



SEYCHELLES WILLINGNESS TO PAY SURVEY

SUMMARY OF RESULTS
PRESENTATION TO SEYCCAT FINANCE COMMITTEE
MONDAY 28 OCTOBER 2019
MINISTRY OF FINANCE CONFERENCE ROOM, LIBERTY HOUSE

Survey Objectives

Main objective

- to conduct a willingness to pay (WTP) survey to determine the feasibility of adding an environmental levy to Seychelles' existing departure fees to invest in the natural resources in Seychelles through conservation, management and research.

Specific objectives

- Ascertain the visitors' willingness to pay an additional fee to invest in the natural heritage assets in Seychelles and the maximum they are willing to pay;
- Ascertain the importance of certain attributes in the visitors' decision to visit Seychelles; and
- Obtain feedback from visitors on their experiences during their stay in Seychelles, in terms of activities participated in, their level of satisfaction and their broad vacation expenditure categories.

Methodology: sampling plan

- A random sample of 1500 was to be selected
- 1/3 each of visitors entering, leaving and at the end of their stay
- Location of visitors matched 2017 statistics (66% Mahe, 19% Praslin, 5% La Digue 10% Other islands & vessels).

I.1. Arrival lounge, Seychelles International Airport	
Mahe	330
La Digue	25
Other Islands	30
Vessels	20
Total: Arrival lounge	405
I.2. Domestic Terminal at the airport (visitors going straight to Praslin on 95 disembarking)	
TOTAL: ARRIVING	500
II. VISITORS IN THE MIDDLE OF STAY	
II.1. Mahe	
	330
• Beau Vallon Beach	110
• Anse Royale Beach	110
• Port Launay Beach (Ephelia)	110
II.2. Praslin	
	95
• Praslin Airport	24
• Baie Ste Anne Jetty	24
• Anse Lazio	24
• Cote d'Or Beach	23
II.3. La Digue	
	25
• La Digue Jetty	13
• La Digue beaches	12
II.4. On vessels	
	20
• Eden Island Marina	10
• Inter-Island Quay	10
II.5. Other Islands	
	30
• Domestic terminal (Passengers flying to Desroches, Bird, Denis)	15
• Silhouette Terminal (Bel Ombre)	15
TOTAL: MIDDLE OF STAY	500
III. VISITORS DEPARTING	
III.1. Departure lounge, Seychelles International Airport	
Mahe	330
Praslin	95
La Digue	25
Other Islands	30
Vessels	20
TOTAL: DEPARTING	500

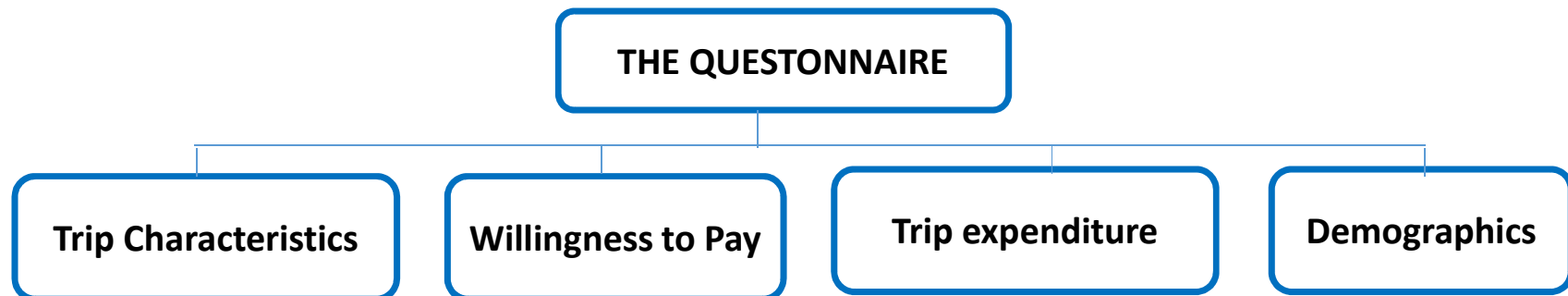
Survey Methodology – cont'd

Dates

- Pilot Survey: 5 – 9 August 2019
- Main Survey: 15 August – 7 September 2019

Surveyors

- Trained Field Supervisors
- Trained Research Assistants - Echo School Teachers/Call Centre employees/Unisey Students



Respondents by survey location and stage of trip

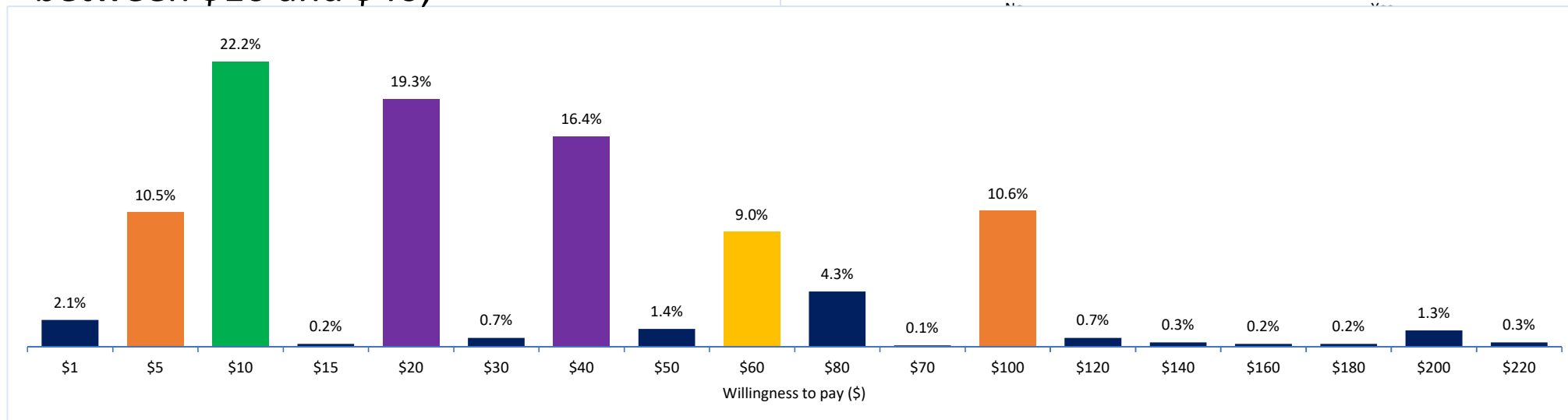
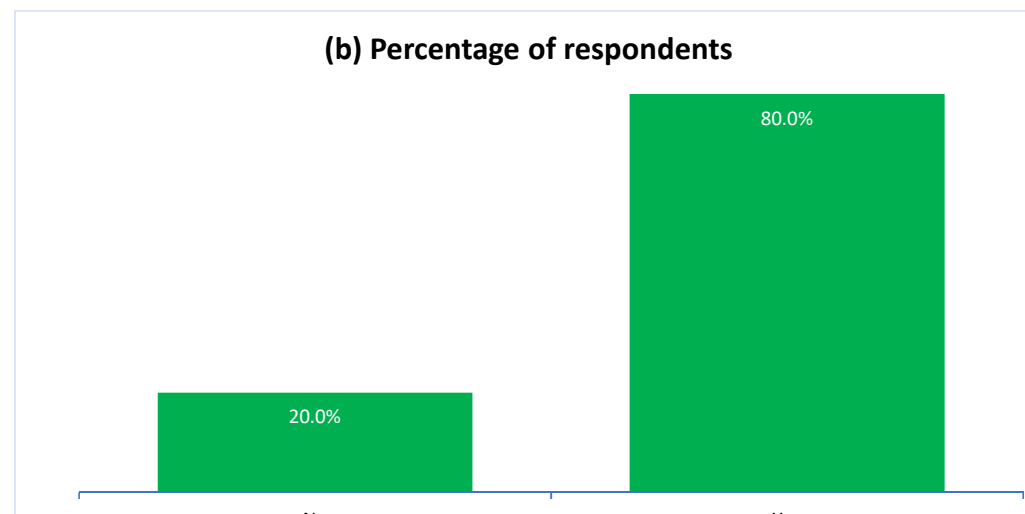
	Stage of trip				
Island	Entering	Middle	Leaving	Total	Percentage
La Digue	15	53	19	87	7.9%
Mahé	229	238	263	730	66.3%
Praslin	57	156	71	284	25.8%
Total	301	447	353	1,101	100.0%
Percentage	27.3%	40.6%	32.1%	100.0%	

76% Response rate

VISITORS' WILLINGNESS TO PAY

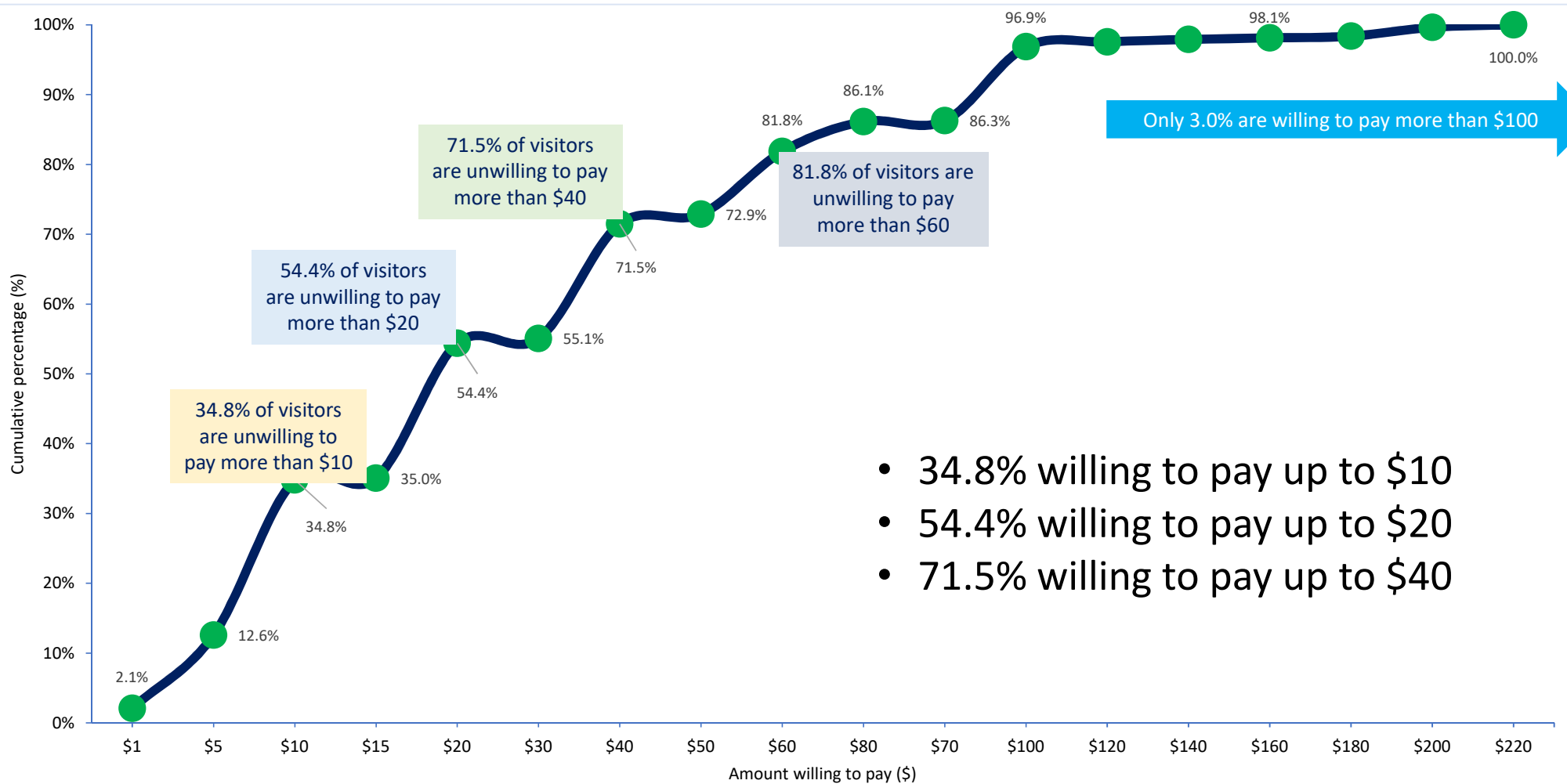
Visitors' willingness to pay and the amount (n=1,101)

- 80% of visitors surveyed are willing to pay an environmental fee
- The 20% unwilling to pay because Seychelles is expensive and the fee will make it more so.
- 58.9% respondents are willing to pay between \$10 and \$40;



