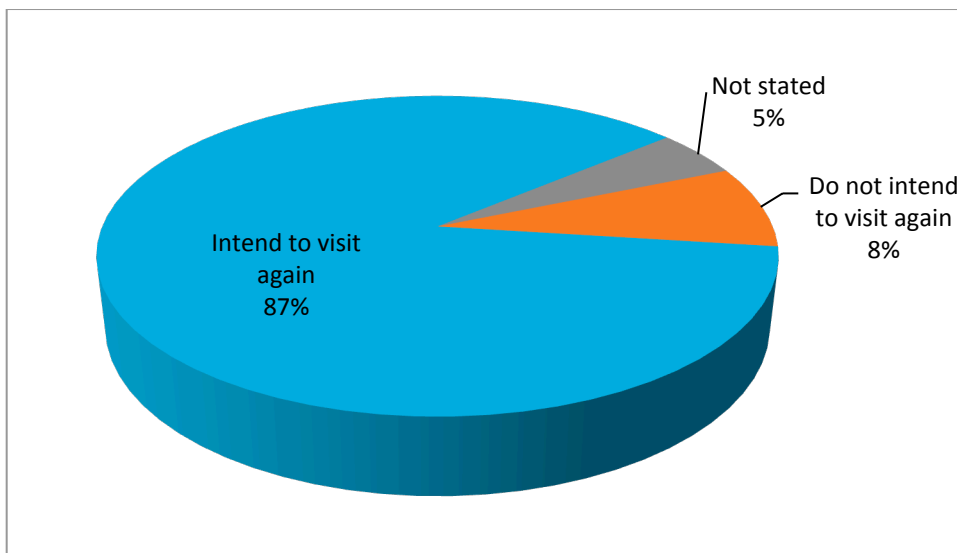


Figure 44 Intention to visit the Maldives again

Of the 8% of visitors who stated that they did not intend to visit again, the main reasons given are: the Maldives is too expensive, long distance of traveling and their desire to see new places.

4 METHODOLOGY

The questionnaire for the Maldives Visitor Survey undertaken in February 2013 was prepared based on the questionnaire for the survey conducted in 2012. Consultations were undertaken with Ministry of Tourism and Maldives Association for Tourism Industry (MATI) in the preparation and finalization of the questionnaire. The questionnaire consisted of three sections and 27 questions in total.

A letter was provided by Ministry of Tourism to accompany the questionnaire explaining the purpose of the survey. February 2013 questionnaire did not include an incentive to participate or complete the questionnaire.

The questionnaire was prepared in seven different languages of English, Italian, German, French, Japanese, Chinese and Russian. Translation and proofreading of the questionnaire was organized and conducted by CDE Consulting.

Total required number of questionnaires for distribution was 1,500.

Sample size for each language was decided based on the top ten nationalities of 2012 arrivals. Derivation of sample size is given in Table 2. Based on the top ten nationalities, the targeted distribution was 1,800.

Table 2 Derivation of sample size

Top 10 nationalities	Arrivals (2012)	Arrivals (Feb 2012)	Questionnaires	Language relevant to nationality	Survey language
China	229,551	12,237	200	Chinese	200
Germany	98,351	8,591	200	German	250
UK	91,776	9,006	200	English	450
Russia	66,378	5,370	200	Russian	200
Italy	62,782	8,910	200	Italian	250
France	56,775	9,742	100	French	250
Japan	36,438	2,650	100	Japanese	200
Switzerland	35,457	4,169	100	English, German, French, Italian	
India	31,721	2,219	100	English	
Korea	23,933	1,600	100	English	
Total	733,162	64,494	1,500		1800

The questionnaires were colour-coded depending on availability of coloured paper in required number.

Approval of Department of National Planning was sought to carry out the survey by Ministry of Tourism. The survey was carried out by two team leaders and six enumerators. A half day training was held for the enumerators prior to the commencement of the survey. Each questionnaire was designed to have three serial numbers: a number prior to the commencement of the survey, a number upon collection of the questionnaire after the survey and a number for the purpose of data entry.

The survey was conducted for a period of 13 days between 3 and 20 February at Ibrahim Nasir International Airport. By the end of the survey period the number of questionnaires distributed was 1,548. Respondents to the survey averaged at 119 per day. The dates and hours of surveying were selected based on flights schedule obtained from the airport.

Questionnaires were distributed after Immigration clearance and collected at departure gates. Banners were put up outside at the entrance of the Departure Terminal, after immigration and after security clearance. The collected questionnaires were organized by language and serial number for collection at CDE at the end of each day.

Altogether 1507 questionnaires were collected. Table 3 shows the number of questionnaires printed, distributed and completed. Out of the 1459 questionnaires completed, 1456 questionnaires were fit for analysis.

