

# IMPACT ANALYSIS REPORT

Inner Island Cruise Ship Study

## PREPARED FOR

SEYCHELLES CONSERVATION CLIMATE ADAPTATION TRUST (SEYCCAT) AS PART OF THE PROJECT "DIRECT ECONOMIC AND SPECIFIC ENVIRONMENTAL IMPACT ASSESSMENT OF THE CRUISE ACTIVITIES IN SEYCHELLES' INNER ISLANDS, IN RELATION TO THE MPAS"



## **DIRECT ECONOMIC AND SPECIFIC ENVIRONMENTAL IMPACT ASSESSMENT OF THE CRUISE ACTIVITIES IN SEYCHELLES' INNER ISLANDS, IN RELATION TO THE MPAS**



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**SEYCHELLES NOVEMBER 2025**

## TABLE OF CONTENTS

<b>List of Figures .....</b>	<b>4</b>
<b>List of Tables .....</b>	<b>7</b>
<b>Executive Summary .....</b>	<b>8</b>
<b>Introduction and Objectives .....</b>	<b>9</b>
<b>1 Cruise Mapping .....</b>	<b>11</b>
1.1 Introduction .....	11
1.2 Methodology .....	11
1.3 Cruise Arrivals in Seychelles .....	11
1.4 Cruise Vessel Characteristics .....	13
1.5 Stakeholder Overview .....	15
1.6 Itineraries and Routes .....	16
1.7 Activities .....	19
1.8 Environmental Impacts .....	21
1.9 Fees and Economic Impact .....	23
1.10 Discussion and Conclusion .....	27
<b>2 Empirical Research .....</b>	<b>28</b>
2.1 Methodology .....	28
2.1.1 Quantitative .....	28
2.1.2 Qualitative .....	29
2.2 Data Evaluation and Findings .....	30
2.2.1 Quantitative Passenger Survey .....	30
2.2.2 Qualitative Stakeholder Interviews .....	58
2.3 Discussion of Quantitative and Qualitative Findings .....	71
2.3.1 Economic Significance and Spending Behaviour .....	71
2.3.2 Visitor Segments and Market Orientation .....	71
2.3.3 Shore Excursion Patterns and Product Development .....	72
2.3.4 Environmental Awareness and Sustainability .....	72

2.3.5 Governance and Policy Context ..... 73

**3 Conclusion ..... 74**

3.1 Recommendations that Support Evidence-based Planning, Policy &  
Decision Making .....74

3.2 Limitations .....85

3.3 Recommended next Steps .....85

**Annex ..... 87**

Annex 1 .....87

Annex 2 .....87

Annex 3 .....93

## LIST OF FIGURES

Figure 1:	Cruise Arrivals 2019-2024 .....	11
Figure 2:	Monthly Passenger Arrivals 2019-2024 .....	12
Figure 3:	Stakeholder Overview (incl. Cruise Committee) .....	15
Figure 4:	Expedition Cruise Vessels Itineraries (3 and more islands).....	18
Figure 5:	Cruise Passenger Hotspots.....	20
Figure 6:	Distribution of Survey Participants by Cruise Ship.....	30
Figure 7:	Distribution of Survey Participants by Cruise Ship Capacity .....	30
Figure 8:	Distribution of Survey Participants by Ship Type .....	31
Figure 9:	Distribution of Survey Participants by Gender.....	31
Figure 10:	Distribution of Survey Participants by Age Group .....	32
Figure 11:	Distribution of Survey Participants by Ship Type and Age Group .....	32
Figure 12:	Distribution of Survey Participants by Region of Origin.....	33
Figure 13:	Distribution of Survey Participants by Ship Type and Region of Origin .....	33
Figure 14:	Distribution of Survey Participants by Status on Cruise Trip .....	34
Figure 15:	Distribution of Survey Participants by Ship Type and Status on Cruise Trip .....	34
Figure 16:	Distribution of Survey Participants by Status on Spending Time in Seychelles (Before or After the Cruise) .....	35
Figure 17:	Distribution of Survey Participants by Number of Additional Nights Staying in Seychelles .....	35
Figure 18:	Distribution of Survey Participants by Average Amount Spent or Intended to Spend per Person and Night of Additional Stay in Seychelles .....	36
Figure 19:	Distribution of Survey Participants by Status on First Time Visiting Seychelles .....	36
Figure 20:	Areas Visited by Survey Participants .....	37
Figure 21:	Areas Visited by Survey Participants and Hours Stayed Ashore .....	37
Figure 22:	Areas Visited by Survey Participants and Status in Taking Part in Organised Shore Excursion .....	38
Figure 23:	Activities Engaged in by Survey Participants .....	38
Figure 24:	Distribution of Survey Participants by Length of Stay Ashore .....	39
Figure 25:	Distribution of Survey Participants by Ship Type and Length of Stay Ashore .....	39
Figure 26:	Distribution of Survey Participants by Status in Taking Part in Organised Shore Excursion and Length of Stay Ashore .....	40
Figure 27:	Distribution of Survey Participants by Organisation of Shore Leave .....	40
Figure 28:	Distribution of Survey Participants by Ship Type and Organisation of Shore Leave .....	41
Figure 29:	Distribution of Survey Participants by Hours Stayed Ashore and Organisation of Shore Leave .....	41
Figure 30:	Distribution of Survey Participants by Age Group and Organisation of Shore Leave .....	42
Figure 31:	Distribution of Survey Participants by Way of Booking Organised Shore Excursion .....	42

Figure 32:	Distribution of Survey Participants by Age Group and Way of Booking Organised Shore Excursion .....	43
Figure 33:	Distribution of Survey Participants by Region of Origin and Way of Booking Organised Shore Excursion .....	43
Figure 34:	Distribution of Survey Participants by Time they Booked Organised Shore Excursion .....	44
Figure 35:	Distribution of Survey Participants by Region of Origin and Time they Booked Organised Shore Excursion .....	44
Figure 36:	Distribution of Survey Participants by Amount Paid per Person for the Organised Shore Excursion (USD) .....	45
Figure 37:	Distribution of Survey Participants by Ship Type and Amount Paid per Person for the Organised Shore Excursion.....	45
Figure 38:	Average USD Spent for Organised Shore Excursion by Age Group .....	46
Figure 39:	Distribution of Survey Participants by Whether they Purchased Additional Goods or Services Apart from the Cost of the Organised Shore Excursion .....	46
Figure 40:	Distribution of Survey Participants by Hours stayed Ashore and Whether they Purchased Additional Goods or Services Apart from the Cost of the Organised Shore Excursion .....	47
Figure 41:	Distribution of Survey Participants by Age Group and Whether they Purchased Additional Goods or Services Apart from the Cost of the Organised Shore Excursion .....	47
Figure 42:	Distribution of Survey Participants by Amount Paid per Person during Individually Organised Shore Leave (USD) .....	48
Figure 43:	Distribution of Survey Participants by Ship Type and Amount Spent per Person during Individually Organised Shore Leave .....	48
Figure 44:	Distribution of Survey Participants by Hours stayed Ashore and Amount Spent per Person during Individually Organised Shore Leave .....	49
Figure 45:	Average Amount Spent per Person during Individual Visit by Age Group .....	49
Figure 46:	Average Spend in Different Service Areas during Individually Organised Shore Leave (USD) .....	50
Figure 47:	Distribution of Survey Participants by Status on Whether they'd liked to Purchase more Locally Produced Products .....	50
Figure 48:	Distribution of Survey Participants by Status in Taking Part in Organised Shore Excursion and Whether they'd Liked to Purchase more Locally Produced Products.....	51
Figure 49:	Products that Survey Participants would like to see Locally Produced .....	51
Figure 50:	Importance of Having an Environmentally Friendly Shore Leave .....	52
Figure 51:	Distribution of Survey Participants by Awareness about Nature/Environment (aggregated).....	52
Figure 52:	Distribution of Survey Participants by Ship Type and Facts Aware of About Nature/Environment (aggregated).....	53
Figure 53:	Top Facts about Seychelles Survey Participants are Aware of .....	53
Figure 54:	Distribution of Survey Participants by Willingness to Pay More for Shore Leave, if it's Guaranteed that Funding will Go towards Environment Protection .....	54
Figure 55:	Distribution of Survey Participants by Ship Type and Willingness to Pay More for Shore Leave, if it's Guaranteed that Funding will go Towards Environment Protection .....	54
Figure 56:	Distribution of Survey Participants by Proportion Willing to Pay More for Shore Leave, if it's Guaranteed that Funding will Go towards Environment Protection .....	55



Figure 57:	Distribution of Survey Participants by Ship Type and Proportion Willing to Pay More for Shore Leave, if it's Guaranteed that Funding will go Towards Environment Protection .....	55
Figure 58:	Distribution of Survey Participants by Satisfaction with Shore Leave .....	56
Figure 59:	Distribution of Survey Participants Rating on Likelihood of Returning to Seychelles.....	56
Figure 60:	Distribution of Survey Participants by Ship Type and Rating on Likelihood of Returning to Seychelles .....	57
Figure 61:	Distribution of Survey Participants by Hours stayed Ashore and Rating on Likelihood of Returning to Seychelles .....	57
Figure 62:	Stakeholder Perspectives on Economic Benefits from Cruise Tourism.....	58
Figure 63:	Stakeholder Perspectives on Economic Benefits from Cruise Tourism by Group .....	58
Figure 64:	Stakeholder Perspectives on Beneficiaries of Cruise Tourism .....	59
Figure 65:	Stakeholder Perspectives on Job Creation Through Cruise Tourism.....	59
Figure 66:	Stakeholder Perspectives on Employment Opportunities Through Cruise Tourism.....	60
Figure 67:	Stakeholder Perspectives on Income for Individual Companies from Cruise Tourism .....	60
Figure 68:	Stakeholder Perspectives on Cruise Tourism Income for Individual Companies by Island.....	61
Figure 69:	Stakeholder Perspectives on Desirability of Additional Cruise Ship Calls .....	61
Figure 70:	Stakeholder Perspectives on Desirability of Longer Cruise Ship Layovers .....	62
Figure 71:	Stakeholder Perspectives on Economic Advantage of Seychelles as Home Port.....	62
Figure 72:	Stakeholder Perspectives on Correlations between Ship Size and Economic Impacts .....	63
Figure 73:	Stakeholder Perspectives on Cruise Tourists being Less Economically Relevant than Other Forms of Tourists .....	63
Figure 74:	Stakeholder Perspectives on Cruise Tourism Changing the Structure of the Local Economy.....	64
Figure 75:	Stakeholder Perspectives on Hidden Costs generated from Cruise Tourism.....	64
Figure 76:	Stakeholder Perspectives on Economic Seasonality Effects generated from Cruise Tourism.....	65
Figure 77:	Stakeholder Perspectives on Cruise Tourism Helping Nature Conservation .....	65
Figure 78:	Stakeholder Perspectives on Cruise Tourism Lowering the Pressure on Natural Resources .....	66
Figure 79:	Stakeholder Perspectives on Cruise Tourism Having an Impact on Ecological Seasonality .....	66
Figure 80:	Stakeholder Perspectives on Incoming Cruise Ship Numbers as an Ecological Problem.....	67
Figure 81:	Stakeholder Perspectives on Most Influential Behaviors Affecting Climate and Biodiversity .....	67
Figure 82:	Stakeholder Perspectives on Incoming Cruise Ships' Size as an Ecological Problem .....	68
Figure 83:	Stakeholder Perspectives on Cruise Operation Facets Affecting Marine Habitats .....	68
Figure 84:	Stakeholder Perspectives on Particularly Problematic Emissions.....	69
Figure 85:	Stakeholder Perspectives on Cruise Ships' Form of Powering as an Ecological Challenge .....	69
Figure 86:	Stakeholder Perspectives on Other Cruise Ship Features Perceived as Reducing Emissions .....	70
Figure 87:	Stakeholder Perspectives on Minimizing Cruise Tourism's Environmental Impact .....	70

LIST OF TABLES

Table 1: Cruise Vessel Characteristics .....13

Table 2: Itineraries and Routes of Large Cruise Vessels .....16

Table 3: Itineraries and Routes of Expedition Cruise Vessels.....17

Table 4: Activities Offered for Cruise Passengers .....19

Table 5: Exemplary Emissions Calculation.....22

Table 6: Fees and Economic Impact of Cruise Vessels .....23

Table 7: Exemplary Comparison of Fees for Large vs. Expedition Ships .....26



## EXECUTIVE SUMMARY

Cruise tourism has become an increasingly dynamic segment of Seychelles' visitor economy. Following a decade of steady expansion and a temporary decline during the pandemic, the sector has recovered strongly and continues to grow. This renewed momentum underlines Seychelles' attractiveness within the Indian Ocean cruise market but also places additional pressure on port infrastructure, island communities, and sensitive ecosystems. The central challenge now lies in ensuring that the sector's development supports both local prosperity and environmental integrity.

This study, conducted by the Seychelles Sustainable Tourism Foundation (SSTF) in partnership with national and international institutions, represents the first comprehensive, evidence-based assessment of cruise tourism in Seychelles. It combines a passenger survey with in-depth stakeholder interviews to generate baseline data on the economic and environmental dimensions of cruise operations across the inner islands. The findings provide a foundation for policy decisions and strategic planning aimed at aligning cruise tourism with the principles of the Blue Economy and sustainable destination management.

The results show that while cruise tourism brings visibility and diversification to Seychelles' tourism offer, its local economic contribution remains limited. Revenues are concentrated among a few intermediaries, and many small businesses find it difficult to participate in the cruise value chain. Strengthening coordination, improving information flow, and promoting longer or better-structured visits could enhance opportunities for local enterprises and increase value retention within the islands.

Visitor profiles and travel behaviours vary notably by cruise segment. Smaller expedition ships tend to attract guests who are more sustainability-minded and interested in authentic, nature-based experiences, whereas larger vessels often cater to a more traditional, less environmentally engaged clientele. These differences suggest that focusing on smaller, high-value, low-impact operations would better align the sector with Seychelles' vision for sustainable tourism.

Stakeholders also identified key governance and environmental challenges. Weak coordination among institutions, insufficient waste management infrastructure, and limited enforcement of maritime regulations constrain the sector's sustainability performance. At the same time, both visitors and operators demonstrate increasing interest in supporting conservation initiatives, indicating strong potential for mechanisms such as environmental levies and partnerships with cruise companies to fund ecosystem protection and community projects.

Building on these insights, the study outlines three strategic priorities:

1. **Integrating cruise tourism into destination governance** through clear policy direction, defined vessel criteria, and strengthened multi-stakeholder coordination.
2. **Optimizing local economic benefits** by improving regulatory frameworks, enhancing transparency in revenue distribution, and supporting small enterprises and artisans.
3. **Advancing sustainability and environmental management** by embedding clear standards in port and excursion operations, improving waste systems, and fostering collaboration between government, NGOs, and the private sector.

By pursuing these measures, Seychelles can position itself as a model for sustainable and inclusive cruise tourism in the Indian Ocean—ensuring that growth contributes to community wellbeing, economic resilience, and the long-term preservation of its natural and cultural heritage.

## INTRODUCTION AND OBJECTIVES

Cruise tourism in Seychelles has expanded significantly over the past decade. Between 2014 and 2019, the country recorded strong year-on-year growth in cruise passenger arrivals, reaching a peak of 66,832 passengers in 2019 (Seychelles Ports Authority). Following a temporary national cruise ship ban during the COVID-19 pandemic, arrivals dropped sharply to 1,107 passengers in 2021, before gradually recovering to 8,538 passengers in 2022 and 33,816 passengers in 2023. By 2024, the sector rebounded to 67,987 passengers, exceeding pre-pandemic levels, with strong continued growth projections for the upcoming cruise seasons.

According to the 2020 Mahé, Praslin and La Digue Tourism Carrying Capacity Studies (CCS), the rapid growth in cruise ship arrivals has placed increasing pressure on key port infrastructure, particularly Port Victoria and the St. Anne jetty. These developments have raised concerns among residents and tourism stakeholders regarding the limited local economic benefits and the potential negative social and environmental impacts of cruise tourism on island communities.

Globally, research has highlighted that the cruise industry is a major source of environmental pollution and ecosystem degradation, affecting air, water, soil, fragile habitats and wildlife (Marine Pollution Bulletin, 2021). Given that Seychelles' natural beauty and cultural-historical diversity are among its key tourism assets, the potential risks to Marine Protected Areas (MPAs) – of which there are eight in the inner islands – warrant careful examination.

Previous studies have emphasized the need for data-driven decision-making in this emerging sector. The Value Chain Analysis “Strengthening Economic Resilience of Seychelles Through Inclusive Tourism” (March 2017) noted the absence of a comprehensive cost-benefit analysis of cruise ship impacts, either in economic or environmental terms, and recommended a thorough assessment of this growing segment. Furthermore, the development of a Cruise Ship Strategic Plan was identified as a national priority by the Department of Tourism.

In response to these concerns and recommendations, the present baseline study – “Assessing the Direct Economic and Specific Environmental Impact of Cruise Activities in Seychelles' Inner Islands, in Relation to Marine Protected Areas (MPAs)” – has been initiated by the Seychelles Sustainable Tourism Foundation (SSTF) in partnership with the Department of Tourism and the Seychelles Ports Authority (SPA), and is funded by the Seychelles Conservation and Climate Adaptation Trust (SeyCCAT).

Given the pilot nature of the research and the logistical constraints associated with outer island assessments, the study focuses on the inner islands and sites located within or adjacent to MPAs, following the guidance of the Blue Grants Fund Committee. Data collection took place during the main cruise season from October 2024 to May 2025, within the project period July 2024 to October 2025.

The study combined a review of existing global, regional, and national literature with primary data collection, including a quantitative cruise passenger survey and qualitative interviews with key stakeholders. Its objectives are to:

- Generate baseline data on the economic and environmental impacts of inner island cruise operations;
- Provide evidence-based policy recommendations to guide sustainable management of the cruise sector; and
- Contribute to the integration of environmental and socio-economic considerations into national planning processes.

The findings will be of particular relevance to the Department of Tourism, which is developing a National Cruise Strategy, as well as to the Seychelles Ports Authority, which aims to gradually incorporate Green Port Initiatives into its development agenda (SPA Strategic Plan, 2019–2023).

# 1 CRUISE MAPPING

## 1.1 Introduction

The purpose of the mapping exercise was to identify and analyse key geographical, logistical and defining factors relevant to the cruise industry within the Seychelles. This exercise was important for the cruise study as it helped in understanding cruise characteristics, confirmed schedules for the season and overviews of collected fees and types of activities offered to passengers. By mapping these elements in the first phase of the study, the cruise study team was able to make informed decisions for developing the research methodology.

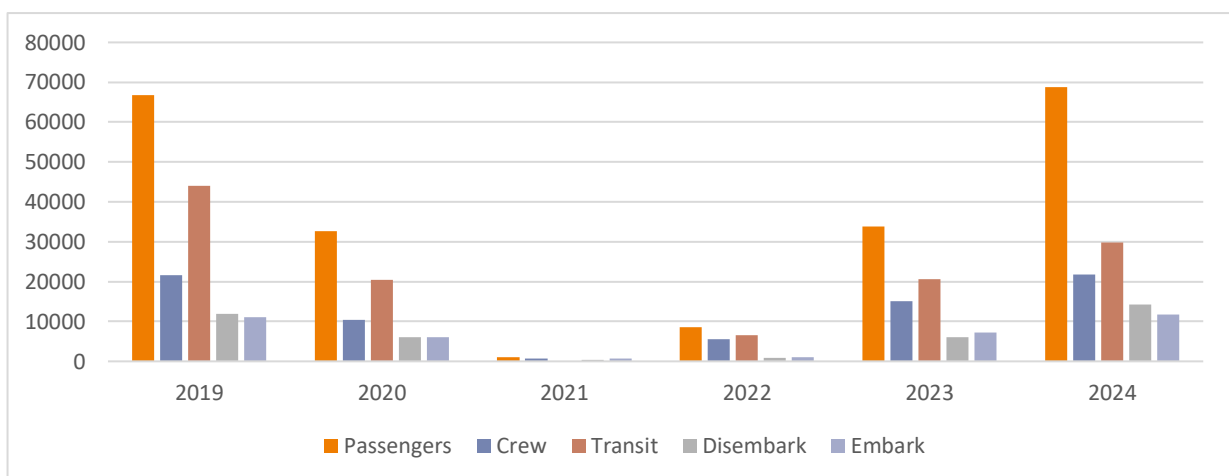
The geographical focus of this mapping exercise was on the inner islands of Seychelles. These areas include key islands such as Mahé (Port Victoria), Praslin, and La Digue, which are vital to the cruise industry due to their infrastructure, attractions, and accessibility.

## 1.2 Methodology

Data was gathered through various methods to ensure a comprehensive understanding of the industry. The Seychelles Port Authority provided valuable data via email, which included essential information regarding cruise operations and related statistics. Additionally, the Seychelles Sustainable Tourism Foundation (SSTF) conducted meetings with key stakeholders, including the Department of Environment and representatives from Mahe Shipping and Hunt Deltel, Seychelles Revenue Commission and DMCs and reached out to ship chandlers and the waste management company working with cruise vessels. These discussions facilitated a deeper insight into environmental considerations and shipping operations. Following these meetings, supporting documents were shared with the SSTF by these institutions, further enriching the data set and allowing for more informed analysis.