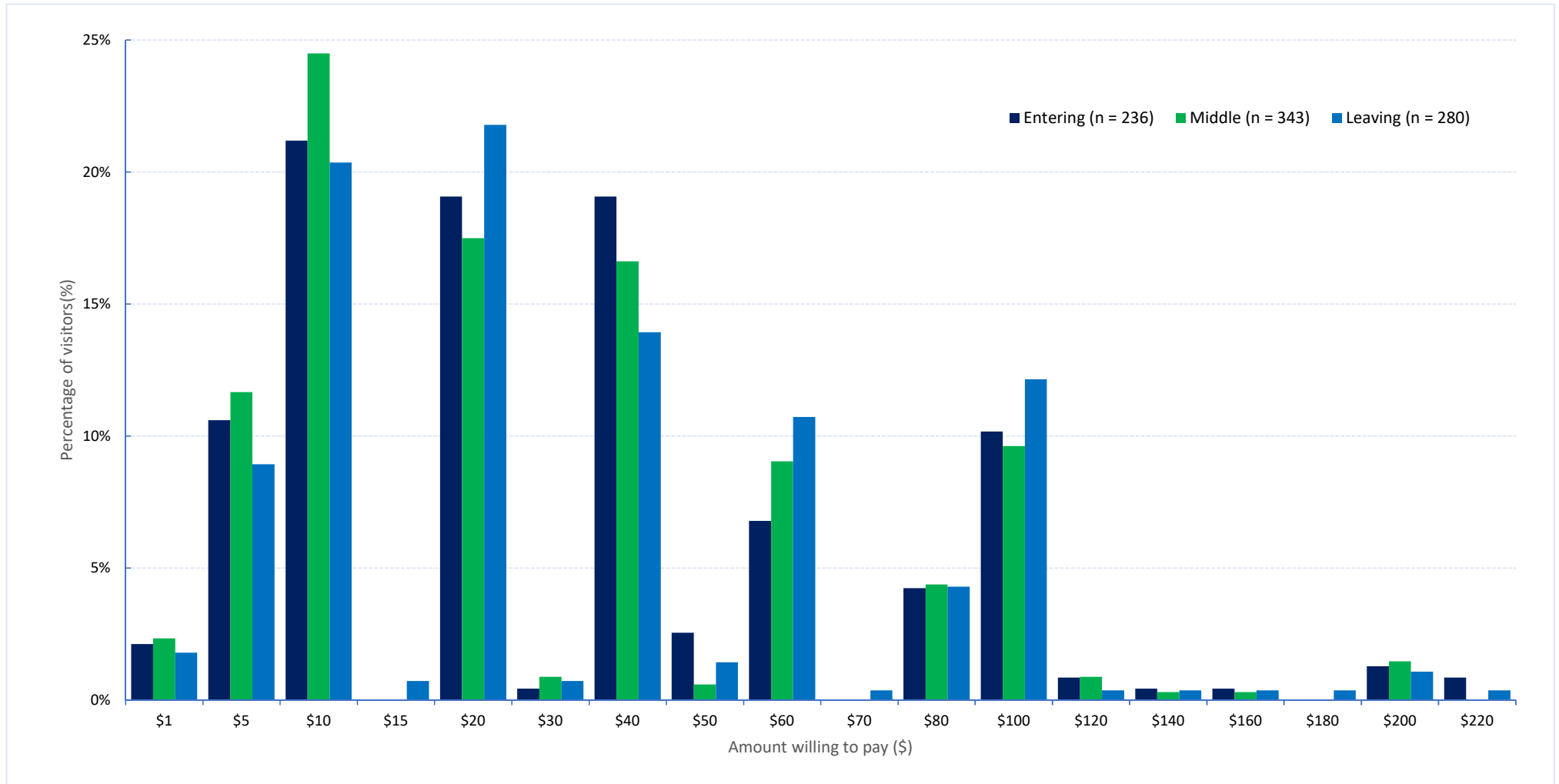
Notes: (1) Total respondents = 859 visitors. Of the 881 respondents that said that they were willing to pay, 22 did not indicate a specific amount and were not included in the analysis.
 (2) Measures of central tendency: mean = \$39.1; median = \$20; and mode \$10.

Amount visitors willing to pay, cumulative %



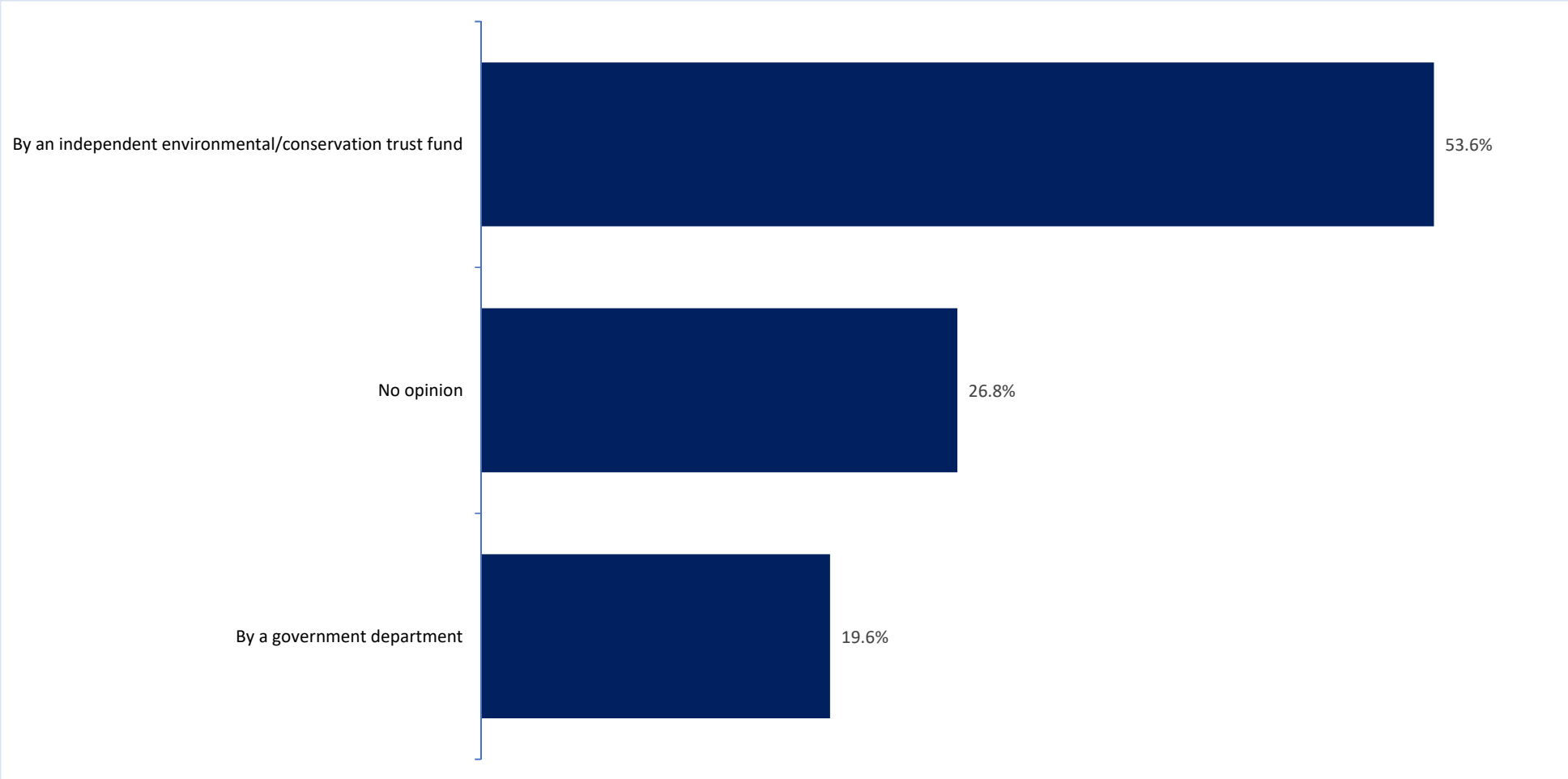
Notes: (1) Total respondents = 859 visitors. Of the 881 respondents that said that they were willing to pay, 22 did not indicate a specific amount and were excluded in the analysis. (2) The cumulative percentage for a given \$ amount is the total percentage of the \$ amount plus lower dollar amounts, if any.

Willingness to pay by stage of trip



Note: Total respondents = 859 visitors. Of the 881 respondents that said that they were willing to pay, 22 did not indicate a specific amount and were not included in the analysis.

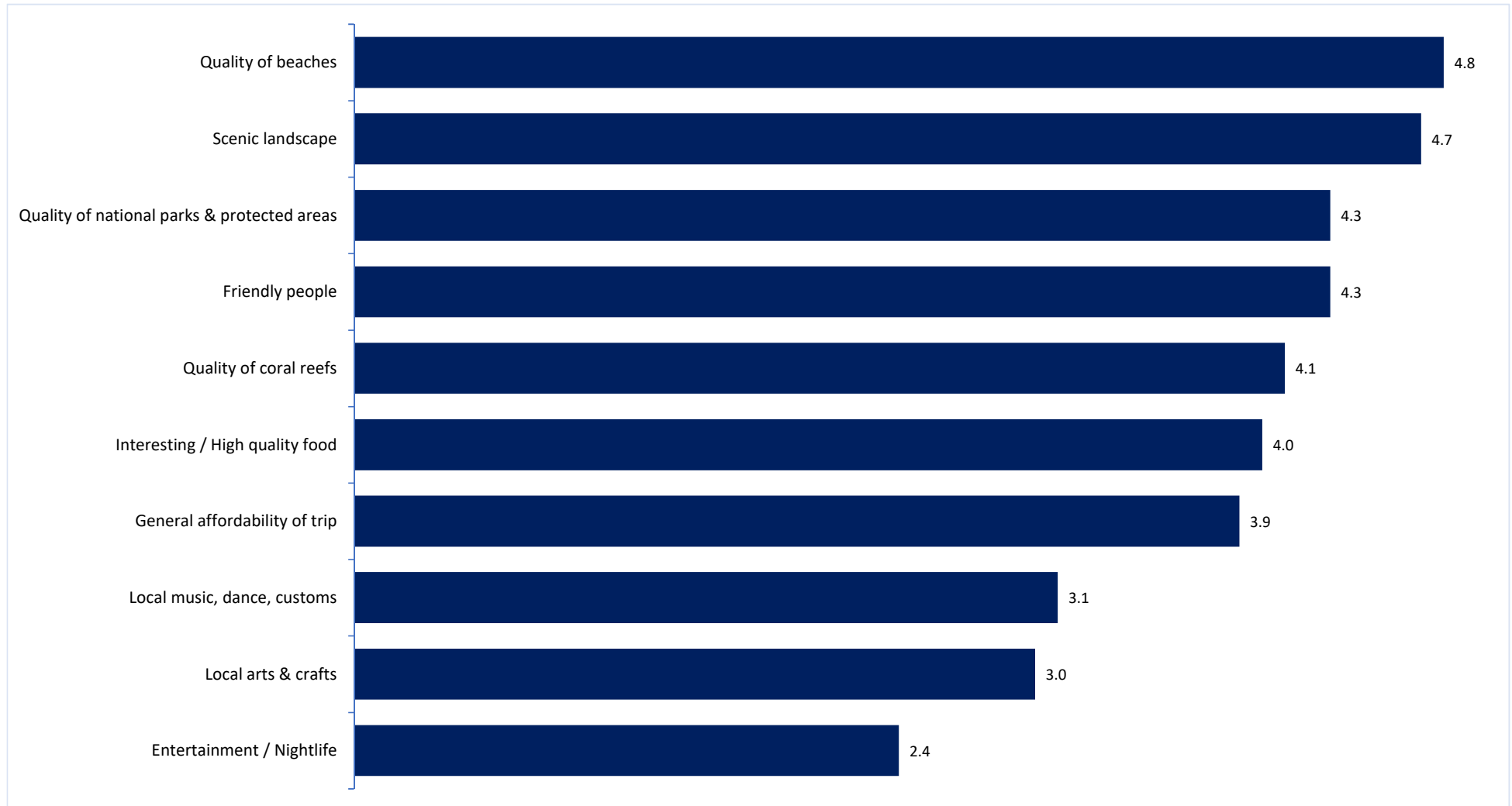
Who should manage the funds?



Note: Total respondents = 881 visitors.

