

STUDY ON DOMESTIC TOURISM IN THE MALDIVES 2016



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EXECUTIVE SUMMARY

This very first study on domestic tourism in the Maldives (DTS 2016) was conducted to understand and measure the current status and potential of domestic tourism in the Maldives, and to gather baseline data on domestic tourism for the compilation of a Tourism Satellite Account.

The study was implemented as a household survey using a sample of 1,128 respondents drawn from Male' and selected locations from the Atolls. According to the Census of 2014 the total number of households in the Maldives was 68,249 of which 26,739 (39.2%) were in Male'.

The study noted that the median household size for both Male' and Atolls was 6 persons, while comparison of mean household size revealed that Male' tend to have slightly larger households than in the Atolls.

Every three out of four households (75%) in the Atolls took at least one domestic tourist trip during the 12-month reference period, and 60% of Male' households took a domestic tourism trip during the same period. The average number of domestic trips taken by Atoll households stood 3.77 trips per household, and for Male' households the figure stood considerably lower at 1.40 trips per households.

A higher percentage (65%) of domestic tourism trips taken by Male' households were leisure and holiday purposes where as only 9% of Atoll households took domestic visits for leisure and holiday purposes. A large percentage (60%) of trips taken by Atoll households was for the main purpose of medical treatment, whereas only 1% of trips taken by Male' households were for medical treatment.

Seventy-five percent of all domestic tourism trips were taken coinciding with school holiday period and Alha-Eid holiday moth. In 56% of overnight trips visitors stayed with relatives or friends, and in 24% stayed in guesthouses and rented rooms. Two-third of all overnight domestic visits were made for a duration less than a week.

The most frequently used primary mode of transport for domestic travel was the normal passenger ferry (dhoani ferry), accounting for nearly half (49%) of all domestic trips taken. Sea transport was used as the primary modes of transport in almost four out of five trips (79%) and air transport was used as the primary modes of transport in 17% of trips.

On average households spent MVR10,138 per household annually on domestic tourism trips. A wide discrepancy existed between average spending of households in Male' (MVR4,043) and households in the Atolls (MVR14,064). The discrepancy may be explained by the difference in main purpose of the trips and activities engaged by Atoll and Male' households. Atoll households are largely driven by necessity for medical purposes, whereas domestic trips by Male' households are predominantly for pleasure. In over half (54%) of trips Atoll households engaged in medical and health services compared to just 3% of trips by Male' households.

Overall, households spent the most on transport, which amounted to MVR3,711 per household or a third of total expenditure on domestic tourism trips.

Based on the survey, total expenditure on domestic tourism trips by all households in the Maldives is estimated at MVR692 million. The figure is most likely an understatement of the actual spending on domestic tourism given that respondents were not always able to recollect or associate all relevant expenses incurred in lieu of all their trips taken during the 12-month reference period.

Forty percent of Male' households and 25% of Atoll households did not engage in any domestic trip during the 12-month reference period. Out of the non-tourist households, 38% of Male' respondents cited work and family commitment as their main reason for not being able to take a domestic trip, whereas 24% of Atoll respondents cited "not interested" as their main reason, for not taking a domestic trip.

Outbound travel has direct and indirect impacts on domestic travel. The study noted that by far the most popular purpose for outbound travel is for medical treatment by Atoll households (58%) as well as Male' households (49%).

CHAPTER 1. INTRODUCTION

1.1. BACKGROUND

The Maldives is an island nation, with more than 1190 small islands scattered across in an area of 90,000 square km in the sea, making it one of the most sparsely populated countries in the world. 188 islands are inhabited while 112 islands (as at end of 2015) are developed and operated as tourist resorts. The resident population of the country is 402,071 according to the most recent census of 2014.

A third of the entire population of the country representing 39% of all households resides in Male'¹, the capital of Maldives. Male' is a melting pot of migrants from all parts of the country, and is the central hub of commerce, transport, government administration, as well as education and health services.

The Maldives has a thriving inbound tourism industry which had a record arrival of 1,234,248 international tourists in 2015. According to statistics of Department of Immigration and Emigration, the outbound traveller number for 2014 was 196,542. However, presently there is no mechanism to collect or estimate data on domestic travel.

The Manila Declaration on World Tourism adopted at the World Tourism Conference in 1980 at Manila, Philippines, puts domestic tourism as an important economic activity capable of balancing the national wealth through income redistribution. Domestic tourism is not only an economic activity, but also a social activity that enhances the sense of national identity and creates awareness on common interests by the nationals through socialisation and interaction.

The Study on Domestic Tourism in the Maldives 2016 (DTS 2016) is the first time a survey is conducted to estimate the size and understand domestic tourism sector in the country. The study is conducted for the Ministry of Tourism by FJS Consulting Pvt Ltd.

¹ All references to Male', unless otherwise specified, refers to Greater Male', comprising of Male', Hulhumale' and Villingilli island.

1.2. OBJECTIVES OF THE STUDY

The purpose of this study was to understand and measure the current state and potential of domestic tourism in the Maldives. The specifically designed survey and data collected in the study will also be used to gather baseline data on domestic tourism for the compilation of a Tourism Satellite Account (TSA) in the Maldives.

The findings of the study will assist the policy makers in taking informed decisions in the sustainable development of domestic tourism in the Maldives. The findings will also provide a better understanding of the economic contribution and level of local participation in the tourism industry.

1.3. SAMPLING DESIGN & METHODOLOGY

DTS 2016 was conducted as a household survey, implemented through a face-to-face interview using a structured questionnaire. A total of 1150 questionnaires were administered (600 in Male' and 550 in the Atolls) and 1128 responses were received.

Resource constraints ruled out the possibility of a nation wide study based on a representative sample from the Atolls using probability sampling techniques. Hence, it was decided to conduct the study in Male', one point from southern region, one point from northern region and one point from the central region of the country.

In the analysis and the presentation of the findings, Male' and the Atolls were treated as two distinct domains given the distinct differences in urban settings and population characteristics between the two. A two-stage cluster probability sampling was used in Male' to draw out a sample of 600 households from 100 blocks. Whereas in the Atolls, as only a few locations were to be chosen, judgement sampling was applied to an extent in the selection of atolls and island so as to achieve the best possible balance between inclusion of heterogeneous groups of the target population and cost considerations. Distribution of sample in the Atolls was as follows:

Region	Sample Size	Enumerated Islands (sample size)
North	198	Ha.Hanimadhoo(23), Ha.Hoarafushi(50), Ha.Ihavandhoo(25), Ha.Utheem(25), Hdh.Kulhudhuffushi(50), Hdh.Nolhivaram(25)
Central	194	R. Dhuvaafaru(25), R.Innamadhoo(25), R.Maakurath(25), R.Meedhoo(25), Lh.Hinnvaru(25), K.Gulhi(20), L.Gan(32), L.Fonadhoo(17)
South	150	S.Hithadhoo(75), S.Maradhoo(25), S.Feydhoo(25), S.Hulhumeedhoo(25)

Limitations:

Due to the dispersed nature of the islands and high logistical expenses involved, a sufficiently diverse and representative sample was not applied in Atolls. Moreover, as sampling in the Atolls was not entirely based on probability sampling, it is subject to sampling bias. Nonetheless, the sample was extended to encompass households from key geographic clusters of the population with regard to domestic travel and provide a useful indication of the impact and extent of domestic tourism in the country.

The survey was conducted in administrative islands, meaning those households residing in non-administrative islands (resorts islands and other industrial and agricultural islands) were excluded from the sample. According to Census 2014, approximately 0.9% of all households representing 9.1% of the country's resident population resides in non-administrative islands.

The study relies on the ability of respondents to recollect and report on their past travel. As the reference period for the study extended up to 12 months into the past, respondents were not always able to recollect the details on all their trip activities and expenses.

Although respondents interviewed were either heads of households (44%) or senior members who could provide answers on behalf of the household (56%), under-reporting is expected as respondents may not be aware of or able to remember details of all trips taken by all household members. The effect is somewhat mitigated as in many households more than one member was present at the time of the interview and contributed to filling in the details.

With regard to tourism expenditure, the study reports on direct expenses incurred by tourist households (including those which may be paid for by others), but does

not take into account impaired expenses which may be borne by others such as increased food budget of host households while accommodating visiting friends and relatives, government subsidies, etc.

1.4. DEFINITION OF TERMS

The following terms used in this report are in line with definitions offered by World Tourism Organization (UNWTO) as outlined in the International Recommendation for Tourism Statistics (IRTS) 2008.

Domestic travel: The act of moving from usual place of residence (resident island) to another island in the Maldives by a person who is a resident of the Maldives (regardless of nationality), irrespective of the purpose of travel, length of stay and means of transport used.

Domestic visitor or domestic tourist: Any person residing in the Maldives regardless of nationality, who travels to a place in the Maldives outside of his usual environment (resident island) for a period of not more than 12 months, whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.

Excursion trip: A trip outside of the respondent's usual environment, where they leave and return within the same day (i.e. do not stay overnight).

