

Maldivians Travelling Abroad Survey 2017

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Maldives Monetary Authority



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Introduction

This report presents the findings of Maldivians Travelling Abroad (MTA) survey 2017, coupled with analyses of MTA survey results for 2015 and 2016. The report mainly focuses on the purpose of travel, destination and expenditure of Maldivian travellers. The MTA survey is conducted primarily to aid in estimating travel expenditure of the Maldivians, which is one of the main components of the current account of the Balance of Payments (BOP) statistics.

In the current format, the MTA survey has been conducted once every year since 2011. The main reason for including a comparison of the data from previous years is to depict how travel and spending patterns has changed in recent times.



Methodology

The MTA survey 2017 was conducted at the arrival hall of Velana International Airport spanning over 7 days during the peak season for Maldivian travellers. All major flights carrying Maldivians during the survey period were targeted in the survey. Staff from various departments of MMA participated in this survey as enumerators.

In 2017, a web-based questionnaire was introduced, replacing the paper questionnaires used in previous years. Although the survey questionnaire was designed in English, for ease of communication, the survey was conducted in Dhivehi.




Data Processing


The web-based questionnaire used in 2017, allowed the transfer of data to a real-time database. This eliminated the need for data entry from physical documents as practiced in previous years and helped in expediting the process of data analysis.

Similar to the previous year, the data was processed and analysed using the statistical software 'R'. The MMA started using 'R' for data processing in 2015. Hence, it is important to note that the survey results for the period of 2015 to 2017 may not be comparable with the results of the MTA surveys conducted prior to 2015, as the data processing criteria may not be consistent.

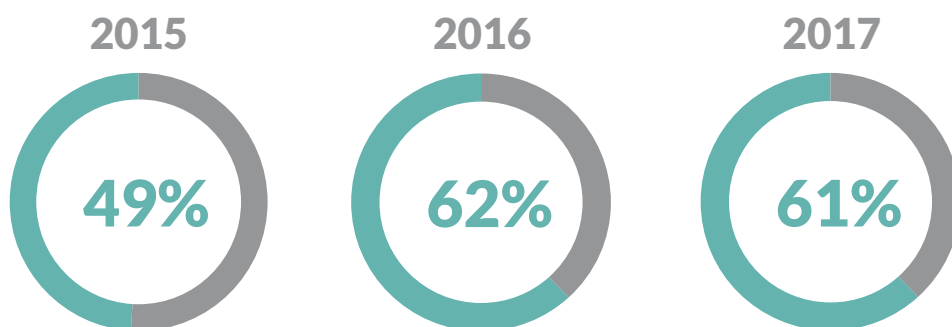
Response Rate

As per the Maldives Immigration's statistics, a total of 6,943 Maldivians arrived during the survey period in 2017, of which 4,220 passengers were surveyed. This represents response rate of 61%. Similarly, the response rates for 2015 and 2016 surveys were 49% and 62%, respectively.

	2015	2016	2017
TOTAL ARRIVED	7,930	7,185	6,943

	2015	2016	2017
TOTAL SURVEYED	3,891	4,488	4,220

RESPONSE RATE



Expenditure on Airfare

Expenditure on Airfare

(Per Person in US Dollars)






	2015	2016	2017
India	266	278	307
Sri Lanka	197	230	233
Malaysia	340	350	395
Thailand	441	477	360
Singapore	503	503	604

The average expenditure on airfare for India gradually increased over the past three years, and stood at US\$307 per person in 2017. Similarly, the average expenditure on airfare to Sri Lanka and Malaysia increased steadily from 2015 to 2017 and stood at US\$233 and US\$395 per person in 2017, respectively. In contrast, the expenditure on airfare to Thailand declined steeply to US\$360 per person in 2017, after an increase in 2016 when compared to 2015. Average airfare quoted by Maldivian travellers to Singapore remained constant in 2015 and 2016 at US\$503, while it increased significantly by 20% in 2017.

Purpose of Travel

This section presents analyses on the main purposes of Maldivian travellers in terms of duration and expenditure.