Importance of certain attributes in the visitors' decision to visit Seychelles;

Importance of attributes in deciding to visit Seychelles



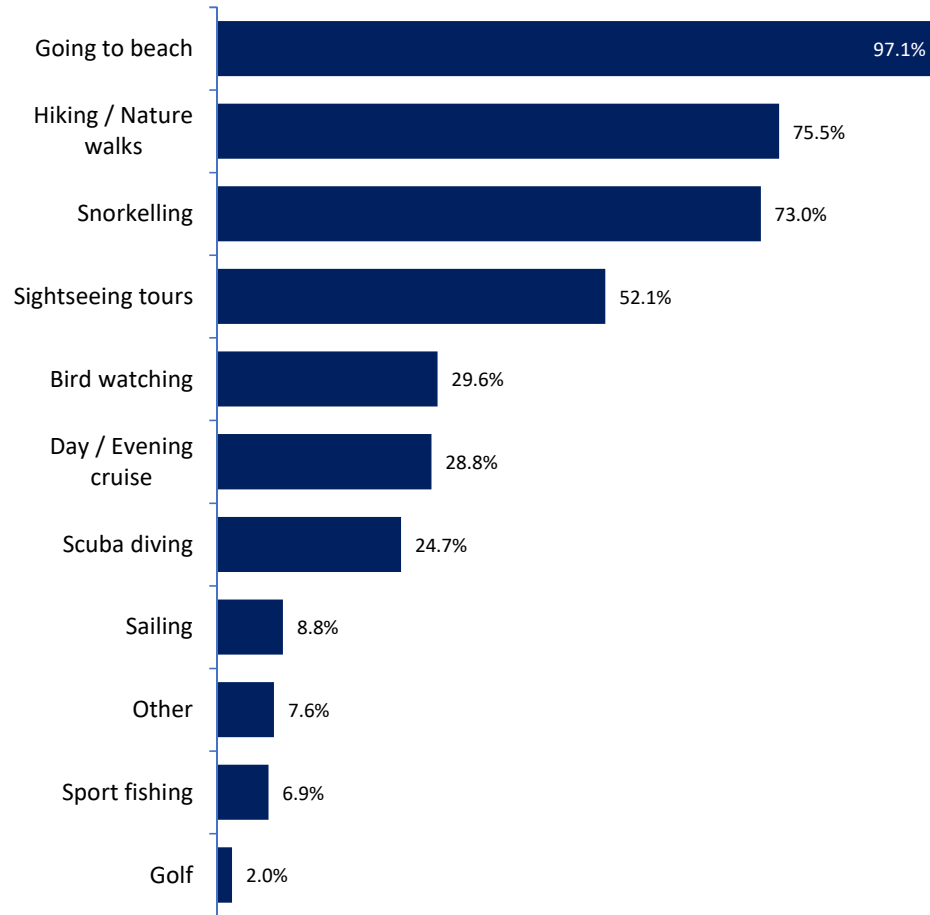
Notes: (1) Total respondents = 1,101 visitors.

(2) Minimum = 1 and maximum = 5.

Visitors experiences and their level of satisfaction and broad vacation expenditure categories.

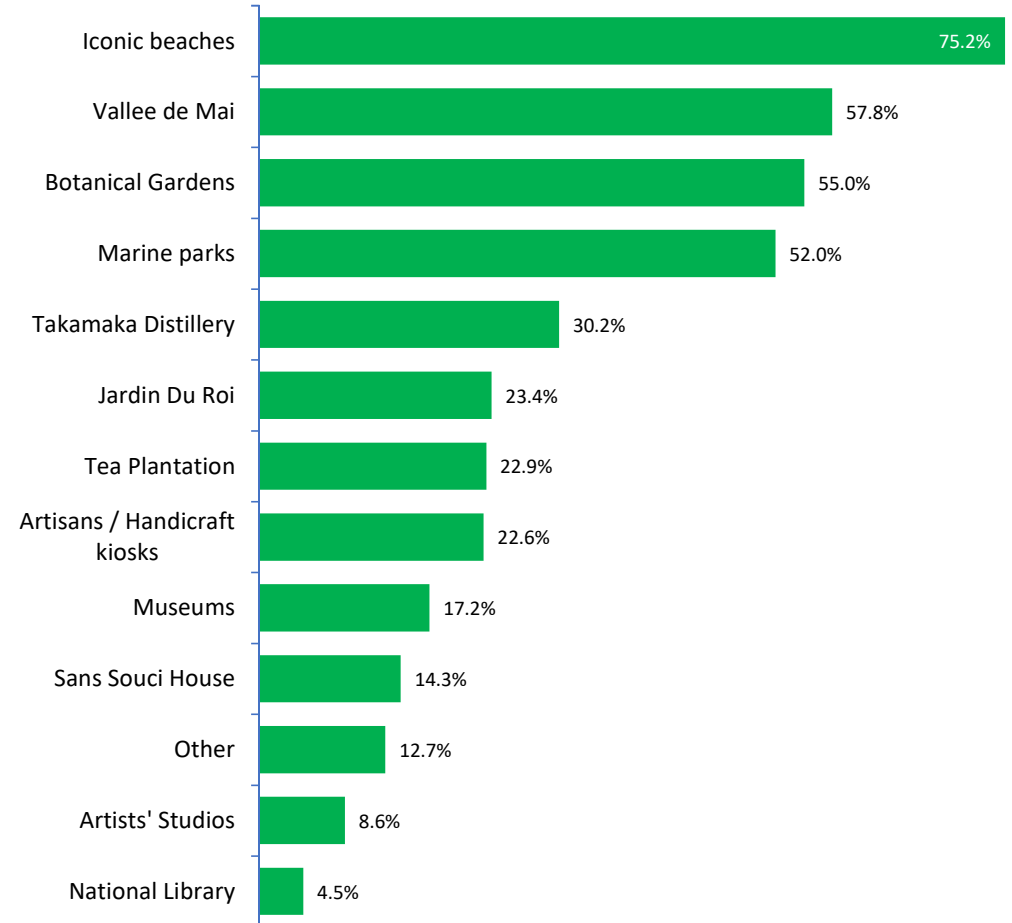
Activities and sites/attractions participated/plan to participate in

(a) Activities



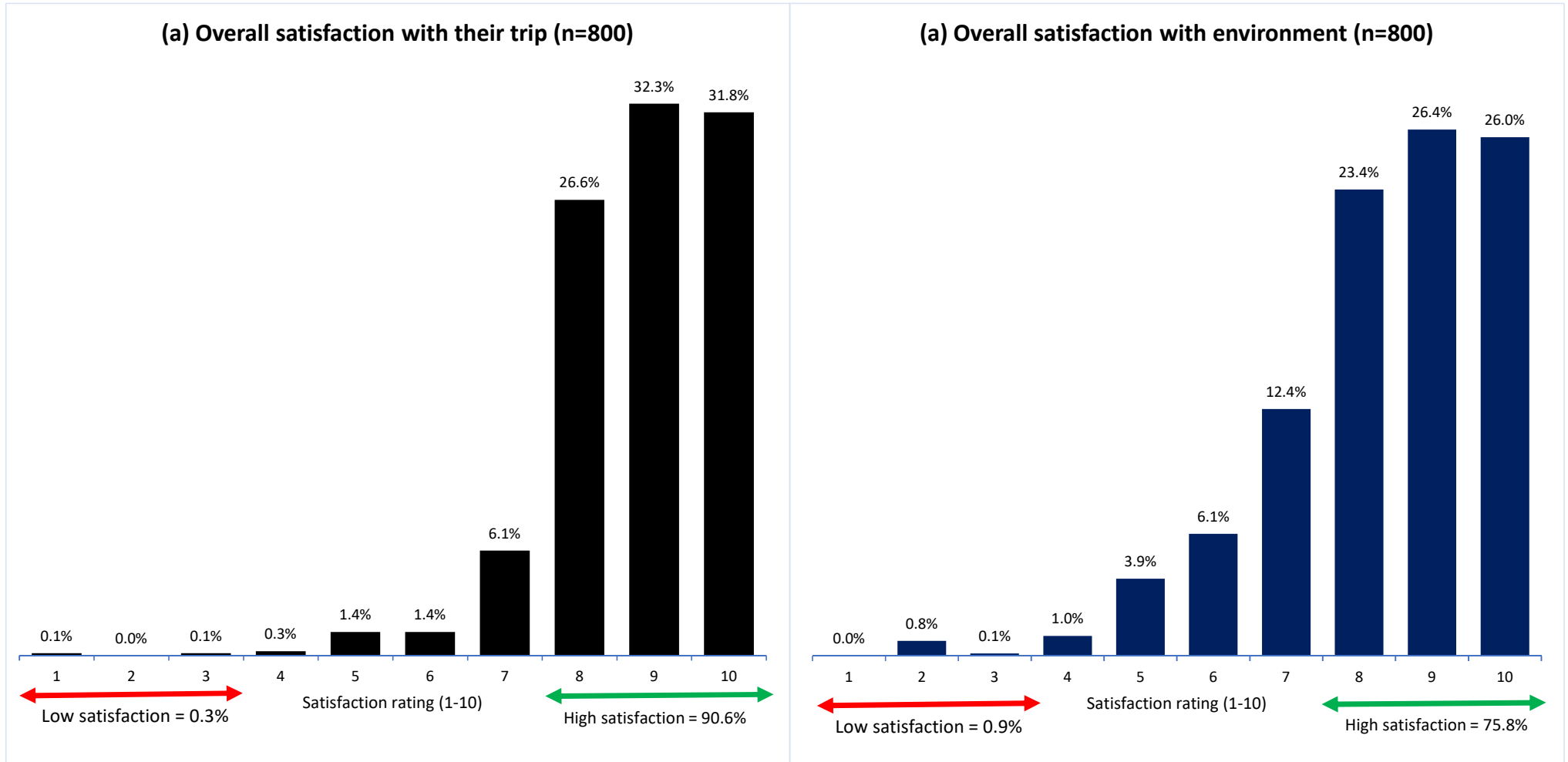
Note: Total respondents = 1,101 visitors.

(b) Attractions



Note: Total respondents = 1,101 visitors.

Visitors' levels of satisfaction with their trip and the environment



Notes: (1) Total respondents = 800 visitors, with 447 in the middle of their trips and 353 at end of their trips.

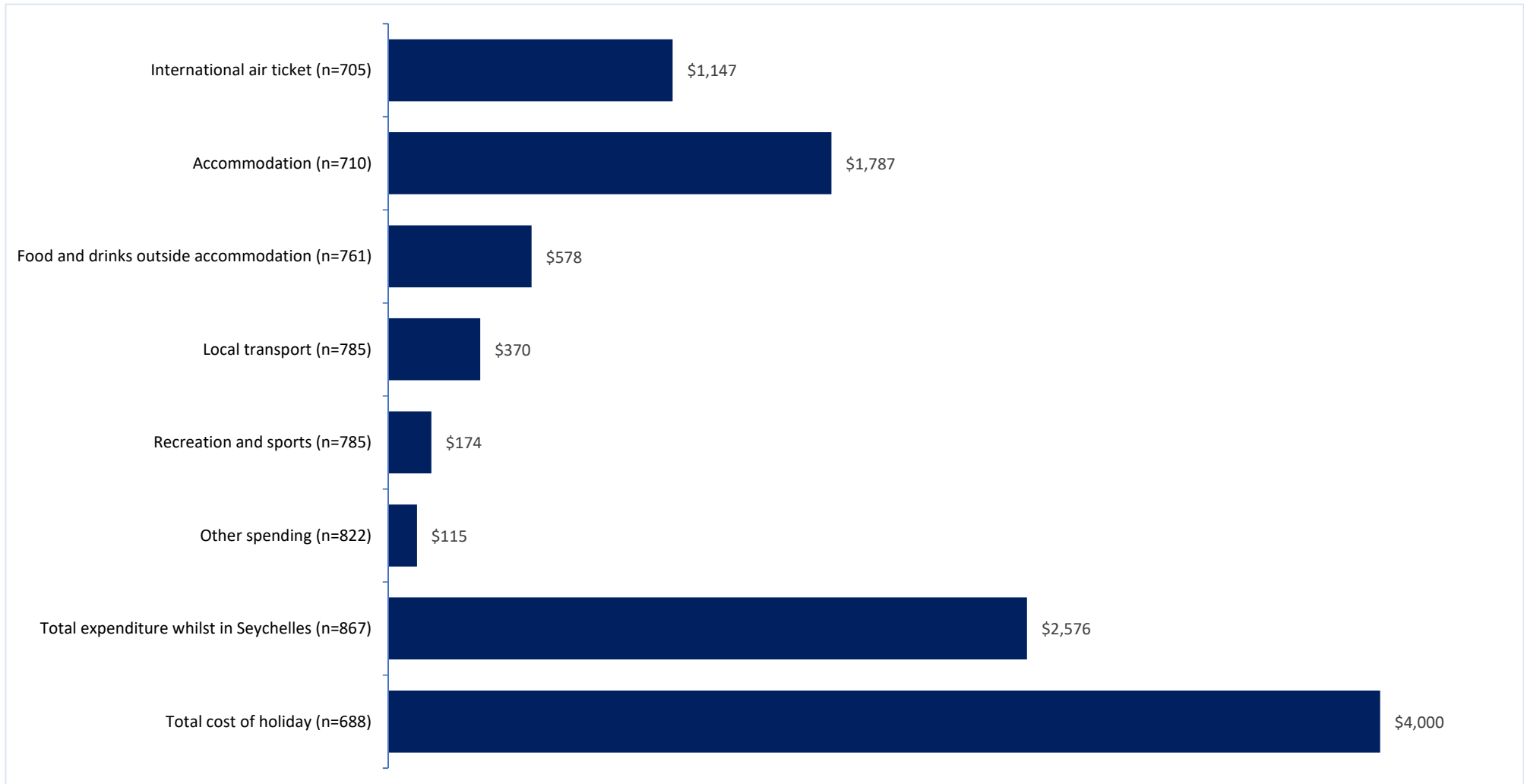
(2) Weighted average satisfaction rating for visitors in the middle of their trip, at the end of their trip and overall = 8.8.

(3) Satisfaction ratings 1-3 are considered low, while satisfaction ratings 8-10 are considered high.