Table 3 Questionnaires printed, distributed and completed in different languages

Language	Printed	Distributed	Collected	Completed	Printed	Distributed	Collected	Completed
English	450	450	438	423	25%	29%	97%	29%
French	250	244	243	241	14%	16%	100%	17%
German	250	250	236	230	14%	16%	94%	16%
Italian	250	162	159	150	14%	10%	98%	10%
Japanese	200	77	77	75	11%	5%	100%	5%
Chinese	200	200	200	200	11%	13%	100%	14%
Russian	200	165	154	140	11%	11%	93%	10%
TOTAL	1800	1548	1507	1459	100%	100%	97%	100%

A database was created using PHP, MySQL and SPSS. Each completed questionnaire was given a serial number for data entry purposes. A two-hour training was conducted on data entry for the staff. Data entry was done in February and March. Data entry was carried out by five staff including enumerators of the survey. Data analysis was undertaken using Statistical Package for the Social Sciences (SPSS).

Tourist arrivals in 2012 were 958,027 and arrivals was 104,745 in February 2013. The survey sample that was analysed thus amounted to 0.15% of all arrivals during 2012 and 1.4% of arrivals during the

survey month of February 2013. This represents one in every 650 tourists that arrived during the year 2012 or one in every 70 of those who arrived in February 2013 (Table 4).

Table 4 Comparison of Tourist arrivals in 2012, February 2013 and Surveyed

Region	Arrivals 2012	Arrivals Feb 2013	Surveyed		
			Number	Percentage (2012)	Percentage (Feb 2013)
Europe	517,809	54,095	1,026	0.20%	1.9%
Asia & the Pacific	384,506	45,774	308	0.08%	0.67%
America	7,095	386	34	0.48%	8.8%
Africa	26,774	2,541	5	0.02%	0.20%
Middle East	21,843	1,949	19	0.09%	0.97%
Unknown			64		
Total	958,027	104,745	1,456	0.15%	1.4%

Appendix 1: Questionnaire

MALDIVES VISITOR SURVEY 2013

ED:
EC:
EE:

SECTION A

1. How many times have you visited the Maldives? (Please tick (✓) one box)

- a. First Time b. 2-5 times c. 6-10 times d. more than 10 times

2. With whom did you travel? (Please tick (✓) one box)

- a. Alone/Single traveler b. Partner c. Family (parents / children)
d. Friends e. Business associates f. Special interest group

3. How many people are in your travel group, including yourself?

- Adults Children under 18

4. Where did you stay during your holiday in the Maldives? (Please tick (✓) relevant boxes)

- a. Resort b. Hotel c. Guest house d. Safari vessel/yacht
e. Other

5. Please write down the name of the place you stayed (If more than one place, give the name of the place where you stayed most of the time)

6. How many nights did you stay in the Maldives? nights

7. What is the MAIN purpose of your visit? (Please tick (✓) one box)

- a. Honeymoon b. Wedding c. Business
d. Incentive visit e. Diving f. Health & Wellness g. Surfing
h. Others; please specify

8. How did you learn about the Maldives? (Please tick (✓) one box)

- a. Word of Mouth b. Internet c. Travel Agent d. Outdoor Advertising
e. TV f. Magazines g. Newspaper h. Radio
i. Guidebook j. Fairs/Exhibitions k. Others, please specify

9. What motivated you to choose Maldives as your holiday destination? (Please tick (✓) one box)

- a. Beach b. Weather c. Underwater beauty d. Reputation/well-known
e. Uniqueness f. Peacefulness g. Privacy
h. Others, please specify

10. How did you organize your trip? (Please tick (✓) one box)

- a. Direct booking with resort via internet b. Direct booking with tour operator via internet
c. Visited a travel agency to book d. Incentive visit
e. Others, please specify

11. When did you do the booking? (Please tick (✓) one box)

- a. Less than a week b. 1 week c. 2-4 weeks d. 1-2 months
 e. 3-5 months f. 6-12 months g. Over one year
 h. Others, please specify

SECTION B

12. How would you rate the following services? (Please tick (✓) one box)

<u>At the Airport</u>	Excellent	Good	Satisfactory	Poor	Very Poor	Not Applicable
a. Passport clearance at immigration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Customs clearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Information and signage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Friendliness of immigration staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Shopping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Cafes and restaurants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Transportation

a. Waiting time for hotel transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Service quality of hotel transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Comfort of hotel transfer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At your place of stay

a. Accommodation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Beverages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Friendliness of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Recreational Facilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. What type of meal plan did you use? (Please tick (✓) one box)

- a. Room only b. Bed and breakfast c. Half board (breakfast and one meal included)
 d. Full board (three meals included) e. All inclusive