Household: A group of persons, generally but not necessarily bound by ties of kinship, who sleep in the same dwelling unit and have common arrangements for the preparation and consumption of food.

Main purpose of trip: This is the purpose in the absence of which the trip would not have been made or the given destination would not have been visited.

Outbound trip: A journey to a country outside Maldives for a period of less than 12 consecutive months, and whose main purpose of travel is other than the exercise of an activity remunerated from the country visited.

Overnight trip: A trip outside of the respondent's usual environment where one night or more is spent away.

Primary mode of transport: Mode of transport used to travel the greatest distance during the trip.

Respondent: A respondent is a responsible household member 18 years old

and over, who can provide reliable answers to the survey questions.

Reference period: The time period about which questions were asked (i.e., past 12 months up to December 2015).

Tourism Satellite Account (TSA): A new economic accounting method (initiated by UNWTO and endorsed by UN Statistical Commission) that estimates the total contribution of tourism industry to the national economy through consumption, investments, government revenue or the balance of payments. A Satellite Account is a term developed by the United Nations to measure the size of economic sectors that are not defined as industries in national accounts.

Trip expenditure: This includes all related expenditures incurred in lieu of a trip by all household members who went on the trip on goods and services incurred before, during and after a tourism trip. Expenditure may have been paid for by another party, for example, the host or employer.

Tourist household: A household with at least one member who has taken a domestic visit during the reference period.

Usual environment: The usual environment is taken as the usual resident island of the respondent, irrespective of the distance from their place of usual residence. The following are falling outside the usual environment and were excluded from domestic tourism:

- Persons travelling on a routine basis to take care of daily necessities;
- Persons who travel regularly or frequently between neighbouring localities to work or study;
- For domestic same-day visitors, in addition to the above, persons travelling within greater Male' or within islands connected by land or causeway.

CHAPTER 2. DOMESTIC TOURISM

According to the International Recommendation for Tourism Statistics (IRTS 2008), a traveller is someone who moves between different geographic locations for any purpose and any duration¹. Tourism is more limited than travel, as it refers to specific types of trips: those that take a traveller outside his/her usual environment for less than a year and for a main purpose other than to be employed by a resident entity in the place visited. Individuals when taking such trips are called visitors. Tourism is therefore a subset of travel and visitors are a subset of travellers².

In line with UNWTO definitions, for the purpose of this study, domestic tourists are referred to as persons residing in the Maldives who travelled within the Maldives outside of their usual environment during the past 12 months from January to December 2015 for a main purpose other than the exercise of an activity remunerated from within the place visited. This includes residents of the Maldives regardless of their nationality. Usual environment in local context is taken as the island (or islands when connected by land/causeway) which the person resides.

The survey focused on households to gather information on domestic visitors. This section provides the findings of the survey, covering tourist households, main purpose of their travel, length of stay, places visited and expenses incurred during their domestic tourism trips.

2.1. DOMESTIC TOURIST HOUSEHOLDS

The findings from the household survey is reported along two main domains – households in Male' and households in the Atolls – for the reason that the country has a high concentration of households and residents in Male'. In this context, Male' refers to Greater Male' area that includes the capital island Male', Villimale' and Hulhumale'. According to the Census of 2014 the total number of households in the Maldives is 68,249 of which 26,739 (39.2%) are in Male'.

out of 68,249 Households
across Maldives
39.2%
of Households are in Male'

¹ International Recommendations for Tourism Statistics (IRTS) 2008
² IRTS 2008

Figure 1 shows the proportion of households by size of the household in Male' and the Atolls. According to survey findings, Male' tend to have slightly larger households than in the Atolls. The average household size is 7.0 persons in Male' and 6.5 persons in the Atolls. The median size of household for both Male' and the Atolls is 6 persons. Most notable difference is that the proportion of households smaller households, that is, household with one person or two persons is more than twice high in the Atolls compared to Male'.

Figure 1. Frequency Distribution of Households by Size of Household

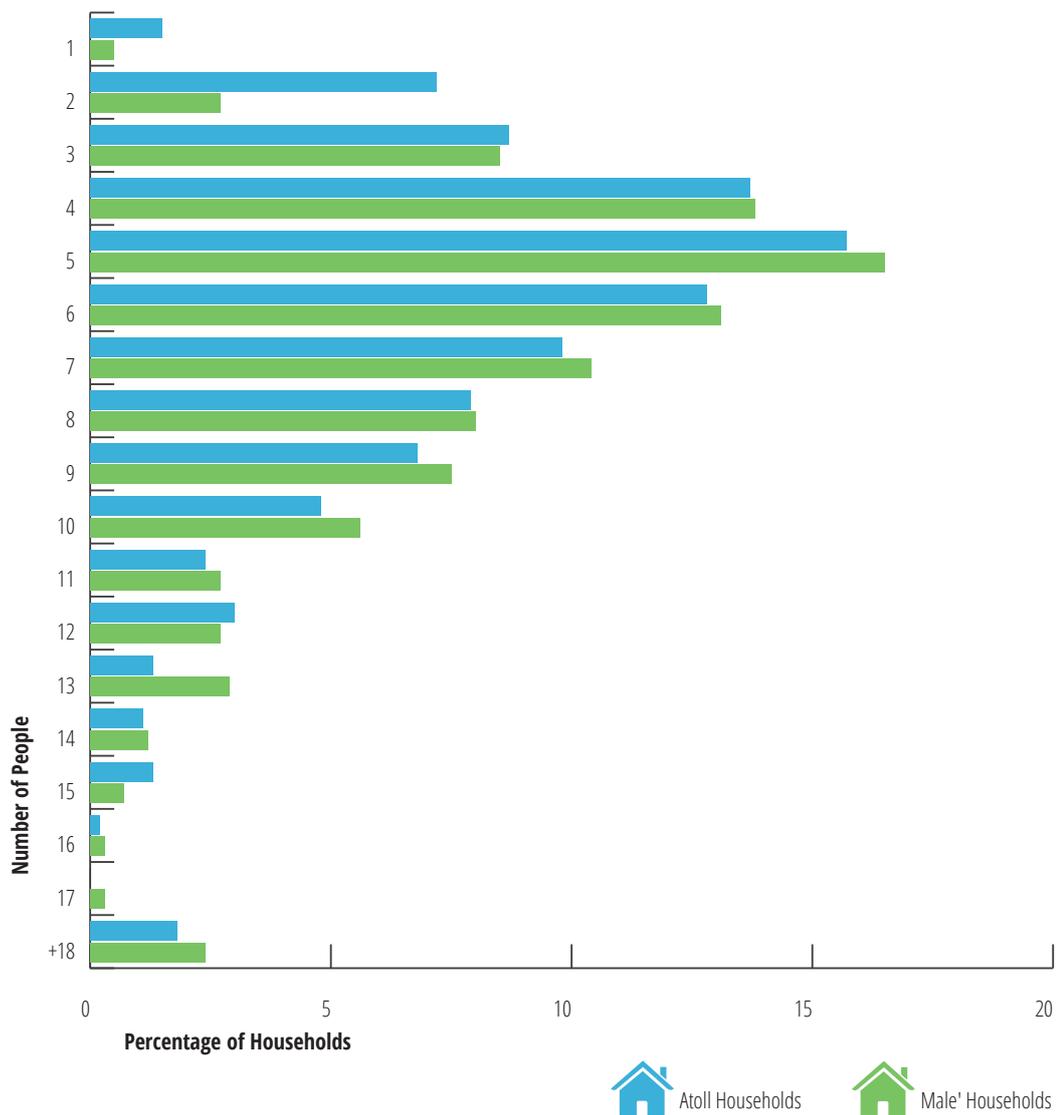


Figure 2 shows the proportion of tourist households, that is households with at least one of its members who had taken a domestic trip (excursion or overnight) during the reference period. While every three out of four households or 75% households in the Atolls made a domestic tourist trip, the proportion of tourist households were much less in Male' (60%). However, proportion of households who engaged in outbound visits was higher in Male' (59%) than in the Atolls (49%).

