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Section 1: INTRODUCTION

Visitor Safety and Security (VSS) survey data collection for the third quarter of 2013, took place during the week of 23rd to 29th September 2013. Departing visitors at the international airport supplied data through a self administered questionnaire. Out of the 4,123 visitors departing Seychelles during that week, a total of 1,287 visitors were canvassed in the survey. A total of 617 questionnaires were returned. Out of the 617 questionnaires returned, 594 answered questions about safety and security. This covered an average of 2 persons per questionnaire and gave a response rate of 96%.

The Visitors Safety and Security survey questions were part of the Visitor Survey questionnaire. The questionnaire included two sections; one for “Visitor Expenditure” and the second one “Visitor Safety and Security”.

82 % of the visitors who responded to the safety and security questionnaire were from Europe. Of these, 26% were from Germany, 20% from Italy, 15% from France, 13% from United Kingdom, 7% from Switzerland and 4% from Spain, while the rest of Europe constituted 15%. The remaining visitors were from Africa (9%), Asia (6%), North America (1%) and Oceania (2%).

Section 2: RESULTS

2.1 Purpose of Visit

A breakdown of the respondents by purpose of visit showed that a greater number of visitors were on holiday (53%), while 7% came for business purposes, 27% came specifically for honeymoon and 12% for both wedding and honeymoon. The rest of the respondents (1%) visited Seychelles for other purposes which included attending wedding, performing in national activities and for consultancy work.

A cross quarter comparison shows that the percentage of visitors who were in Seychelles for their honeymoon increased from 22% in the second quarter of 2013 to 27% in the third quarter of 2013 and those who came for both wedding and honeymoon increased from 9% to 12%.

2.2 Personal safety

The percentage of visitors who felt concerned about their personal safety increased from 4% in the second quarter of 2013 to 5% in the third quarter of 2013 and visitors who felt threatened increased from 2% in the second quarter of 2013 to 3% in the third quarter (see Table 1 below).

A cross quarter comparison shows that in the third quarter of 2013, 1% of visitors reported being attacked and this figure is similar to the percentage of visitors who reported being attacked in the third quarter of 2012. Of the total surveyed visitors, 5% felt concerned about their safety in the third quarter of 2013 compared to 4% in the same quarter of 2012.

Table 1: Percentage of visitors, who felt concerned, felt threatened, was attacked or witnessed an attack during their stay in the Seychelles, Quarter 3 (2008 - 2013) and Quarter 1 and 2 (2013)

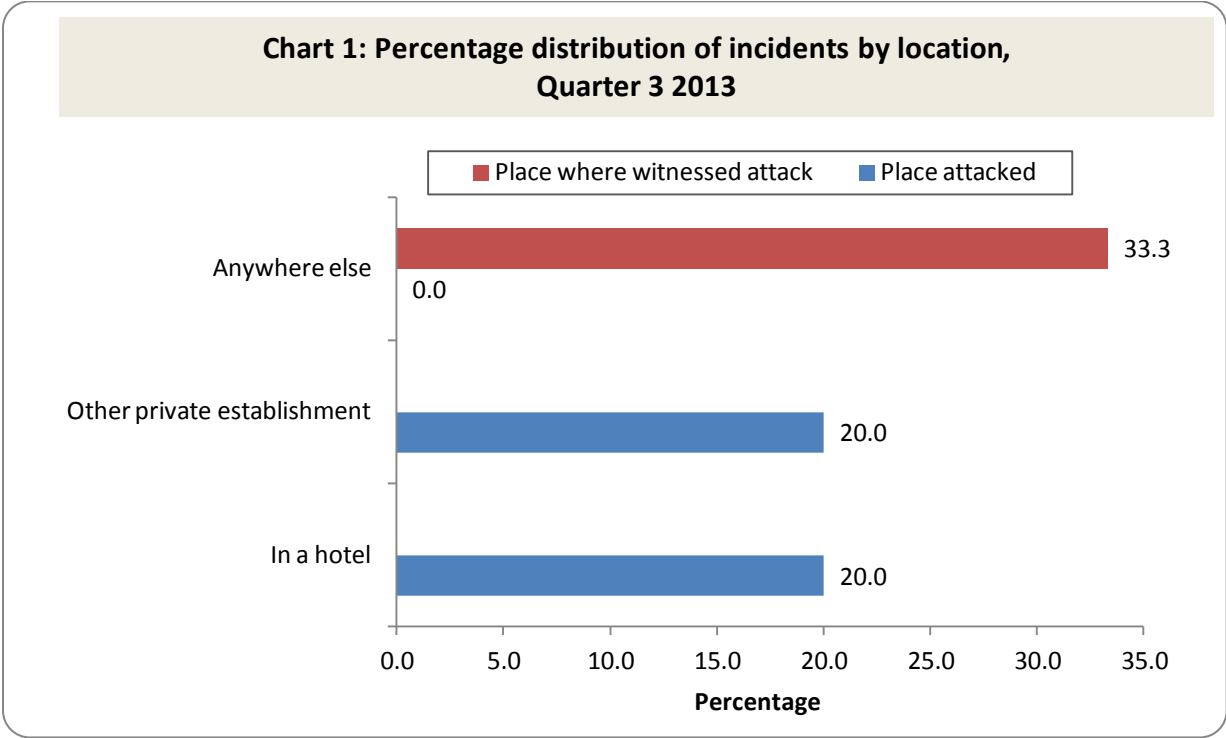
%	2008	2010	2012	2013		
	Q3	Q 3	Q 3	Q 1	Q2	Q3
Concerned	10.1	6.6	4.2	4.8	4.4	4.9
Threatened	2.8	0.5	2.3	2.9	1.8	2.9
Attacked	3.2	2.0	0.8	0.9	0.6	0.8
Witnessed serious attack	n/a	n/a	0.8	0.2	0.7	0.5