What visitors expect to make their stay better

What expected	Frequency
Environmental sustainability (Must do more to protect the environment; general cleanliness; not enough bins especially at beaches; need for more recycling; state of coral reefs; and renewable energy sources)	75
Affordability of Seychelles as a tourism destination	74
Road transport infrastructure and public services (Quality of roads; road safety; unlit roads; pavements; road signs; information about schedule of public transportation; availability of bus services at night)	48
Better tourist services and facilities (Variety of food; access to and facilities at tourist attractions; tourist information; and quality of accommodation)	41
Weather	39
Customer service (Immigration officers; at tourist establishments; and friendliness of local population)	19
More maritime and adventure tourism activities (underwater diving; jet skis; and zip lining)	18
More cultural tourism activities (Cultural activities; entertainment; night life; and casino)	14
La Digue (Number of cars, overcrowded, overly developed, weak water and electricity infrastructure, too many buildings, and lost charm)	14
Others (Internet/Wi-Fi; security on the beach; stray dogs; and access to Outer Islands)	23

Visitors' average expenditure



CONCLUSIONS

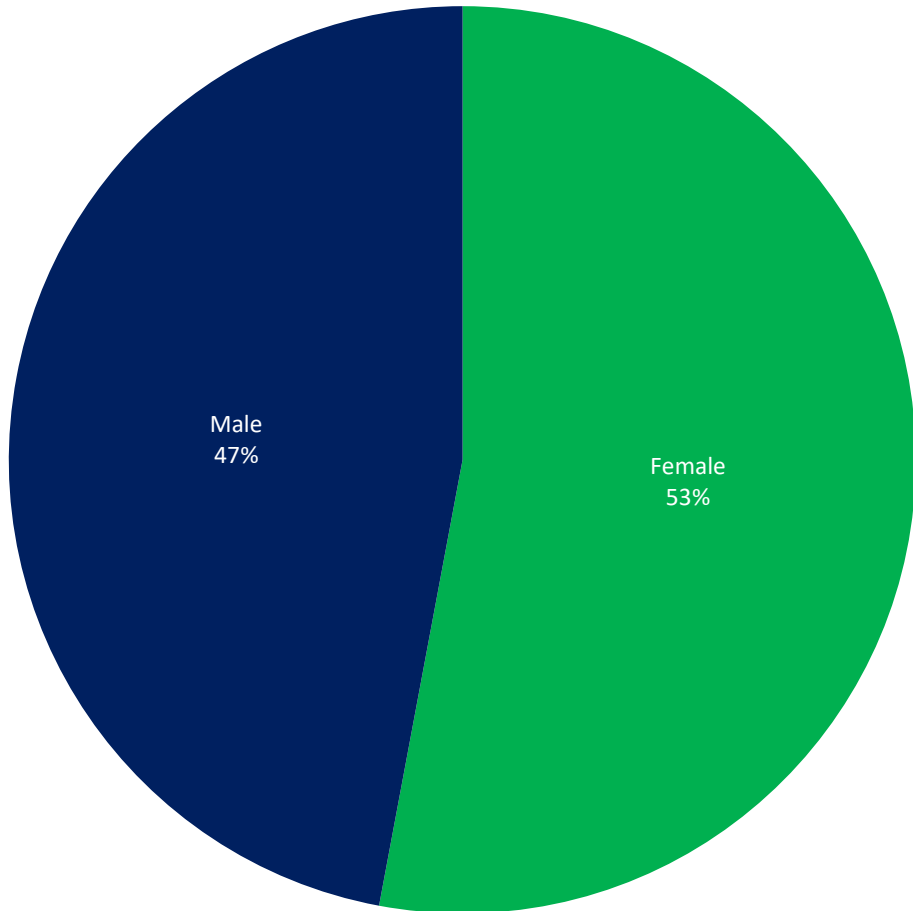
1. Most visitors are willing to pay an additional environmental fee (80%) to help Seychelles protect its environment.
2. Among those who are willing to pay, 72% would be comfortable paying up to \$40, with a median of \$20 and mean of \$39.
3. Of those who are willing to pay an extra fee, a majority said they would prefer that the funds generated be managed by an independent trust fund.
4. Seychelles continues to rate highly among visitors, reflected in their overall satisfaction with their visits, as over 90% were satisfied with their current trip to Seychelles.
5. Just over three quarters of visitors had a high satisfaction level with the condition of the environment.
6. However, visitors highlighted a number of challenges faced by Seychelles as a tourism destination, the most important of which were environmental sustainability and affordability.

QUESTIONS?

ADDITIONAL SLIDES

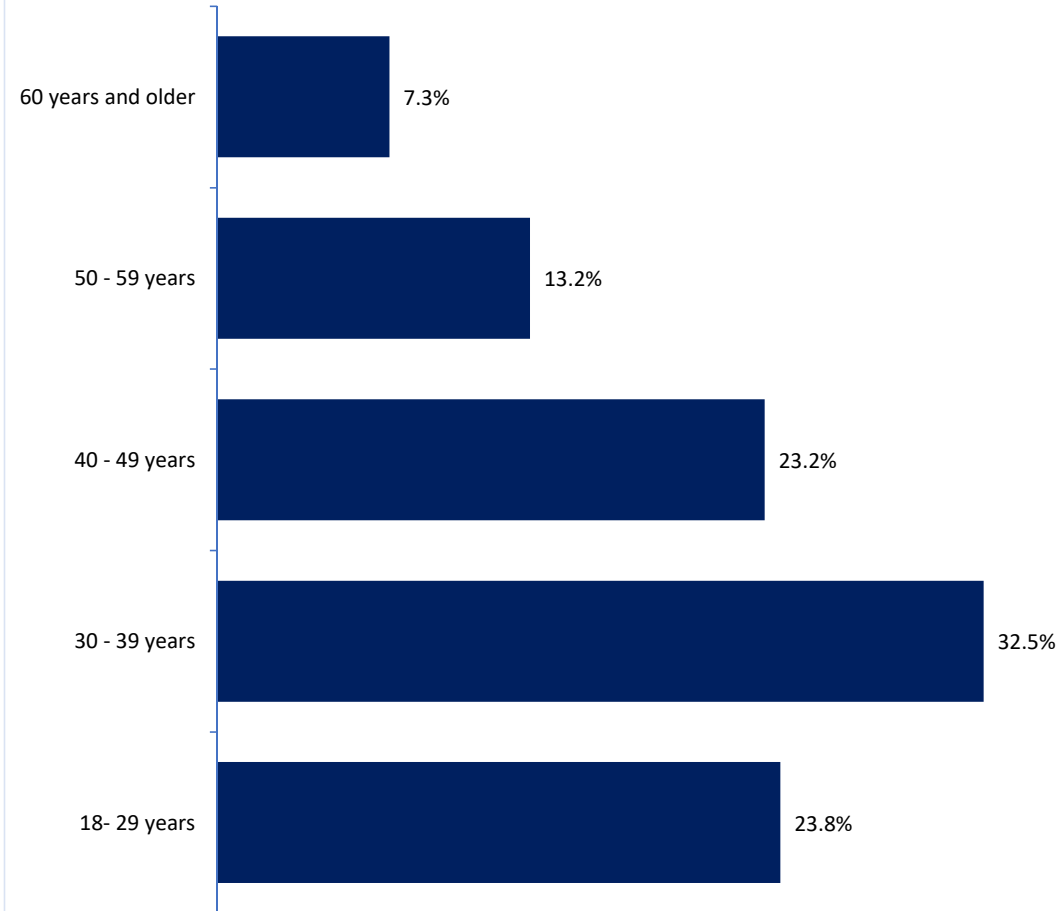
Respondents by gender and age group

(a) Respondents by gender



Note: Total respondents = 969 visitors.

(b) Age of respondents

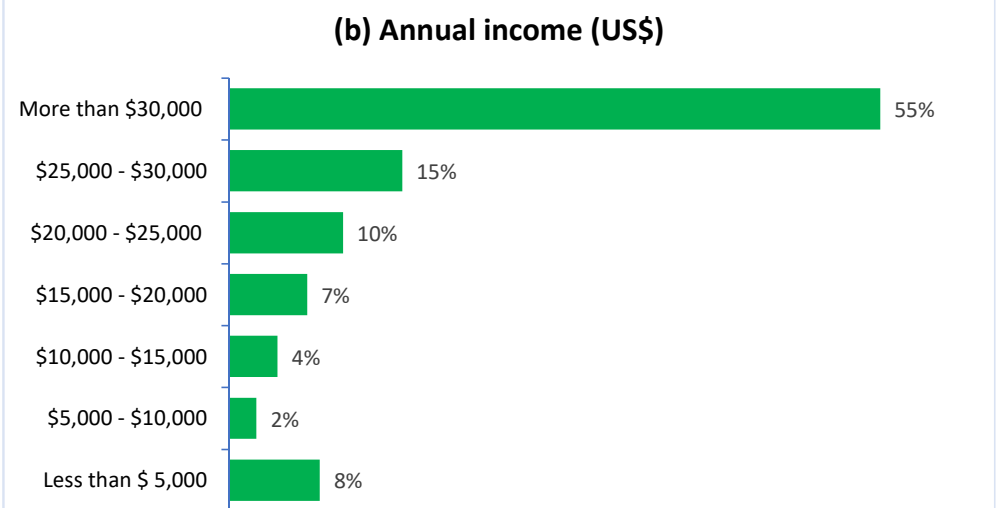
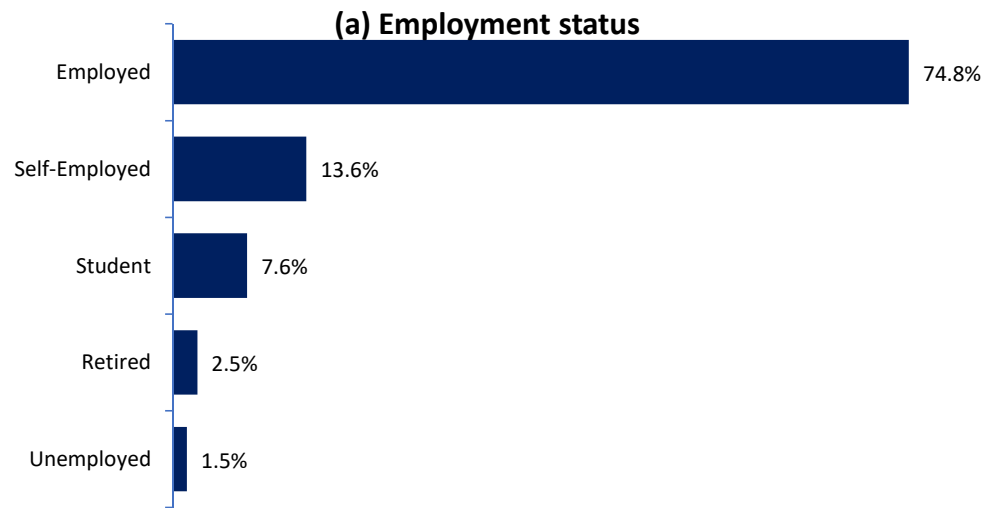
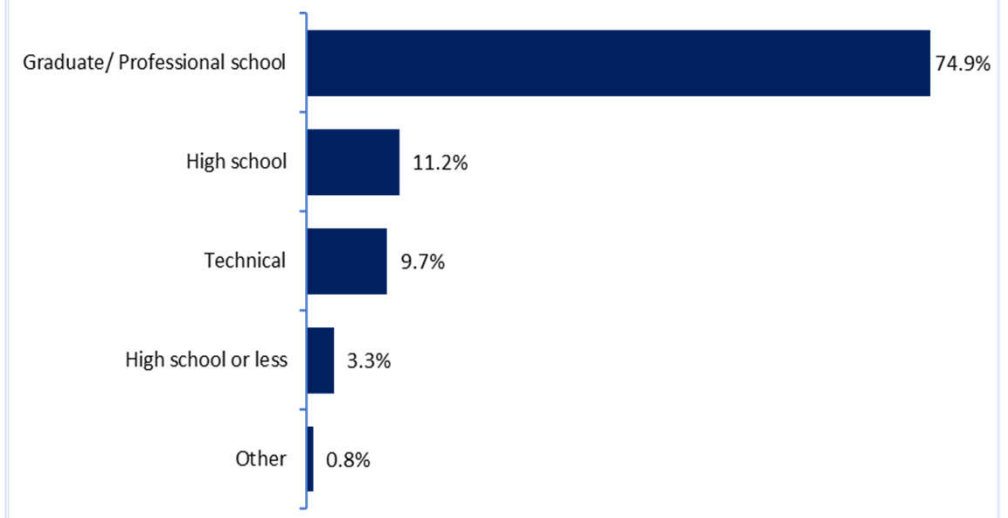
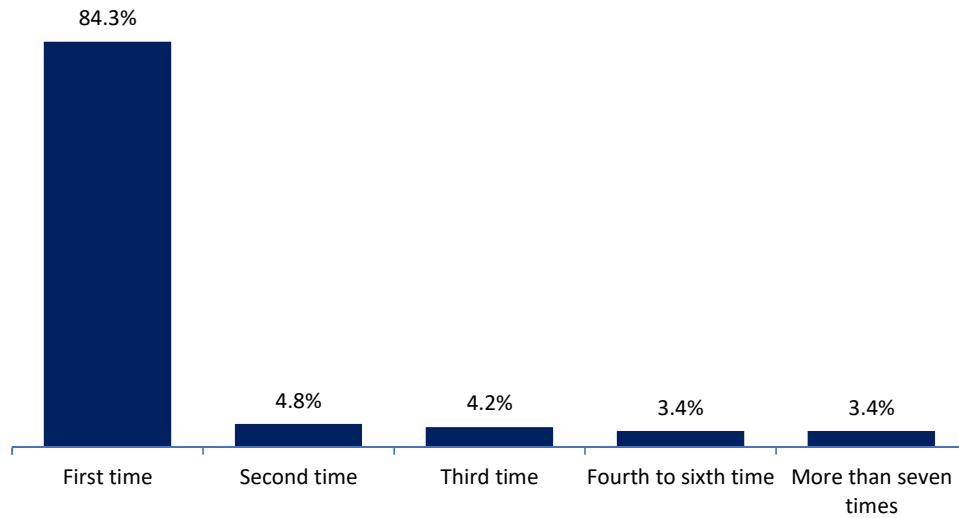


Note: Total respondents = 961 visitors.