Purpose of Travel

		2015	2016	2017
	Medical	2,247 (58%)	2,281 (51%)	1,889 (45%)
	Vacation	1,056 (27%)	1,540 (34%)	1,396 (33%)
	Education and Training	244 (6%)	131 (3%)	160 (4%)
	Business and Official	120 (3%)	188 (4%)	122 (3%)
	Other	224 (6%)	348 (8%)	653 (15%)
	TOTAL	3,891	4,488	4,220

The most common purposes of travel cited by the survey respondents were medical and vacation. The share of people who travelled abroad for vacation increased from 27% in 2015 to 34% in 2016 and remained relatively unchanged in 2017. In contrast, the proportion of Maldivians travelling to obtain medical services decreased in 2016 compared to the previous year, and further declined to 45% in 2017. Meanwhile, travellers for business and official purposes remained largely unchanged with just over 3% during the period. Respondents citing education and training as their purpose of travel decreased in 2016, followed by a slight upturn in 2017. The remaining passengers were classified as 'other', which is a residual category as the purpose of travel for these passengers could not be classified under a single broad category identified in the survey. The survey results show that travellers for other purposes increased over the period.

Medical Travel

Travel for Medical Purposes (% Share)

	2015		2016		2017	
	NO	%	NO	%	NO	%
India	1,281	57%	1,312	58%	1,233	65%
Sri Lanka	823	37%	774	34%	493	26%
Malaysia	19	1%	22	1%	11	1%
Thailand	81	4%	121	5%	122	6%
Singapore	12	1%	12	1%	2	>1%
Other	31	1%	40	2%	28	1%
TOTAL	2,247		2,281		1,889	

The most popular countries among Maldivians travelling to obtain medical services are India and Sri Lanka. While India accounted for 65% of the Maldivian medical travellers in 2017, a notable increase was recorded in 2017. On the other hand, the share of Maldivians travelling to Sri Lanka to obtain medical services gradually declined over the period and accounted for 26% in 2017. Meanwhile, the Maldivians medical travellers to Thailand has been increasing although at a marginal pace.

Average Duration of Stay of Medical Travellers (in days)

	2015	2016	2017
India	14	14	13
Sri Lanka	10	11	11
Malaysia	17	17	19
Thailand	10	9	10
Singapore	8	12	14
Other	17	23	26

The average duration of stay for medical travelers to India and Sri Lanka remained relatively constant from 2015 to 2017. In particular, a medical traveller to India is estimated to stay on average for around 14 days during the period, while a medical traveller is estimated to stay in Sri Lanka for the same purpose for around 11 days on average. Similarly, the average duration of stay in Thailand for medical purposes remained relatively constant over the past three years, at just over 9 days. The average duration of a medical travellers to Malaysia increased marginally (19 days in 2017), after remaining constant in 2015 and 2016. Meanwhile, the average duration of stay, in Singapore for the same purpose, increased gradually over time.

Average Expenditure on Medical Purposes (Per Person in US Dollars)

	2015	2016	2017
India	512	641	687
Sri Lanka	515	634	499
Malaysia	973	589	1,320
Thailand	864	1,416	1,359
Singapore	663	1,186	2,500
Other	711	2,357	1,401

Travel payments consist of all expenses on goods and services of travellers. Therefore, the expenditure of a person travelling for medical purposes does not necessarily reflect the amount spent on acquiring medical services alone, but rather includes the expenses for the entire trip; inclusive of food, accommodation, average duration of their stay and other personal expenses.

Looking into details, the average expenditure of a medical traveller to India stood at US\$641 in 2016 which was an increase of 25% in comparison to 2015, with a further increase of 7% recorded in 2017. Meanwhile, the average expenditure of a traveller to Sri Lanka for medical purposes declined by 21%, despite reporting an upturn of 23% in 2016. The average expenditure of a medical traveller to Singapore was observed to have been increasing significantly over the past three years and stood at US\$2,500 in 2017. Meanwhile, the average expenditure of a medical traveller to Thailand was estimated at US\$1,359 in 2017— a marginal decline when compared with an annual increase of 64% in 2016. The average expenditure of a Maldivian travelling to Malaysia stood at US\$1,320 in 2017, which was a significant increase when compared with 2016.

Travel for Vacation

Travel for Vacation (% Share)

	2015		2016		2017	
	NO	%	NO	%	NO	%
India	202	19%	241	16%	171	12%
Sri Lanka	549	52%	665	43%	556	40%
Malaysia	119	11%	318	21%	280	20%
Thailand	80	8%	141	9%	265	19%
Singapore	32	3%	51	3%	34	2%
Other	74	7%	124	8%	90	6%
TOTAL	1,056		1,540		1,396	

Looking into details of the Maldivians travelling abroad for vacation, the top choice of destination among the Maldivian holidaymakers continued to be Sri Lanka, with 40% of travellers returning from that country. This was followed by Malaysia with a share of 20% in 2017. Maldivian holiday makers to Thailand increased substantially during 2017, making the country the third most popular country among the holiday makers. The number of Maldivians travelling to India for vacation declined steadily over the past three years and was recorded as the fourth choice in 2017 with a share of 12%.