Figure 2. Proportion of Tourist Households

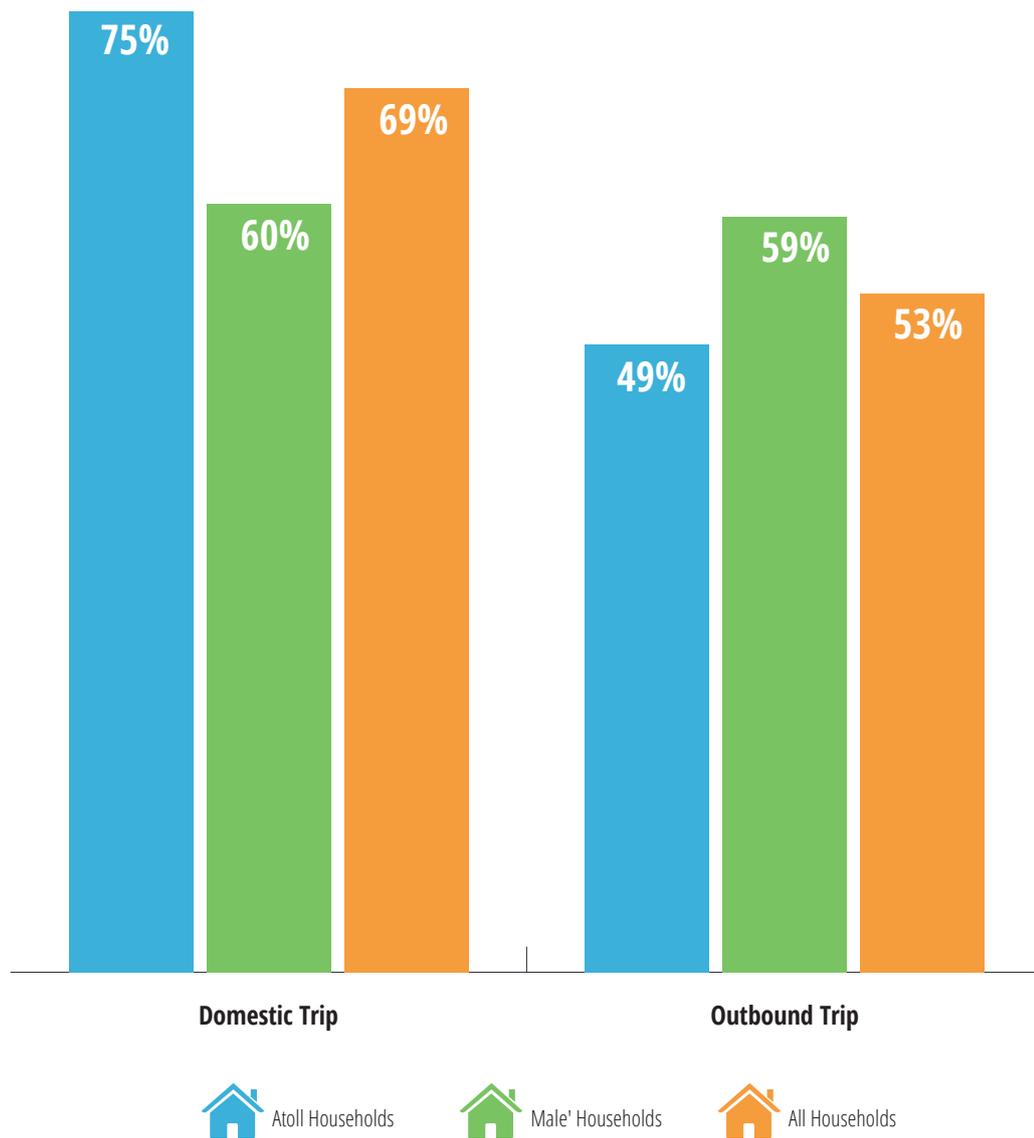
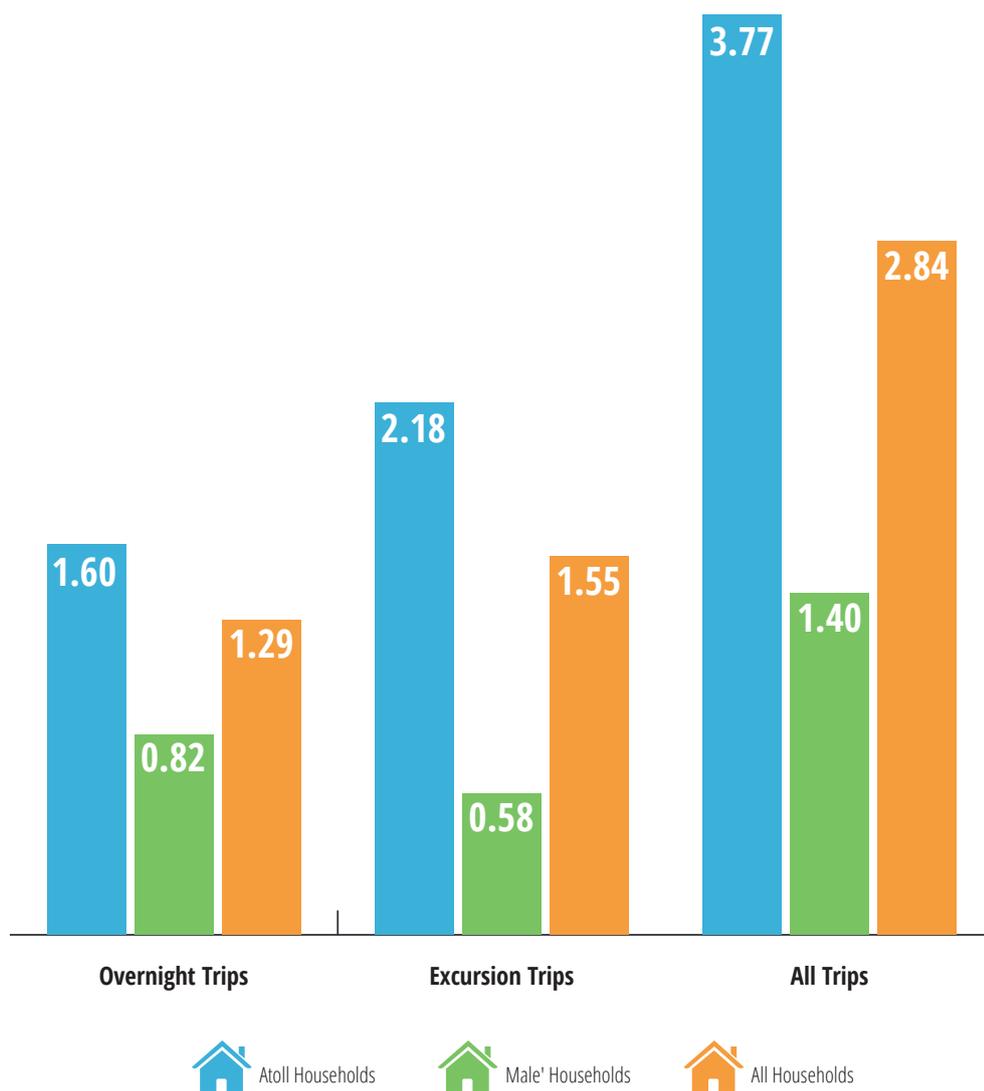


Figure 3 shows the average number of domestic trips taken per household during the past year. It shows on average 2.84 domestic trips were undertaken by households surveyed. Atoll households took significantly more overnight trips (1.60/household) as well as excursion trips (2.18/household) compared to Male' households, who took an annual average of 0.82 overnight trips and 0.58 excursion trips per household.

Figure 3. Average Number of Domestic Trips Taken per Household during the Past Year



2.2. MAIN PURPOSE OF TRAVEL

In the survey, households were asked to state the main purposes of their trips, that is, the purpose in the absence of which the trip would not have taken place.

Figure 4 shows proportion of domestic trips by main purpose of the trip undertaken by households from Male' and Atolls.

Overall, 48% of all domestic trips were taken for medical purposes. Interestingly only 1% of trips by Male' households were for medical treatment. Thus the high overall proportion of medical related travel is entirely driven by Atoll households. An overwhelming 60% of trips undertaken by Atoll households were for medical treatment. Thus, relatively higher participation in domestic tourism by Atoll households is largely driven out of necessity for medical treatment.

In contrast, a significantly higher percentage (65%) of domestic trips by Male' households were for leisure and holiday purposes while only 9% of domestic trips by Atoll households were for leisure and holiday purposes.

The other notable main purposes for domestic tourism travel was visiting friends and relatives. About 21% of trips by Male' households and 9% of trips by Atoll households were for visiting friends and family. Among Male' households the percentage of households visiting friends and relatives may be high due to their extended family members residing in Atolls.