14. What activities did you enjoy most in the Maldives? (Please tick (✓) relevant boxes)

- a. Diving b. Snorkeling c. Spa d. Water Sports e. Land based sports
 f. Local island visit g. Picnic h. Other, please specify

15. Have you ever visited any destination similar to the Maldives? Yes No (if "No", go to Q16)

a. If "Yes", please state the last destination you visited:

b. Compared to that destination, how would you rate the Maldives with regard to; (Please tick (✓) one box)

	Low	Same	Higher
a. Friendliness of staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Quality of the product	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Quality of services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Natural environment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Safety/Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Recreational activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Value for money	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. In general, how did you find the price charged for the following? (Please tick (✓) one box)

	Expensive	Value for Money	Cheap	Not applicable
a. Accommodation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Soft drinks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Alcoholic Beverages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Transportation by Sea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Transportation by Air	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Telephone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Internet	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Sports activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Diving	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
l. Spa treatment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
m. Excursions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
n. Souvenirs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. What is the one word / phrase that comes to your mind to describe the Maldives holiday experience?

.....

18. What did you like the most about the Maldives?

.....

19. Did your holiday experience meet your expectations?

- a. Yes b. No

Please explain your reason

.....

20. Do you intend to visit Maldives again?

- a. Yes b. No

Please explain your reason

.....

21. Would you recommend the Maldives as a tourist destination to others?

- a. Yes b. No

Please explain your reason

.....

SECTION C

22. Country of Residence:

23. Gender Male Female

24. Age Group: (Please tick (✓) one box)

- a. Below 18 years b. 18 – 24 years c. 25 – 34 years d. 35 - 44 years
- e. 45 - 54 years f. 55 - 64 years g. 65 years and over

25. Economic status: (Please tick (✓) one box)

- a. Employed b. Self-employed c. Home maker d. Student
e. Retired/Unemployed

If 'employed', What is your occupation? (Please tick (✓) one box)

- a. Manager, Director and Senior official b. Professional
c. Associate Professional and Technical d. Administrative and Secretarial
e. Skilled trades f. Caring, Leisure and Other Service
g. Sales and Customer Service h. Not Applicable

26. Did you travel on a package tour? (Please tick (✓) one box)

- a. Yes b. No (if "No", go to Q27)

If "Yes", what is the total price of the package?

Currency USD GBP EUR RMB JPY RUB

Amount

What other destinations are included in your package?

Destination 1:

Destination 2:

Destination 3:

27. How much in total have you spent on your visit to Maldives?

Currency USD GBP EUR RMB JPY RUB

Amount

~ Thank you for your time! ~

Appendix 2: Statistical Annex

TABLE 1 TOP TEN NATIONALITIES OF SURVEY PARTICIPANTS OF MALDIVES VISITOR SURVEY 2013 FEBRUARY

	Frequency	Percent
Indian	52	4%
Austrian	53	4%
Swiss	58	4%
Japanese	77	5%
Russian	115	8%
British	123	8%
German	130	9%
Italian	142	10%
Chinese	172	12%
French	223	15%

TABLE 2 PLACE OF RESIDENCE OF TOP TEN NATIONALITIES

	Residing outside country of nationality	Residing in country of nationality	Not stated	Total	Residing outside country of nationality	Residing in country of nationality	Not stated
Austrian	1	43	9	53	2%	81%	17%
Indian	2	48	2	52	4%	92%	4%
Swiss	8	48	2	58	14%	83%	3%
Japanese	1	59	17	77	1%	77%	22%
French	13	204	5	222	6%	92%	2%
Italian	7	129	6	142	5%	91%	4%
Russian	1	97	17	115	1%	84%	15%
British	13	105	5	123	11%	85%	4%
German	6	116	9	131	5%	89%	7%
Chinese	6	136	29	171	4%	80%	17%

TABLE 3 INTERNATIONAL VISITOR ARRIVALS BY AGE GROUP

	Percent
Not Stated	4.1
Below 18 years	1.9
65 years and over	5.0
18-24 years	7.9
55-64 years	11.0
45-54 years	17.7
35-44 years	20.4
25-34 years	32.1
Total	100.0

TABLE 4 INTERNATIONAL VISITOR ARRIVALS BY AGE GROUP AND REGION

	Below 18 years	18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65 years and above	Not stated
Africa	0%	14%	57%	14%	0%	0%	0%	14%
Middle East	0%	16%	53%	16%	5%	11%	0%	0%
America	0%	12%	24%	15%	21%	24%	3%	3%
Asia & the Pacific	5%	9%	52%	17%	8%	2%	0.3%	6%
Europe	1%	7%	25%	22%	21%	14%	7%	3%
Not stated	11%	6%	39%	20%	9%	2%	6%	6%