## 1.3 Cruise Arrivals in Seychelles

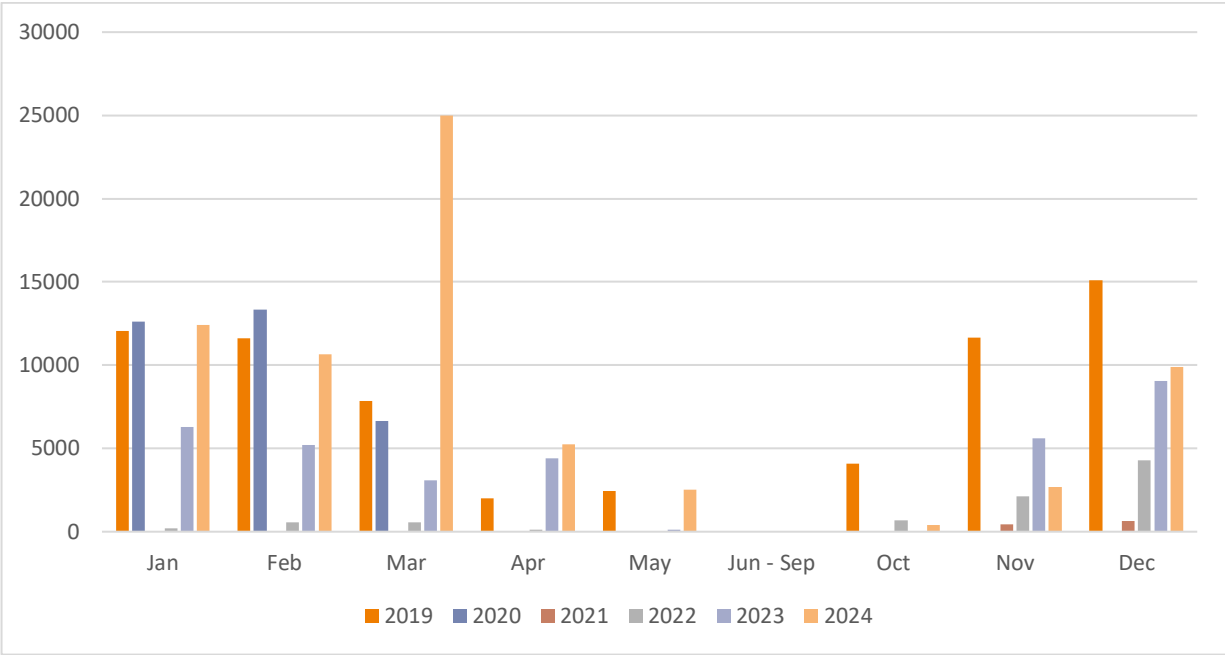
**Figure 1: Cruise Arrivals 2019-2024**



Source: Seychelles Port Authority

The cruise arrivals in Seychelles over the past five years have been significantly influenced by the global COVID-19 pandemic. In 2019, Seychelles recorded an all-time high of 66,832 cruise passengers. However, with the onset of the pandemic in 2020, arrival numbers plummeted, reaching a low of just 1,107 passengers in 2021. Since then, there has been a gradual recovery, with arrivals climbing steadily. By 2024, the number of passengers had risen to 67,987, exceeding pre-pandemic levels. This is in line with global observations that cruises are the tourism segment that has recovered most quickly from the pandemic-related decline in demand and is generally experiencing exceptional growth (CLIA, 2023). The data further highlights that the majority of passengers visit Seychelles as part of a transit route, with only a comparatively small proportion embarking or disembarking on the islands.

**Figure 2: Monthly Passenger Arrivals 2019-2024**



Source: Seychelles Port Authority

The analysis of monthly arrival data reveals that cruise tourism in the Seychelles exhibits distinct seasonality, with passenger arrivals peaking from October to May. During the summer months, from June to September, the industry experiences an off-season with no cruise ship arrivals. In 2019, the high season extended from November to February, with passenger numbers ranging between 3,000 and 4,500. Conversely, October, March, April, and May recorded lower numbers, with arrivals of up to 1,500 passengers. Although the data from 2020 to 2023 were significantly impacted by the COVID-19 pandemic, the seasonal pattern of cruise tourism remained evident. Notably, in 2024, there has been a shift in these dynamics, with the high season appearing to have extended. March 2024, in particular, saw a record high of 25,000 cruise passengers arriving in Seychelles.

## 1.4 Cruise Vessel Characteristics

**Table 1: Cruise Vessel Characteristics**

Vessel Name	Cruise Line	Vessel Type	Tonnage (GT)	Length (m)	Passenger Capacity	Crew Capacity	Agent	DMC
AIDAstella	Aida Cruises	Contemporary	71,304	253	2,700	620	Hunt Deltel	Creole / Masons / 7° South
Crystal Symphony	Crystal Cruises	Luxury	51,044	238.1	848	548	Mahe Shipping	Creole / Masons
Hebridean Sky	Noble Caledonia	Expedition	4,200	90.6	119	71	Hunt Deltel	7° South
Le Bougainville	Ponant	Expedition	10,700	131.5	184	118	Hunt Deltel	Creole
Le Dumont-d'Urville	Ponant	Expedition	10,700	131.5	184	110	Hunt Deltel	Creole
Le Lapérouse	Ponant	Expedition	9,976	131.5	184	118	Hunt Deltel	
MS INSIGNIA	Oceania Cruises	Luxury	30,277	180	656 to 824	372	Mahe Shipping	Masons
MS Serenissima	Noble Caledonia	Expedition	2,598	87.4	96	48	Hunt Deltel	7° South
MSC MAGNIFICA	MSC Cruises	Contemporary	95,128	293.8	2,518	1,014	Mahe Shipping	Masons
MV Europa	Hapag-Lloyd Cruises	Luxury	28,890	198	408	285	Hunt Deltel	Masons
Nautica	Oceania Cruises	Luxury	30,277	181	655 to 824	409	Mahe Shipping	Masons
Norwegian Dawn	Norwegian Cruise Line Holdings	Contemporary	92,250	294.1	2,370	1,032	Mahe Shipping	Masons
Norwegian Sky	Norwegian Cruise Line Holdings	Contemporary	77,104	258.6	2,004	899	Mahe Shipping	Masons
Riviera	Oceania Cruises	Contemporary	66,172	239.3	1,238	776	Mahe Shipping	Masons
Seabourn Sojourn	Inchcape Shipping Services Mauritius	Luxury	32,346	198	450 to 540	330	Mahe Shipping	
Seven Seas Voyager	Oceania Cruises	Luxury	42,363	181	700	446	Mahe Shipping	Masons
Silver Dawn	Silver Sea	Luxury	40,700	212.8	576 to 691	408	Mahe Shipping	Masons

SILVER SPIRIT	Silver Sea	Luxury	39,519	210.7	608	408	Mahe Shipping	Masons
Viking Sky	Viking Ocean Cruises	Luxury	47,842	228.2	930	550	Mahe Shipping	
Zuiderdam	Inchcape Shipping Services Mauritius	Contemporary	82,305	285.5	1,970	816	Mahe Shipping	

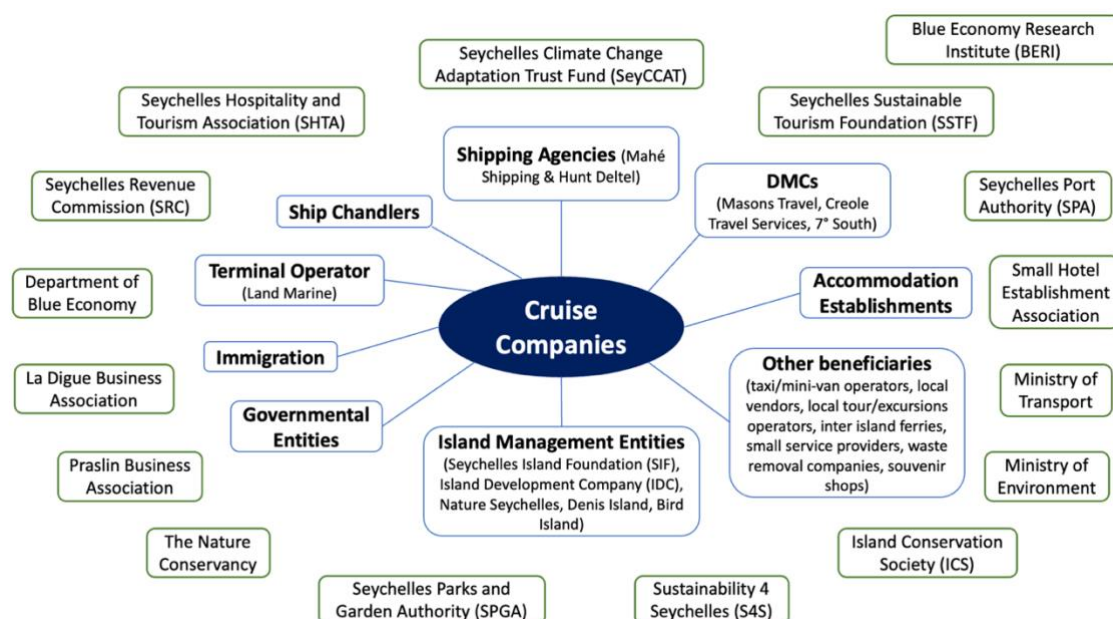
Source: Seychelles Sustainable Tourism Foundation (SSTF)

Table 1 provides an overview of the types of cruise vessels visiting the Seychelles in the 2024-25 season. Most of these vessels fall into the *luxury* segment, typically measuring between 180 and 240 meters in length and accommodating around 400 to 999 passengers. *Contemporary* ships, by contrast, are larger – generally 240 to 300 meters long – and carry more than 1,000 passengers. *Expedition* ships form the smallest category, averaging 90 to 130 meters in length and hosting no more than 400 guests. In total, the 30 listed vessels operate under the auspices of 17 different cruise companies. An analysis of the local agents reveals that Mahe Shipping primarily handles the larger vessels, whereas Hunt Deltel manages most of the expedition ships.



## 1.5 Stakeholder Overview

**Figure 3: Stakeholder Overview (incl. Cruise Committee)**



Source: Seychelles Sustainable Tourism Foundation (SSTF)

The cruise industry in Seychelles involves a broad range of stakeholders. Within the port sector, key players include terminal operators, ship changers, and shipping agencies. For passenger-related services and excursions, the stakeholders encompass Immigration authorities, destination management companies (DMCs), accommodation providers, and other beneficiaries. Overall coordination and guidance are provided by island management entities and governmental entities.

As part of the cruise impact study conducted by SSTF, it was decided to form a Cruise Committee, with representatives from all key cruise stakeholder institutions in the country. The aim of the Committee is to ensure a multi-stakeholder participatory research process, enabling the study to benefit a broad range of key stakeholders in the cruise industry. The SSTF is committed to gathering data that is not only relevant, but also valuable for evidence-based policy making and the future management of the sector. This will be achieved through regular consultation between the SSTF, its partners, and key cruise industry stakeholders throughout the study. The Committee's tasks will involve attending periodic meetings, which may be held either face-to-face or virtually. Members will be expected to contribute information to the research efforts, provide feedback on various documents such as the literature review, this cruise mapping, and the final report, in the form of comments, and actively participate in discussions. This active engagement is crucial to ensure the study remains relevant and meets the needs of all involved stakeholders. The Blue Economy Research Institute (BERI) is a special case among the members, as they are both part of the Cruise Committee and part of the research team conducting the study.

## 1.6 Itineraries and Routes

**Table 2: Itineraries and Routes of Large Cruise Vessels**

Vessel Name	Ports of Call				Duration (days)	Highlight (Start/End in Seychelles)
	Port Victoria	La Digue Island	Praslin	Others		
AIDAstella	X	X	X		3	
Crystal Symphony	X				1	
MSC MAGNIFICA	X				1	
MS INSIGNIA	X	X			2	
MV Europa	X	X	X	Curieuse	4	
Nautica	X				1	
Norwegian Dawn	X	X			2	
Norwegian Sky	X	X			2	
Riviera	X				1	
Seabourn Sojourn	X		X		2	
Seven Seas Voyager	X				1	
Silver Dawn	X		X		3	
SILVER SPIRIT	X				1	
Viking Sky	X				1	
Zuiderdam	X				1	

Source: Hunt Deltel & Mahe Shipping

Table 2 illustrates that nearly half of the large cruise vessels visiting the inner islands of Seychelles remain for only one day, with Port Victoria on Mahé being their sole port of call. The remaining vessels typically include one or two of the other main islands, La Digue and Praslin, in their itinerary, resulting in stays of two or three days. One vessel extends its itinerary to include a third island, Curieuse, and prolongs its stay to a total of four days. Consequently, the average duration of a large cruise ship's visit to the inner islands of Seychelles is **2.1 days**.

**Table 3: Itineraries and Routes of Expedition Cruise Vessels**

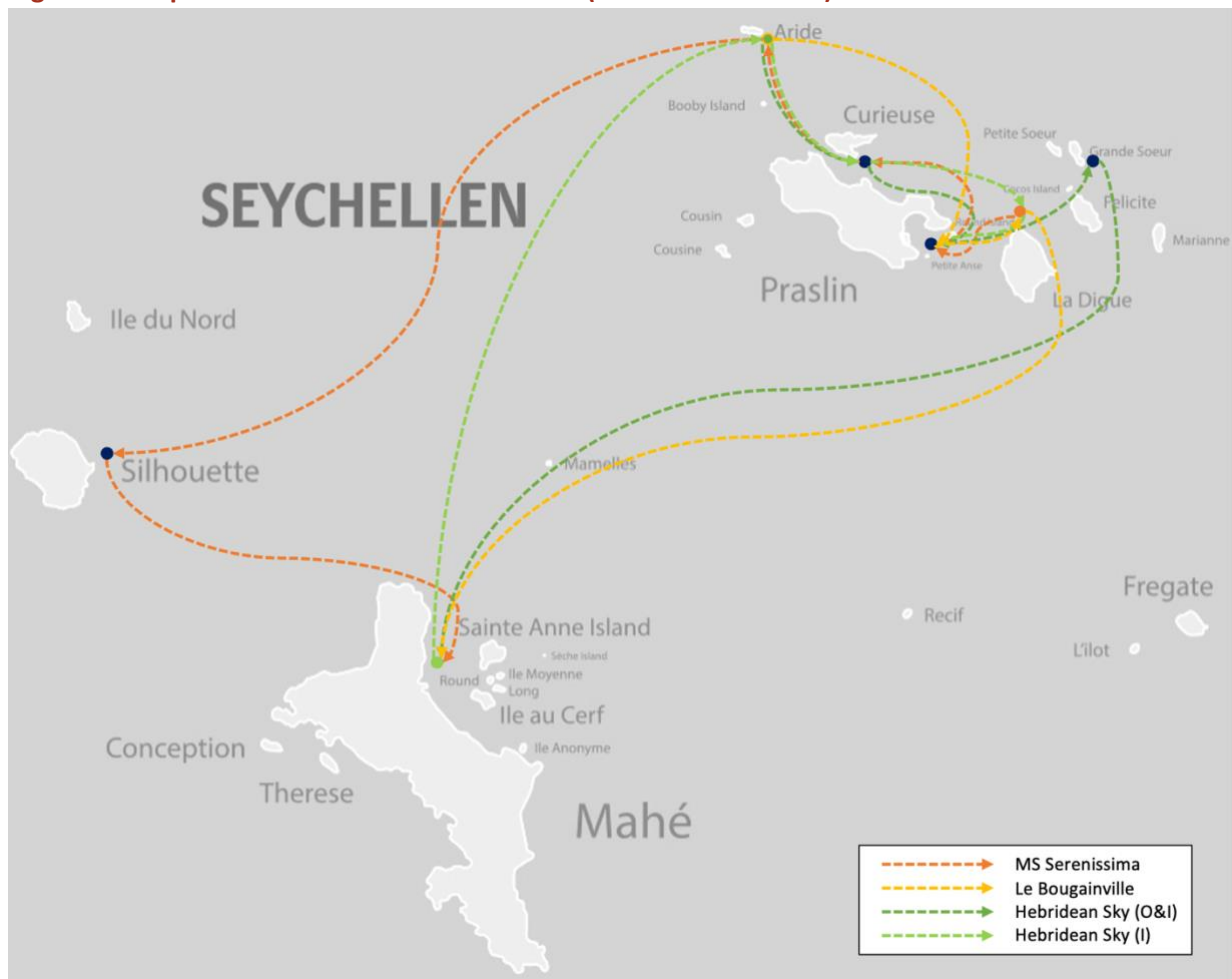
Vessel Name	Ports of Call	Duration (days)	Highlight (Start/End in Seychelles)
Hebridean Sky (Outer Islands [O])	Assumption – Cosmoledo – Aldabra Atoll	4	
Hebridean Sky (Outer and Inner Islands [O&I])	[Assumption – Aldabra Atoll – Cosmoledo – Farquhar – Bijoutier – Poivre] Aride – Curieuse – Praslin – Grande Soeur – Port Victoria	3 [9]	End
Hebridean Sky (Inner Islands [I])	Port Victoria – Aride – Curieuse – La Digue Island – Praslin	3	Start
Hebridean Sky (Inner and Outer Islands [I&O])	Port Victoria – Praslin – Aride [Bijoutier – Astove – Cosmoledo – Aldabra Atoll – Assumption]	2 [7]	
Le Dumont- d’Urville (Inner Islands [I])	La Digue Island – Port Victoria	1	End
Le Dumont-d’Urville (Inner and Outer Islands [I&O])	Port Victoria – La Digue Island [Bijoutier – Aldabra Atoll – Astove – Assumption]	2 [8]	Start
Le Bougainville (Inner and Outer Islands short [I&Os])	Port Victoria – La Digue Island [Bijoutier – Aldabra Atoll – Astove – Assumption]	2 [8]	Start
Le Bougainville (Outer and Inner Islands short [O&Is])	[Assumption – Aldabra Atoll – Astove – Bijoutier] La Digue Island – Port Victoria	1 [7]	End
Le Bougainville (Outer and Inner Islands long [O&Il])	[Assumption – Aldabra Atoll – Astove – Farquhar – Saint François – Poivre – Rémire] Aride – Praslin – La Digue Island – Port Victoria	2 [8]	End
MS Serenissima	La Digue Island – Praslin – Curieuse – Praslin – Aride – Silhouette – Port Victoria	4	
Le Lapérouse	La Digue Island	1	

Source: Hunt Deltel &amp; Mahe Shipping

Table 3 indicates that most expedition cruise vessels visit both the inner and outer islands of the Seychelles. For those visiting only the inner islands, the average duration of stay is **2.3 days**. When including routes that also encompass the outer islands, the average duration of the visit increases to 5.5 days.

Figure 4 provides an illustration of the various routes taken by expedition ships while visiting the inner islands of Seychelles.

**Figure 4: Expedition Cruise Vessels Itineraries (3 and more islands)**



Source: Hunt Deltel & Mahé Shipping

## 1.7 Activities

**Table 4: Activities Offered for Cruise Passengers**

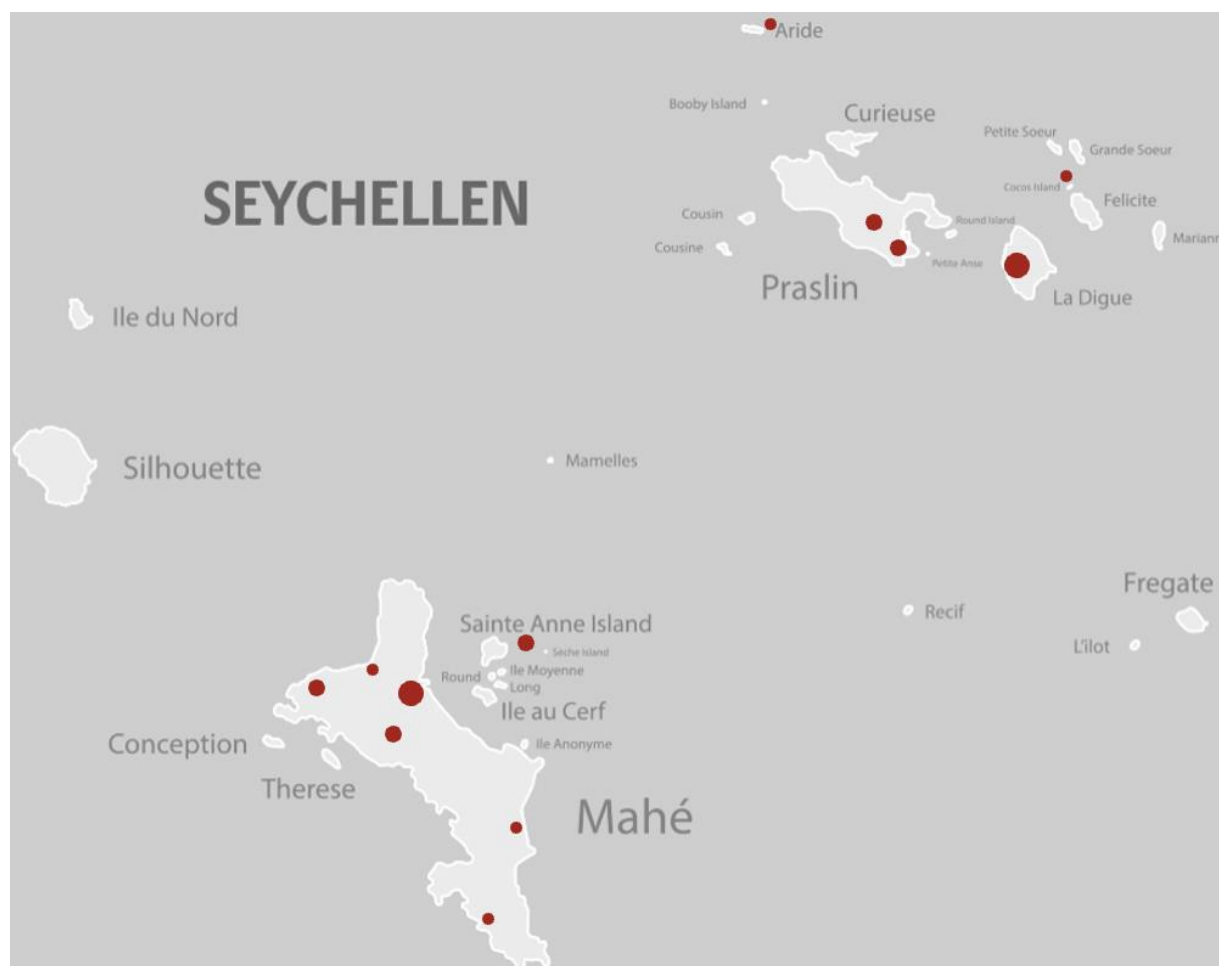
Island	Name of activity	Type of activity	MPA	Booking modalities
<b>Mahé</b>	Victoria North	Land-based	-	Prebooked and prepaid by the Cruise Company (net-rates)
	Victoria & Heart of Mahé	Land-based	-	
	Mahé Discovery	Land-based	-	
	Beach Tour	Land-based	-	
	Rum Factory	Land-based	-	
	Hiking Tour	Land-based	Yes	
	Creole Night/Day	Land-based	-	
	Catamaran Cruise	Marine-based	Yes	
	Spice & Cruise	Marine-based	-	
	Copolia Trail	Land-based	-	
	The Enchanting Secluded Cove of Anse Major	Land-based	-	
<b>La Digue</b>	La Digue Highlights	Land-based	-	Prebooked and prepaid by the Cruise Company (net-rates)
	La Digue by bike with L'Union Estate	Land-based	-	
	Exploring Praslin & La Digue in one day	Land-based	-	
<b>Praslin</b>	Praslin Highlights	Land-based	Yes	Prebooked and prepaid by the Cruise Company (net-rates)
	Hike Fond Ferdinand	Land-based	-	
	Vallée de Mai	Land-based	-	
	Exploring Praslin & La Digue in one day	Land-based	-	
<b>Other Islands</b>	St. Anne Marine Park	Marine-based	Yes	Prebooked and prepaid by the Cruise Company (net-rates)
	Coco Island	Marine-based	Yes	
	Aride Island	Marine-based	-	
	Helicopter, fishing, cooking (on demand)	Land-/Marine-based	-	

Source: Masons Travel, 7° South, (& Creole Travel Services)

An analysis of the activities offered by DMCs for cruise passengers visiting Seychelles (Table 4) reveals that the majority are land-based and concentrated on the island of Mahé. The most frequently visited sites, included in at least two of the excursions listed above, are the Botanical Garden in Victoria, Anse Major, the Copolia Trail, St. Anne Marine Park, L'Union Estate, Vallée de Mai, and Fond Ferdinand.