Figure 4. Main Purpose of the Trip

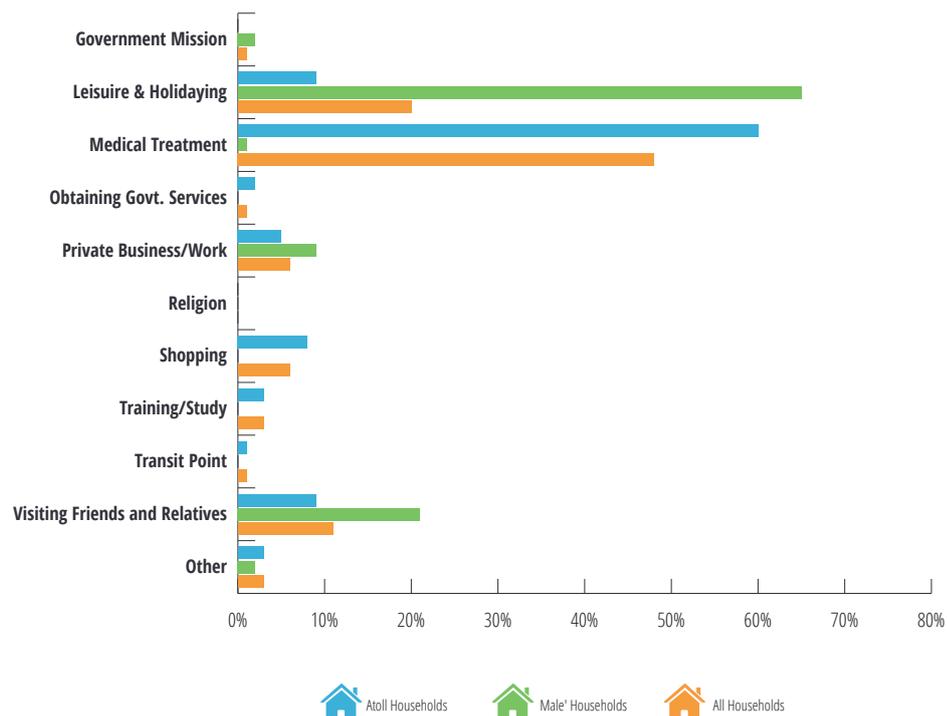


Figure 5 and **Figure 6** show an isolated look at visits to Male' by Atoll households and visits to Atolls by Male' households respectively. By and large the main purpose for trips taken by Atoll households visiting Male' is noted as medical treatment (75%). Second and third frequent reasons for trips to Male' by Atoll households were for leisure and holidaying (8%) and visiting friends and family (6%).

In contrast, main purpose of visits to Atolls by Male' households was for leisure and holidaying, signifying 59% of visits by Male' households to Atolls. Following in second, visiting friends and relatives represented 22% of visits to Atolls by Male' households.

Figure 5. Main Purpose of Visits to Male' by Atoll Households

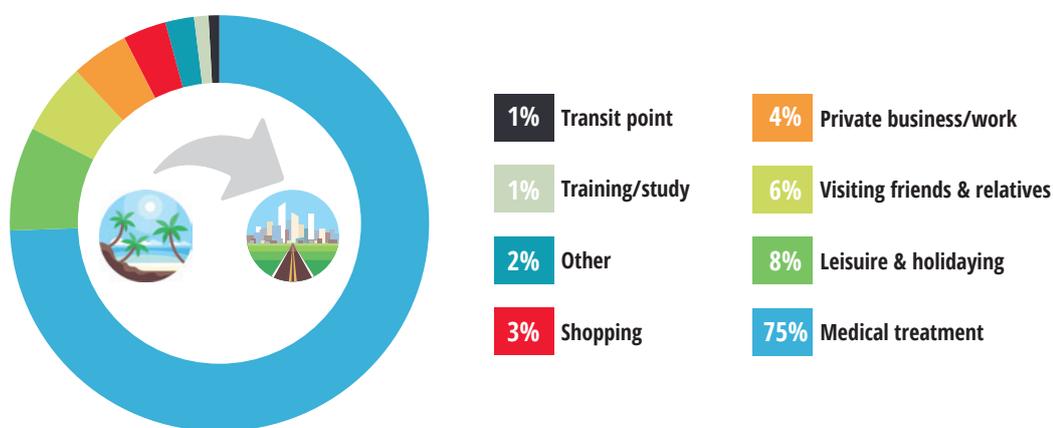
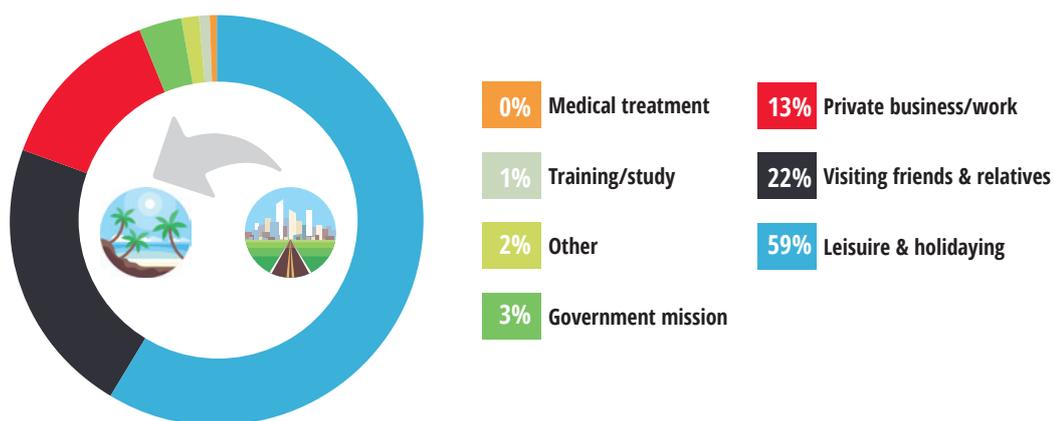


Figure 6. Main Purpose of Visits to Atolls by Male' Households

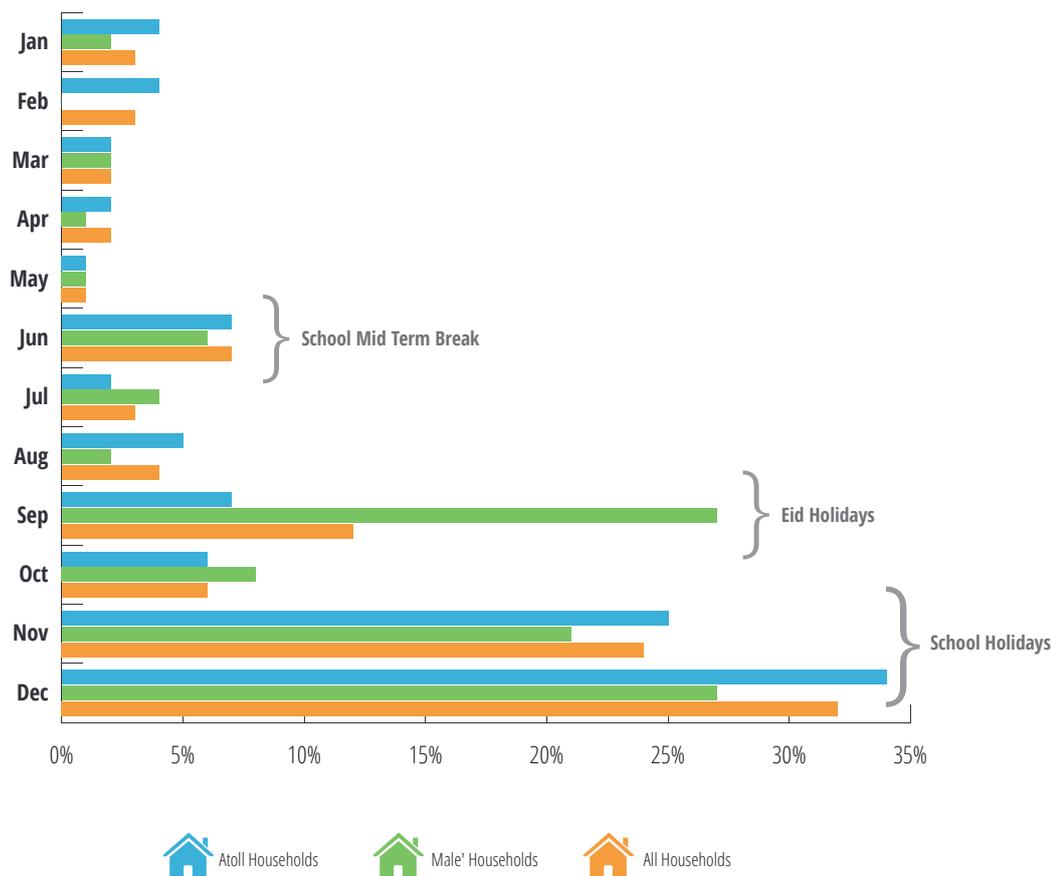


2.3. TRAVEL PATTERNS

Figure 7 shows comparison of domestic tourism travel by month of the year, revealing surges in the travel frequencies coinciding with long school and public holidays. It shows that during school term break (June) and school holiday period (November and December), and Eid holiday period (September) both Male' and Atoll households took significantly more domestic trips.

While Atoll households did 73% of all their domestic trips during the holiday months, Male' households did 81% of all their domestic trips during the holiday months. A notable difference in travel pattern is noted during Eid holidays, where Male' households did proportionately more trips than Atoll households. Male' households did 27% of all their trips during Eid holiday month whereas Atoll households did only 7% of their trips during Eid holiday month. In November and December, which is the school year end holidays, Atoll households did relatively more of their travelling (59% of trips) than their Male' counterparts (48%).