Respondents by country of origin compared to 2018 visitor arrivals

Country/Region	Sub-total	Total	%	% for 2018
Germany	224		23.2%	17.5%
Italy	169		17.5%	7.0%
France	165		17.1%	12.4%
United Kingdom	58		6.0%	7.6%
Other Europe	153		15.9%	21.9%
Europe		769	79.7%	66.4%
United Arab Emirates	42		4.4%	7.2%
India	29		3.0%	4.0%
China	11		1.1%	2.6%
Other	24		2.5%	6.2%
Asia		106	11.0%	20.0%
South Africa	26		2.7%	3.5%
Other Africa	37		3.8%	6.2%
Africa		63	6.5%	9.7%
Oceania		5	0.5%	0.6%
United States of America	15		1.6%	2.7%
Other America	7		0.7%	1.2%
America		22	2.3%	3.9%
TOTAL		965	100.0%	100.0%

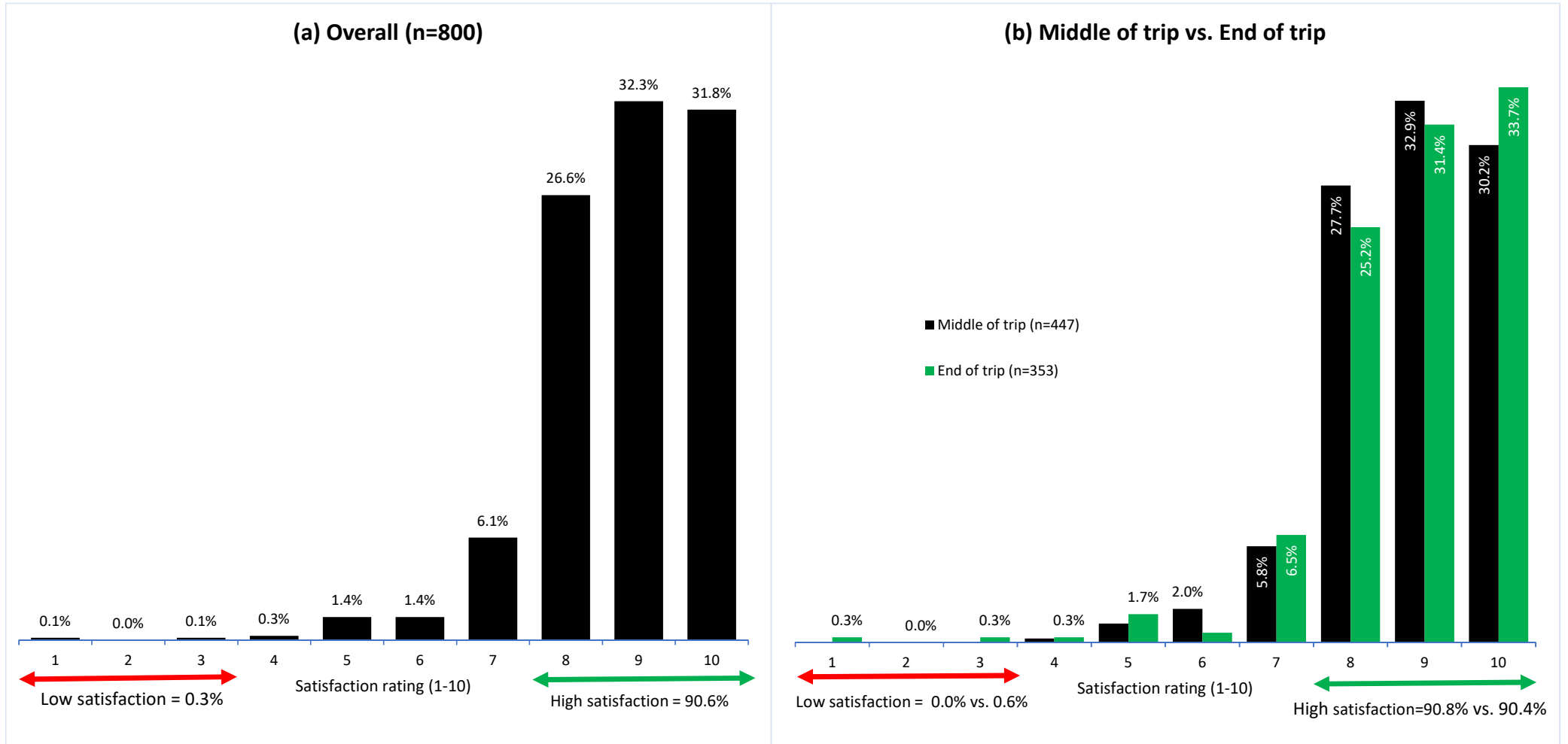
Respondents' profile



Note: Total respondents = 949 visitors.

Note: Total respondents = 560 visitors.

Visitors' levels of satisfaction with their trip



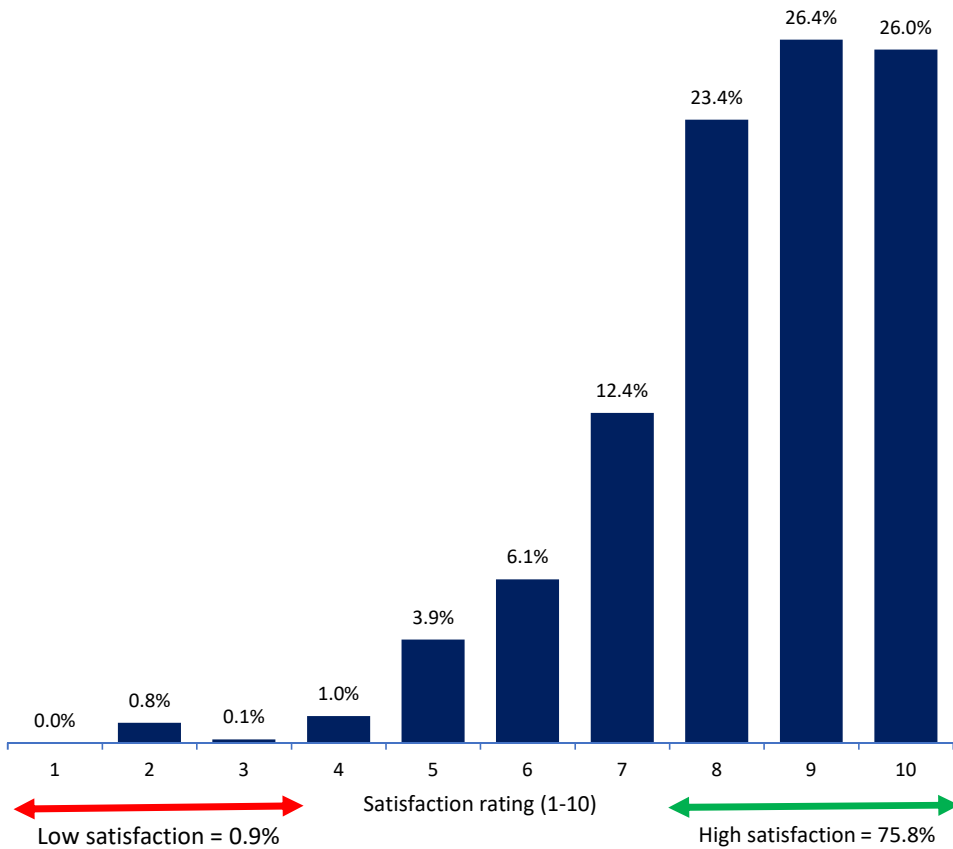
Notes: (1) Total respondents = 800 visitors, with 447 in the middle of their trips and 353 at end of their trips.

(2) Weighted average satisfaction rating for visitors in the middle of their trip, at the end of their trip and overall = 8.8.

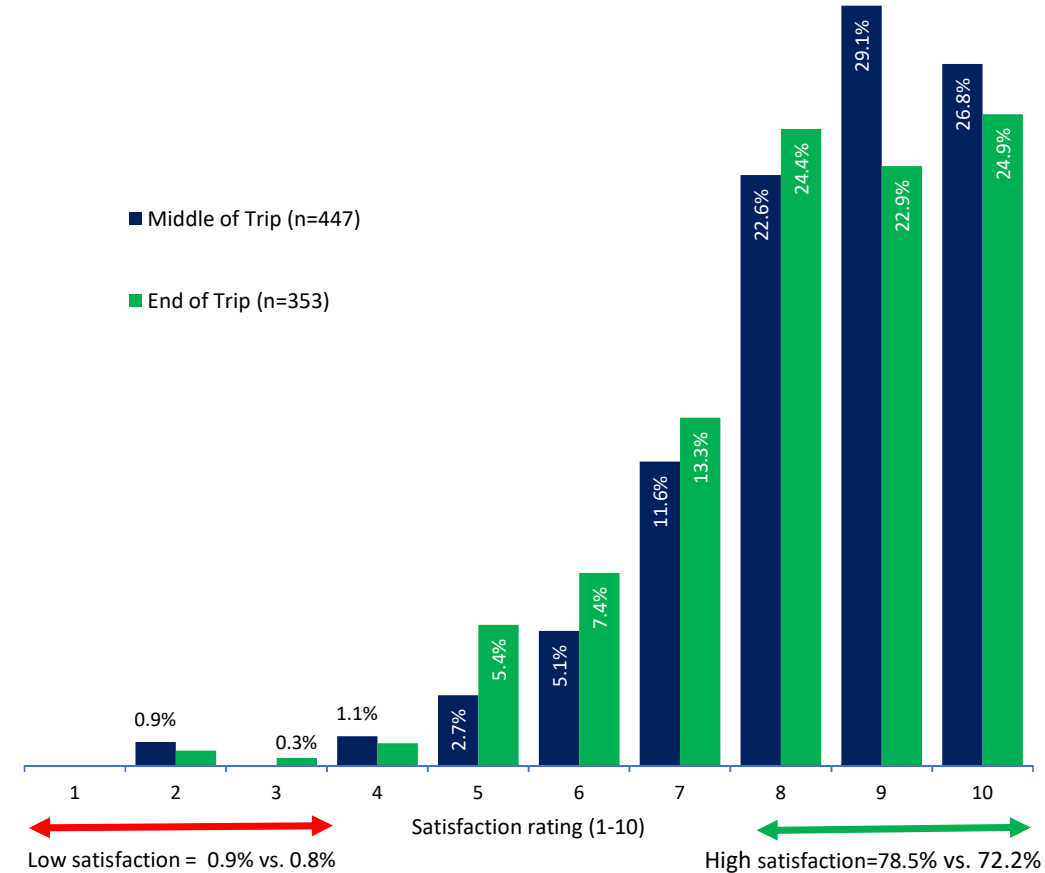
(3) Satisfaction ratings 1-3 are considered low, while satisfaction ratings 8-10 are considered high.