TABLE 5 INTERNATIONAL VISITOR ARRIVALS BY AGE GROUP AND NATIONALITY

	Below 18 years	18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65 years and above	Not stated	Total
Austrian	4%	8%	21%	19%	21%	15%	6%	8%	100%
Indian	0%	10%	81%	8%	2%	0%	0%	0%	100%
Swiss	2%	17%	19%	21%	12%	19%	3%	7%	100%
Japanese	0%	4%	57%	16%	12%	6%	1%	4%	100%
French	0.4%	4%	29%	22%	23%	13%	5%	4%	100%
Italian	1%	3%	19%	30%	21%	16%	10%	1%	100%
Russian	0%	24%	34%	18%	16%	3%	1%	3%	100%
British	0%	1%	20%	23%	27%	16%	13%	0%	100%
German	1%	3%	21%	22%	22%	20%	7%	5%	100%
Chinese	9%	10%	40%	21%	9%	0%	0%	10%	100%

TABLE 6 INTERNATIONAL VISITORS BY GENDER

	Percent
Female	43.2
Male	48.0
Not stated	8.8
Total	100.0

TABLE 7 VISITORS OF TOP TEN NATIONALITIES BY GENDER

	Female	Male	Not stated	Total
Austrian	42%	43%	15%	100%
Indian	46%	50%	4%	100%
Swiss	33%	53%	14%	100%
Japanese	38%	57%	5%	100%
French	40%	54%	6%	100%
Italian	42%	52%	6%	100%
Russian	42%	51%	7%	100%
British	50%	46%	3%	100%
German	47%	37%	15%	100%
Chinese	49%	51%	0%	100%
Not stated	49%	35%	17%	100%

TABLE 8 PURPOSE OF VISIT TO THE MALDIVES

	Percent
Others	10%
Surfing	1%
Wedding	1%
Business	1%
Incentive visit	5%
Holiday/relaxation	17%
Diving	19%
Health & Wellness	22%
Honeymoon	23%
Total	100%

TABLE 9 MAIN PURPOSE OF VISIT BY TOP TEN NATIONALITIES

	Honeymoon	Wedding	Business	Incentive visit	Diving	Health & Wellness	Surfing	Others	
Austrian	18%	0%	0%	0%	28%	33%	0%	21%	100%
Indian	80%	0%	6%	0%	2%	0%	0%	13%	100%
Swiss	9%	0%	0%	0%	38%	32%	1%	20%	100%
Japanese	55%	2%	0%	28%	4%	1%	1%	9%	100%
French	26%	1%	0%	2%	25%	21%	0%	24%	100%
Italian	7%	1%	3%	3%	23%	35%	0%	28%	100%
Russian	13%	4%	2%	4%	16%	31%	3%	28%	100%
British	15%	0%	2%	2%	11%	20%	1%	50%	100%
German	9%	0%	0%	1%	25%	39%	0%	26%	100%
Chinese	33%	3%	2%	11%	18%	16%	1%	17%	100%

TABLE 10 MOTIVATORS FOR CHOOSING THE MALDIVES

	Percent
Others	2%
Privacy	7%
Reputation/well-known	10%
Peacefulness	12%
Uniqueness	12%
Weather	15%
Beach	21%
Underwater beauty	21%
Total	100%

TABLE 11 MOTIVATORS FOR CHOOSING THE MALDIVES BY TOP TEN NATIONALITIES

	Others	Beach	Weather	Underwater Beauty	Reputation/ well-known	Uniqueness	Peacefulness	Privacy	
Indian	1%	27%	4%	16%	5%	15%	17%	16%	100%
Austrian	0%	20%	18%	26%	5%	13%	6%	12%	100%
Swiss	2%	19%	18%	24%	6%	12%	12%	8%	100%
Japanese	2%	23%	10%	34%	12%	6%	10%	3%	100%
Russian	2%	25%	22%	17%	12%	6%	10%	6%	100%
British	3%	14%	17%	14%	13%	20%	12%	6%	100%
German	1%	17%	18%	18%	8%	20%	8%	11%	100%
Italian	3%	25%	5%	19%	5%	20%	20%	3%	100%
Chinese	0%	19%	11%	23%	16%	11%	16%	4%	100%
French	2%	19%	18%	25%	10%	5%	10%	10%	100%

TABLE 12 ECONOMIC STATUS OF VISITORS

	Percent
Home maker	2.9
Student	5.4
Retired/Unemployed	8.9
Self-employed	20.3
Employed	57.8
Not Stated	4.7
Total	100.0

TABLE 13 INTERNATIONAL VISITORS TO THE MALDIVES BY OCCUPATIONAL CATEGORIES

	Percent
Caring, Leisure and Other Service	3%
Skilled trades	4%
Sales and Customer Service	5%
Associate Professional and Technical	6%
Administrative and Secretarial	6%
Professional	15%
Manager, Director and Senior official	20%
Not Stated	42%
Total	100.0