Average Duration of Stay of Vacationers (In Days)

	2015	2016	2017
India	13	13	17
Sri Lanka	9	10	9
Malaysia	14	12	13
Thailand	11	9	9
Singapore	16	7	9
Other	13	13	14

Delving into the average duration of Maldivian holidaymakers by destination, the duration of stay in Sri Lanka and Malaysia remained relatively constant over the past three years. Meanwhile, the average duration of stay for Maldivian vacationers to India leaped to 17 days in 2017 when compared with the average duration of 13 days in 2015 and 2016. On the other hand, the average duration of Maldivian holidaymakers to Thailand declined from 11 days in 2015 to 9 days in 2016 and remained unchanged in 2017. The average duration of stay of Maldivians travelling to Singapore for vacation declined significantly from 16 days in 2015 to 7 days in 2016, and picked up marginally in 2017.

Average Expenditure on Vacation (Per Person in US Dollars)

	2015	2016	2017
India	567	585	560
Sri Lanka	503	475	561
Malaysia	835	806	751
Thailand	963	888	825
Singapore	1,088	931	1,859
Other	1,138	1,138	1,226

With regard to the expenditure of the Maldivian vacationers, it was observed that the average expenditure of a holidaymaker to Sri Lanka was recorded to be US\$561 in 2017; which is an increase of 18% compared to the previous year. However, in 2017 the average expenditure of visitors to Malaysia and Thailand for the same purpose declined by 7%, and recorded US\$751 and US\$825 respectively. The average expenditure of visitors to India for vacation declined in 2017 and stood at US\$560 after marking an increase of 3% from 2015 to 2016. The average expenditure of Maldivian holidaymakers in Singapore almost doubled compared to 2016 and is estimated to have spent US\$1,859 in 2017.

Analysis by Destination of Travel

In this section, the primary focus is to further analyse the most popular destinations among the Maldivian travellers in terms of average duration of stay, average expenditure per trip and average expenditure per day.

Destination of Travel

	2015		2016		2017	
	NO	%	NO	%	NO	%
India	1,535	39%	1,613	36%	1,509	36%
Sri Lanka	1,574	40%	1,678	37%	1,293	31%
Malaysia	222	6%	415	9%	351	8%
Thailand	219	6%	302	7%	482	11%
Singapore	85	2%	89	2%	66	2%
Other	256	7%	391	9%	519	12%
TOTAL	3,891		4,488		4,220	

As per the survey result, the South Asian and South-east Asian countries remained the most popular destinations among the Maldivian travellers. With regard to leading countries, India and Sri Lanka continued to be the primary travel destinations with a combined total share of 67%, followed by Thailand (11%), Malaysia (8%) and Singapore (2%) in 2017. Despite India and Sri Lanka being the most popular destinations, the collective share of the Maldivians travelling to these destinations declined from 79% in 2015 to 67% in 2017. On the other hand, travellers to Thailand increased gradually over the past three years, and recorded a share of 11% in 2017. Similarly, travellers returning from countries other than the aforementioned countries, as well as those who travelled to more than one country, increased progressively over the past three years and accounted for 12% of travellers in 2017.



India

Travel to India

		Share of Travellers			Duration of Stay (in Days)			Expenditure per Trip (in US Dollars)		
		2015	2016	2017	2015	2016	2017	2015	2016	2017
TOTAL		1,535	1,613	1,509	14	14	15	524	652	678
o/w	Health	1,281 (83%)	1,312 (81%)	1,233 (82%)	14	14	13	512	641	687
	Vacation	202 (13%)	241 (15%)	171 (11%)	13	13	17	567	585	560
	Business	7 (<1%)	8 (<1%)	15 (1%)	6	5	7	745	2,170	1,150

Looking into the past three years' survey results, over 80% of Maldivian visitors to India revealed that they travelled to India to obtain medical services, while on average 13% of the travellers' main purpose for the past 3 years was for vacation. Moreover, travellers to India for business accounted for around 1% of the respondents travelling to the country. The average duration of a trip to India remained relatively constant over the period and was estimated to last two weeks, while the average expenditure per trip for a Maldivian travelling to India was estimated to have increased over the period and stood at US\$678 in 2017.