Figure 5 provides a visual representation of all visited locations, where circles of varying sizes indicate the number of activities that include each site: the smallest circle represents one activity, with progressively larger circles corresponding to two, three, or more activities.

**Figure 5: Cruise Passenger Hotspots**



Source: Masons Travel, 7° South, (& Creole Travel Services)

According to the DMCs, all activities are prebooked many months in advance and prepaid by the cruise companies, which then resell them to the passengers. Cruise passengers usually book their shore excursions prior to their arrival in Seychelles, with a few exceptions (e.g. last-minute tailor-made private excursions, e.g. for couples). DMCs noted that cruise companies operate on extremely tight schedules only allowing for limited time on the islands and congestion during peak times, e.g. at La Digue Jetty. DMCs tend to cooperate during peak cruise season in terms of sharing coaches and catamarans for transporting large number of cruise passengers at a time. DMCs also highlighted that for the cruise passenger survey planned as part of this study, it will be most advisable to approach passengers once they have alighted from coaches/catamarans and are on their way back on board, or once they have boarded the cruise ship again.

It is also to be noted that shipping agents observed that there is a considerable percentage of cruise passengers, especially among the large cruise vessels who decide not to disembark in Seychelles.

## 1.8 Environmental Impacts

This cruise mapping focused primarily on obtaining existing data on the characteristics of the cruise industry in Seychelles. Specific environmental impacts will be studied in-depth during the primary data collection phase of the project. However, preliminary exchange with stakeholders highlighted a number of considerations for developing the interview questionnaires.

Exchange with the Principal Secretary for Environment highlighted that in relation to the MPAs, due to the time limitations of cruise passengers, the main focus of shore activities would be at Cap Ternay and St Anne MPA, as well as Curieuse and Ile au Coco. He highlighted that during peak times with very big groups arriving, there is the need to move groups around, e.g. to be able to accommodate people at BBQ areas, which can cause dissatisfaction among passengers and provide additional pressure on the MPA teams. He stressed the importance to contact protected area bodies involved, such as SPGA, Nature Seychelles and Moyenne Foundation, as well as Seychelles Marine Safety Authority (SMSA) who would be the instance in case of any environmental concerns. It will be crucial to find out the range of services in place by the MPA bodies, e.g. drop-off points for cruise passengers to limit environmental damages, as well as guidance and enforcement, e.g. in relation to visitor behaviour and waste management. He highlighted that the possibility to provide services to cruise companies might be limited from a risk management perspective, i.e. with responsibilities arising when dealing directly with passengers, knowing of instances where authorities were sued by companies in the past.

In relation to the sustainability equipment of the cruise vessels visiting Seychelles' Inner Islands, it is worth noting that according to one shipping agent many expedition vessels are equipped with modern technology designed to reduce their environmental impact. For instance, dynamic positioning systems allow ships to remain stationary without dropping anchors, which helps protect coral reefs. This information also forms a basis for stakeholder interviews in the next phase. Certain expedition cruise companies, such as Ponant, have equipment to reduce CO<sub>2</sub> emissions, adopted policies to eliminate single use plastics on board and have vacuum toilet systems which allow to treat black and gray water, with processes to then use water for technical purposes or engine cooling.

During the initial Cruise Committee meeting in early September 2024, the question of how to calculate emissions for cruise vessels in Seychelles was raised. The literature review found that while standardized methodologies exist, there is currently no universally accepted procedure for emissions calculation. Emissions are influenced by various factors, including fuel consumption, onboard hotel operations, waste management, and entertainment activities, many of which are difficult to quantify precisely. Statements from shipping agents indicate that cruise vessels idle in Seychelles, and do not take electricity from the port, as these facilities are not yet available. The practices of shipping companies often lack transparency, while public institutions face significant challenges in obtaining the necessary ship-specific data. As a result, estimating emissions accurately is complex and prone to uncertainty. Tools like Klimalink may provide guidance, and starting 2026, a CO<sub>2</sub> disclosure for cruise voyages is expected.

For now, the myClimate CO<sub>2</sub> offsetting tool allows for a comparable estimation of emissions per passenger and per cruise based on factors such as cabin type and occupancy, ship size, and the ratio of sea to harbour days. Table 5 presents an example calculation from the tool for the expedition ship MS Serenissima and the larger vessel AIDAstella. The total emissions generated by the AIDAstella cruise ship are approximately ten times higher than those of the MS Serenissima. However, it is important to note that the emissions per passenger on the MS Serenissima are about 2.5 times higher than those per passenger on the AIDAstella.



**Table 5: Exemplary Emissions Calculation**

	MS Serenissima	AIDAstella
Cabin	Standard	Standard
Occupancy	2 persons	2 persons
Ship size	<500 (96)	2,000-3,000 (2,700)
Length of cruise (in Seychelles)	4 days	3 days
Number of harbour days	4 [14.5h not docked/anchored]	2 [24h not docked/anchored]
Emissions per passenger / cruise (t CO <sub>2</sub> e)	2.5	0.962
Emissions per cruise (t CO <sub>2</sub> e)	240	2,597.4

Source: Seychelles Sustainable Tourism Foundation (SSTF) & myClimate

It could be argued that the emissions produced by the cruise vessels stopping in Seychelles are not particularly useful unless placed within the broader context of emissions from other tourism-related activities. Such comprehensive comparisons are beyond the scope of this study.

## 1.9 Fees and Economic Impact

**Table 6: Fees and Economic Impact of Cruise Vessels**

Type of fee	Amount (SCR)	Specification	Recipient	Source
<b>Port Dues</b>	0.91 per GT	0 to 48 hours	SPA	Harbour Regulations 2024
	0.33 per GT	Each subsequent period of 24 h or part thereof	SPA	
<b>Berth Dues</b>	0.43 per GT	0 to 24 hours or part thereof	SPA	Harbour Regulations 2024
	0.62 per GT	Each subsequent period of 24 hours or part thereof	SPA	
<b>Maritime Safety Dues</b>	275 per call	up to 150 GT	SPA	Harbour Regulations 2024
	481.25 per call	Above 150 GT	SPA	
<b>Marine Environment and Protection Dues</b>	0.15 per 48h	per GT	SPA	Harbour Regulations 2024
<b>Environmental Levy</b>	450 per call		SPA	Harbour Regulations 2024
<b>Passenger Fee</b>	150 per passenger		SPA	Harbour Regulations 2024
<b>Hire of fender and gangway</b>	Fender 3437.50 Gangway 2887.50	per 24h	SPA	Harbour Regulations 2024
<b>Administrative fee</b>	100 SCR	Admin fee applicable for any of the following services: washing, diving, repairs, port access, etc	SPA	Harbour Regulations 2024
<b>Port clearance</b>	75 per vessel	up to 150 GT	SPA	Harbour Regulations 2024
	150 per vessel	Above 150 GT	SPA	
<b>Voluntary environmental donation</b>	voluntary donation	Only for air travellers arriving to Seychelles (so possible for cruise passengers embarking in Seychelles). Collected through Seychelles Travel Authorization platform, powered by Travizory, as a donation option which goes to Environment Trust Fund (ETF)	ETF	Travizory

<b>Taxes</b>	3% on gross revenue derived from the carriage by the ship of passengers, mail, merchandise  All goods entering the country are subject to 15% VAT. <sup>1</sup>	Only applicable for cruise vessels that embark goods or passengers in Seychelles	SRC	Business Tax Act 2009
<b>Temporary cruise permits and temporary import permits</b>		long term cruising	SMSA/SRC	
<b>Bill of entries</b>	VAT rate of 15% on imported goods	long term cruising	SRC	VAT on importation
<b>Agency fees</b>	1,000-4,000 USD per call (apprx. 12,500-50,000 SCR)	Dependant on size of vessel and services required	Shipping agency	Shipping agent
<b>Crew changes</b>			Shipping agency	Shipping agent
<b>Waste management fee</b>		Information still to be obtained	SM Plant Hire	

Source: Hunt Deltel & Mahe Shipping

<sup>1</sup> There is only 15% VAT when importing a vessel.

All goods entering the country are subject to the 15% VAT. However, there are some regimes where the taxes are suspended given that they are not for the local market. A vessel can enter the country in transit. i.e., the vessel will be loading fuel or stores to be used during the trip. There will be no tax as the vessel is not staying in the country. A vessel can come on a temporary regime. i.e., the vessel will enter the country; the vessel will cruise for personal. In this category, the vessel should not conduct any commercial activity. The 15% VAT will be suspended. However, a guarantee is required as per the CMA.

If a vessel is coming into the country for commercial activity, the vessel will be subject to the 15% VAT. If the company importing the vessel is a VAT registered business, the company can request for the VAT upon importation to be deferred.

The economic impact of cruise ships, reflected in this mapping through various fees, demonstrates that longer stays and additional ports of call result in higher charges. However, since most fees are calculated based on tonnage, larger ships contribute significantly more than expedition vessels. For instance, the AIDAstella, which stays in the Seychelles for 3 days and visits Mahé, La Digue, and Praslin, generates approximately 790,000 SCR in fees. In contrast, the MS Serenissima, despite a 4-day stay and 6 different ports of call, contributes around 105,500 SCR. A detailed breakdown of these calculations can be found in Table 6. It is also notable that taxes are only levied when cruise vessels embark goods or passengers in the Seychelles, excluding the majority of large ships and also some of the expedition vessels, as these primarily visit for transit. Interestingly, exchange with SRC showed that in recent years no taxes had been collected from cruise vessels, despite a small, yet considerable number embarking passengers in the Inner Islands. This will be followed up in the next phase of the project. It is also to be noted that a feasibility study is ongoing on a possible cruise ship levy for biodiversity financing resulting from the BIOFIN process. The cruise ship study team is in contact with the consultant to find synergies.

Shipping agents stated that most cruise companies do not use many services from Seychelles, especially when it comes to perishable goods and rather opt for Mauritius for supplies for price reasons, or have the products imported from the EU or US, with the shipping agents then taking care of the customs formalities. In rare occasions cruise vessels refuel in Seychelles or restock on fresh water.

**Table 7: Exemplary Comparison of Fees for Large vs. Expedition Ships**

Type of fees / Ship	AIDAstella (71,304 GT, 2,700 psgrs, 3 ports of call, 3 days)	MS Serenissima (2,598 GT, 96 psgrs, 6 ports of call, 4 days)
Port Dues	$64,886.64 + 23,530.32 = 88,416.96$	$2,364.18 + 1,714.68 = 4,078.86$
Berth Dues	$30,660.72 + 88,416.96 = 119,077.68$	$623.52 + 4,832.28 = 5,455.8$
Maritime Safety Dues	1,443.75	2,887.5
Marine Environment and Protection Dues	21,391.2	779.4
Environmental Levy	1,350	2,700
Passenger Fee	405,000	14,400
Administrative fee	100	100
Port clearance	150	150
Agency fees	150,000	75,000
<b>Total</b>	<b>786,929.59 (apprx. 58,000 USD)</b>	<b>105,551.56 (apprx. 7,800 USD)</b>

Source: Own Calculations based on SPA, Hunt Deltel &amp; Mahe Shipping

## 1.10 Discussion and Conclusion

The cruise mapping exercise revealed several key insights regarding cruise ship activity in the Seychelles' Inner Islands. According to shipping agents, most large cruise ships, with lengths between 200 to nearly 300 meters, typically begin their journeys from ports in the USA (Miami), the UAE, or South Africa. These vessels often make a stop at Port Victoria in Seychelles, as well as the inner islands like Praslin and La Digue, during their transit through the region or as part of their Indian Ocean tours. In contrast, smaller expedition cruises tend to stay longer in Seychelles waters, with visits ranging between two to three weeks or up to one month. These expedition cruises primarily explore the outer island groups, such as Aldabra, the Amirantes group, the Farquhar group, and African Banks, with clearance procedures frequently carried out at Assomption Islands.

However, recent regulations imposed by the SMSA and the SRC, particularly concerning temporary cruise permits and increased port fees, have raised concerns among stakeholders. According to shipping agents, many cruise operators are dissatisfied with these changes, which could lead to a decline in the number of expedition cruises calling at Seychelles in the future and has already been noted when comparing total ports of call and turnaround ports in 2022-23 with 2023-24 (Hunt Deltel). This development was further explored during in-depth stakeholder interviews in the next phase of the study.

The cruise industry in Seychelles is highly seasonal, with activity peaking between October/November and February/March. During the 2024-25 season, 30 ships are expected, of which eight are expedition vessels. The majority of large cruise ships, with capacities ranging from 500 to 2,800 passengers, stay in the inner islands for only one day, typically docking only at Port Victoria. As a result, the average duration of a large cruise ship's stay in Seychelles is 1.8 days, whereas expedition vessels stay for an average of 3.2 days.

Most activities for cruise passengers are land-based and concentrated on Mahé. These activities are pre-booked and prepaid with local DMCs by the cruise companies, who then resell them to the passengers. From an economic perspective, fees levied by the SPA are calculated based on the tonnage of the vessels, meaning that larger ships contribute significantly more than the smaller expedition vessels. Taxes are only applied when cruise ships embark goods or passengers in Seychelles.

Preliminary environmental considerations have been discussed with stakeholders and will be deepened during the primary data collection phase.

This mapping exercise showed that cruise agents (legal representative of cruise companies in Seychelles) and DMCs have a critical role to play in relation to the cruise industry. They continued to be essential partners for the study team when it came to planning and conducting the cruise passenger survey.

## 2 EMPIRICAL RESEARCH

### 2.1 Methodology

#### 2.1.1 Quantitative

In collaboration with national and international partners, SSTF developed an 18-question survey instrument (see Annex). The questionnaire was reviewed and validated by the Cruise Committee during a dedicated workshop on research tool validation. A pretest was conducted at Port Victoria in December 2024 to assess the clarity, functionality, and suitability of the instrument. Minor adjustments were made based on the pilot results. The National Bureau of Statistics (NBS) digitized the final version of the questionnaire using the KoboToolbox software and configured the tablets for field data collection.

Quantitative data were collected at Port Victoria, Mahé, during the peak cruise season from January to April 2025. Cruise passengers were surveyed regarding their spending behavior and environmental awareness. Passengers were approached by trained surveyors and field supervisors from the University of Seychelles directly at the Port upon their return from their respective shore visits. The interviewers were strategically positioned around the Port area and the questioning took around 10 minutes per interview. Surveyors guided respondents through the questionnaire, using the programmed tablets to capture the responses. The target population comprised all passengers disembarking and visiting Mahé during this period.

The sample for the quantitative survey was determined according to established methodological standards. Based on a total population of 13,420 passengers (i.e. all passengers of all cruise ships arriving at Port Victoria between 01 January and 31 March 2025, according to the cruise schedule) and applying standard statistical parameters (95% confidence level, 5% margin of error), the required sample size was calculated as  $n = 374$ . To ensure representativeness, quotas were defined for each cruise ship according to its passenger capacity, so that each vessel was proportionally reflected in the survey. This approach also allowed for the analysis of potential correlations, such as differences in spending behavior between passengers of smaller and larger ships.

To capture these differences more systematically, the cruise ships were classified into three main categories based on passenger capacity:

- **Expedition Ships:** < 400 passengers
- **Luxury Ships:** 400-999 passengers
- **Contemporary Ships:** > 1,950 passengers

Although the survey was originally planned to run from January to March, it was extended until the end of April. This adjustment was necessary for two main reasons: firstly, on two days in March quotas could not be met due to heavy rainfall. Secondly, it proved challenging to obtain a representative share of respondents from the category of DMC clients (see chapter on limitations at the end of the report for additional information). To address this gap, two additional large cruise ships arriving in April were included, with surveyors focusing particularly on excursion participants returning from shore visits organised by Mason's or Creole Travel Services.

The field phase concluded successfully with the overall quota achieved and exceeded. The final sample size after data cleaning was 439. The analysis of the dataset was then conducted in collaboration with NBS, applying standard statistical evaluation criteria to ensure accuracy and reliability of the results. To



begin, a general descriptive analysis was conducted using the entire sample to determine the overall survey results. This was followed by a group-specific descriptive analysis, in which segments of the sample were examined and compared to one another to generate detailed findings by segment.

### 2.1.2 Qualitative

For the sampling process, all individuals involved in the cruise tourism ecosystem of the Seychelles were initially taken into account. These were grouped into the following stakeholder categories: Ports, Shipping Agents, Local Hospitality Providers, Site Attractions, Retail, Taxi Drivers, Excursion Operators, Business and Private Sector Associations, Local Authorities, Environmental NGOs, Waste Management Companies, and Ship Chandlers.

Before selecting specific participants, the aim was set to include at least two representatives from each group, depending on the group's overall size. This served as a basic guideline to ensure broad stakeholder representation and aiming to reach theoretical saturation – the point at which further interviews no longer generated substantially new insights.

To identify suitable participants, desk research was conducted to determine relevant institutions and organisations, their key decision-makers in cruise tourism matters, and their contact details. No additional selection criteria were applied beyond affiliation with the defined stakeholder groups, as the overall number of potential participants remained manageable.

For the coordination of virtual interviews, an automated booking page was set up. Invitations containing the booking link were sent by email to all identified stakeholders. Reminder messages followed one and two weeks later. In addition, non-responding contacts were approached by phone by a local member of the team. The online interviews were held via a Zoom business account and recorded with the platform's built-in recording function, once participants had given their explicit consent.

A slightly different procedure was applied for face-to-face interviews. On selected days, members of the project team were present on Mahé, Praslin, and La Digue to meet stakeholders in person. While some institutions and organisations had been contacted in advance, it often proved more effective to reach out to stakeholders directly on site in order to secure sufficient representation across all groups. With participants' permission, these interviews were recorded using the interviewer's mobile device.

The interview phase took place from late November 2024 until early May 2025 and resulted in a total of 54 completed interviews. The audio files were securely shared within the project team for subsequent transcription and analysis.

The interview guideline was developed on the basis of the literature review conducted at the beginning of the project. It consisted of a set of core questions posed in each interview, complemented by additional questions tailored to the expertise and background of individual participants. This ensured a certain level of consistency across all conversations while also allowing flexibility to capture stakeholder-specific insights.

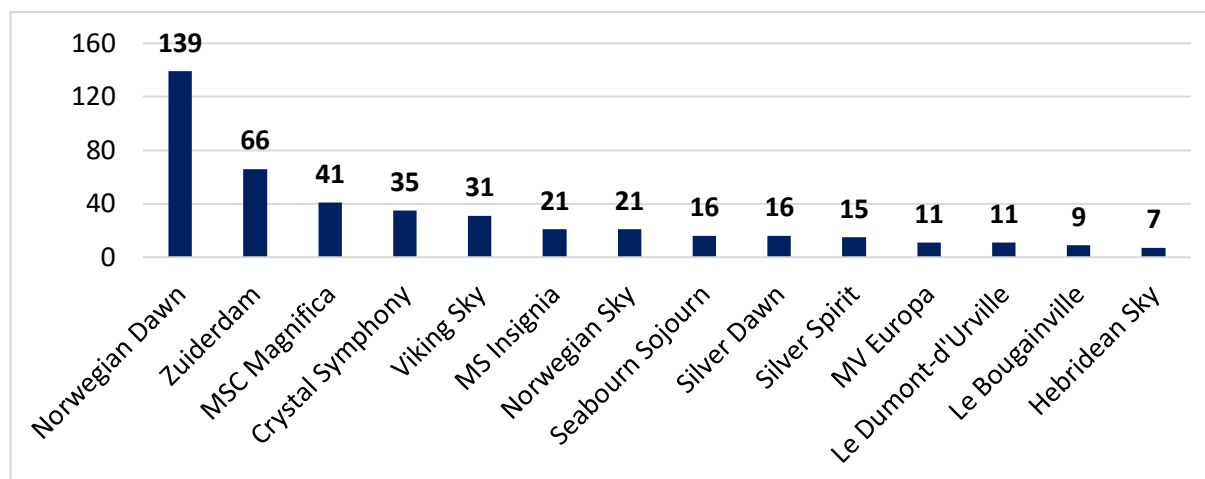
All transcripts were analyzed using Philipp Mayring's qualitative content analysis. This approach made it possible to identify recurring themes and trends mentioned by several stakeholders, while at the same time taking individual perspectives into account that added further nuance to the findings.