Visitors satisfaction with the condition of the environment

(a) Overall (n=800)



(b) Middle of trip vs. End of trip

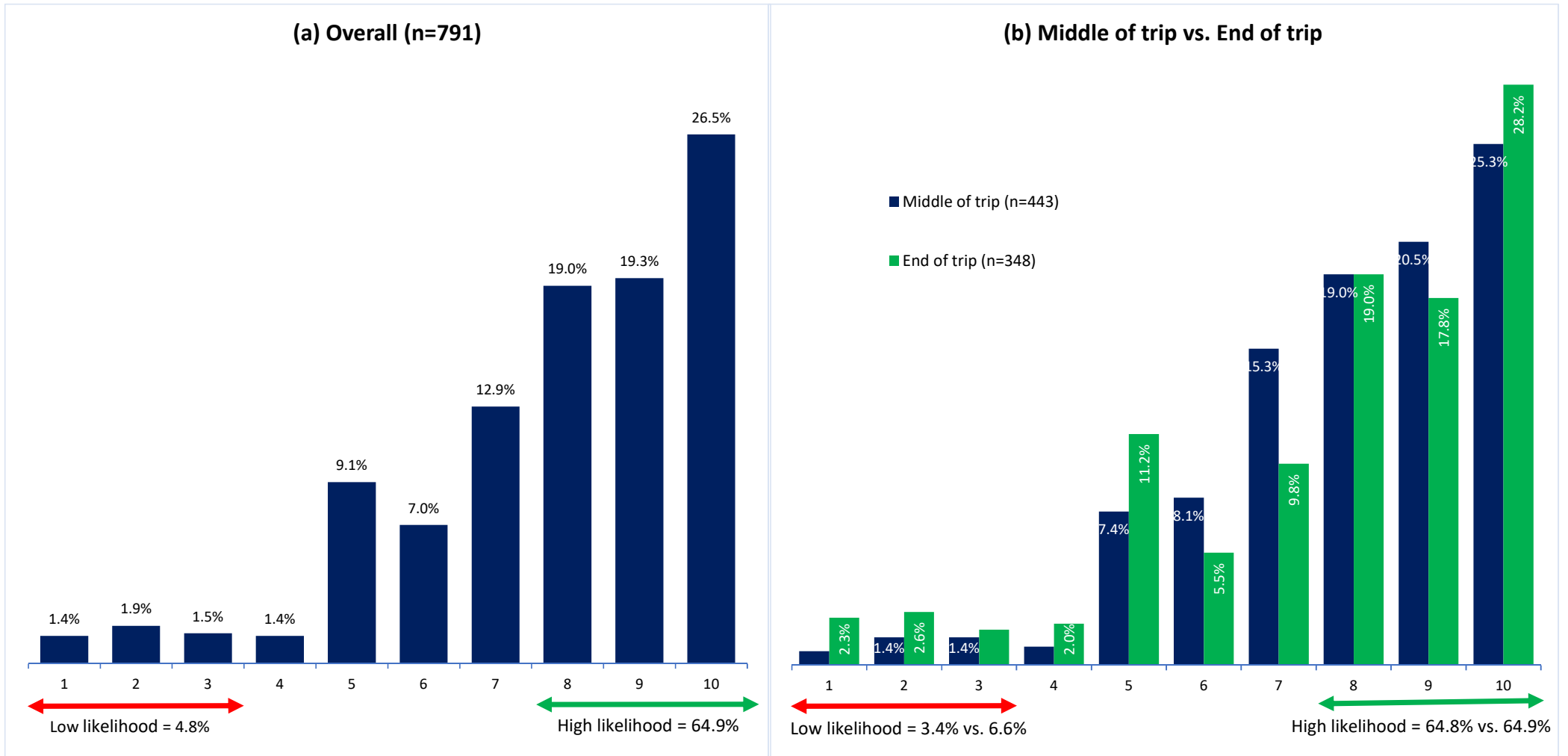


Notes: (1) Total respondents = 800 visitors, with 447 in the middle of their trips and 353 at end of their trips.

(2) Weighted average satisfaction rating for all visitors = 8.3; visitors in the middle of their trips = 8.4; and visitors at the end of their trips = 8.2.

(3) Satisfaction ratings 1-3 are considered low, while satisfaction ratings 8-10 are considered high.

Visitors' likelihood to visit Seychelles again

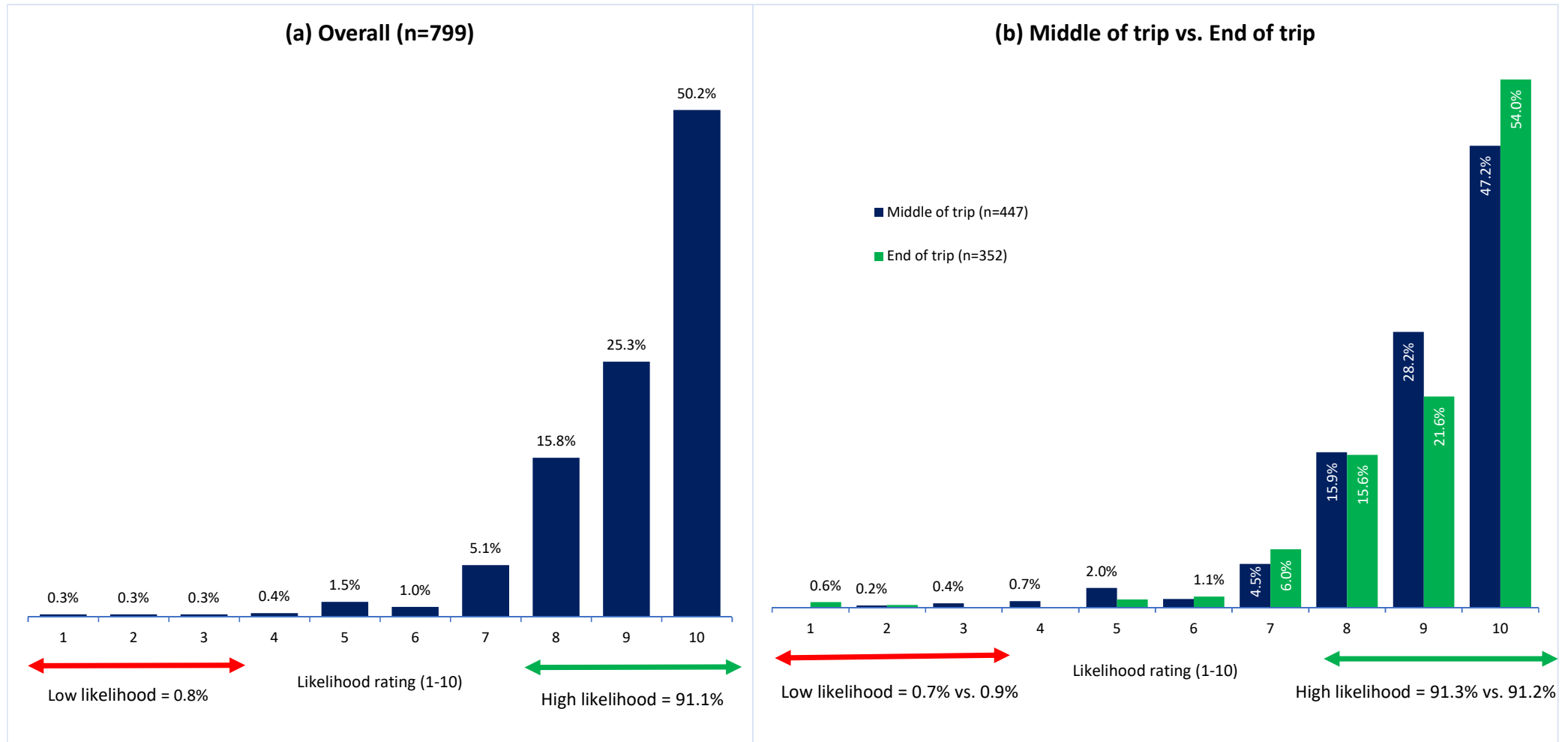


Notes: (1) Total respondents = 791 visitors, with 443 in the middle of their trips and 348 at the end of their trips.

(2) Weighted average likelihood rating: overall = 7.8; for visitors in the middle of their trip = 7.9; and, for visitors at the end of their trip and overall = 7.7.

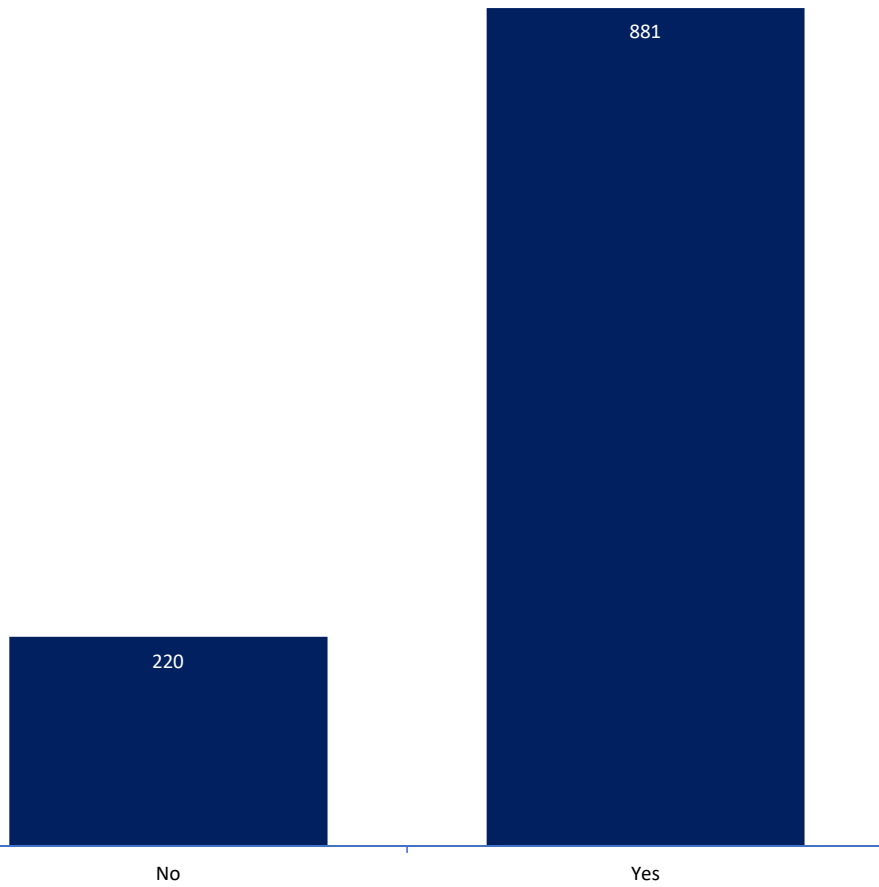
(3) Likelihood ratings 1-3 are considered low, while likelihood ratings 8-10 are considered high.

Visitors' likelihood to recommend Seychelles to friends and family



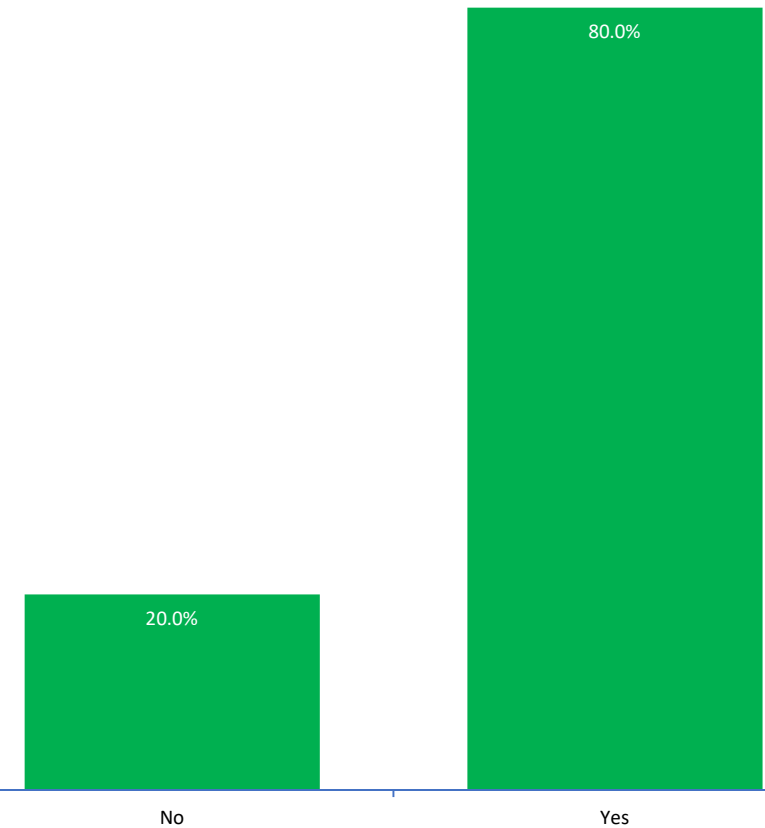
- Notes:** (1) Total respondents = 799 visitors, with 447 in the middle of their trips and 352 at the end of their trips.
 (2) Weighted average likelihood rating: overall = 9.1 for visitors in the middle of their trip = 9.0; and, for visitors at the end of their trip and overall = 9.1.
 (3) Likelihood ratings 1-3 are considered low, while likelihood ratings 8-10 are considered high.