Source: NBS Visitor Safety and Security surveys, 2008, 2010, 2012, 2013.

Note: The 2008 and 2010 survey did not capture information about witnessing attacks.

In the third quarter of 2013, 20% of attacks reported by visitors occurred during the day compared to the third quarters of 2008, 2010 and 2012 where 63%, 71% and 75% (respectively) of reported incidents took place during the day. In regards to witnessing attack, 67% of those who witnessed attacks also witnessed them during the day compared to the third quarter of 2012 where 33% of attacks were witnessed during the day.

As for the location where the incidents were experienced or witnessed, these, were reported to have occurred at hotels, other private establishments and in one of the cases the incident witnessed was at the Regatta at Beau Vallon (Chart 1).

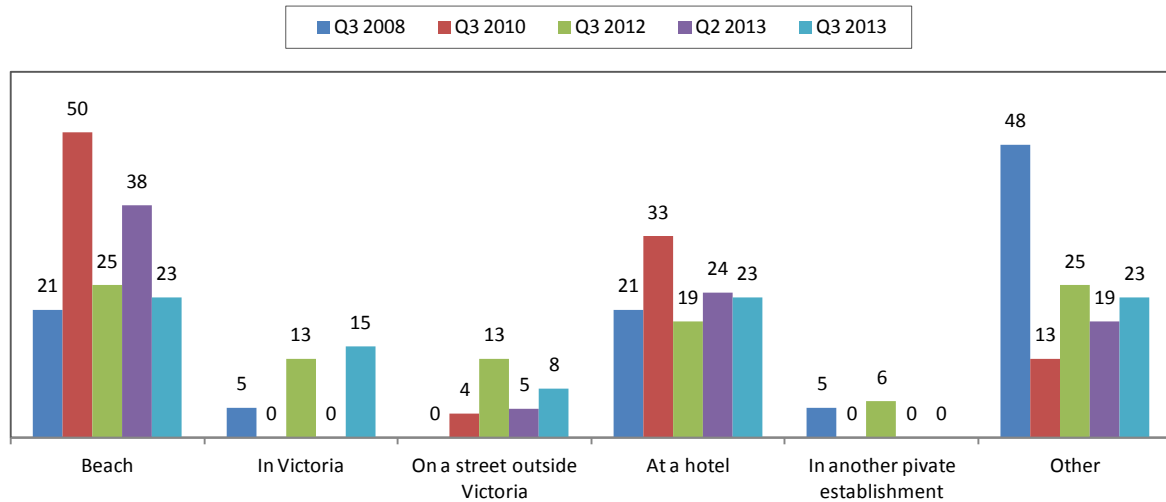


2.3 Safety of property

The percentage of visitors who reported loss of property/belonging during their stay in Seychelles increased from 5% in the second quarter of 2013 to 6% in the third quarter of 2013. Of those who reported loss of property/belonging, no one reported experiencing more than one incident. The most commonly stolen/lost items were 'Clothing (28%) and mobile phone (28%)'.