## 2.2 Data Evaluation and Findings

### 2.2.1 Quantitative Passenger Survey

#### Sample Composition

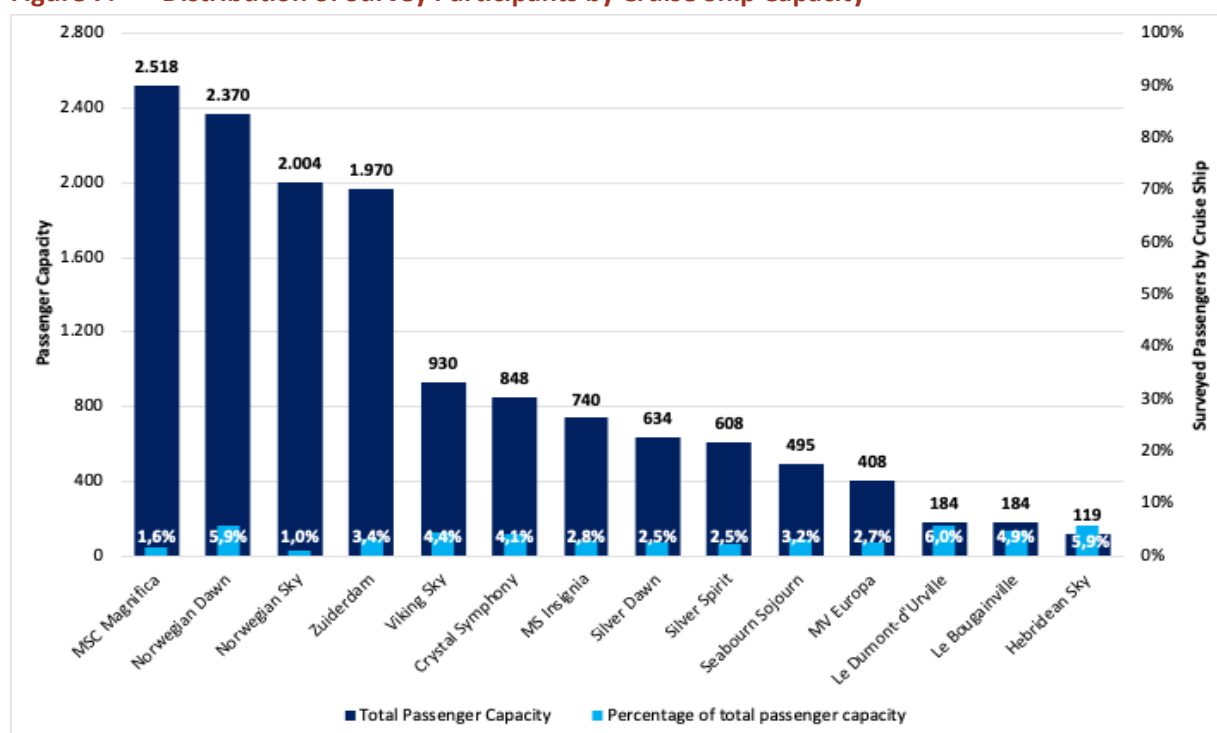
**Figure 6: Distribution of Survey Participants by Cruise Ship**



Source: Own data collection (n = 439)

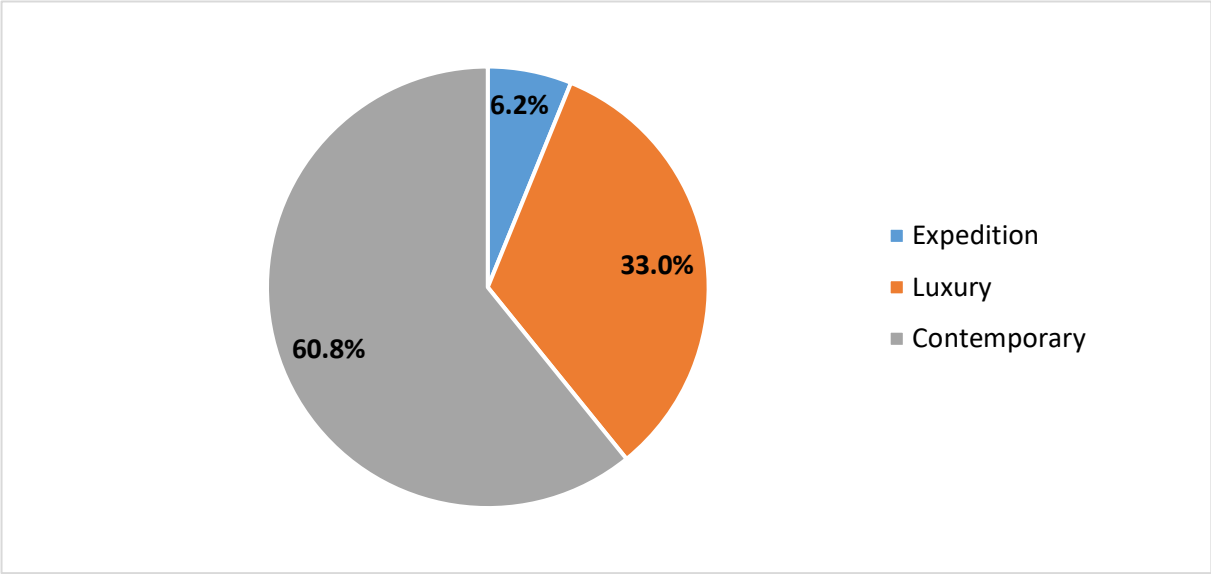
The Norwegian Dawn accounts for the highest number of survey participants with 139 responses. This can be attributed to its large passenger capacity of 2,370, making it one of the biggest ships in the sample (see Figure 7). The Hebridean Sky, with a capacity of 119 passengers, has the fewest responses, with 7 survey participants. The remaining ships contribute between 9 and 66 participants each. Overall, the sample size per ship represents between 1% and 6% of their respective passenger capacities.

**Figure 7: Distribution of Survey Participants by Cruise Ship Capacity**



Source: Own data collection (n = 439)

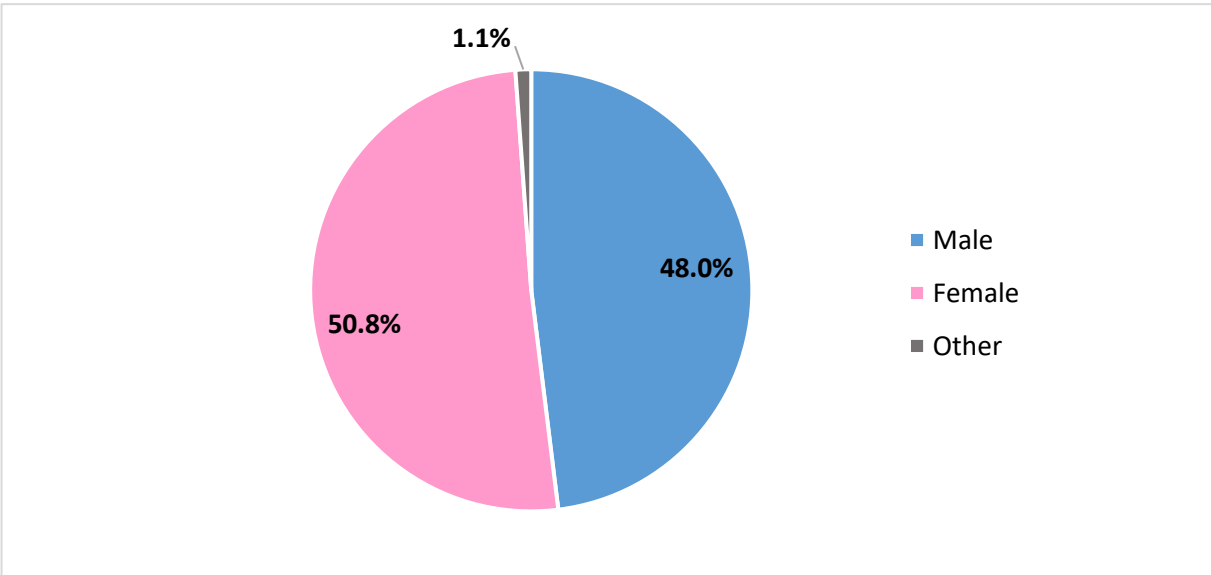
**Figure 8: Distribution of Survey Participants by Ship Type**



Source: Own data collection (n = 439)

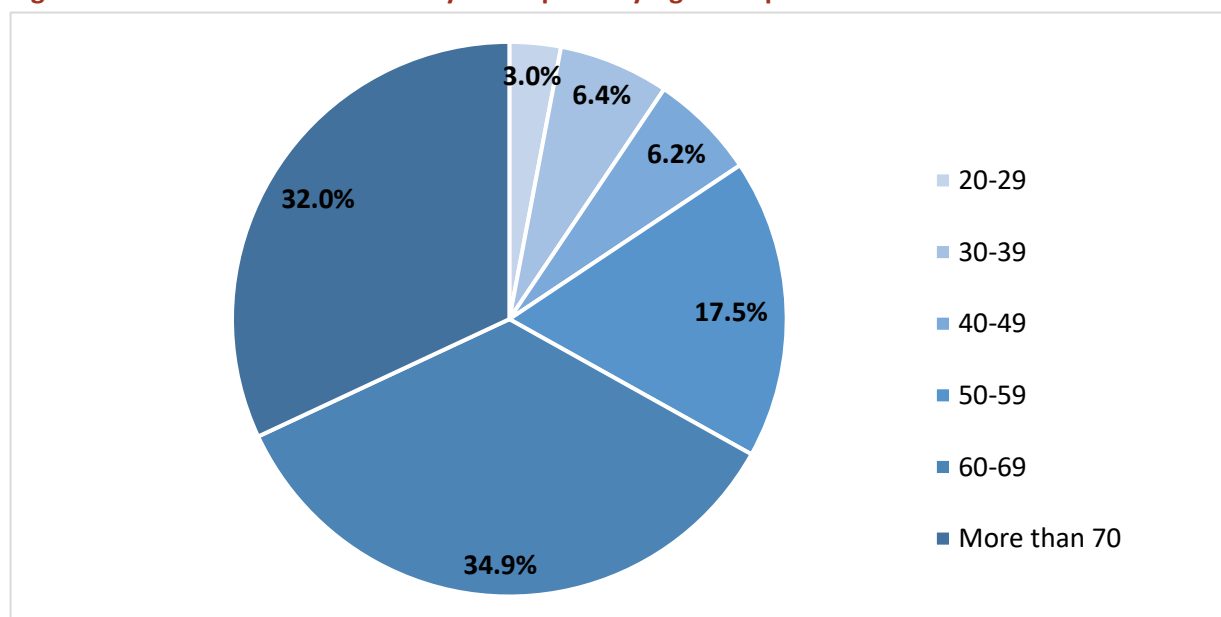
The majority of survey participants travel on contemporary cruise ships, which account for over 60% of all responses. Around one third of participants come from luxury cruise ships, suggesting a strong presence of high-end cruise tourism. In contrast, only a small fraction – just over 6% – are aboard the expedition vessels, reflecting their more niche market and smaller passenger capacity.

**Figure 9: Distribution of Survey Participants by Gender**



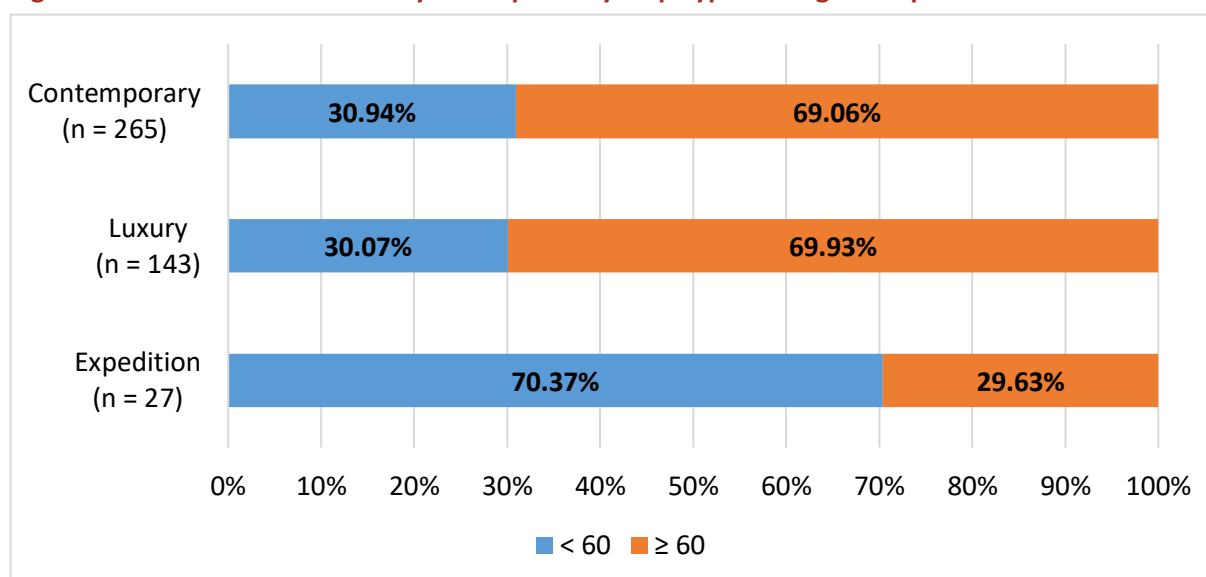
Source: Own data collection (n = 435)

The survey findings show a balanced distribution of participants by gender, with respondents almost evenly divided between male and female. Alongside these two main groups, 1.1% of participants identify as other. This category represents individuals whose self-identification does not fall within the male or female classifications recorded in the survey.

**Figure 10: Distribution of Survey Participants by Age Group**

Source: Own data collection (n = 435)

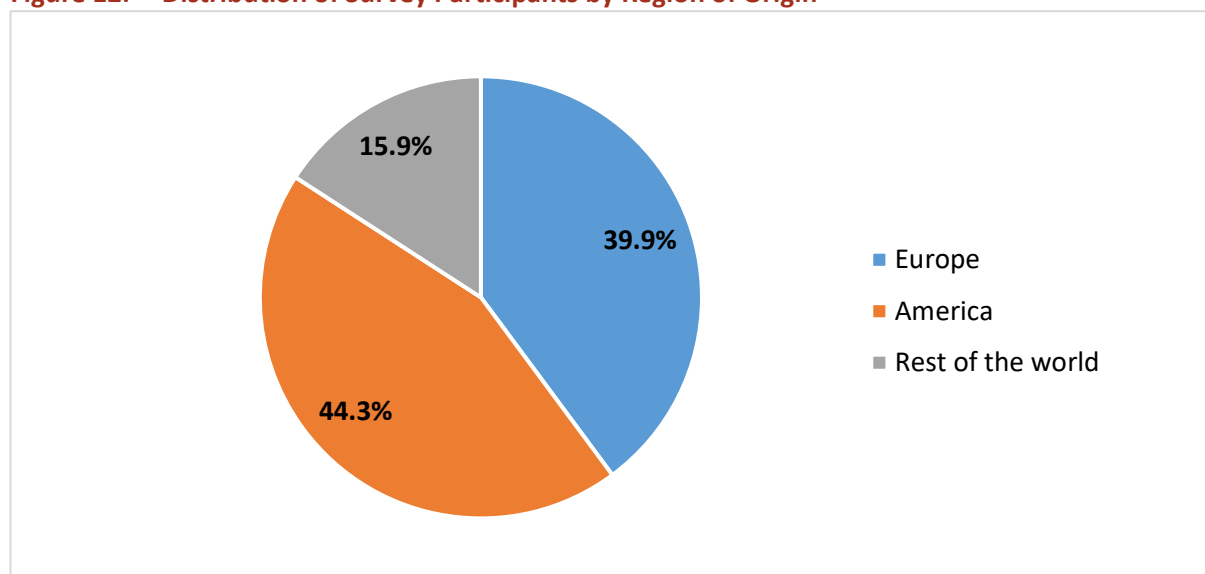
The age distribution of survey participants shows that two thirds of respondents are aged 60 years and above. Within this group, 35% are in the 60 to 69 years age category, and 32% are aged 70 years and above. The 50 to 59 years age group represents 17% of the sample. Respondents aged 40 to 49 years and those aged 30 to 39 years each account for 6%. The smallest proportion, 3% of participants, are in the 20 to 29 years age category.

**Figure 11: Distribution of Survey Participants by Ship Type and Age Group<sup>2</sup>**

Source: Own data collection (n = 435)

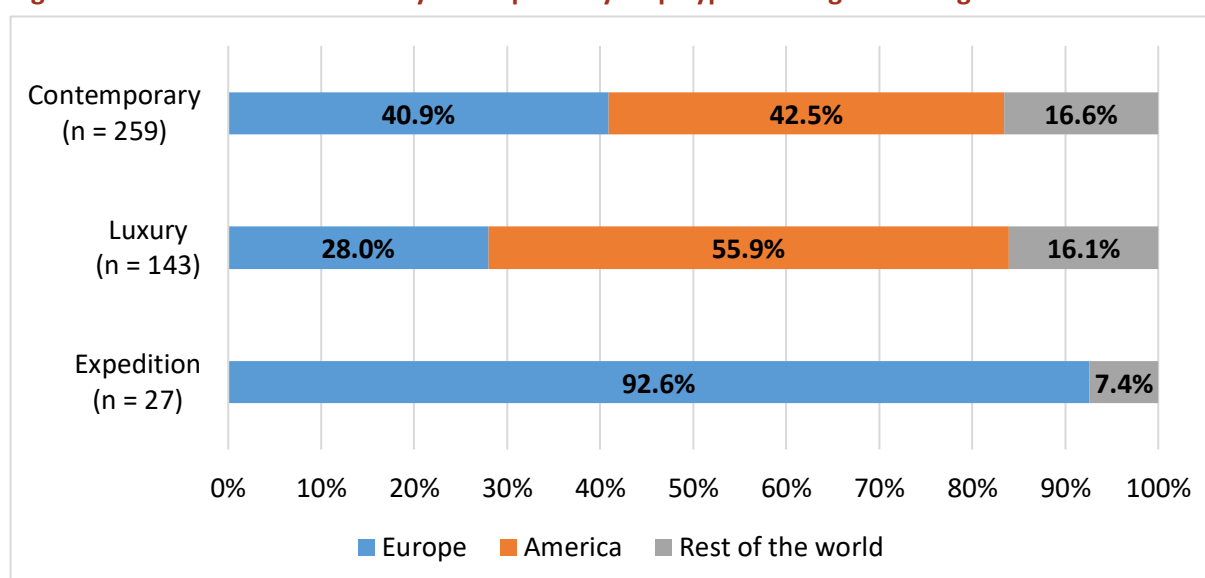
Considering ship type and age group together, some clear patterns emerge. Passengers on contemporary and luxury ships tend to be older, with more than two thirds aged 60 and above. Expedition ships, in contrast, attract a younger clientele with fewer than one third aged 60 and above.

<sup>2</sup> To highlight differences between age groups and to account for the relatively small number of participants in some categories, the six age groups from Figure 10 were consolidated into two major groups.

**Figure 12: Distribution of Survey Participants by Region of Origin**

Source: Own data collection (n = 429)

The regional origin of survey participants is concentrated in two main areas. Respondents from the Americas, primarily the United States, account for 44.3% of respondents, while Europe represents 39.9%. Together, these regions make up the clear majority of the sample. The remaining 15.9% of participants come from other parts of the world, including Asia, Africa, Oceania, and the Middle East.

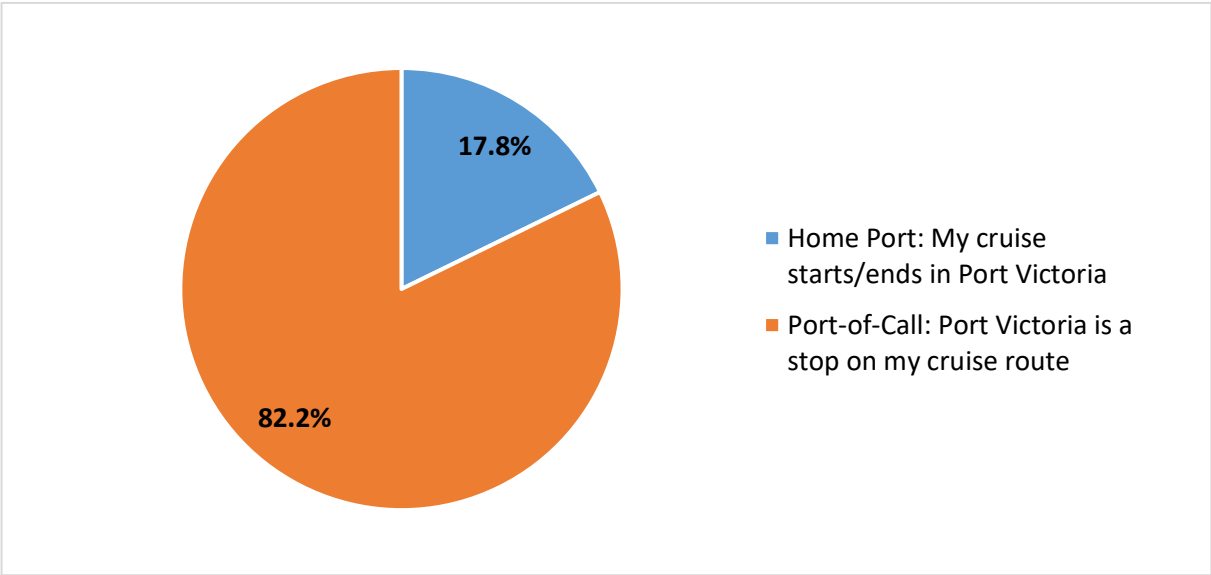
**Figure 13: Distribution of Survey Participants by Ship Type and Region of Origin**

Source: Own data collection (n = 429)

Considering ship type and region of origin together, contemporary ships have a balanced passenger mix from Europe and America, with 16.6% coming from other regions. Luxury ships are dominated by American passengers, followed by Europeans and a smaller share from other regions. Expedition ships, in contrast, have an almost exclusively European passenger base, with only 7.4% coming from other parts of the world.