(a) Number of respondents

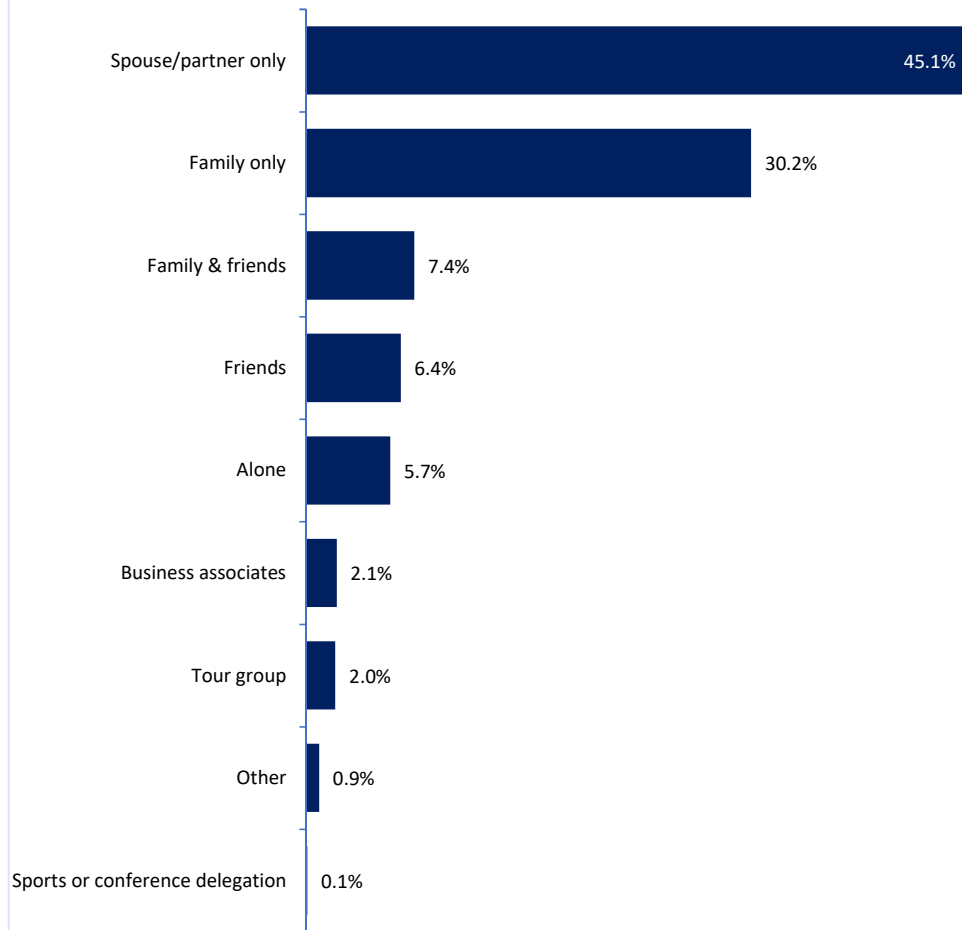


Note: Total respondents = 1, 101 visitors.

(b) Percentage of respondents

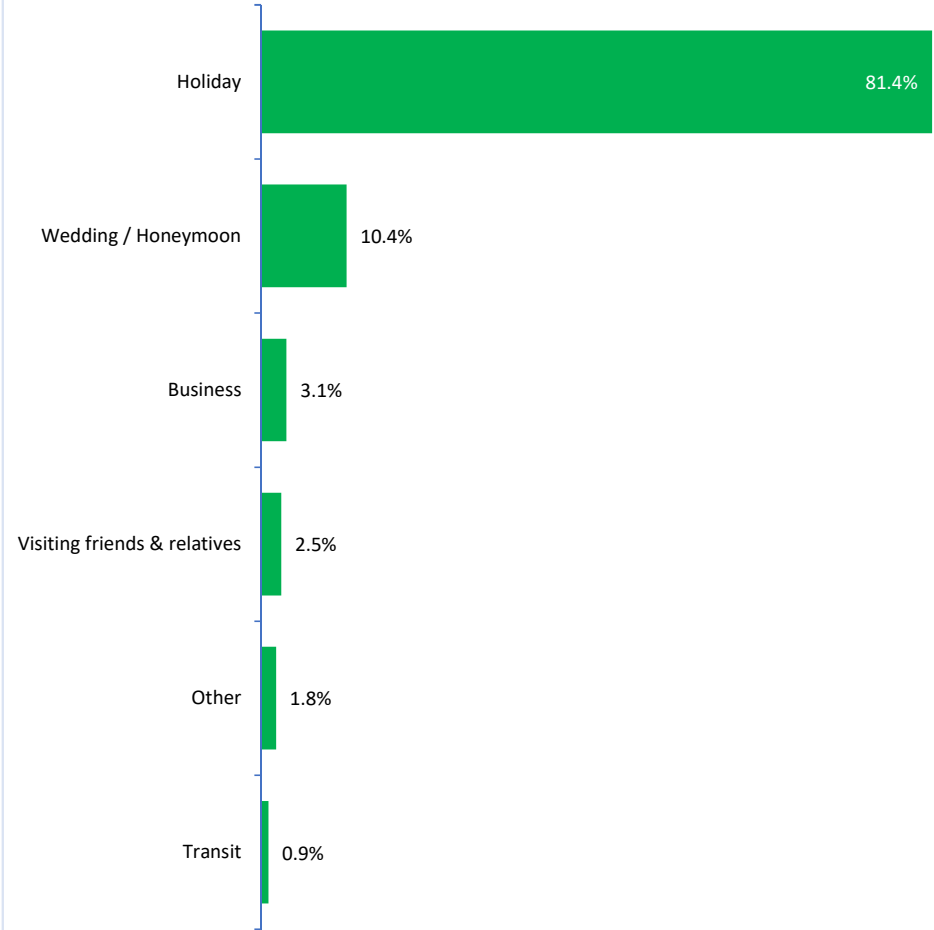


(a) Visitors were travelling with:

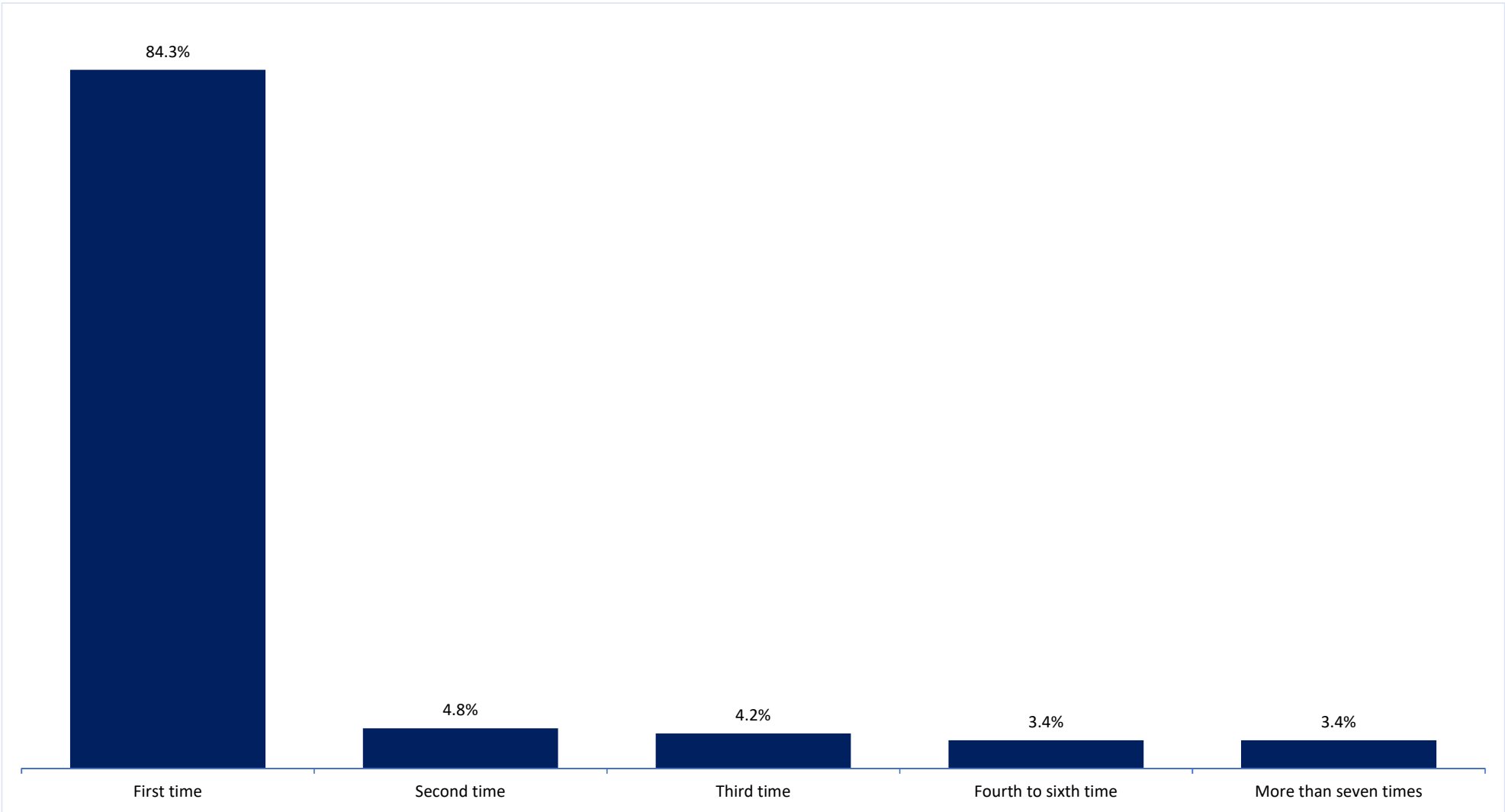


Note: Total respondents = 1,101 visitors.