As shown in chart 2, beaches and hotels were amongst the most commonly mentioned locations where visitors lost their property/belonging during the third quarter of 2013; *beach (23%) and hotel (23%)*.

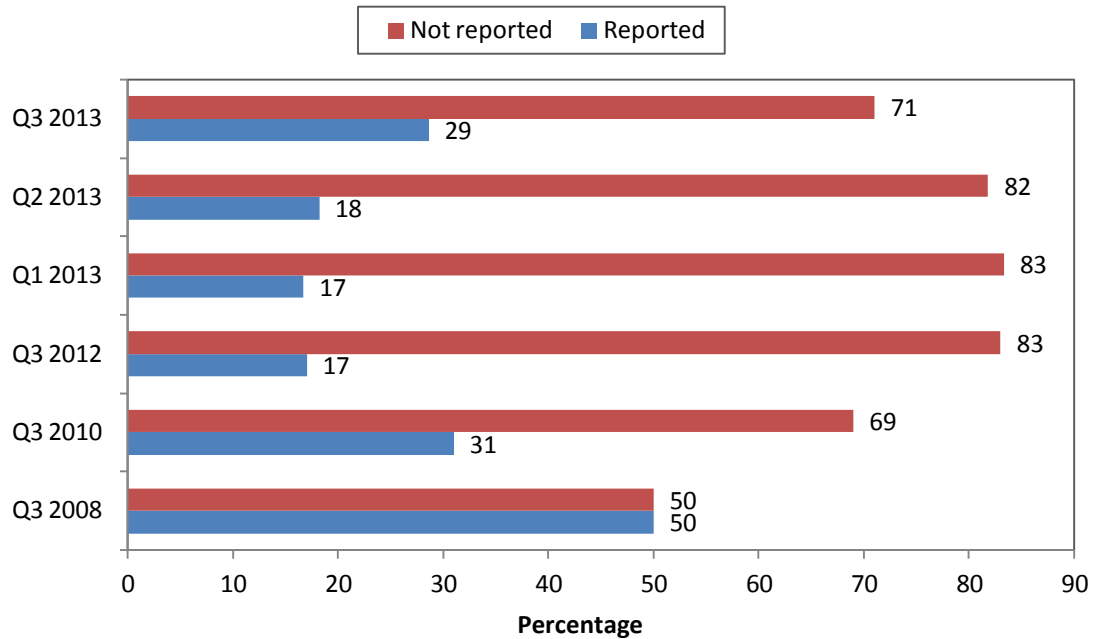
**Chart 2:
Loss of property by location Q3 (2008, 2010, 2012, 2013) and Q2 (2013)**



Of those who reported loss of property/belonging, 19% believed their property/belonging had been stolen, and 29% of those affected reported the incident(s) to the police (Chart 3).

A cross-quarter comparison shows an increase in the percentage of those who reported incidents to the police, from 17% in the third quarter of 2012 to 29% in the same quarter in 2013.

Chart 3:
Percentage of visitors who believed property was stolen - reported and non-reported incidents, Quarter 3 (2008, 2010, 2012, 2013) & Quarter 2, 2013



2.4 Foreign exchange

Chart 4 shows that the percentage of visitors approached to exchange foreign currency other than at a bank or official currency exchange facility increased from 3.6% in the second quarter of 2013 to 4.4% in the third quarter of 2013. The percentage is still below what it was in the same quarter for 2008, 2010 and 2012.

Chart 4:
Percentage of visitors approached to exchange foreign currency
Quarter 3 (2008, 2010, 2012, 2013) & Quarter 2 (2013)