**Seychelles’ Role in the Cruise Journey**

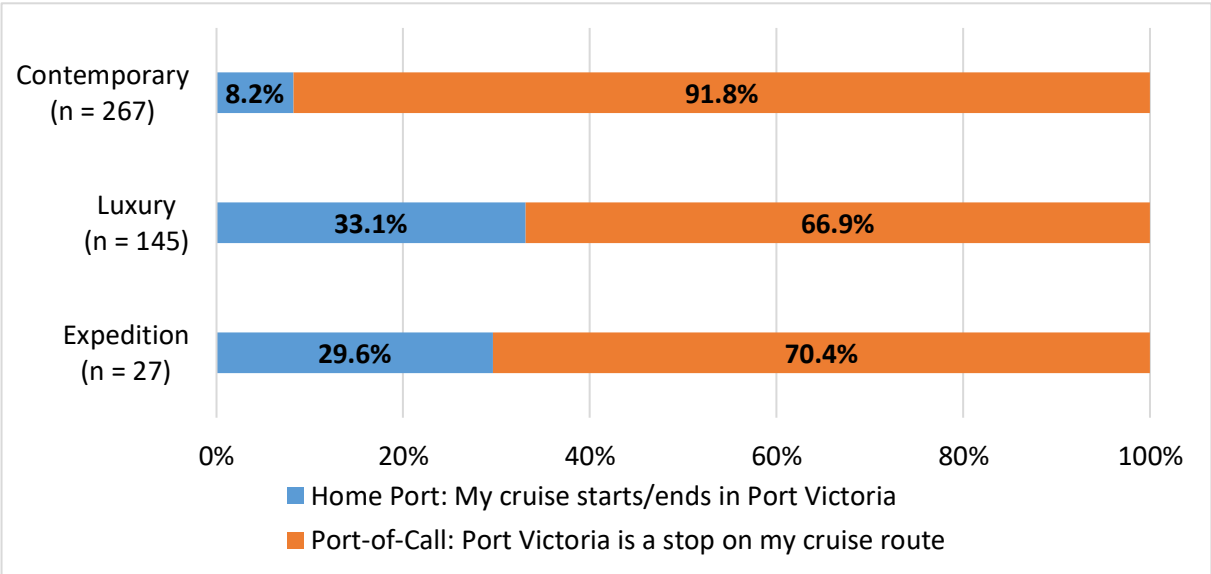
**Figure 14: Distribution of Survey Participants by Status on Cruise Trip**



Source: Own data collection (n = 439)

The survey data shows that Port Victoria mainly functions as a port of call rather than a home port for cruise passengers. Specifically, 82.2% of participants report visiting Port Victoria as one stop among multiple destinations on their cruise itinerary, while only 17.8% indicate that their cruise began or ended at this port.

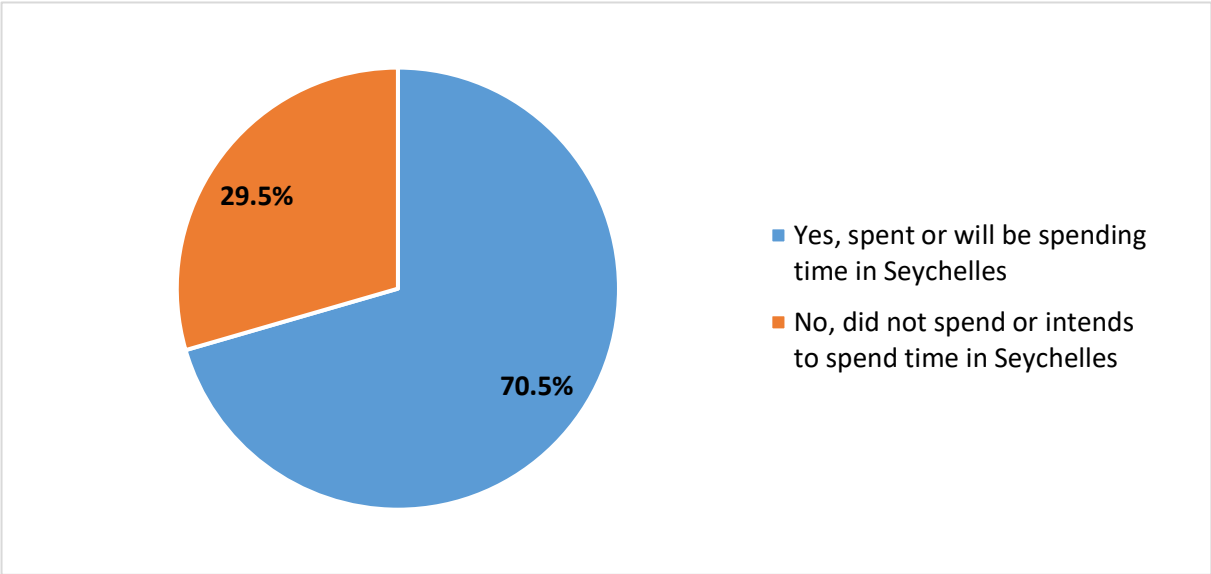
**Figure 15: Distribution of Survey Participants by Ship Type and Status on Cruise Trip**



Source: Own data collection (n = 439)

Considering ship type and status on cruise trip together, it is evident that the vast majority of passengers on contemporary ships visit Port Victoria as a port of call, while only 8.2% start or end their cruise there. On luxury ships, two thirds visit Port Victoria as a port of call and one third uses it as a home port. Expedition ships show a similar pattern, with 70.4% visiting as a port of call and 29.6% starting or ending their cruise in Port Victoria.

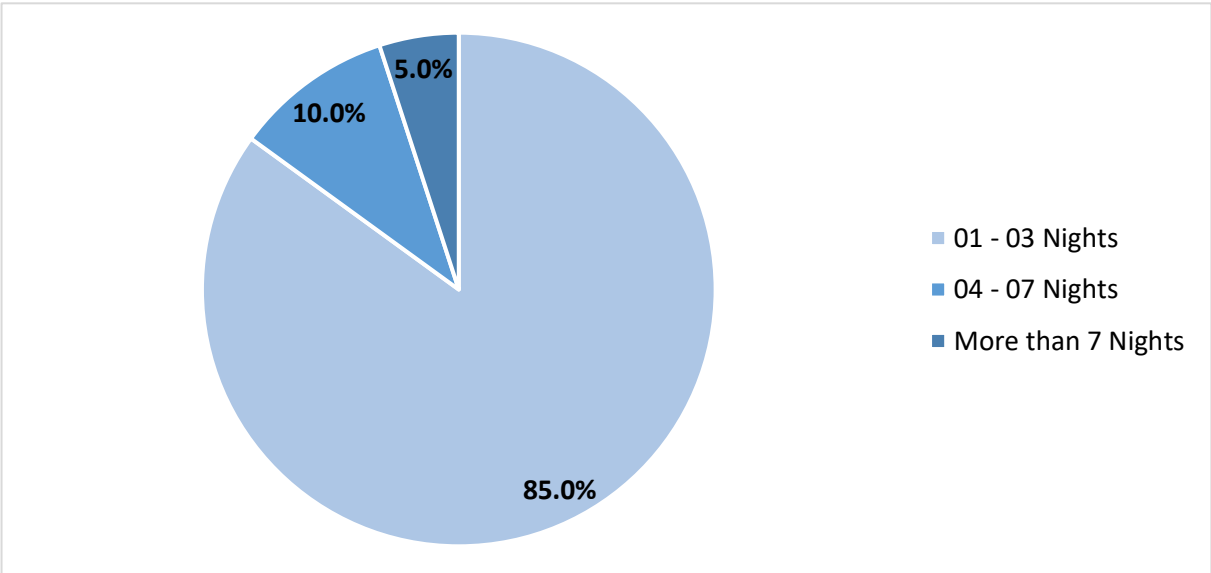
**Figure 16: Distribution of Survey Participants by Status on Spending Time in Seychelles (Before or After the Cruise)**



Source: Own data collection (n = 78)

Among the participants whose cruise began or ended in Port Victoria, survey findings show that 70.5% either spent or intend to spend time in Seychelles before or after their cruise. In contrast, 29.5% of this group indicate that they did not spend and do not plan to spend additional time in Seychelles beyond their cruise visit. Considering this aspect together with ship type, most expedition and luxury passengers report spending or planning to spend additional time in Seychelles before or after their cruise. For contemporary ship passengers, in contrast, this remains the exception.

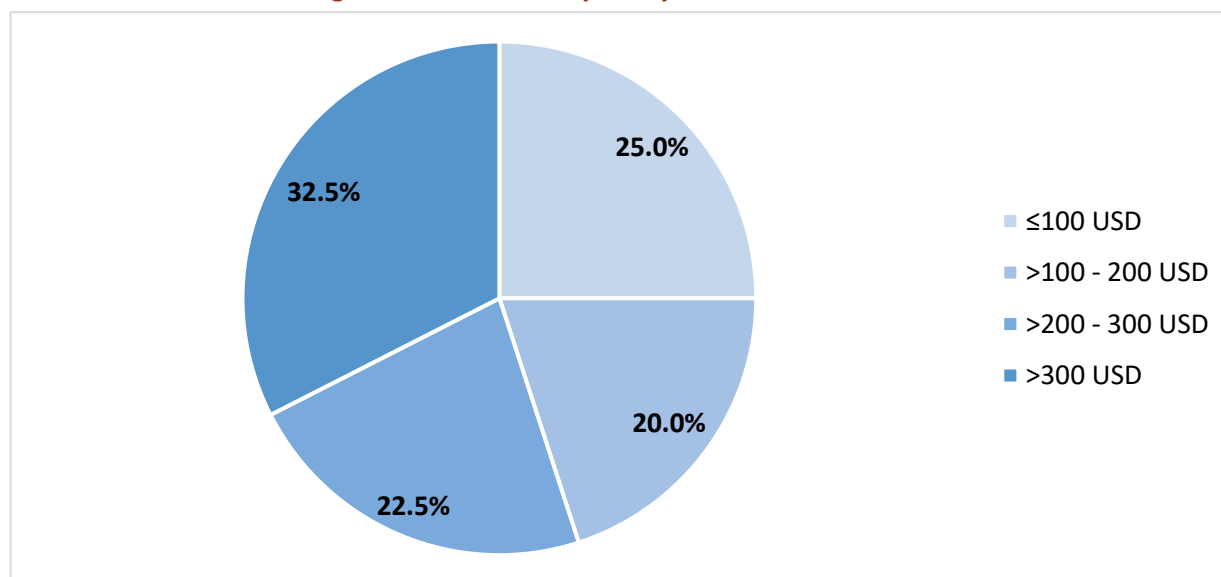
**Figure 17: Distribution of Survey Participants by Number of Additional Nights Staying in Seychelles**



Source: Own data collection (n = 40)

Among passengers who spent or will be spending time in the Seychelles before or after their cruise, the vast majority of 85% indicate that they stay for an additional 1 to 3 nights. A smaller proportion of respondents (10%) extend their stay to up to one week, while half of that share report staying for more than 7 nights. The overall average length of an additional stay in Seychelles is 2.4 nights.

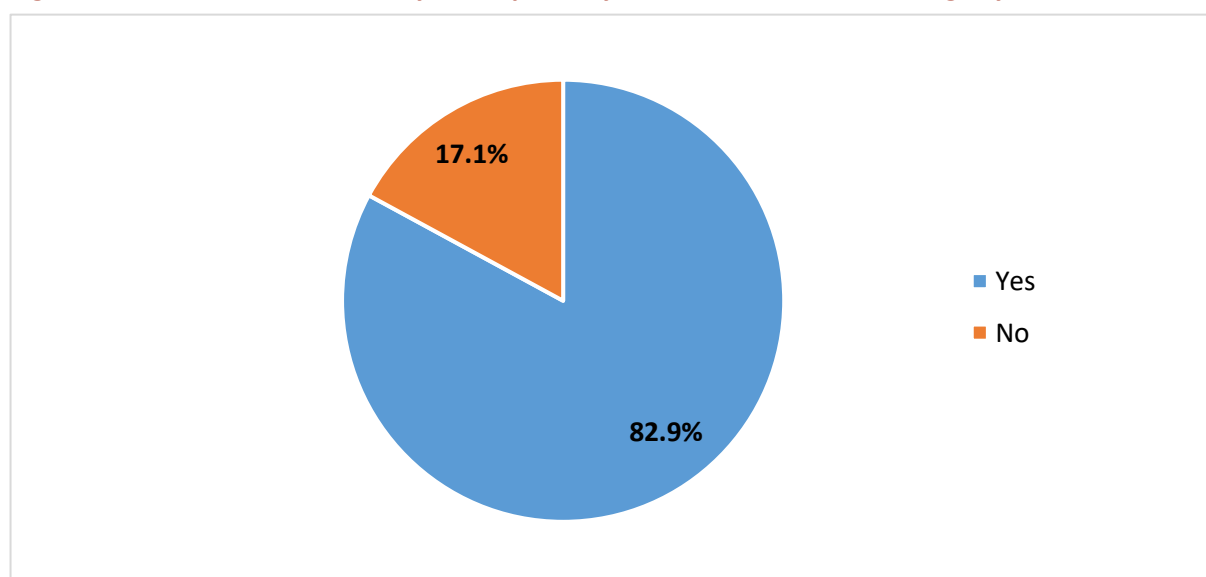
**Figure 18: Distribution of Survey Participants by Average Amount Spent or Intended to Spend per Person and Night of Additional Stay in Seychelles**



Source: Own data collection (n = 40)

A quarter of survey participants staying on Seychelles before or after their cruise report spending less than 100 USD per person and night of additional stay, while one fifth is spending between 100 and 200 USD. About 22.5% indicate spending between 200 and 300 USD, and nearly one third report expenditures above 300 USD per night. The overall average per night of an additional stay amounts to 306.56 USD, while the overall average per additional stay is 735.75 USD.

**Figure 19: Distribution of Survey Participants by Status on First Time Visiting Seychelles**



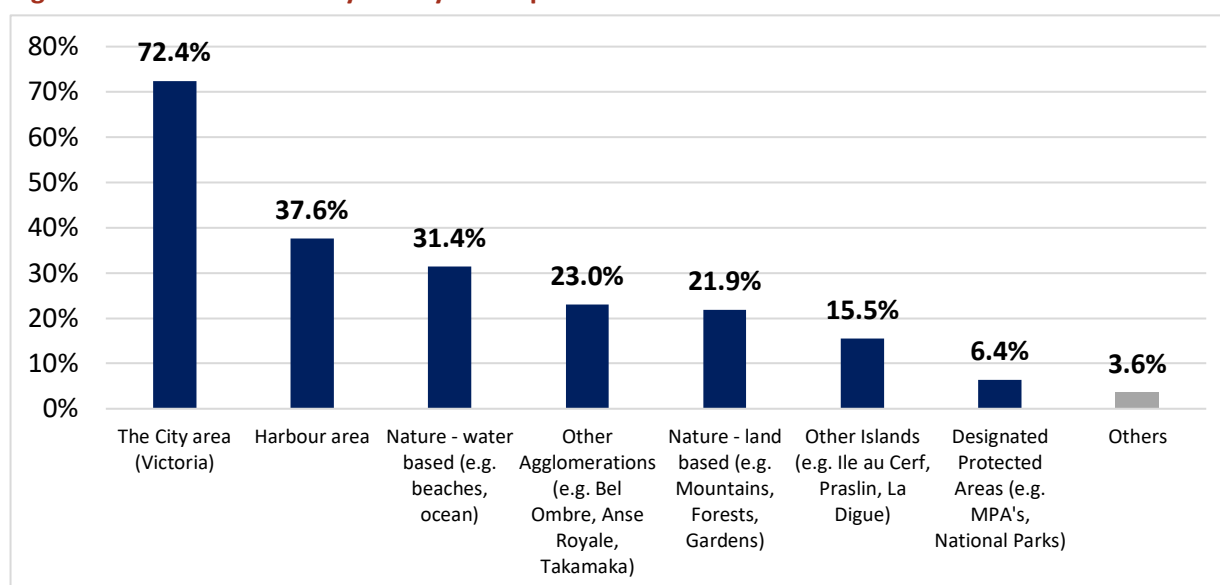
Source: Own data collection (n = 439)

The survey results reveal that a substantial majority of all respondents (82.9%) are visiting Seychelles for the first time. In contrast, only 17.1% of participants are on a repeat visit, having previously traveled to the destination at least once.



## Onshore Visit Insights

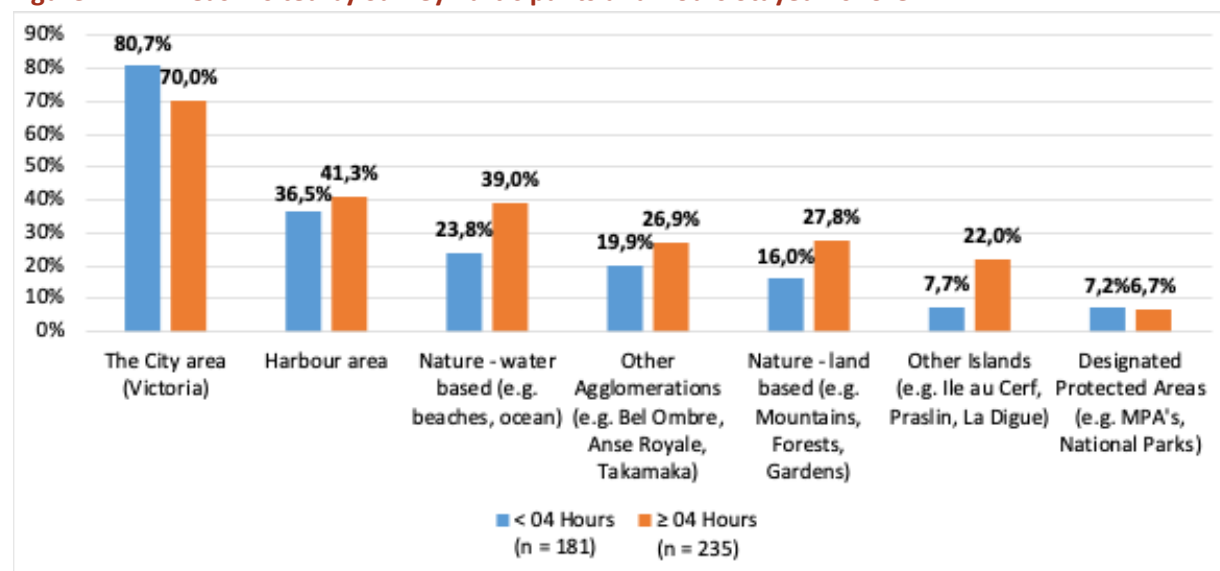
**Figure 20: Areas Visited by Survey Participants**



Source: Own data collection (n = 439, multiple answers possible)

Regarding the most popular destinations to visit, the city area (Victoria) ranks first by far, with over 70% of respondents indicating it, while the harbour area follows at close to 40%. Nature-based water attractions are chosen by around 30%, whereas other agglomerations and land-based nature areas each attract roughly 20-25% of respondents. In contrast, other islands account for about 15% and designated protected areas for around 6%.

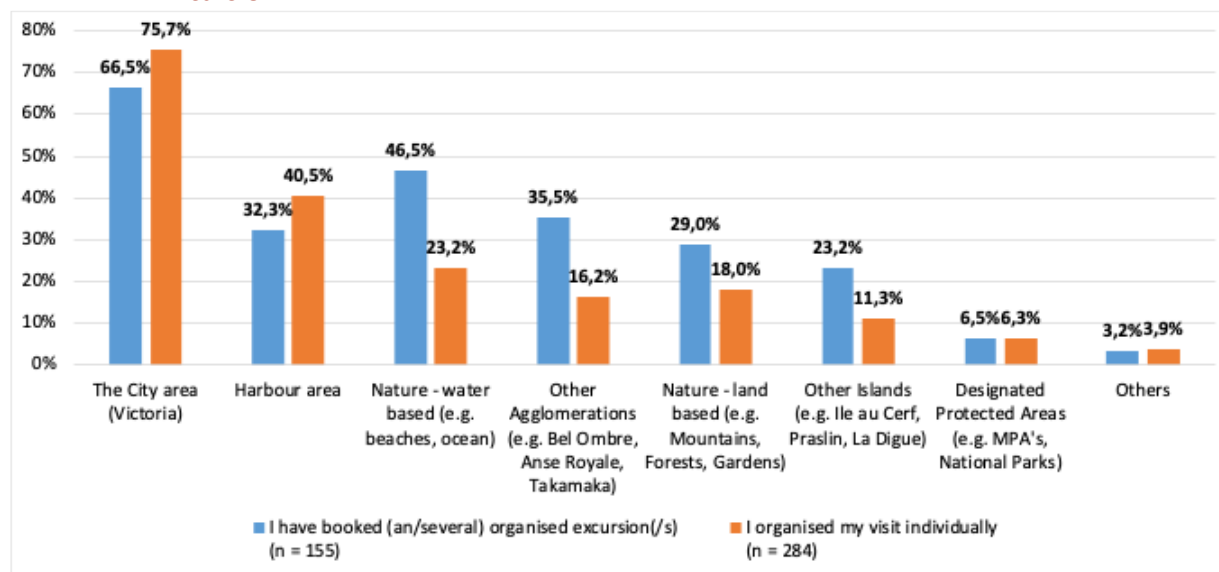
**Figure 21: Areas Visited by Survey Participants and Hours Stayed Ashore**



Source: Own data collection (n = 416, multiple answers possible for Places Visited)

Considering the areas visited together with the length of stay ashore, passengers staying for less than four hours mainly visit Victoria and the harbour area, while other sites are less frequented. Among those staying longer, Victoria and the harbour area remain the most common destination, but visits are more evenly spread across land- and water-based natural attractions, other agglomerations, and other islands. In both groups, protected areas attract the fewest visitors.