TABLE 14 SOURCE OF PRE-ARRIVAL INFORMATION ABOUT THE MALDIVES

	Percent
Others	3%
Radio	0.4%
Fairs/Exhibitions	0.4%
Newspaper	2%
Outdoor Advertising	2%
Guidebook	4%
Tv	9%
Magazines	10%
Travel Agent	18%
Internet	26%
Word of Mouth	26%
Total	100%

TABLE 15 SOURCES OF INFORMATION BY TOP TEN NATIONALITIES

	Other	Word of Mouth	Internet	Travel Agent	Outdoor Advertising	Tv	Magazines	Newspaper	Radio	Guidebook	Fairs/Exhibitions
Austrian	5%	21%	31%	14%	1%	5%	14%	6%	0%	3%	0%
Indian	3%	34%	38%	9%	1%	5%	4%	1%	0%	3%	1%
Swiss	5%	36%	18%	25%	3%	4%	4%	3%	1%	0%	3%
Japanese	2%	26%	20%	21%	3%	10%	11%	1%	0%	7%	0%
French	2%	25%	15%	20%	1%	12%	12%	1%	0%	11%	0%
Italian	3%	26%	20%	17%	5%	9%	13%	2%	1%	5%	0%
Russian	1%	21%	36%	19%	3%	9%	8%	1%	0%	1%	1%
British	6%	39%	28%	14%	0%	4%	5%	1%	1%	1%	1%
German	3%	23%	16%	24%	2%	13%	13%	3%	0%	3%	1%
Chinese	0%	28%	33%	14%	3%	8%	8%	3%	0%	3%	0%

TABLE 16 MODE OF TRIP ORGANIZATION USED BY INTERNATIONAL VISITORS

	Frequency	Percent
Incentive visit	8	1%
Not Stated	9	1%
Others	41	3%
Direct booking with resort via internet	165	11%
Direct booking with tour operator via internet	291	20%
Visited a travel agency to book	942	65%
Total	1456	100%

TABLE 17 MODE OF TRIP ORGANIZATION BY TOP TEN NATIONALITIES

	Direct booking with resort via internet	Direct booking with tour operator via internet	Visited a travel agency to book	Incentive visit	Other	Not stated	total
Austrian	6%	8%	81%	0%	6%	0%	100%
Indian	19%	25%	54%	0%	2%	0%	100%
Swiss	21%	29%	48%	0%	2%	0%	100%
Japanese	5%	21%	70%	0%	1%	3%	100%
French	4%	15%	76%	1%	3%	0%	100%
Italian	11%	12%	75%	0%	0%	1%	100%
Russian	9%	23%	65%	0%	0%	3%	100%
British	10%	41%	41%	0%	7%	1%	100%
German	6%	12%	79%	0%	2%	1%	100%
Chinese	16%	23%	59%	2%	0%	1%	100%

TABLE 18 TYPE OF TRAVEL COMPANION

	Percent
Alone/Single traveler	2.7
Partner	56.9
Family(parents/children)	28.6
Friends	9.3
Business associates	.5
Special interest group	1.5
Not Stated	.4
Total	100.0

TABLE 19 TYPE OF TRAVEL COMPANION BY NATIONALITY

	Alone/ Single traveler	Partner	Family (parents/ children)	Friends	Business associates	Special interest group	Not Stated	
Austrian	0%	66%	19%	13%	0%	2%	0%	100%
Indian	2%	90%	4%	0%	4%	0%	0%	100%
Swiss	3%	62%	22%	12%	0%	0%	0%	100%
Japanese	6%	30%	40%	16%	0%	6%	1%	100%
Russian	0%	12%	76%	10%	0%	3%	0%	100%
Italian	3%	56%	25%	12%	2%	3%	0%	100%
French	2%	69%	20%	8%	0%	1%	0%	100%
British	5%	80%	9%	7%	0%	0%	0%	100%
German	3%	68%	18%	9%	0%	2%	0%	100%
Chinese	1%	44%	49%	4%	1%	0%	1%	100%

TABLE 20 SIZE OF THE TRAVEL GROUP BY ADULT COMPANIONS

No. of Adults	Percentage
Alone	4%
2 people	74%
3-5 people	11%
6 or more	7%
not stated	5%
	100%

No. of children	Percentage
No children	88%
1 - 2 children	10%
3 - 5 children	1%
6 or more	1%
	100%

TABLE 21 NUMBER OF VISITS TO THE MALDIVES

	Percent
First Time	70%
2-5 times	21%
6-10 times	5%
More than 10 times	3%
Not Stated	1%
Total	100.0