Figure 7. Domestic Travel by Month of the Year



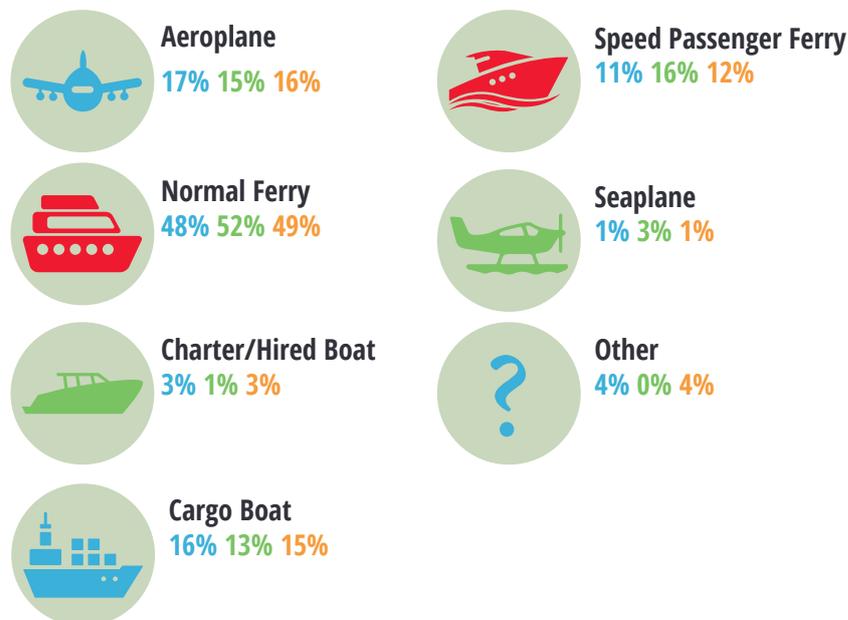
2.4. PRIMARY MODE OF TRANSPORT

Figure 8 shows primary modes of transport used by Atoll and Male' residents for domestic trips. The islands in the Maldives are separated by sea, hence, the popular modes of transportation are sea and air transport. In the past decade passenger ferry services were introduced in many parts of the country. The most frequently used mode of transport for domestic travel during the reference period was noted as the normal (dhoani type) passenger ferry, accounting for almost half (49%) of all domestic trips undertaken. Almost equally high proportion of domestic trips were done via normal passenger ferry by those living in Male' (52%) and the Atolls (48%). Aeroplane (16% of trips), cargo boats (15%) and speed passenger ferry (12%) were also popular modes of domestic transport.

49%
of domestic trips
utilized the
normal ferry

Even though the Maldives has the largest seaplane operation in the world, domestic visitors seldom used this mode of transport for their domestic travel, may be due to exclusiveness of seaplane transport service for inbound tourist market. Only 3% of trips were done via seaplane even by Male' households, who had relatively easy access to the transport hub (Figure 8).

Figure 8. Type of Primary Transportation Used



2.5. LENGTH AND PLACE OF STAY FOR OVERNIGHT TRIPS

Traditionally, when most household residents (Atolls and Male') take a domestic trip, their place of stay was with relatives or friends. However, this age old tradition may be changing now due to availability of choice for overnight accommodation such as room rental services, guesthouses and cafés across population centres of the country.

Figure 9 shows place of stay for overnight domestic visits. During the reference period in 56% of overnight trips, households stayed with relatives or friends. The percentage of trips visitors stayed with friends or relatives is almost twice as high for visits by Atoll households (64%) compared to visits by Male' households (34%).

A high percentage (34%) of overnight visits Male' households stayed in their own home or apartment. This may be due to high number of residents from Atolls who have migrated to Male' and make visits to their home islands in the Atolls.

Figure 9. Place of Stay for Overnight Trips

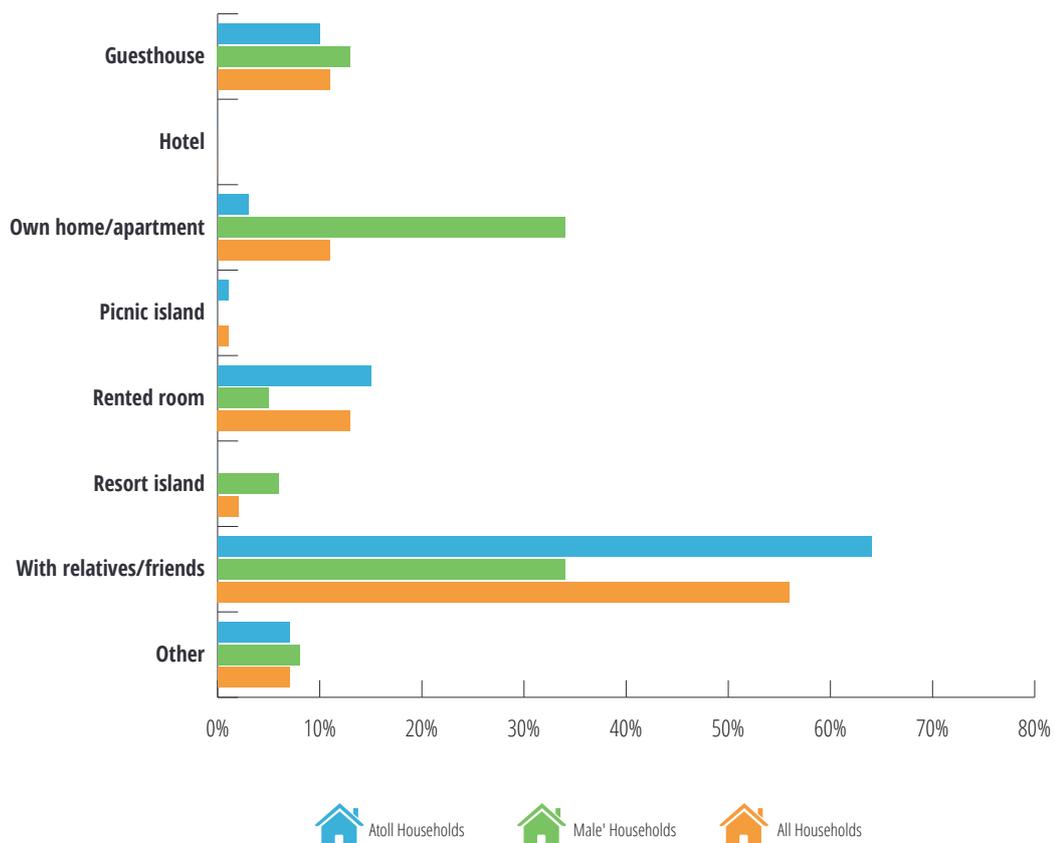
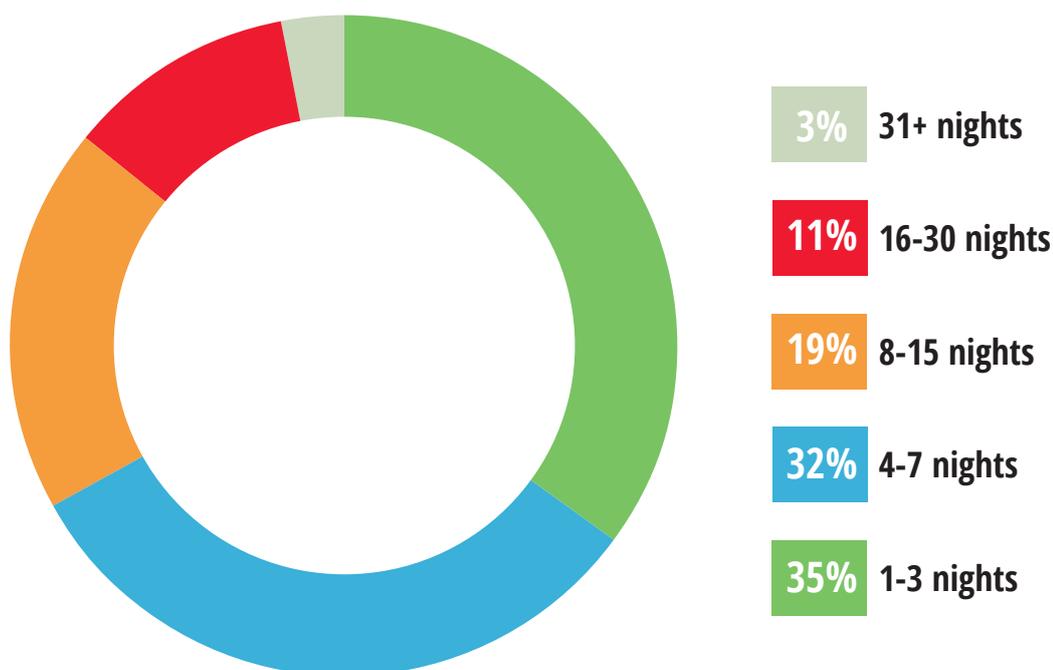


Figure 10 shows duration of stay for overnight visits. Two-third of all overnight domestic visits were made for a duration less than a week. In 34% of overnight trips tourists stayed between 1 to 3 nights, and in another 32% of the trips, stay we between 4 to 7 nights. Only in 3% of the trips visitors stayed more than 30 nights.