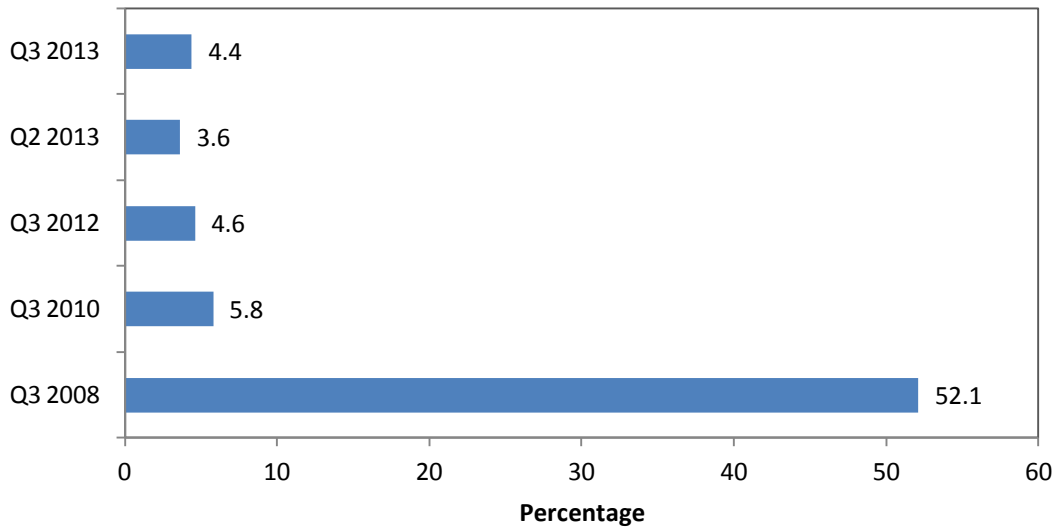
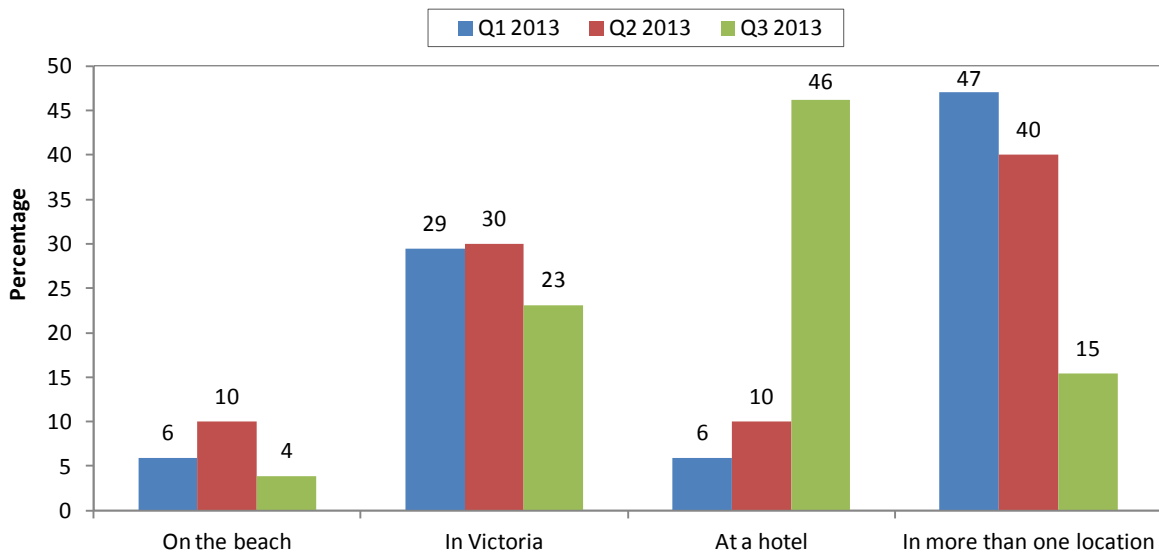


Chart 5 shows that of those approached to exchange foreign currency, 46% reported having been approached in their hotels or other private establishments. Another 23% reported having been approached in Victoria, 4% on the beach and 15% were approached in more than one location.

Chart 5: Percentage of visitors approached to exchange foreign currency by location, Quarter 1, 2 & 3 (2013)



When asked whether or not they would recommend Seychelles as a holiday destination, 92% said that they would. Visitors were also asked whether or not they considered the Seychelles to be a green destination and 78% said they found the Seychelles to be a green destination. This shows a drop compared to the 83% reported in the second quarter of 2013.

2.5 Visitors' comments

a) Safety and Security

A smaller number of visitors commented on safety and security and most of those who commented said they found the island quiet and relaxing. At the same time some few isolated cases of robbery and theft were mentioned including a case where a rented bike was stolen from a visitor. One of the visitors felt unsafe because of many stray dogs, which are in some cases aggressive and this was regarded as a risk for personal safety. There were also complaints of some vehicles moving very fast and making it dangerous for other road users.

b) Customer Care

Many of the visitors described Seychelles as stunning, with amazing beaches and the Seychellois as gentle, friendly, warm and helpful people. Seychelles was commended as a very nice tourism country for honeymoon and family gathering. Many visitors found the excursions very nice and the Cap Ternay Marine Park was also mentioned as being fantastic for diving. The number of visitors who say they will come back continues to increase. This notwithstanding a few who were disappointed with services being slow in some restaurants, some pointed out the delay in flights between Mahe & Praslin, and some commented on the ATMs not functioning properly. They also mentioned that some road signs on Mahe make it difficult to know which road to take. One group had their arrival ruined due to a diversion to Mauritius where their luggage was wrongly offloaded and they were without their luggage for three days.