TABLE 22 FIRST TIME VISITORS AND REPEAT VISITORS BY TOP TEN NATIONALITIES

	First timers	Repeat visitors	Not Stated	
Austrian	53%	43%	4%	100%
Indian	90%	6%	4%	100%
Swiss	45%	53%	2%	100%
Japanese	78%	22%	0%	100%
Italian	49%	49%	2%	100%
French	74%	25%	1%	100%
Russian	74%	26%	0%	100%
British	63%	36%	1%	100%
German	56%	44%	0%	100%
Chinese	95%	5%	0%	100%

TABLE 23 DURATION OF ADVANCE BOOKING OF HOLIDAY BY VISITORS

	Percent
Over one year	1%
Less than a week	6%
1 week	5%
2-4 weeks	19%
6-12 months	15%
3-5 months	27%
1-2 months	28%
Others	0%
Not Stated	1%
Total	99%

TABLE 24 DURATION OF ADVANCE BOOKING OF HOLIDAY BY TOP TEN NATIONALITIES

	Less than a week	1 week	2-4 weeks	1-2 months	3-5 months	6-12 months	Over one year	Not stated	Total
Austrian	0%	0%	21%	11%	40%	28%	0%	0%	100%
Indian	12%	2%	21%	42%	23%	0%	0%	0%	100%
Swiss	2%	3%	10%	31%	36%	16%	0%	2%	100%
Japanese	1%	3%	5%	31%	38%	21%	0%	1%	100%
Italian	8%	8%	32%	23%	25%	4%	0%	1%	100%
French	2%	1%	13%	26%	35%	20%	1%	3%	100%
Russian	21%	16%	26%	25%	10%	1%	0%	2%	100%
British	2%	3%	15%	17%	32%	28%	2%	0%	100%
German	1%	3%	7%	24%	32%	33%	1%	0%	100%
Chinese	3%	5%	31%	46%	12%	3%	0%	0%	100%

TABLE 25 TYPE OF ACCOMMODATION SELECTED BY INTERNATIONAL VISITORS

	Percentage
Resort	85%
Hotel	9%
Guest House	2%
Safari vessel/yacht	4%
Other	1%
Total	100%

TABLE 26 TYPE OF ACCOMMODATION SELECTED BY INTERNATIONAL VISITORS OF TOP TEN NATIONALITIES

	Resort	Hotel	Guesthouse	Safari vessel/yacht	Others	Total
Austrian	87%	6%	2%	6%	0%	100%
Indian	90%	10%	0%	0%	0%	100%
Swiss	93%	5%	2%	0%	0%	100%
Japanese	80%	1%	0%	17%	1%	100%
French	84%	10%	0%	5%	1%	100%
Italian	90%	1%	1%	6%	2%	100%
Russian	68%	25%	2%	3%	2%	100%
British	90%	5%	1%	4%	0%	100%
German	88%	5%	2%	4%	1%	100%
Chinese	88%	9%	1%	0%	1%	100%

TABLE 27 TYPES OF MEAL-PLAN CHOSEN BY INTERNATIONAL VISITORS

	Percent
Room only	1.4
Bed and breakfast	12.1
Half board	20.7
Full Board	23.2
All inclusive	41.4
Not Stated	1.2
Total	100.0

TABLE 28 TYPE OF MEAL PLAN CHOSEN BY TOP TEN NATIONALITIES

	All inclusive	Full board	Half board	Bed and breakfast	Room only	Not stated
Austrian	53%	13%	26%	8%	0%	0%
Indian	6%	23%	35%	31%	6%	0%
Swiss	31%	29%	26%	9%	0%	5%
Japanese	47%	19%	21%	13%	0%	0%
French	48%	30%	18%	2%	1%	1%
Italian	52%	37%	4%	6%	0%	1%
Russian	37%	18%	30%	11%	1%	3%
British	65%	14%	10%	9%	2%	1%
German	63%	15%	18%	2%	1%	2%
Chinese	20%	19%	33%	28%	0%	0%

TABLE 29 NUMBER OF NIGHTS SPENT IN THE MALDIVES

No. of nights	Percent
1	0.1%
2	2%
3	5%
4	16%
5	7%
6	6%
7	23%
8	6%
9	5%
10	7%
11	3%
12	4%
13	2%
14	6%
15	0.8%
16	0.4%
17	0.3%
18	0.1%
19	0.3%
20	0.2%
21	0.5%
23	0.1%
25	0.1%
28	0.1%
29	0.1%
Not stated	5.7%
Total	100.0%