Figure 10. Duration of Overnight Trips



2.6. ANNUAL EXPENDITURE ON DOMESTIC TOURISM

Figure 11 shows expenditure on domestic tourism trips by Atoll and Male' households. On average households spent MVR10,138 annually on domestic tourism trips. A significant disparity exists between average spending of households in Male' (MVR4,043) and households in the Atolls (MVR14,064). Although it may be counter-intuitive, higher expenditure by Atoll households is explicable given that domestic trips by Atoll households are largely driven by necessity for medical purposes, whereas domestic trips by Male' households are predominantly for pleasure. Atoll households also spent significantly more on shopping during their domestic trips (see Figure 12).

Based on the average spending per household surveyed, total annual expenditure on domestic tourism in the Maldives is estimated at MVR692 million.

Figure 11. Annual Expenditure on Domestic Tourism

	Expenditure Per Household (MVR)	Estimated Total Expenditure for All Households (MVR Million)
Atoll Households	14,064	584
Male' Households	4,043	108
All Households	10,138	692

Exchange rate: USD 1 = MVR 15.42

Figure 12 shows breakdown of average annual spending per household on domestic tourism under main categories of spending. Overall, households spent the most on transport (air, sea and land transport combined), representing a third of total spending on domestic tourism or MVR3,711 per household.

When per household expenditure is categorically compared, Atoll households spent a significantly higher amount than Male' households on all categories with the exception of Sports and Recreation. Male' households spent MVR147 per household on sports and recreation, which is three times more than expenditure per Atoll household (MVR42).

Atoll households spent a significant amount (MV2,163 per Atoll household compared to MVR495 per Male' household) on "other purposes". Significant expenses in the "other purpose" category include medical expenses and monetary gifts and donations made to relatives.

Male' households spent significantly less (MVR149 per household) on shopping compared to Atoll households (MVR3,275) during their domestic trips. The most plausible reason is that the smaller islands or even larger islands do not have the wide variety of shops and products available in Male', the commercial hub.

Figure 12. Average Annual Spending per Household on Domestic Tourism Trips (in MVR)

	Accommodation	Food & Beverages	Air Transport	Sea Transport	Land Transport	Shopping	Sports & Recreation	Cultural Activities	Other	TOTAL
Atoll Households	1,603	2,025	2,993	1,516	376	3,275	42	71	2,163	14,064
Male' Households	610	735	1,255	596	37	149	147	18	495	4,043
All Households	1,214	1,520	2,312	1,155	243	2,050	83	50	1,509	10,138

Figure 13 shows the breakdown of total estimated expenditure by all households in the Maldives on domestic tourism under main categories of spending. Atoll households is estimated to have spent the most on transport (MVR 253.3 million on air, water and land combined), followed by shopping (MVR135.9 million).

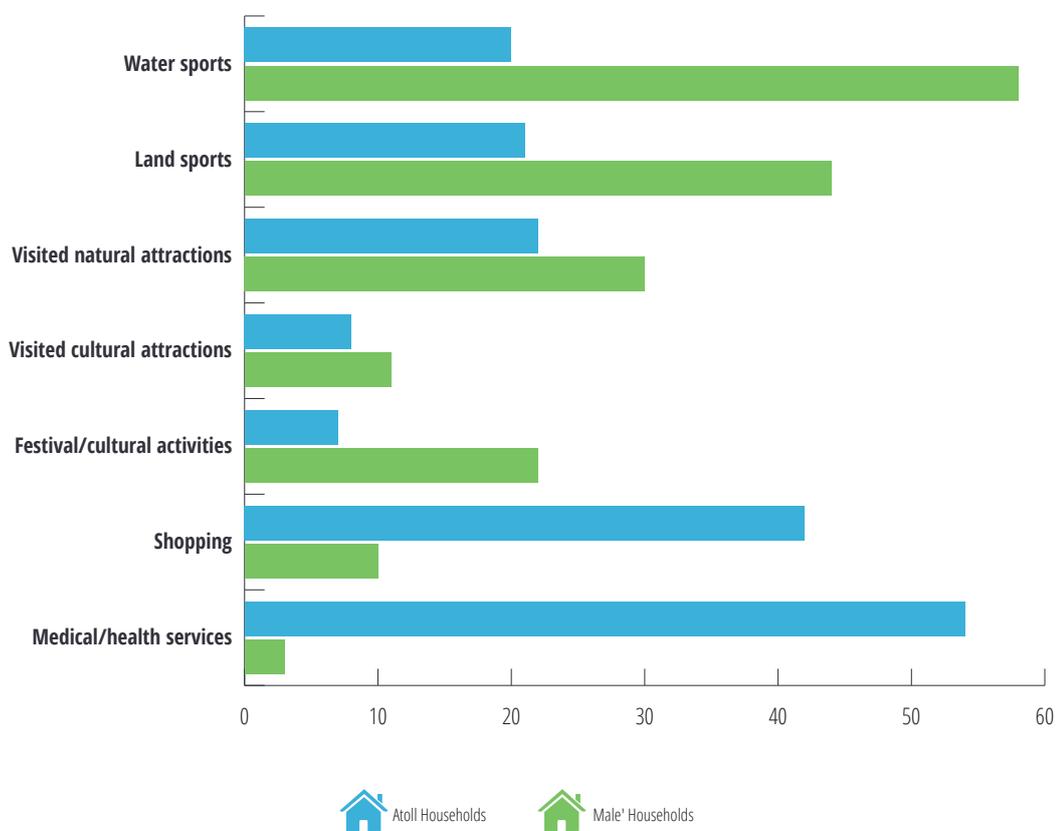
Figure 13. Break down of Total Expenditure on Domestic Tourism Trips (in MVR million)

	Accommodation	Food & Beverages	Air Transport	Sea Transport	Land Transport	Shopping	Sports & Recreation	Cultural Activities	Other	TOTAL
Atoll Households	66.5	84.1	124.2	62.9	15.6	135.9	1.7	2.9	89.8	584
Male' Households	16.3	19.7	33.6	15.9	1.0	4.0	3.9	0.5	13.2	108
All Households	82.9	103.7	157.8	78.9	16.6	139.9	5.7	3.4	103.0	692

2.7. ENGAGEMENT IN ACTIVITIES

Figure 14 shows type of activities visitors engaged during their domestic trips. The type of activities visitors engaged were linked to the main purpose of their travel (see Figure 4). Most popular activities engaged by Atoll households were medical and health services (54% of trips) and shopping (42% of trips). In contrast, engagement in sports and recreational activities are the most popular activities engaged in trips by Male' households. Male' households engaged in water sports and land sports in 58% and 44% of their trips respectively.

Figure 14. Activities Engaged During Domestic Trips

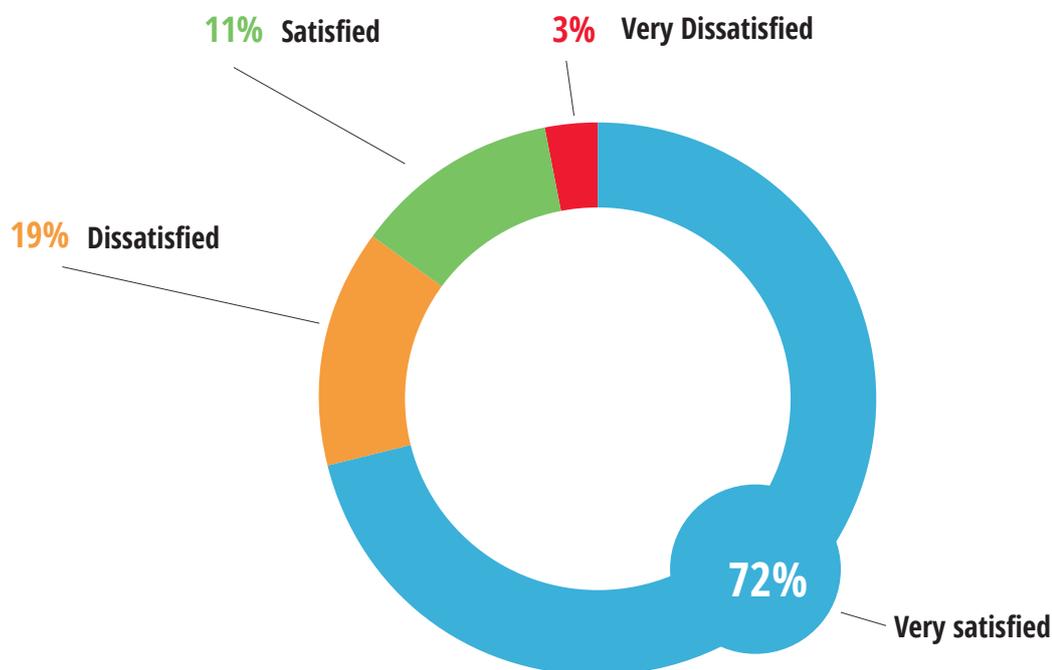


2.8. TRIP SATISFACTION

Figure 15 shows the overall level of satisfaction respondents expressed regarding their most recent trip. A large majority of the respondents noted that they are generally satisfied with all aspects of their domestic trip. Overall 83% of respondents stated they were satisfied or very satisfied with the trip. People who expressed extreme satisfaction (12%) or extreme dissatisfaction (3%) were low,

while 72% of respondents expressed they were satisfied and 14% expressed they were dissatisfied overall.