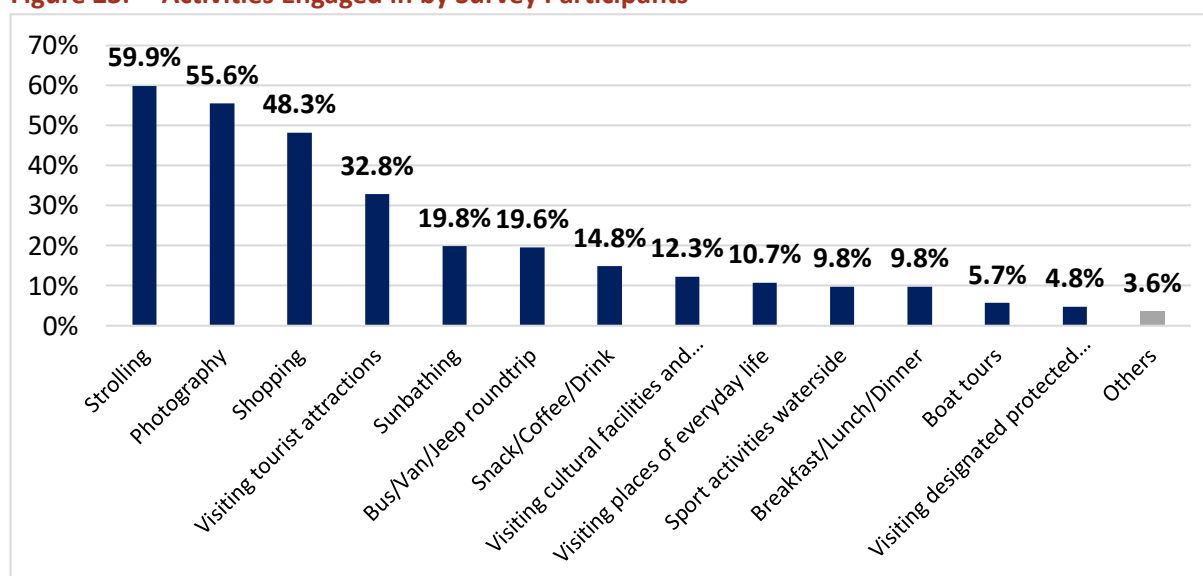
**Figure 22: Areas Visited by Survey Participants and Status in Taking Part in Organised Shore Excursion**



Source: Own data collection (n = 439, multiple answers possible for Places Visited)

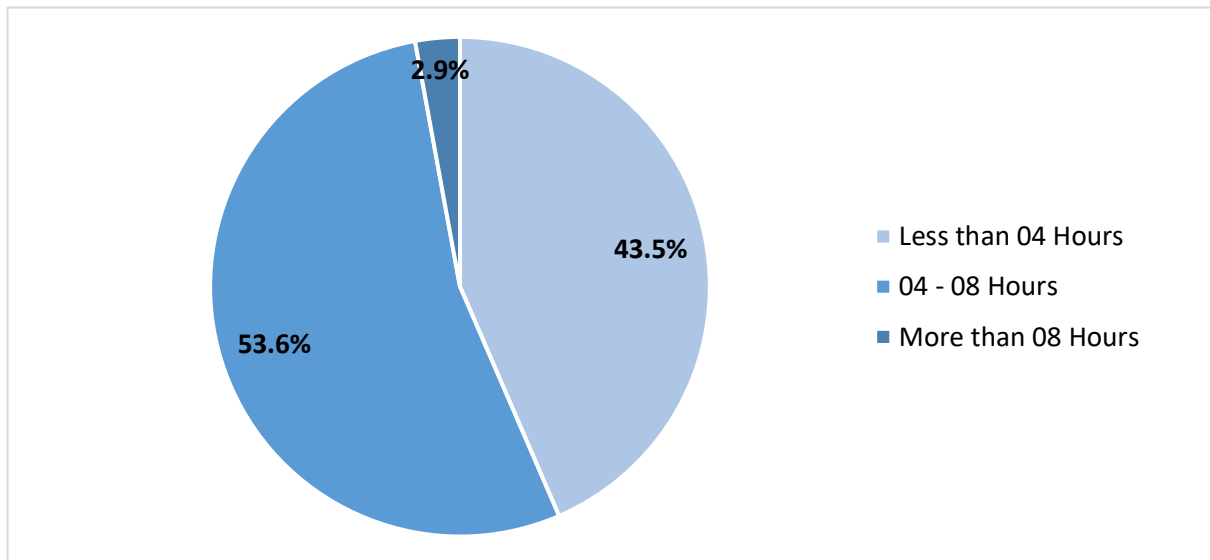
Considering the areas visited together with the status in taking parting in organised shore excursions, both groups most often visit the city area. Individual visitors also frequent the harbour area, while other sites are rare. Excursion participants, by contrast, visit more diverse places, especially water-based nature sites and other agglomerations. Accordingly, individual visitors mainly engage in shopping and strolling, whereas excursion participants take roundtrips, visit attractions, and do waterside sports.

**Figure 23: Activities Engaged in by Survey Participants**



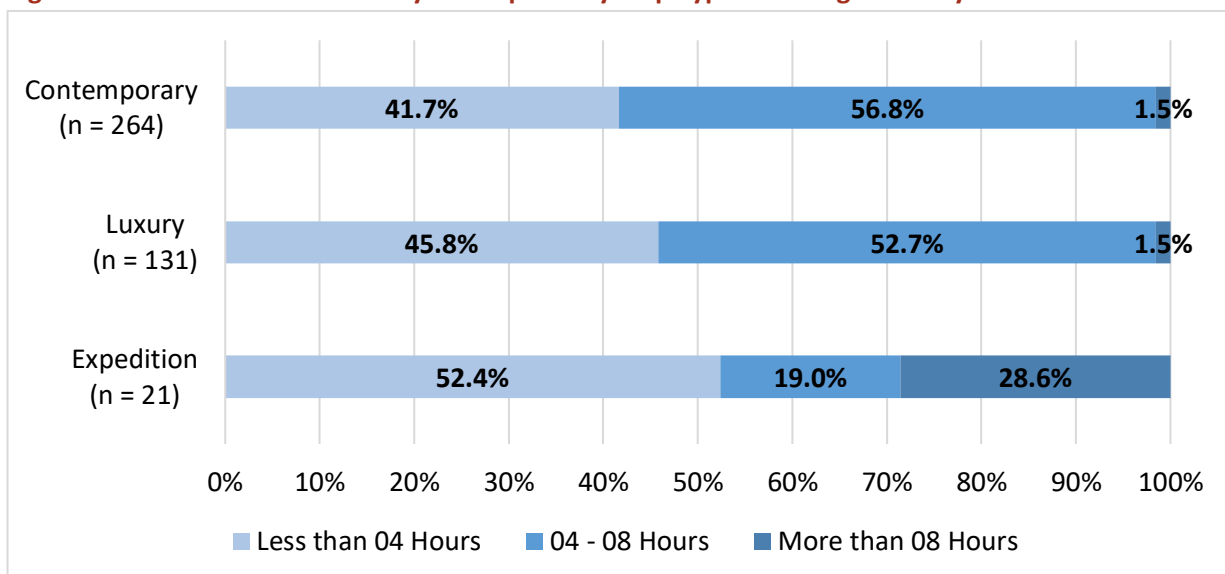
Source: Own data collection (n = 439, multiple answers possible)

Among the activities respondents engaged in during their visit, strolling is the most common, reported by nearly 60% of participants, while photography follows closely at around 56%. Shopping ranks third with close to half taking part, whereas visiting tourist attractions is mentioned by about one-third. In contrast, visiting designated protected areas accounts for less than 5%, and other activities for under 4%.

**Figure 24: Distribution of Survey Participants by Length of Stay Ashore**

Source: Own data collection (n = 416)

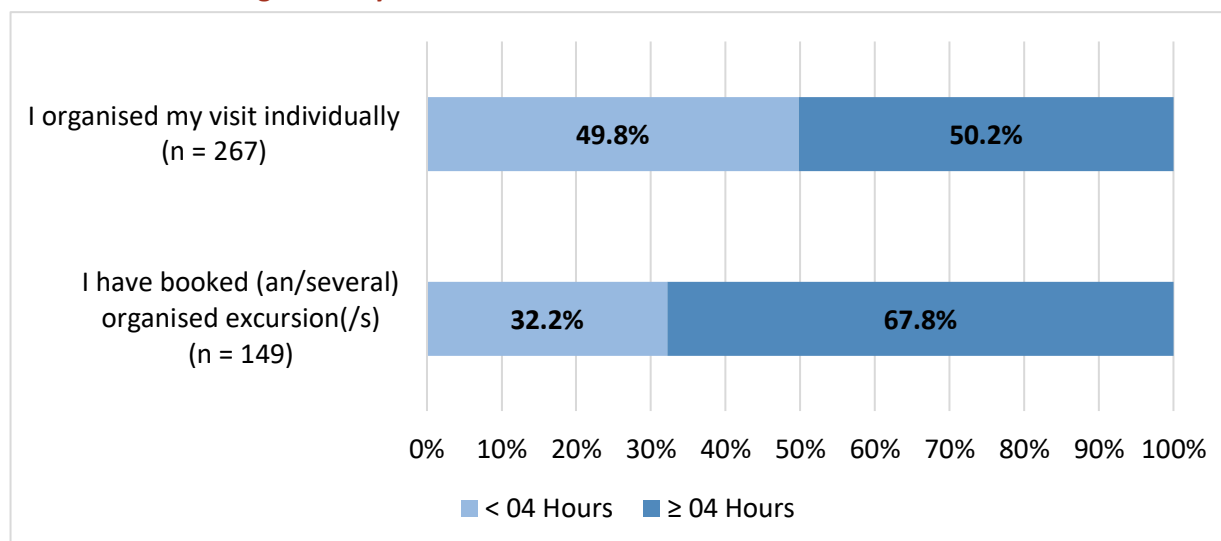
The distribution of survey participants by length of stay ashore shows that the majority spend a moderate amount of time onshore. Over half of respondents report staying between 4 and 8 hours. A substantial proportion (43.5%) stay for less than 4 hours, while only a small minority of 2.9% stay for more than 8 hours.

**Figure 25: Distribution of Survey Participants by Ship Type and Length of Stay Ashore**

Source: Own data collection (n = 416)

Considering ship type and length of stay ashore together, passengers on contemporary and luxury ships mostly stay ashore between four and eight hours, closely followed by shorter stays of less than four hours. Stays of more than eight hours are rare on these ship types. Expedition ship passengers, in contrast, have a comparatively high share of longer stays, with nearly 30% stating a length of over eight hours.

**Figure 26: Distribution of Survey Participants by Status in Taking Part in Organised Shore Excursion and Length of Stay Ashore<sup>3</sup>**

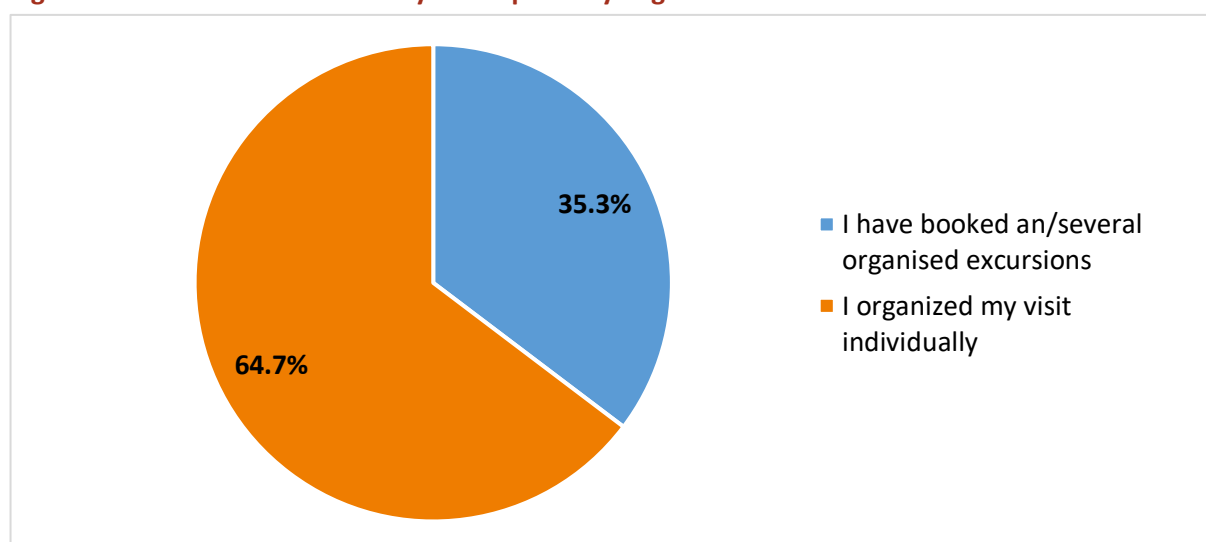


Source: Own data collection (n = 416)

Considering the status in taking part in organised shore excursion and length of stay ashore together, about half of the individual visitors stay ashore for less than four hours, while excursion participants clearly tend to stay longer, with nearly 68% spending more than four hours ashore.

### **Organisation of Onshore Visit**

**Figure 27: Distribution of Survey Participants by Organisation of Shore Leave<sup>4</sup>**

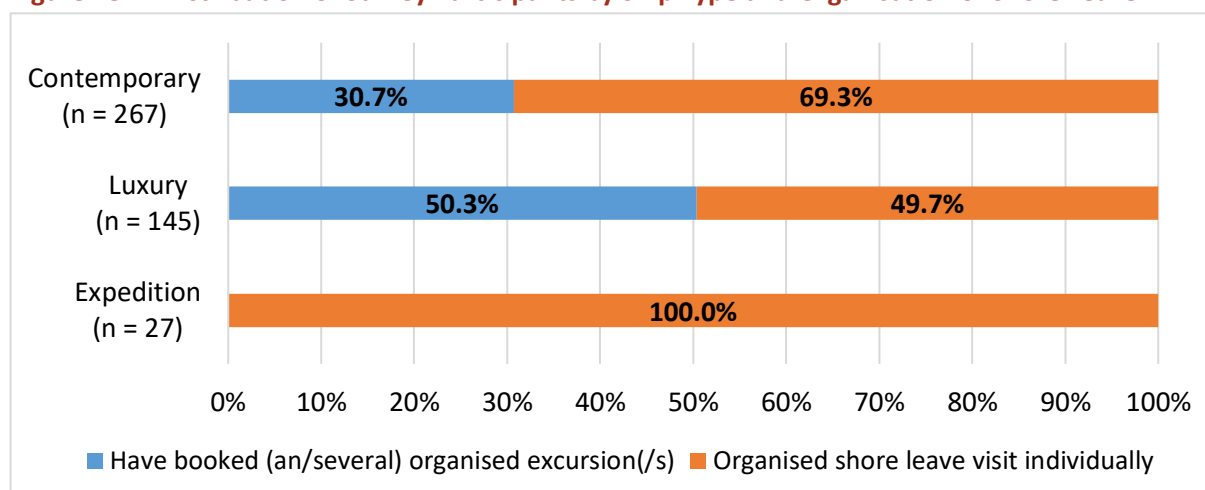


Source: Own data collection (n = 439)

The survey results show that a majority of participants (64.7%) organise their shore leave independently. This includes planning their own itinerary and activities during their time onshore. In contrast, 35.3% of respondents book one or more organised excursions.

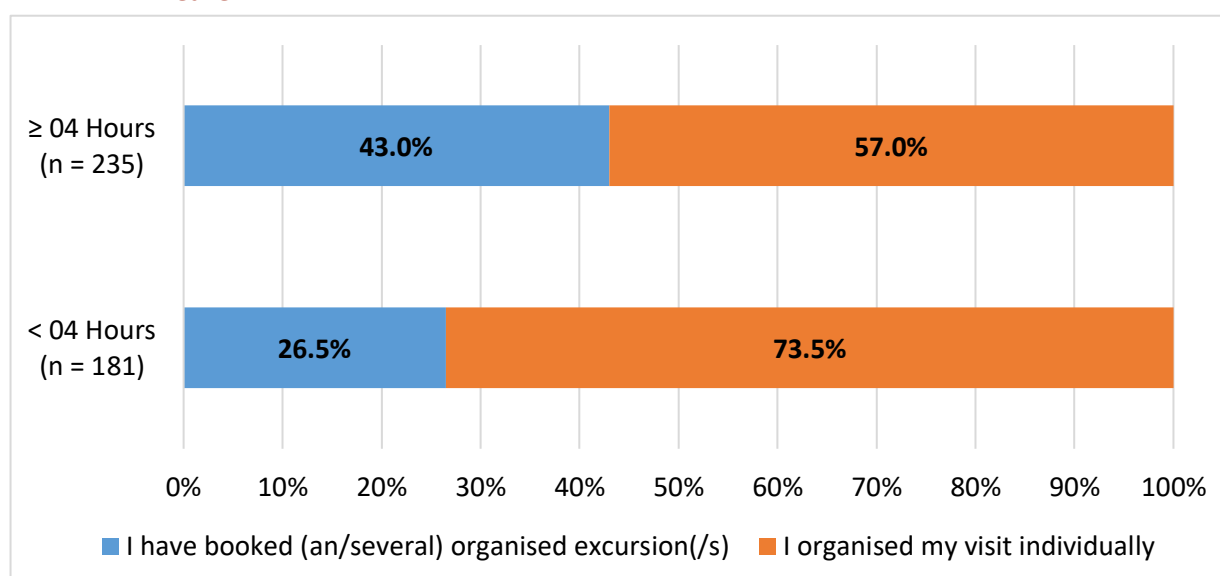
<sup>3</sup> To highlight differences in lengths and to account for the small number of participants staying longer than eight hours, the three groups from Figure 24 were consolidated into two major groups.

<sup>4</sup> See limitation chapter for further information.

**Figure 28: Distribution of Survey Participants by Ship Type and Organisation of Shore Leave<sup>5</sup>**

Source: Own data collection (n = 439)

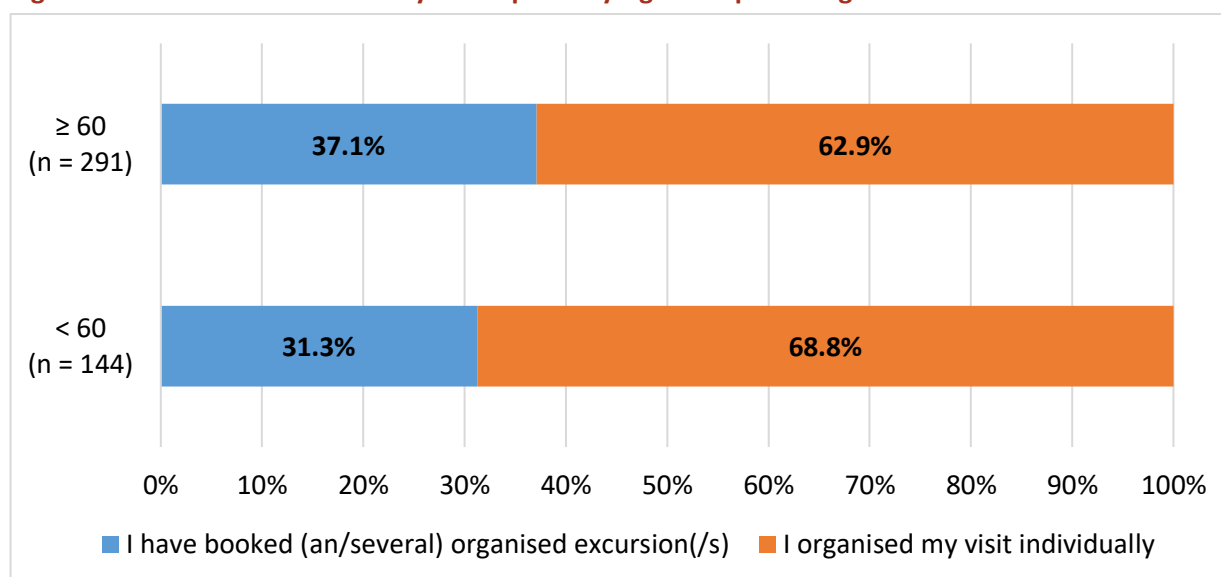
Considering ship type and organisation of shore leave together, the results show that passengers on contemporary ships most often arrange their shore leave individually, with only 30.7% booking organised excursions. Among luxury ship passengers, the split is more balanced, with 50.3% opting for organised excursions and 49.7% arranging visits themselves. Expedition passengers, in contrast, exclusively organise their shore leave individually, stating no participation in organised excursions at all.

**Figure 29: Distribution of Survey Participants by Hours Stayed Ashore and Organisation of Shore Leave**

Source: Own data collection (n = 439)

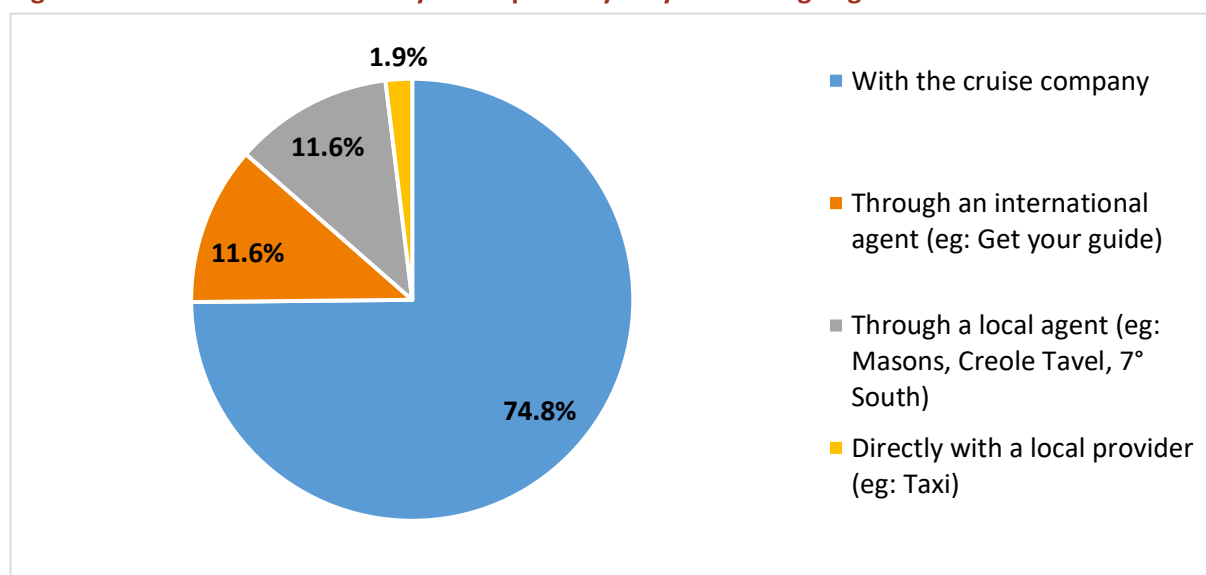
Additionally, considering length of stay ashore together with organisation of shore leave, it is evident that participants with shorter stays tend to organise their visit individually, with only about one in four people booking an organised excursion. Among those staying four hours or more, the distribution is more balanced, with 57% organizing their visit individually and 43% taking part in organised excursions.

<sup>5</sup> See limitation chapter for further information.