TABLE 30 TRENDS IN DURATION OF STAY AMONG VISITORS OF TOP TEN NATIONALITIES

No. of nights	Indian	Austrian	Swiss	Japanese	Russian	British	German	Italian	Chinese	French
NS	8%	4%	7%	0%	3%	11%	6%	9%	2%	6%
1	2%	0%	0%	0%	0%	0%	0%	0%	0%	0%
2	2%	0%	0%	4%	0%	3%	2%	2%	0%	0%
3	31%	2%	0%	12%	0%	2%	1%	2%	2%	4%
4	44%	2%	3%	21%	4%	0%	2%	1%	72%	6%
5	12%	2%	7%	27%	3%	4%	3%	2%	15%	3%
6	2%	6%	0%	23%	4%	6%	5%	1%	2%	6%
7	0%	15%	22%	8%	25%	28%	13%	54%	2%	42%
8	0%	9%	9%	3%	9%	2%	8%	11%	2%	7%
9	0%	6%	10%	0%	3%	7%	12%	1%	0%	9%
10	0%	9%	14%	3%	10%	11%	7%	2%	2%	7%
11	0%	4%	5%	0%	20%	1%	5%	1%	0%	1%
12	0%	6%	0%	0%	10%	4%	11%	4%	0%	1%
13	0%	9%	3%	0%	3%	1%	3%	1%	0%	1%
14	0%	19%	12%	0%	0%	18%	15%	6%	1%	3%
15	0%	2%	3%	0%	0%	1%	2%	1%	0%	0%
16	0%	2%	2%	0%	2%	0%	1%	1%	0%	0%
17	0%	0%	0%	0%	1%	0%	1%	0%	0%	1%
18	0%	0%	0%	0%	0%	0%	2%	0%	0%	0%
19	0%	2%	0%	0%	1%	0%	1%	0%	0%	0%
20	0%	0%	0%	0%	1%	0%	1%	0%	1%	0%
21	0%	2%	2%	0%	0%	1%	1%	0%	0%	1%
23	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%
25	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
28	0%	0%	0%	0%	0%	0%	1%	0%	0%	0%
29	0%	0%	0%	0%	0%	1%	0%	0%	0%	0%
	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

TABLE 31 ACTIVITIES MOST ENJOYED BY INTERNATIONAL VISITORS

	Percent
Other	5%
Picnic	3%
Land based sports	4%
Local island visit	8%
Water Sports	10%
Spa	14%
Diving	17%
Snorkeling	40%
Total	95%

TABLE 32 ACTIVITIES MOST ENJOYED BY TOP TEN NATIONALITIES

	Diving	Snorkeling	Spa	Water Sports	Land based sports	Local island visit	Picnic	Others	
Austrian	20%	41%	14%	9%	3%	8%	2%	3%	100%
Indian	8%	26%	18%	25%	4%	11%	2%	6%	100%
Swiss	21%	41%	13%	8%	2%	10%	3%	3%	100%
Japanese	22%	41%	23%	9%	1%	1%	1%	3%	100%
French	21%	39%	18%	7%	2%	8%	2%	3%	100%
Italian	23%	49%	8%	5%	4%	9%	1%	3%	100%
Russian	17%	30%	16%	12%	5%	10%	6%	4%	100%
British	11%	43%	18%	4%	3%	7%	1%	14%	100%
German	13%	38%	15%	8%	6%	11%	4%	5%	100%
Chinese	17%	45%	3%	19%	5%	6%	3%	2%	100%

TABLE 33 EXPENDITURE WITHIN THE MALDIVES BY VISITORS (EXCLUDING TOUR PACKAGE)

Expenditure (USD)	Percentage
Not stated	28%
<1001	20%
1001-2000	5%
2001-3000	4%
3001-4000	6%
4001-5000	4%
5001-6000	4%
6001-7000	5%
7001-8000	4%
8001-9000	4%
9001-10000	5%
>10000	11%
	100%

TABLE 34 EXPENDITURE WITHIN MALDIVES BY TOP FIVE NATIONALITIES

	USD <1001	USD 1001- 2000	USD 2001- 3000	USD 3001- 4000	USD 4001- 5000	USD >5000	Not stated	
Austrian	4%	13%	4%	8%	6%	23%	43%	100%
Indian	10%	13%	12%	19%	15%	4%	27%	100%
Swiss	9%	2%	10%	7%	3%	24%	45%	100%
Japanese	44%	9%	0%	0%	1%	27%	18%	100%
French	15%	4%	6%	6%	9%	40%	19%	100%
Italian	17%	5%	5%	8%	8%	26%	31%	100%
Russian	13%	18%	10%	3%	2%	23%	30%	100%
British	26%	6%	2%	15%	8%	24%	20%	100%
German	5%	2%	9%	11%	6%	27%	38%	100%
Chinese	19%	15%	3%	1%	1%	40%	22%	100%