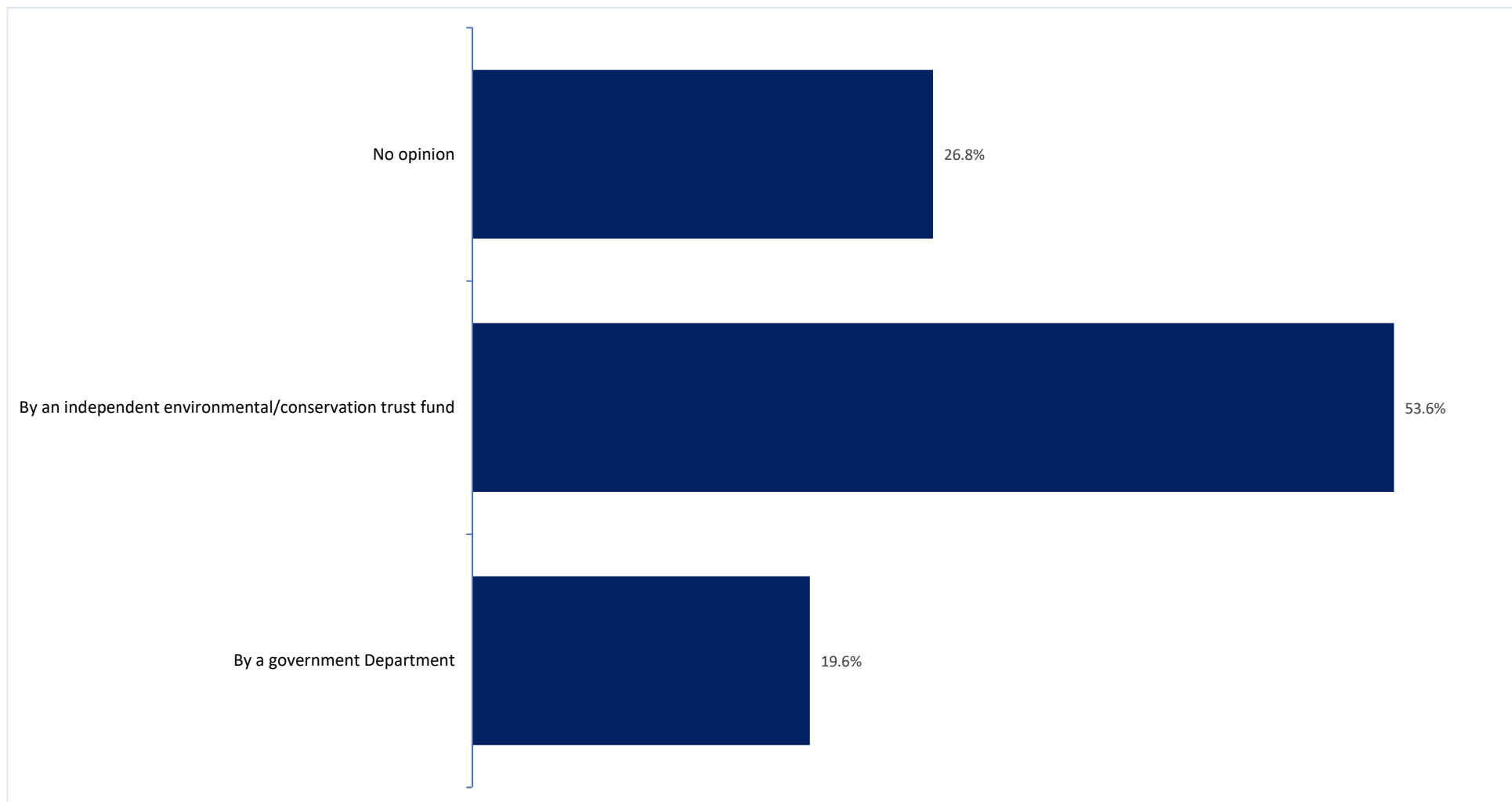
(b) Main purpose of visit



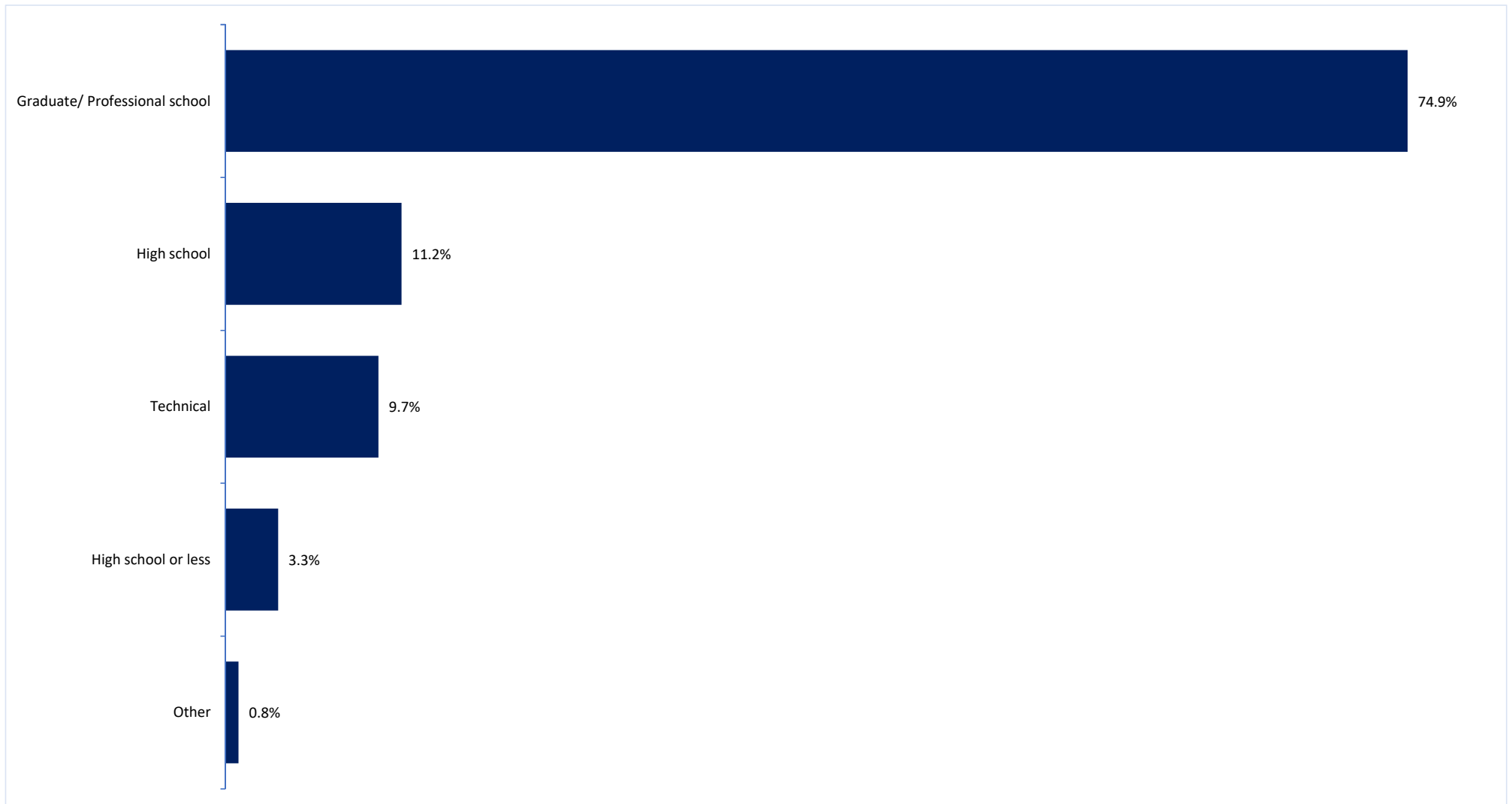
Note: Total respondents = 1,101 visitors.



Note: Total respondents = 1,101 visitors.

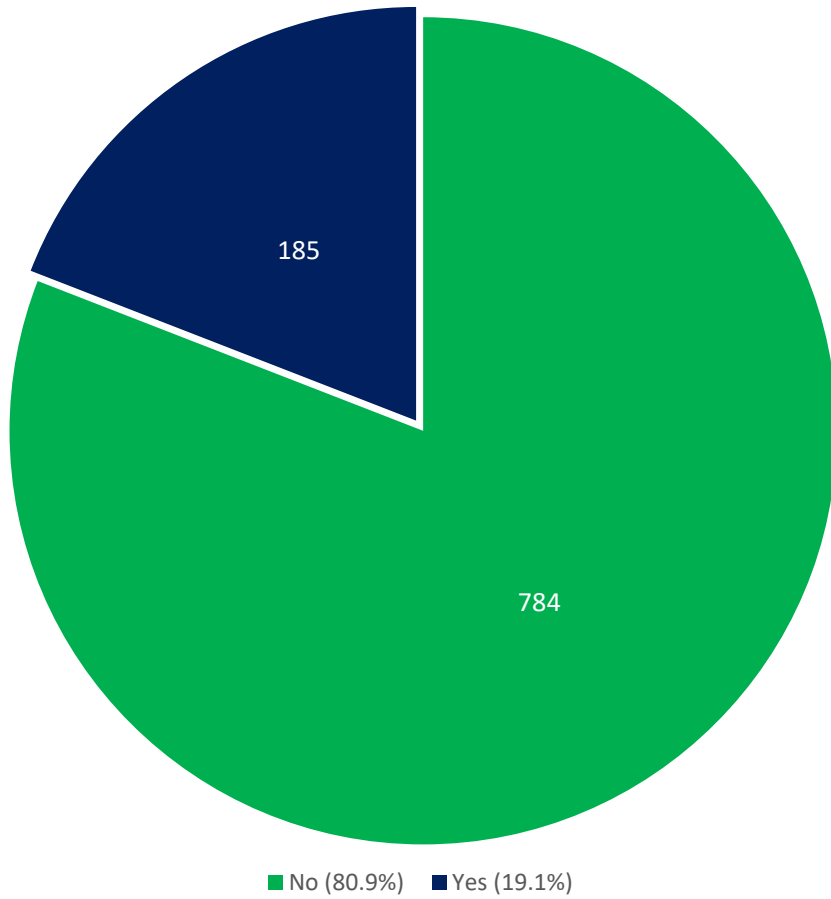


Note: Total respondents = 881 visitors.



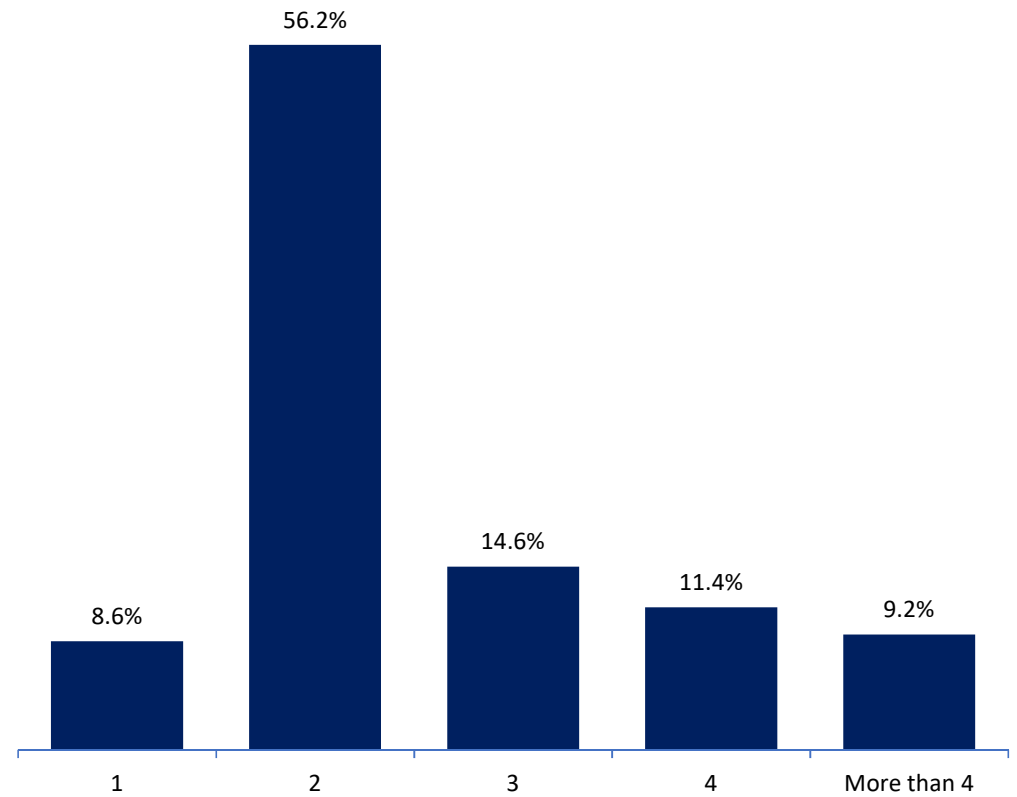
Note: Total respondents = 958 visitors.

(a) Number of respondents

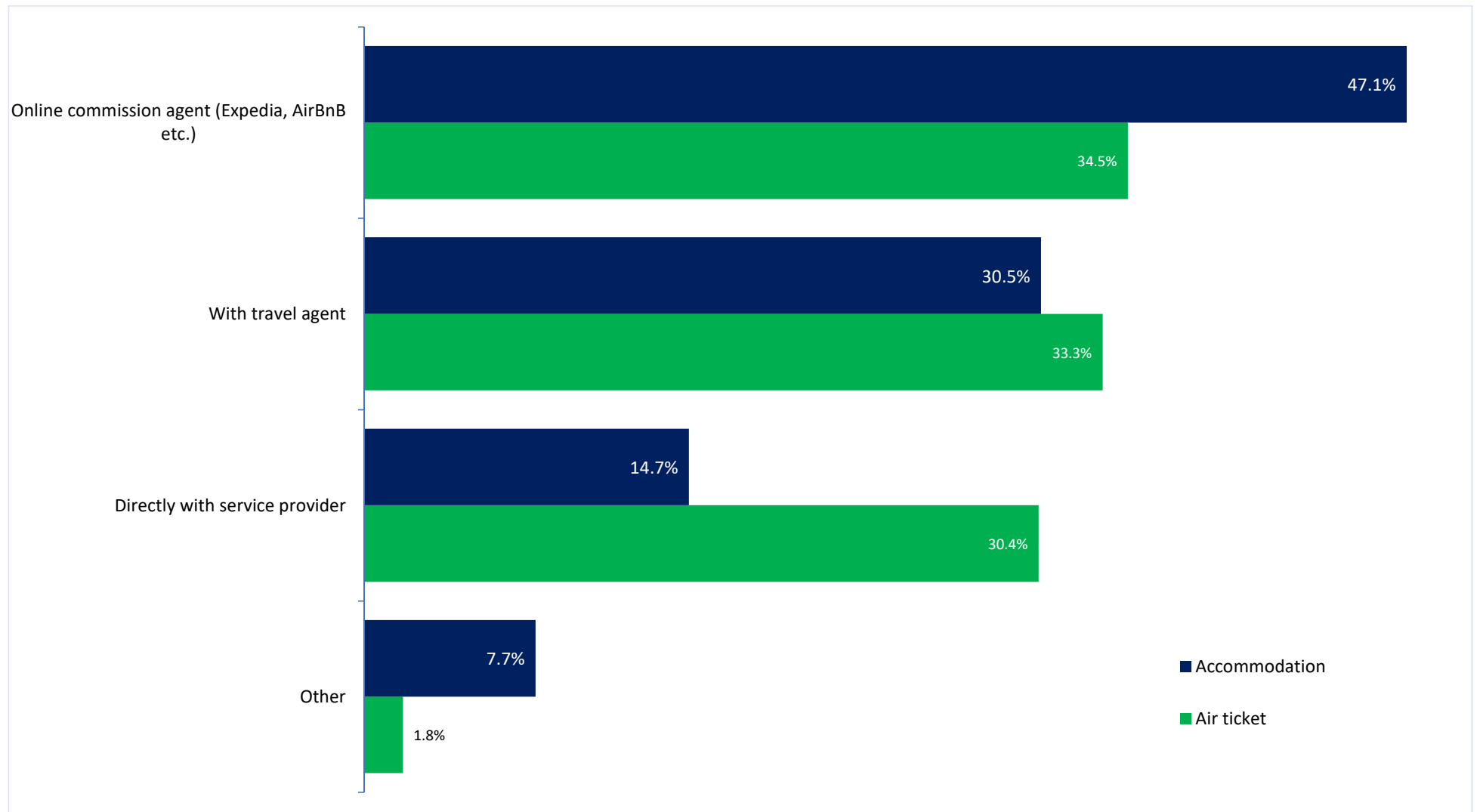


Note: Total respondents = 996 visitors.

(b) People in tour group (%)



Note: Total respondents = 185 visitors.



Note: Total respondents = 966 visitors.