**Figure 30: Distribution of Survey Participants by Age Group and Organisation of Shore Leave**

Source: Own data collection (n = 439)

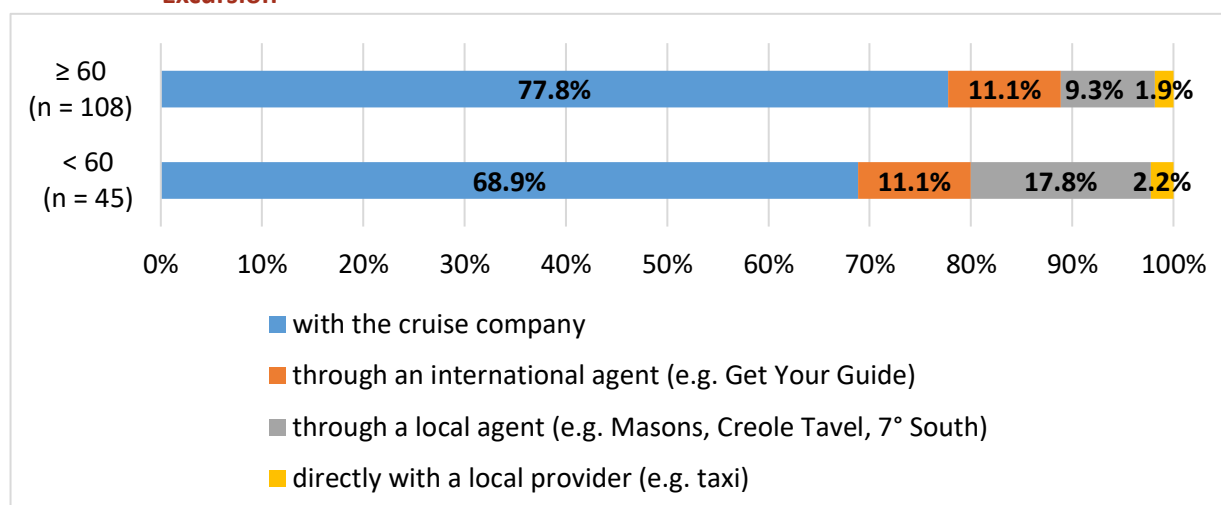
Furthermore, when considering age group and organisation of shore leave together, about two-thirds of respondents under 60 organise their shore leave individually, while 31.3% join organised excursions. Among those aged 60 and above, individual organisation is slightly less common, with 37.1% participating in organised excursions.

**Figure 31: Distribution of Survey Participants by Way of Booking Organised Shore Excursion**

Source: Own data collection (n = 155)

3 out of 4 participants taking part in an organised shore leave book their excursions directly through the cruise company. A smaller but equal proportion of respondents (11.6% each) book through international agents, such as “Get Your Guide,” and local agents, including Mason’s Travel, Creole Travel Services, or 7° South. Only 1.9% of participants book their excursions directly with a local provider.

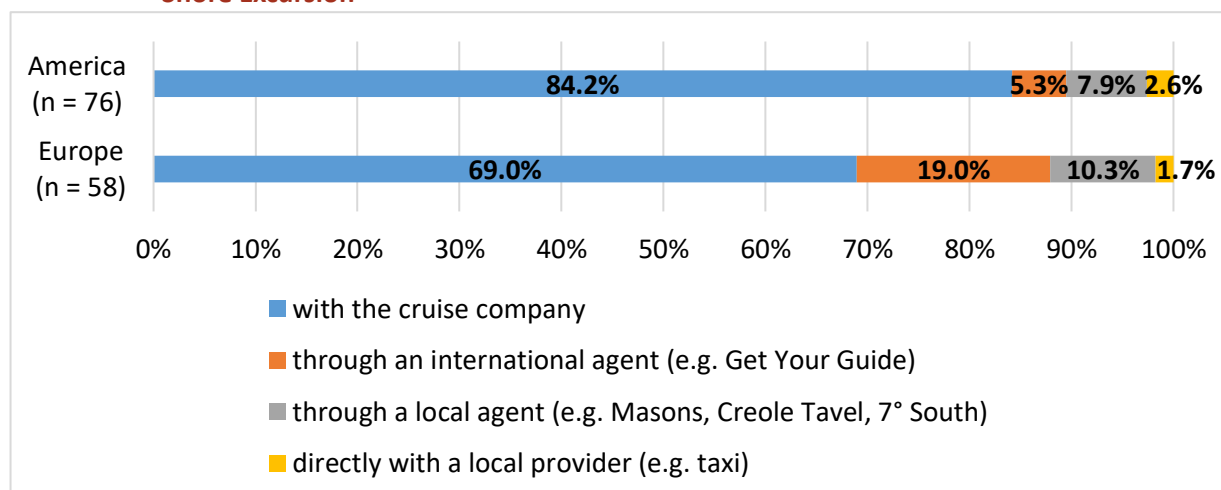
**Figure 32: Distribution of Survey Participants by Age Group and Way of Booking Organised Shore Excursion**



Source: Own data collection (n = 153)

Considering age group and way of booking organised shore excursion together, the majority of participants in both age groups book their organised shore excursions directly with the cruise company. Participants aged 60 and above are slightly more likely to do so compared to those under 60, while the younger group makes more use of local agents (around 18% vs. 9%). The share using international agents (11.1%) or booking directly with local providers (around 2%) is similar in both age groups.

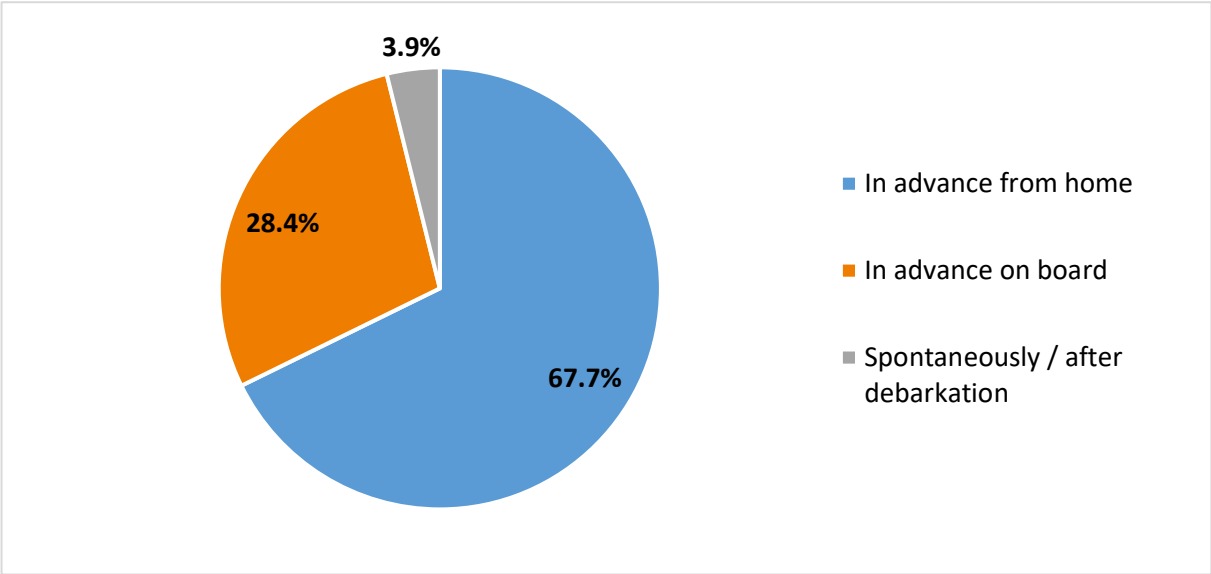
**Figure 33: Distribution of Survey Participants by Region of Origin and Way of Booking Organised Shore Excursion**



Source: Own data collection (n = 134)

When also considering region of origin and way of booking organised shore excursion together, the majority of participants for both region of origins book their organised shore excursions directly with the cruise company. Participants from America are more likely to do so than those from Europe, while Europeans make somewhat more use of international agents (around 19% vs. 5%) and local agents (around 10% vs. 8%). Direct bookings with local providers are similarly rare in both regions (around 2%).

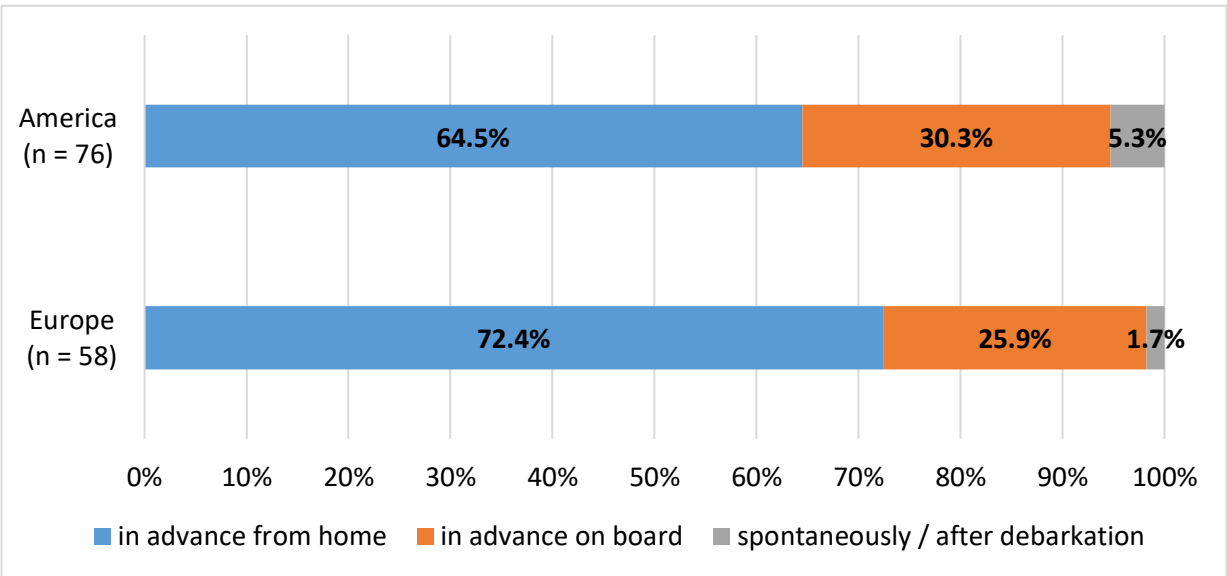
**Figure 34: Distribution of Survey Participants by Time they Booked Organised Shore Excursion**



Source: Own data collection (n = 155)

Regarding the time of booking, more than two thirds of respondents report booking their organised shore excursions in advance from home. A smaller portion (28.4%) book their excursions in advance on board. Only 3.9% of participants make a spontaneous decision and book their excursions after debarkation.

**Figure 35: Distribution of Survey Participants by Region of Origin and Time they Booked Organised Shore Excursion**



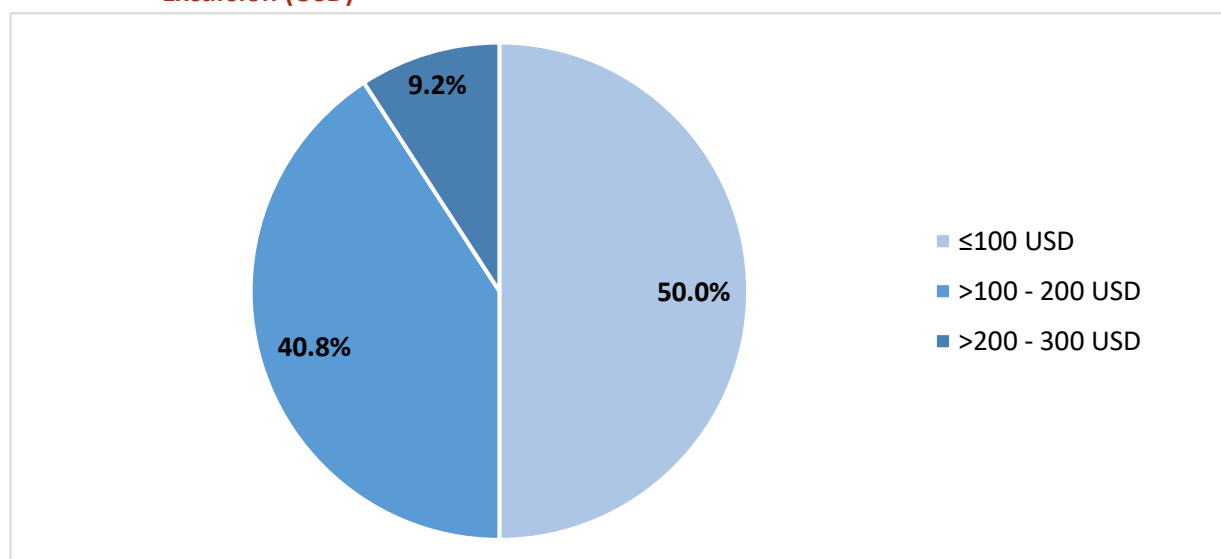
Source: Own data collection (n = 134)

Considering region of origin and time they booked organised shore excursion together, advance bookings from home are the most common in both groups. This is somewhat more frequent among European participants than among American participants, whereas Americans are more likely to book their excursions on board (around 30% vs. 26%). Spontaneous or post-debarkation bookings remain rare in both groups.



## Onshore Spending

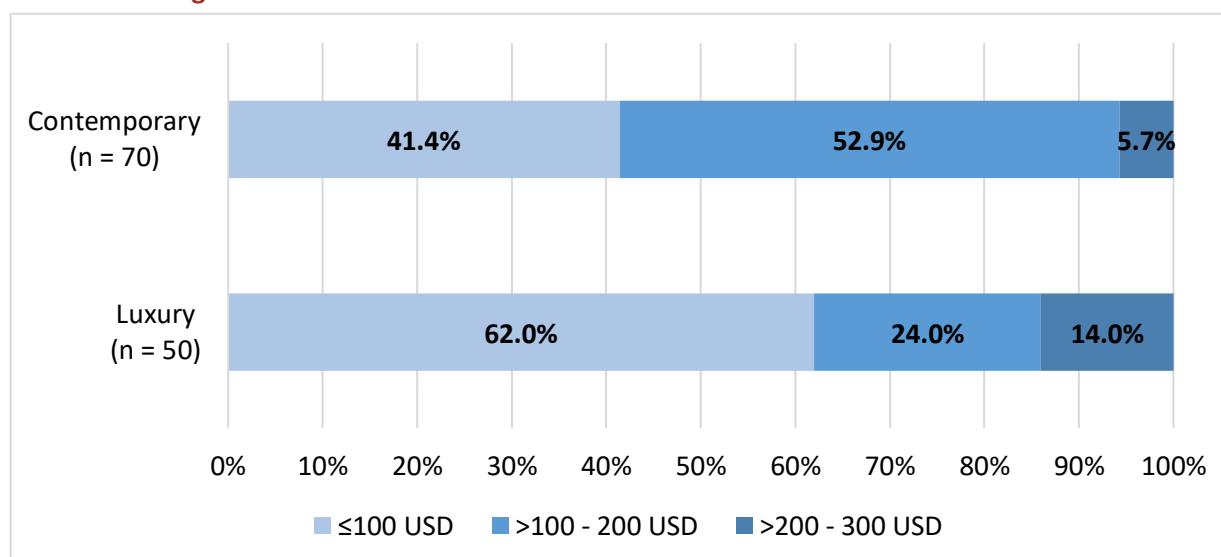
**Figure 36: Distribution of Survey Participants by Amount Paid per Person for the Organised Shore Excursion (USD)**



Source: Own data collection (n = 120)

Half of the survey participants pay less than 100 USD per person for an organised shore excursion, while 40.8% spend between 100 and 200 USD. Only a small proportion indicate spending between 200 and 300 USD. The overall average spend for an organised excursion is 116.15 USD.

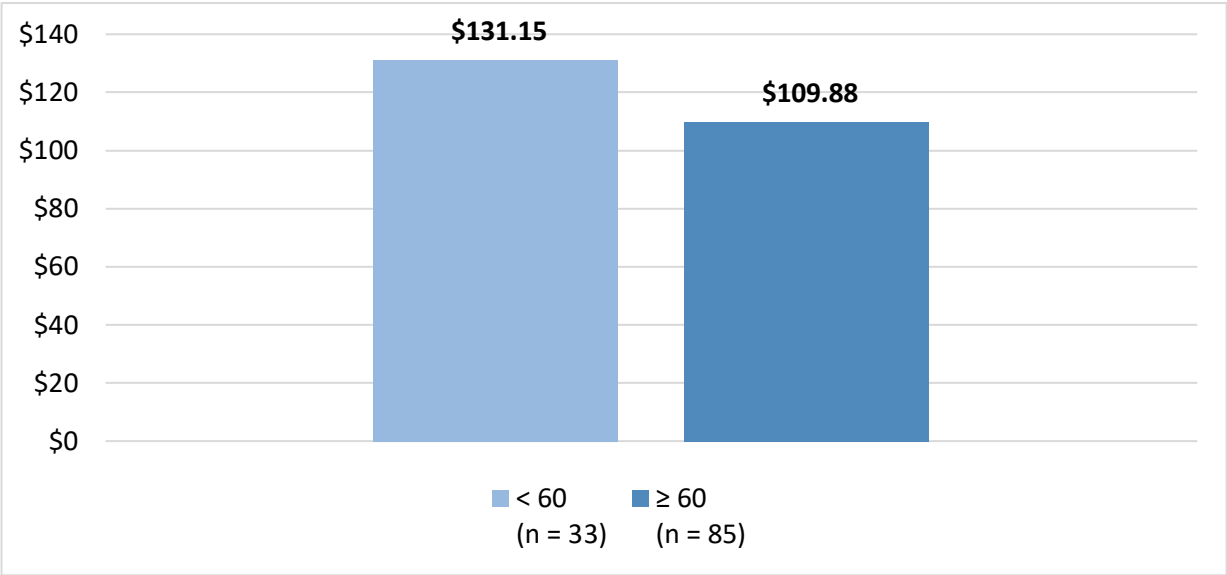
**Figure 37: Distribution of Survey Participants by Ship Type and Amount Paid per Person for the Organised Shore Excursion**



Source: Own data collection (n = 120)

Considering ship type and amount paid for the organised shore excursion, 41.4% of contemporary cruise passengers spend less than 100 USD, while over half spend 100-200 USD. On luxury cruises, by contrast, almost two-thirds spend under 100 USD and only about a quarter 100-200 USD. Notably, 14% of luxury passengers spend 200-300 USD – more than twice the share of contemporary passengers. On average, excursion spending amounts to 126.40 USD for contemporary and 101.80 USD for luxury passengers.

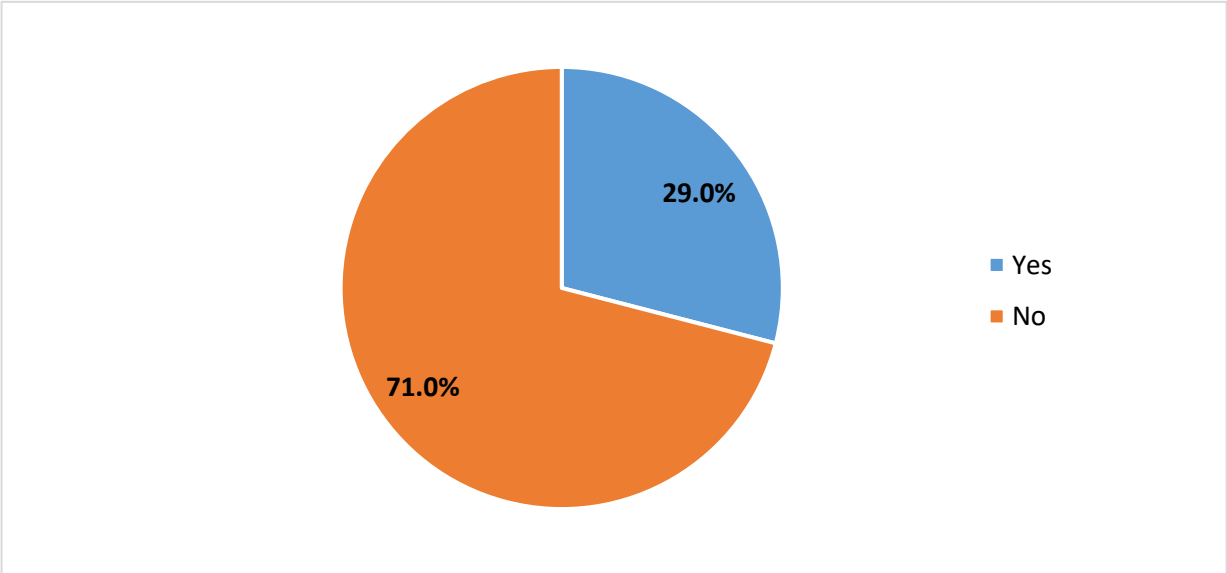
**Figure 38: Average USD Spent for Organised Shore Excursion by Age Group**



Source: Own data collection (n = 118)

When looking at the average spending for organised shore excursion by age group, participants under 60 years spend around 131 USD, while those aged 60 and above spend around 110 USD. Younger visitors therefore show slightly higher spending on organised activities.

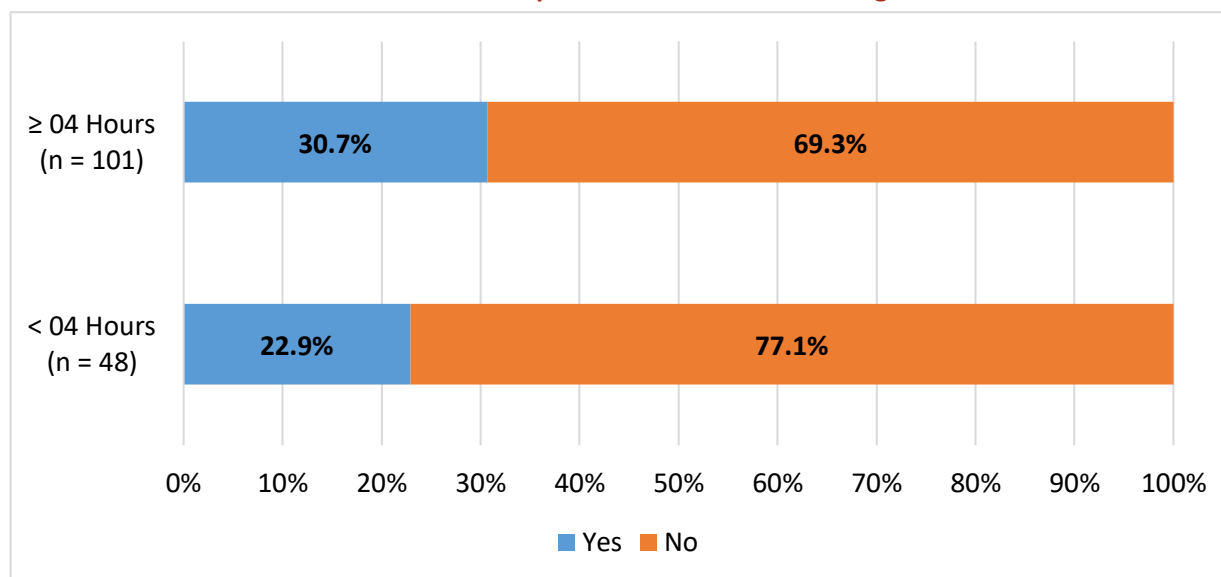
**Figure 39: Distribution of Survey Participants by Whether they Purchased Additional Goods or Services Apart from the Cost of the Organised Shore Excursion**



Source: Own data collection (n = 155)

The majority of organised excursion participants report that they do not purchase additional goods or services beyond the cost of their organised tour. In contrast, 29% of respondents indicate that they spend extra money during their excursion, for example on food, souvenirs, or other personal purchases. The largest share of additional spending is attributed to entertainment and activities as well as transportation.