TABLE 35 PERCENTAGE OF VISITORS TRAVELLING ON A PACKAGE TOUR

	Percent
Did not travel on a package tour	32%
Traveled on a package tour	54%
Not stated	14%
Total	86%

TABLE 36 EXPENDITURE ON TOUR PACKAGE TO THE MALDIVES

Expenditure	Percent
not stated	53%
USD <1001	5%
USD 1001-2000	2%
USD 2001-3000	5%
USD 3001-4000	6%
USD 4001-5000	4%
USD >5000	25%
	100%

TABLE 37 EXPENDITURE ON TOUR PACKAGE TO THE MALDIVES BY TOP FIVE NATIONALITIES

Expenditure (USD)	Chinese	German	British	Russian	Italian
<1001	3%	5%	4%	2%	13%
1001-2000	2%	0%	1%	2%	1%
2001-3000	12%	5%	1%	5%	3%
3001-4000	8%	7%	4%	7%	4%
4001-5000	2%	6%	5%	10%	4%
>5000	16%	40%	38%	37%	26%
Not stated	56%	38%	47%	37%	49%

TABLE 38 RATINGS ON SERVICES PROVIDED AT THE IBRAHIM NASIR INTERNATIONAL AIRPORT

At the Airport	Excellent	Good	Satisfactory	Poor	Very poor	Not stated	Not applicable	Total
Passport clearance at immigration	39%	44%	13%	2%	0%	1%	0%	100%
Customs clearance	37%	44%	14%	1%	0%	3%	2%	100%
Information and signage	28%	45%	20%	3%	0%	3%	1%	100%
Friendliness of immigration staff	40%	38%	16%	2%	1%	2%	0%	100%
Shopping	18%	32%	30%	9%	3%	6%	4%	100%
Cafes and restaurants	16%	32%	27%	9%	2%	8%	6%	100%

TABLE 39 RATINGS ON QUALITY OF TRANSPORTATION SERVICES AND COMFORT AT HOTEL

Transportation	Excellent	Good	Satisfactory	Poor	Very poor	Not stated	Not applicable	Total
Waiting time for hotel transfer	41%	33%	14%	5%	2%	2%	2%	100%
Service quality of hotel transfer	47%	36%	11%	2%	1%	3%	1%	100%
Comfort of hotel transfer	42%	34%	11%	2%	1%	7%	4%	100%

TABLE 40 SERVICE RATINGS FOR PLACE OF STAY IN THE MALDIVES

At your place of stay	Excellent	Good	Satisfactory	Poor	Very poor	Not stated	Not applicable	Total
Accommodation	58%	31%	6%	1%	1%	3%	0%	100%
Food	53%	30%	12%	3%	1%	2%	1%	100%
Beverages	48%	32%	13%	3%	1%	3%	1%	100%
Friendliness of staff	70%	22%	4%	1%	0%	1%	0%	100%
Recreational Facilities	48%	32%	11%	2%	1%	4%	2%	100%

TABLE 41 PERCEPTION OF PRICES CHARGED FOR THE SERVICES

	Expensive	Value for money	Cheap	Not stated	Not applicable	
Accommodation	39%	48%	2%	10%	2%	100%
Food	39%	43%	3%	11%	4%	100%
Water	37%	39%	6%	13%	5%	100%
Soft drinks	38%	38%	4%	13%	7%	100%
Alcoholic Beverages	41%	32%	2%	16%	10%	100%
Transportation by Sea	19%	42%	5%	20%	14%	100%
Transportation by Air	22%	41%	3%	20%	14%	100%
Telephone	29%	24%	4%	22%	21%	100%
Internet	32%	25%	8%	19%	16%	100%
Sports activities	25%	36%	5%	22%	13%	100%
Diving	25%	35%	3%	22%	15%	100%
Spa treatment	35%	28%	2%	20%	14%	100%
Excursions	27%	32%	3%	23%	16%	100%
Souvenirs	43%	28%	3%	18%	9%	100%

TABLE 42 HOLIDAY MET WITH EXPECTATIONS

	Percent
Not stated	2%
Expectations not met	4%
Expectations met	94%
Total	100%

TABLE 43 RATING OF THE MALDIVES COMPARED TO SIMILAR DESTINATIONS

Percent	High	Same	Low	Not stated
Friendliness of staff	41%	42%	8%	9%
Quality of the product	41%	42%	7%	10%
Quality of services	37%	47%	6%	10%
Natural environment	56%	27%	6%	11%
Safety/Security	43%	44%	3%	10%
Recreational activities	31%	48%	9%	12%
Value for money	26%	42%	22%	11%

TABLE 44 INTENTION TO VISIT THE MALDIVES AGAIN

	Percent
Not stated	5%
Do not intend to visit again	8%
Intend to visit again	87%
Total	100%