Sri Lanka

Travel to Sri Lanka

	Share of Travellers			Duration of Stay (in Days)			Expenditure per Trip (in US Dollars)		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
TOTAL	1,574	1,678	1,293	11	11	11	554	594	555
o/w Health	823 (52%)	774 (46%)	493 (38%)	10	11	11	515	634	499
Vacation	549 (35%)	665 (40%)	556 (43%)	9	10	9	503	475	561
Business	38 (2%)	68 (4%)	32 (2%)	3	3	4	1,030	927	913

Among Maldivian travellers who visited Sri Lanka, the main purpose of visit shifted in the year 2017. As such, in 2015 and 2016 the main purpose was cited as to obtain medical services, while vacation was the main purpose in 2017. Hence, the share of the Maldivian visitors to Sri Lanka for vacation increased gradually from 35% in 2015 to 43% in 2017. On the other hand, the proportion of travellers to Sri Lanka for medical services decreased substantially from 52% in 2015 to 38% in 2017, while the proportion of business travellers remained rather constant and accounted for 3% on average over the past three years. The average duration of stay of a Maldivian traveller to Sri Lanka and their average expenditure remained largely unchanged over the past three years. As such, it was estimated that a traveller stayed for 11 days and spent on average US\$555 in 2017 on average.

Travel to Thailand

		Share of Travellers			Duration of Stay (in Days)			Expenditure per Trip (in US Dollars)		
		2015	2016	2017	2015	2016	2017	2015	2016	2017
TOTAL		219	302	482	10	8	10	844	1,079	962
o/w	Health	81 (37%)	121 (40%)	122 (25%)	10	9	10	864	1,416	1,359
	Vacation	80 (37%)	141 (47%)	265 (55%)	11	9	9	963	888	825
	Business	39 (18%)	36 (12%)	24 (5%)	6	6	6	847	1,279	1,016

The share of the Maldivian travellers to Thailand increased gradually over the past three years and accounted for 11% in 2017. As per the survey results, the main purpose of visit was cited as vacation, and the share of such visits increased from 37% in 2015 to 55% in 2017. Although obtaining medical services was quoted as the second main reason for visiting Thailand, its share declined from 40% in 2016 to 25% in 2017. Meanwhile the share of the Maldivian business travellers to Thailand was significantly lower and stood at 5% in 2017 when compared with the preceding years. Further, a Maldivian traveller was estimated to stay in Thailand for 10 days on average in 2017, a slight increase from the previous year. With regard to expenditure, despite the increase in average duration of the stay, the average expenditure of a person per trip declined by 11% and recorded US\$962 in 2017.

Travel to Malaysia

	Share of Travellers			Duration of Stay (in Days)			Expenditure per Trip (in US Dollars)		
	2015	2016	2017	2015	2016	2017	2015	2016	2017
TOTAL	222	415	351	43	20	23	1,062	980	785
o/w Health	19 (9%)	22 (5%)	11 (3%)	17	17	19	973	589	1,320
Vacation	119 (54%)	318 (77%)	280 (80%)	14	12	13	835	806	751
Business	1 <1%	4 1%	7 2%	4	6	7	700	667	2,500

The share of the Maldivian travellers to Malaysia remained quite constant over the past three years and accounted for 8% in 2017. Vacation was cited as the most common purpose of travel to Malaysia, while the number of people citing their purpose of travel as to obtain medical services declined to 3% compared with a 9% in 2015. The average duration of stay for the Maldivian travellers to Malaysia significantly declined in 2016 (20 days) when compared with 2015 (43 days), and slightly improved in 2017. With regard to the expenditure, despite the increase in the duration of the average stay, the average expenditure of a person per trip declined by 20% annually, when compared with the previous year, and recorded US\$785 in 2017.

Limitations

It is advised that the results of this survey be interpreted cautiously, taking into account the following factors.

Firstly, the survey has been conducted during the peak season for the Maldivian travellers i.e. year-end school holidays; hence the survey results in terms of purpose of travel may not necessarily be same for the rest of the year or off-peak travel periods.

Secondly, the coverage of students studying abroad has remained low for the past three years. This may be attributed to the fact that travel patterns of students depends on their respective academic calendars which may not coincide with the survey period.

Lastly, the expenditure of airfare collected in the survey may not necessarily reflect the airfare throughout the year. Considering the survey period coincides with peak travel season for the Maldivians, airfares quoted in the survey may represent seasonally adjusted price marking and/or promotional airfares introduced for the period. It is also possible that prices of airline tickets relate to the booking period of travellers.



Maldives Monetary Authority

Boduthakurufaanu Magu

Male' - 20182

Republic of Maldives

Tel: (960) 3312343

Fax: (960) 3323862

Email: mail@mma.gov.mv

Website: www.mma.gov.mv