Figure 15. Level of Satisfaction on Most Recent Trip

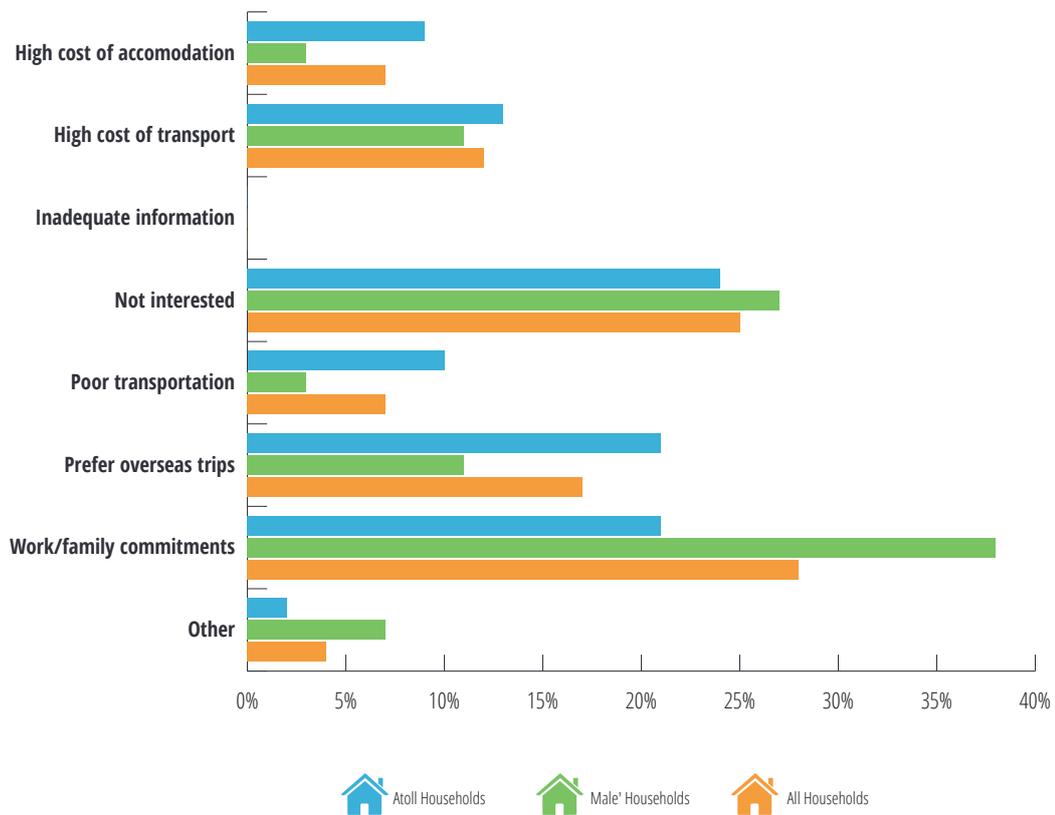


2.9. REASON FOR NOT TAKING A DOMESTIC TRIP

Thirty-one percent of households did not engage in any domestic trip during the survey reference period. Percentage of household in which none of the members engaged in a domestic trip during the past year were higher in Male' (40%) than in the Atolls (25%).

Figure 16 shows the reason cited by households for not having taken any domestic trip during the reference period. Male' households quoted work/family commitments as their number one reason (38%) for not being able to take a domestic trip, while not having an interest to travel domestically is the second main reason (27%). Atoll households cited not having an interest as their main reason (24%) for not taking a domestic trip, followed by work/family commitments (21%) and preference for overseas trips (21%).

Figure 16. Reason for Not Taking a Domestic Trip



High cost of domestic transport had been highlighted by a significant number of households (12% of all households) as a reason for not taking a domestic trip. Nine percent of Atoll households cited high cost of accommodation as the reason for not taking a domestic trip, while only 3% of Male’ households quoted high cost of accommodation for not taking a domestic trip. Ten percent of Atoll households and 3% percent of Male’ households quoted poor transport as holding them back from taking a domestic trip.

2.10. OUTBOUND TOURISM

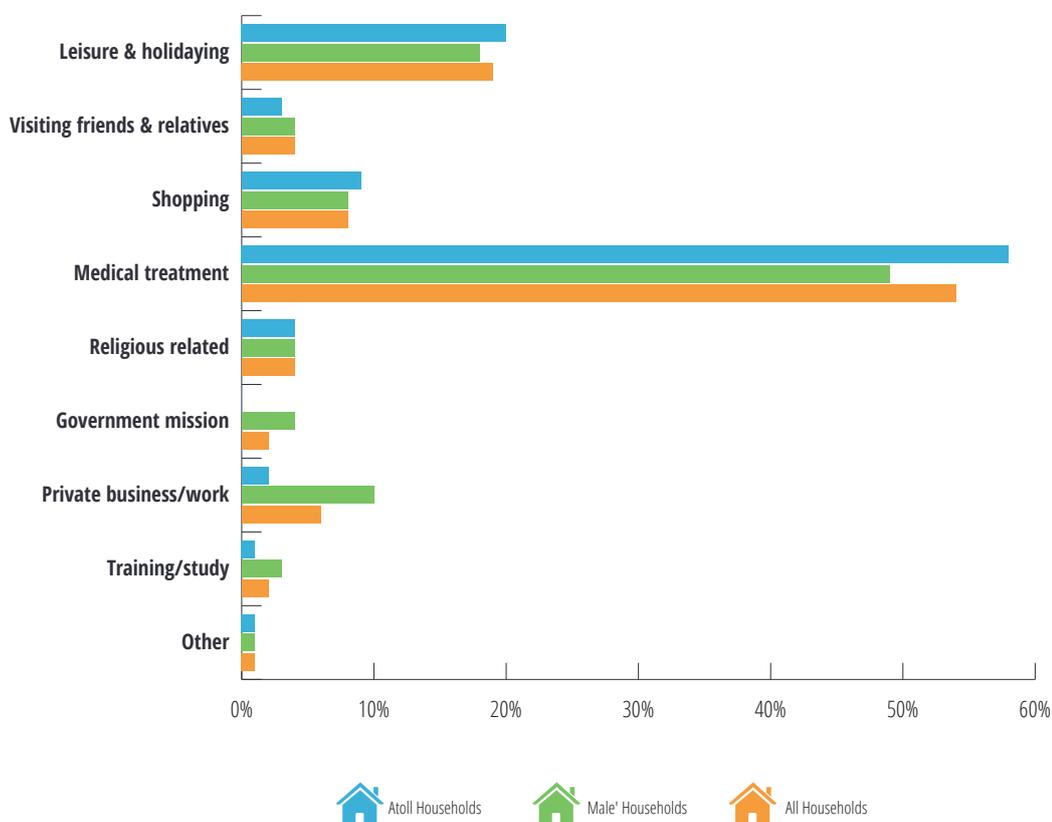
Each year a considerable number of Maldivians engage in outbound travel. Outbound travel has direct and indirect impacts on domestic travel. About 17% of all respondents to the survey noted that they did not engage in domestic travel because they preferred overseas travel (Figure 16). According to the Department of Immigration and Emigration, 196,542

196,542
Maldivians travelled abroad in
2014

Maldivians embarked on outbound travel in 2014. The Maldives Monetary Authority (MMA) conducted 'Maldivians Traveling Abroad Survey' in December 2014, according to which 57% of Maldivians travelled overseas for medical purposes while 32% travelled for vacation.

Figure 17 shows the main purpose for outbound travel cited by respondents to DTS 2016. The findings show about 54% of households travelled abroad for medical treatment during the reference period. The second most popular purpose for outbound travel was leisure and holidaying, cited by 19% of households. Fifty-eight percent of Atoll households travelled abroad for medical treatment while the percentage is slightly less for Male' households at 49%.

Figure 17. Main Purpose of Outbound Tourism Trips



CHAPTER 3. CONCLUSION

As the first study on domestic tourism in the Maldives, DTS 2016 is an insightful exploration into the landscape of domestic tourism in the Maldives and provides a baseline to help map the development trends and build on future studies. In future rounds of the survey, a larger and a more representative sample from across the Atolls is needed to accurately capture economic data for TSA with a calculable degree of accuracy.

DTS 2016 suggests that the majority of Atoll households travelled domestically for medical treatment whereas Male' households engaged in domestic travel for leisure purpose.

This study did not specifically capture medical expenses as a separate category. Realizing its prominence, in future studies a specific category shall be designated to specifically capture medical expenses among country-specific tourism characteristic services.

Given that the pre-eminent purpose for domestic travel is to seek medical services, health sector policy plans and developments initiatives can have profound impact on the landscape of domestic tourism in the country.

Both Atoll and Male' households was found to use public transport as primary mode of transport. Therefore, planning and expanding inter-atoll and inter-island ferry services are paramount in expanding the domestic tourism sector.

The need for efficient and affordable transport networks across the sea and air is further underscored by the finding that a third of expenditure associated with domestic tourism is on transport.