Almost all of the visitors found services very expensive. They specifically pointed out that taxis, food, drinks, accommodation, souvenirs, telecom, Valle de Mai entrance fee and the excursions as being too expensive. Some suggested that prices advertised should be inclusive of tax. Visitors continue to complain about the lack of nightlife saying that the place is dead by 8pm.

c) Environment

The visitors commended the natural beauty of the Islands pointing out Seychelles protection of the flora and fauna as an attractive trait for tourists. Eco system was also said to be exemplary. At the same time many were concerned about garbage found on the roadside and on beaches saying it spoils the environment. Waste classification was suggested, like separation of glass and paper to facilitate proper management of garbage, recycling of garbage, and better sensitization to get the locals to clean up the environment.

Many appreciated the country's emphasis on the environment but felt that more needs to be done for it to be considered as a green destination. Other comments were about wastage of water in toilets and multiple pools in hotels. Other concerns about environment included: noise pollution with loud music in parked cars and buses especially at Beau Vallon beach.

There was also a comment on the high number of fish traps in the Marine Park (Protected area). This is irritating when encountered regularly during snorkeling.

d) Recommendations

- There must be less traffic for a better environment
- The balance between nature and automobile on La Digue should be carefully maintained or else in a few years it will not be possible to circulate safely
- La Digue should be kept eco friendly with a minimum number of hotels
- Fishing should be kept at a minimum
- The planes for domestic flights should be upgraded as they are currently in very poor condition
- Careful not to allow too much construction
- Mass tourism should be avoided
- There should be more effort to promote tourism
- People who offer excursions on the street should indicate the price beforehand so as not to make tourists pay a lot at the end
- There needs to be an improvement in regards to transfer of visitors' luggage amongst the islands
- There should be better facilities to save water. An example would be the installation/promotion of dual -flush toilets where there is the option to use less water
- All prices should include tax/VAT
- Littering of the sea, beach or mangroves should be avoided. There should be fines for culprits
- Government should promote the sale of quality clothing at a fair price
- Purify water to a drinkable level and increase water pressure
- Promote instant photography as a small business
- Consider making a balcony for smokers at the airport
- The price of alcohol should be reduced at hotel resorts

Annex 1: Repeated comments made by visitors

COMMENTS	2008				2010				2012				2013		
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3
Roads															
Roads too narrow and dangerous		X	X	X	X	X	X	X			X	X	X	X	
Build sidewalks for safety of pedestrians		X		X			X			X				X	
Place more signposts on road							X		X	X	X		X	X	X
There should be more lights on the road	X	X		X	X	X	X	X	X			X			
Buses and other drivers															
Buses drive too fast and many reckless drivers	X	X	X	X	X	X		X					X		
Bus service need to run until late						X			X				X	X	X
Bus services in Seychelles should allow passengers to bring luggage on board.											X				
Recreational activities															
Shops should be open beyond 5 pm									X	X	X		X	X	X
There should be a wider variety of crafts									X				X	X	
There should be changing and washrooms at Beau Vallon beach							X								
There should be more parking space									X						
Organize and advertise more activities which will attract visitors			X						X						X
There should be more cafes, bars, and more variety of food											X			X	
Tourist Services															
Poor service in hotels	X	X				X			X	X	X	X		X	X
Tourism offices should provide the right information, especially information on Praslin-La Digue ferry schedules									X						X
La Digue-Praslin ferry timings could be matched with Praslin-Mahe flights/ferry									X						
Re-introduce direct flights from Europe									X	X	X		X	X	
Prices are too high, there is need for improvement in order to compete with other countries			X		X		X		X	X	X	X	X		X
Emergency services															
Improve on health incident treatment (First Aid)					X										
There is not enough police to assist when required.							X								
Environment															
Too many stray dogs on the beach	X	X	X	X	X									X	X
Do not overdevelop islands with too many concrete buildings	X								X		X	X	X	X	X
Sensitize the people on recycling instead of littering the place with rubbish					X				X			X	X	X	X