The study underlines the onset of a sweeping transformation taking place in the local hospitality industry triggered by availability of choice for overnight accommodation such as room rental services, guesthouses and cafés across population centres of the country. A thriving domestic tourism sector is important to reduce poverty and inequality through income redistribution.

CHAPTER 4. APPENDICES

4.1. DATA TABLES

Figure 1. Frequency Distribution of Households by Size of Household

Household Size	Atoll Households	Male' Households
1	1.5%	0.5%
2	7.2%	2.7%
3	8.7%	8.5%
4	13.7%	13.8%
5	15.7%	16.5%
6	12.8%	13.1%
7	9.8%	10.4%
8	7.9%	8.0%
9	6.8%	7.5%
10	4.8%	5.6%
11	2.4%	2.7%
12	3.0%	2.7%
13	1.3%	2.9%
14	1.1%	1.2%
15	1.3%	0.7%
16	0.2%	0.3%
17	0.0%	0.3%
18+	1.8%	2.4%

Figure 2. Proportion of Tourist Households

Took Trip	Atoll Households	Male' Households	All Households
Domestic Trip	74.9%	59.8%	69.0%
Outbound Trip	49.2%	58.8%	52.9%

Figure 3. Average Number of Domestic Trips Taken per Household during the Past Year

	Atoll Households	Male' Households	All Households
Overnight Trips	1.60	0.82	1.29
Excursion Trips	2.18	0.58	1.55
All Trips	3.77	1.40	2.84

Figure 4. Main Purpose of the Trip

	Atoll Households	Male' Households	All Households
Government mission	0.1%	2.2%	0.5%
Leisure & holidaying	8.8%	65.1%	19.8%
Medical treatment	60.0%	0.9%	48.4%
Obtain govt services	1.6%	0.0%	1.3%
Private business/work	4.6%	9.1%	5.5%
Religion	0.3%	0.0%	0.3%
Shopping	7.6%	0.1%	6.2%
Training/study	3.4%	0.4%	2.8%
Transit point	1.3%	0.0%	1.0%
Visiting friends & relatives	9.1%	20.6%	11.4%
Other	2.9%	1.7%	2.7%

Figure 5. Main Purpose of Visits to Male' by Atoll Households

	Percentage of Visits
Leisure & holidaying	7.9%
Medical treatment	74.6%
Private business/work	4.3%
Shopping	3.4%
Training/study	1.0%
Transit point	0.8%
Visiting friends & relatives	5.7%
Other	2.2%

Figure 6. Main Purpose of Visits to Atolls by Male' Households

	Percentage of Visits
Government mission	3.1%
Leisure & holidaying	58.7%
Medical treatment	0.4%
Private business/work	13.3%
Training/study	0.8%
Visiting friends & relatives	22.1%
Other	1.6%

Figure 7. Domestic Travel by Month of the Year

Month Travelled	Atoll Households	Male' Households	All Households
Jan	4.1%	1.7%	3.4%
Feb	4.2%	0.2%	3.1%
Mar	2.3%	2.2%	2.2%
Apr	2.4%	1.4%	2.2%
May	1.4%	0.7%	1.2%
Jun	7.3%	5.8%	6.9%
Jul	2.3%	4.3%	2.8%
Aug	4.5%	1.7%	3.8%
Sep	6.7%	26.6%	12.1%
Oct	5.6%	7.7%	6.2%
Nov	24.8%	20.9%	23.7%
Dec	34.5%	26.9%	32.4%

Figure 8. Type of Primary Transportation Used

Mode of Transportation	Atoll Households	Male' Households	All Households
Aeroplane	17.0%	14.6%	16.5%
Cargo boat	15.5%	12.8%	14.9%
Charter/hired boat	3.4%	1.0%	2.9%
Normal passenger ferry	48.5%	52.4%	49.3%
Seaplane	0.6%	3.0%	1.1%
Speed passenger ferry	10.9%	15.7%	11.9%
Other	4.3%	0.5%	3.5%

Figure 9. Place of Stay for Overnight Trips

Accommodation	Atoll Households	Male' Households	All Households
Guesthouse	9.7%	13.1%	10.6%
Hotel	0.3%	0.4%	0.3%
Own home/apartment	3.2%	34.2%	11.2%
Picnic island	0.7%	0.0%	0.5%
Rented room	15.4%	4.7%	12.7%
Resort island	0.2%	5.6%	1.6%
With relatives/friends	63.8%	34.4%	56.2%
Other	6.7%	7.5%	6.9%

Figure 10. Duration of Overnight Trips

No of Nights	% of Trips
1-3 nights	34.6%
4-7 nights	32.2%
8-15 nights	19.3%
16-30 nights	11.4%
31+ nights	2.6%

Figure 14. Activities Engaged During Domestic Trips

	Water sports	Land sports	Visited natural attractions	Visited cultural attractions	Festival/cultural activities	Shopping	Medical/health services
Atoll Households	19.5%	21.2%	22.2%	8.1%	6.9%	41.7%	54.1%
Male' Households	57.5%	43.9%	29.9%	10.5%	22.2%	9.7%	2.6%

Figure 15. Level of Satisfaction on Most Recent Trip

Satisfaction Level	Overall
Very satisfied	11.5%
Satisfied	71.7%
Dissatisfied	13.7%
Very Dissatisfied	3.0%

Figure 16. Reason for Not Taking a Domestic Trip

Issue	Atoll Households	Male' Households	All Households
High cost of accomodation	8.8%	3.1%	6.6%
High cost of transport	12.5%	10.9%	11.9%
Inadequate information	0.0%	0.4%	0.2%
Not interested	24.3%	27.1%	25.4%
Poor transportation	10.3%	2.6%	7.3%
Prefer overseas trips	20.6%	10.9%	16.8%
Work/family commitments	21.3%	38.4%	28.0%
Other	2.2%	6.6%	3.9%

Figure 17. Main Purpose of Outbound Tourism Trips

Purpose	Atoll Households	Male' Households	All Households
Leisure & holidaying	20.4%	18.0%	19.2%
Visiting friends & relatives	3.2%	4.0%	3.6%
Shopping	8.9%	8.0%	8.4%
Medical treatment	58.5%	49.2%	53.9%
Religious related	4.0%	3.7%	3.8%
Government mission	0.4%	3.7%	2.0%
Private business/work	2.4%	10.2%	6.2%
Training/study	1.4%	2.7%	2.1%
Other	1.0%	0.5%	0.8%

12. Where did you sleep (for overnight trips)

فردی تفریحی سفر (تفریح) کے لیے کونسا مکان میں سوئے؟

- Resort
- Picnic island
- Hotel
- Guesthouse
- Rented room
- With relatives/friends
- Own home/apartment
- Other (specify)

- ہمسفری
- پیکنک آئی لینڈ
- ہوٹل
- گسٹ ہاؤس
- کرایہ پر کمرہ
- رشتہ داروں/دوستوں کے ساتھ
- اپنی گھر/اپارٹمنٹ
- دیگر (تفصیل سے)

	Trip 1	Trip 2	Trip 3	Trip 4
Resort				
Picnic island				
Hotel				
Guesthouse				
Rented room				
With relatives/friends				
Own home/apartment				
Other (specify)				

13. Number of nights spent (write "0" if day trip)

فردی تفریحی سفر کے لیے کتنے راتیں گزارے؟

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14. Estimated total cost of the trip

فردی تفریحی سفر کی کل تخمینہ شدہ قیمت

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15. Trip cost breakdown:

فردی تفریحی سفر کی قیمتوں کا تقسیم

- Accommodation
- Food & beverages
- Air transport
- Sea transport
- Land transport
- Shopping
- Sports and recreation
- Cultural activities
- Other expenses

- اتقامت (سفر کے دوران)
- کھانا اور مشروبات
- ہوائی سفر
- سمنی سفر
- زمینی سفر
- خرید
- کھیل اور تفریح
- ثقافتی سرگرمیاں
- دیگر اخراجات

	Trip 1	Trip 2	Trip 3	Trip 4
Accommodation				
Food & beverages				
Air transport				
Sea transport				
Land transport				
Shopping				
Sports and recreation				
Cultural activities				
Other expenses				

16. What were the activities done?

فردی تفریحی سفر کے دوران کیا سرگرمیاں کی گئیں؟

- Water sports
- Land sports
- Visit natural attractions
- Visit cultural attractions
- Festival & cultural activities
- Shopping
- Medical/health services
- Other (specify)
- None

- پانی کی سرگرمیاں
- زمینی سرگرمیاں
- طبیعی جگہوں کا دورہ
- ثقافتی جگہوں کا دورہ
- مہوڑے اور ثقافتی سرگرمیاں
- خرید
- طبیعی/صحت کی سہولتیں
- دیگر (تفصیل سے)
- کوئی نہیں

	Trip 1	Trip 2	Trip 3	Trip 4
Water sports				
Land sports				
Visit natural attractions				
Visit cultural attractions				
Festival & cultural activities				
Shopping				
Medical/health services				
Other (specify)				
None				



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