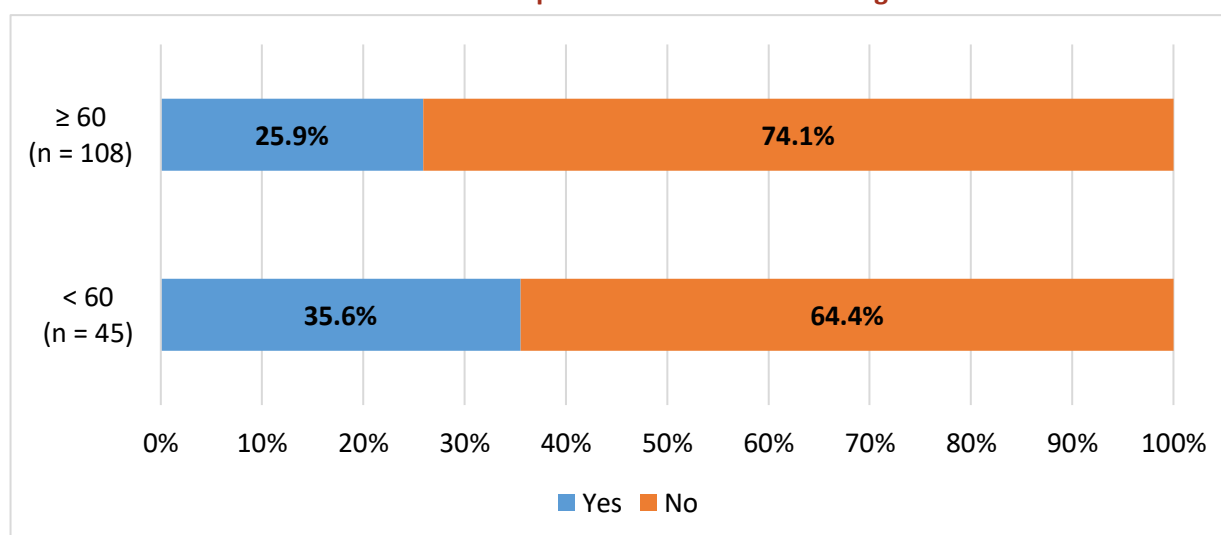
**Figure 40: Distribution of Survey Participants by Hours stayed Ashore and Whether they Purchased Additional Goods or Services Apart from the Cost of the Organised Shore Excursion**



Source: Own data collection (n = 149)

Considering length of stay ashore and additional purchases together, just under 23% of participants staying less than four hours ashore report additional expenses apart from the cost of the organised excursion, while around 77% do not. Among those staying four hours or more, the share is higher, with more than 30% indicating additional expenses.

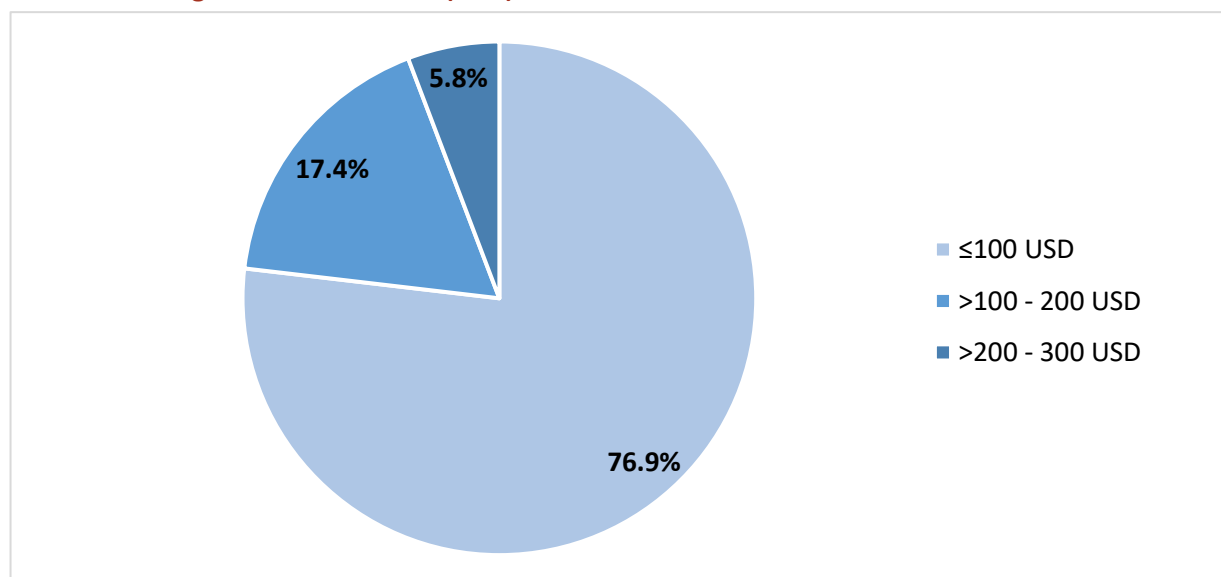
**Figure 41: Distribution of Survey Participants by Age Group and Whether they Purchased Additional Goods or Services Apart from the Cost of the Organised Shore Excursion**



Source: Own data collection (n = 119)

Furthermore, when considering age group and additional purchases together, it becomes clear that additional spendings are somewhat more common among participants under 60 (around 36%) than among those aged 60 and above (around 26%).

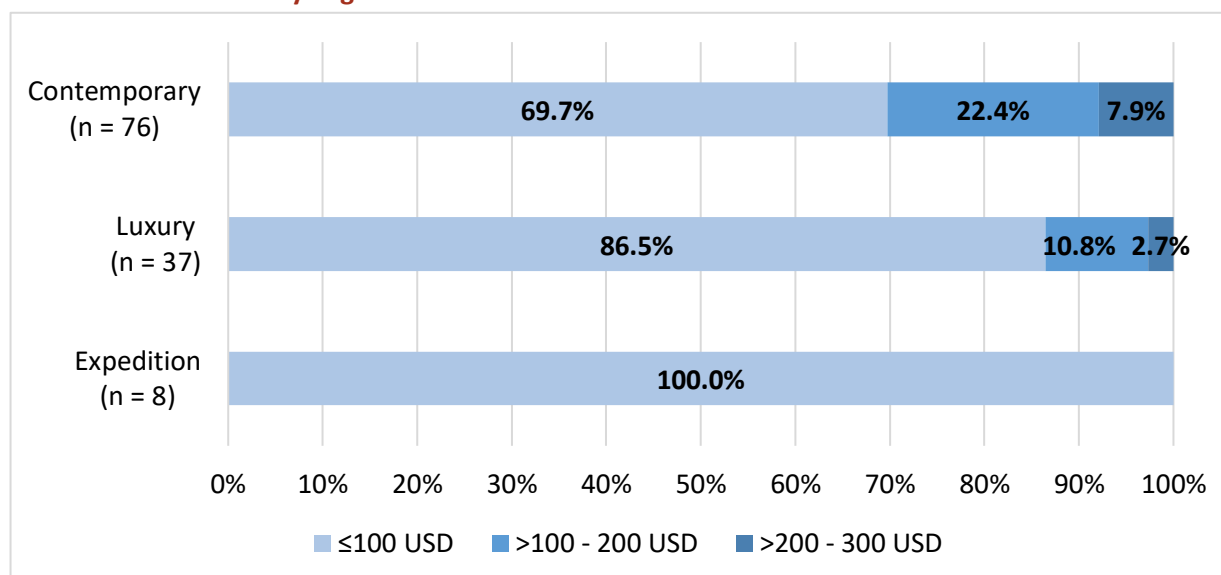
**Figure 42: Distribution of Survey Participants by Amount Paid per Person during Individually Organised Shore Leave (USD)**



Source: Own data collection (n = 121)

When it comes to passengers who did not book an excursion and were on an individually organised shore leave, most participants (76.9 %) spend less than 100 USD per person. A smaller share report expenses between 100 and 200 USD, while only 5.8% spend between 200 and 300 USD. The overall average spend for an individual visit is 63.06 USD.

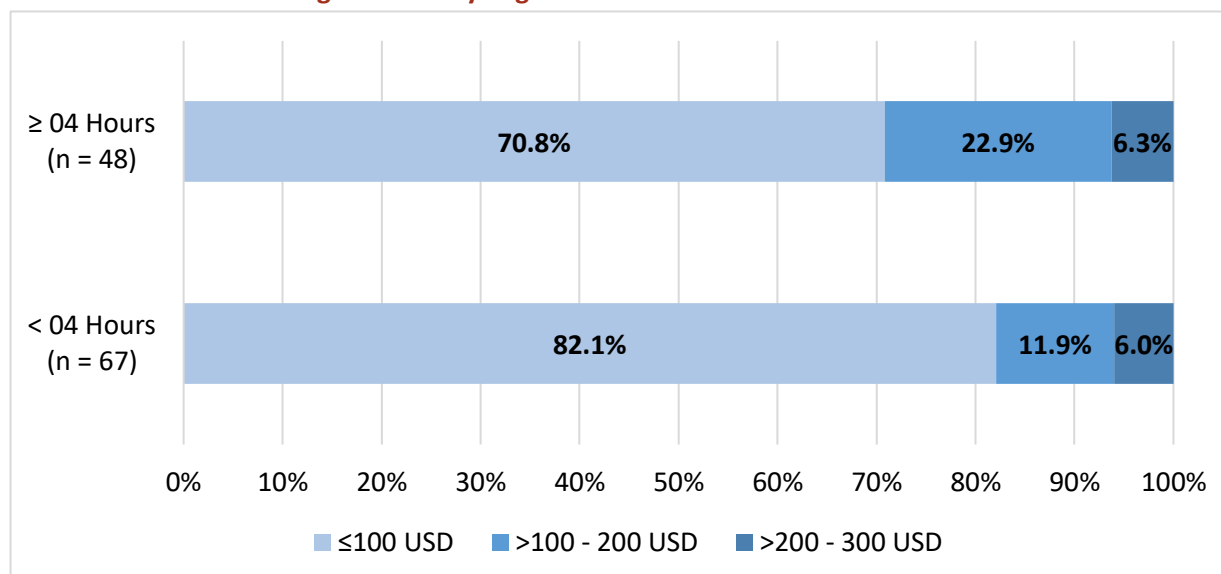
**Figure 43: Distribution of Survey Participants by Ship Type and Amount Spent per Person during Individually Organised Shore Leave**



Source: Own data collection (n = 121)

Considering ship type and the amount spent during individually organised shore leave together, about 70% of contemporary cruise travelers spend under 100 USD, while just over 20% spend 100-200 USD. On luxury cruises, an even larger share (86.5%) stays below 100 USD, with only a few spending more. Expedition cruise passengers stand out, as all spend under 100 USD. Average spending amounts to 73.20 USD for contemporary, 51.19 USD for luxury, and 21.75 USD for expedition passengers.

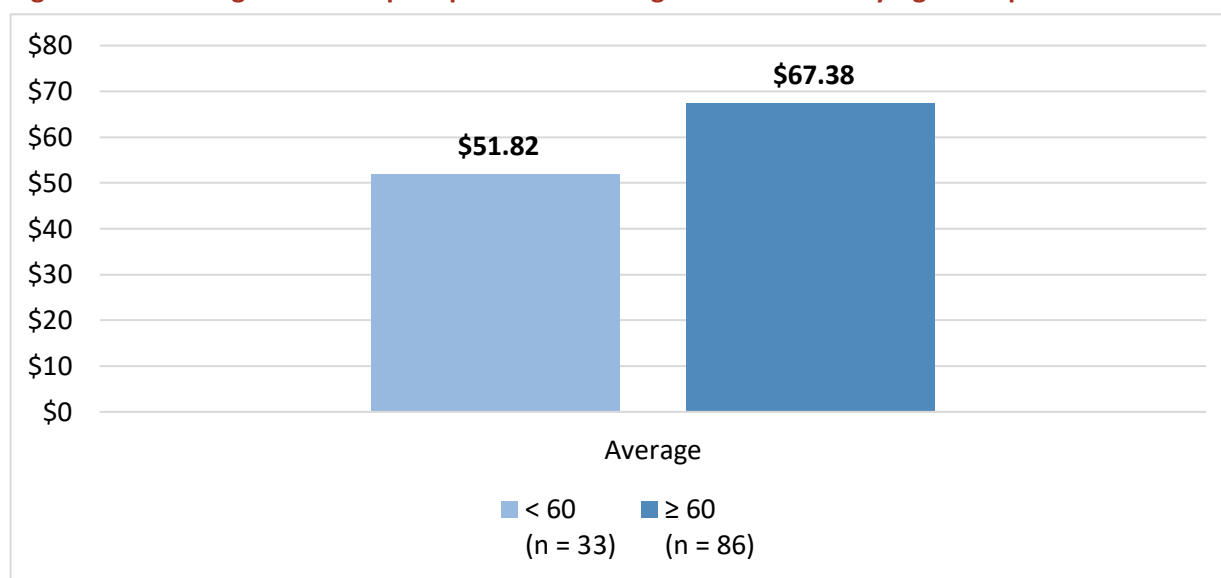
**Figure 44: Distribution of Survey Participants by Hours stayed Ashore and Amount Spent per Person during Individually Organised Shore Leave**



Source: Own data collection (n = 115)

Considering the length of stay ashore together with the amount spent during individually organised shore leave, over 80% of those staying less than four hours and over 70% of those staying longer spend no more than 100 USD. Higher expenditures between 100 and 300 USD are more common among longer-stay passengers (nearly 30%), compared to about 18% of shorter-stay passengers. On average, spending amounts to 53.06 USD for stays under four hours and 71.96 USD for longer stays.

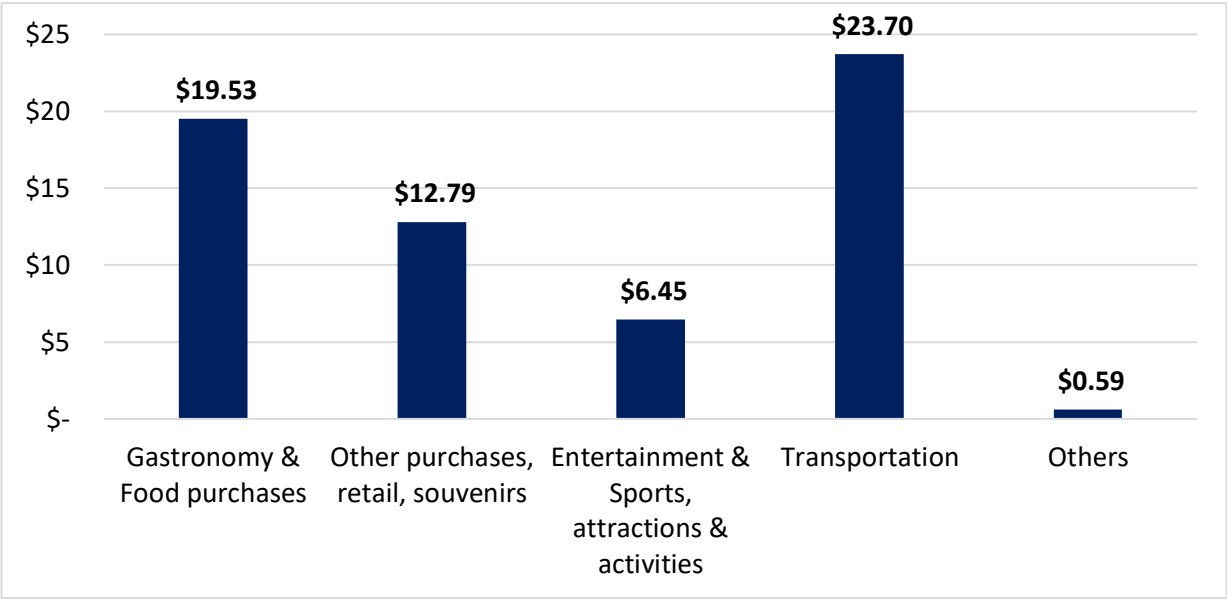
**Figure 45: Average Amount Spent per Person during Individual Visit by Age Group**



Source: Own data collection (n = 119)

Furthermore, considering the average amount spent during individual visit by age group, participants aged 60 and above spend around 67 USD, compared to around 52 USD among visitors under 60. Older participants thus record higher expenditures for individual activities.

**Figure 46: Average Spend in Different Service Areas during Individually Organised Shore Leave (USD)**

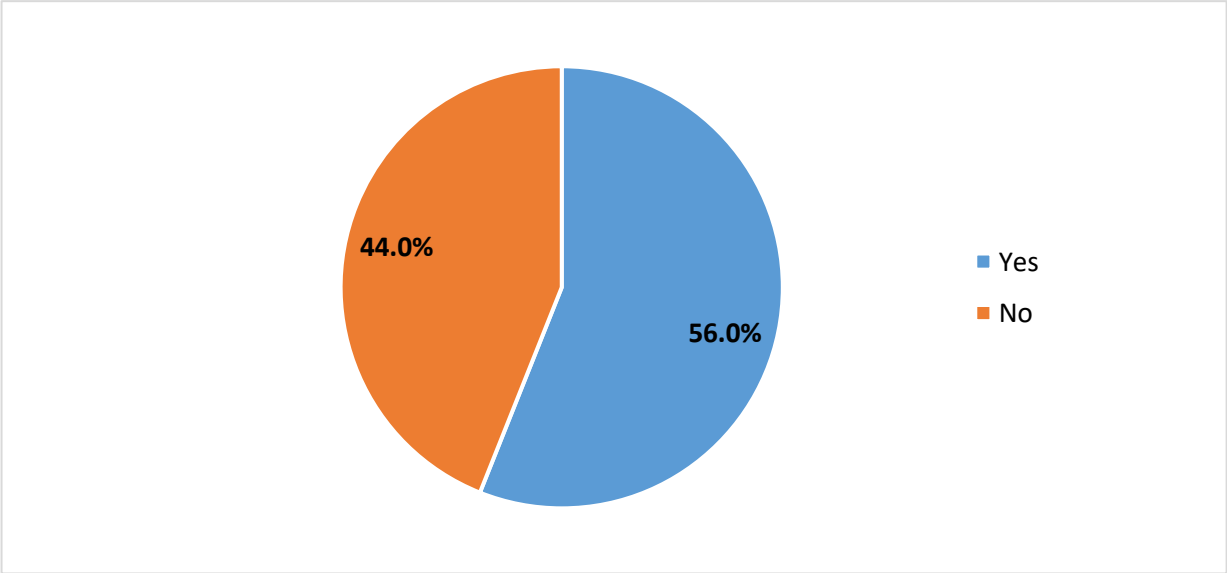


Source: Own data collection (n = 121)

During individually organised shore leave, passengers spend the most on transportation (around 24 USD), followed by gastronomy and food purchases. Spending on retail and souvenir purchases as well as entertainment and activities is considerably lower.

**Demand for Local Products**

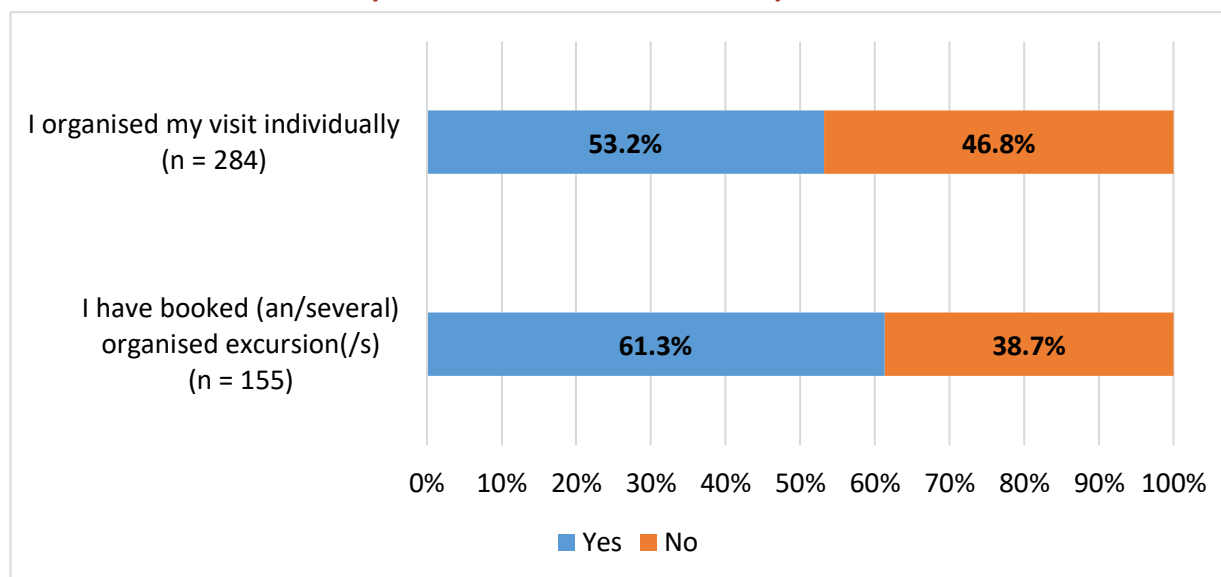
**Figure 47: Distribution of Survey Participants by Status on Whether they'd liked to Purchase more Locally Produced Products**



Source: Own data collection (n = 439)

The results show that out of all survey participants, 56% express interest in purchasing more locally produced products if they were available for sale. However, the remaining 44% of respondents indicate that they are not interested in buying additional local products.

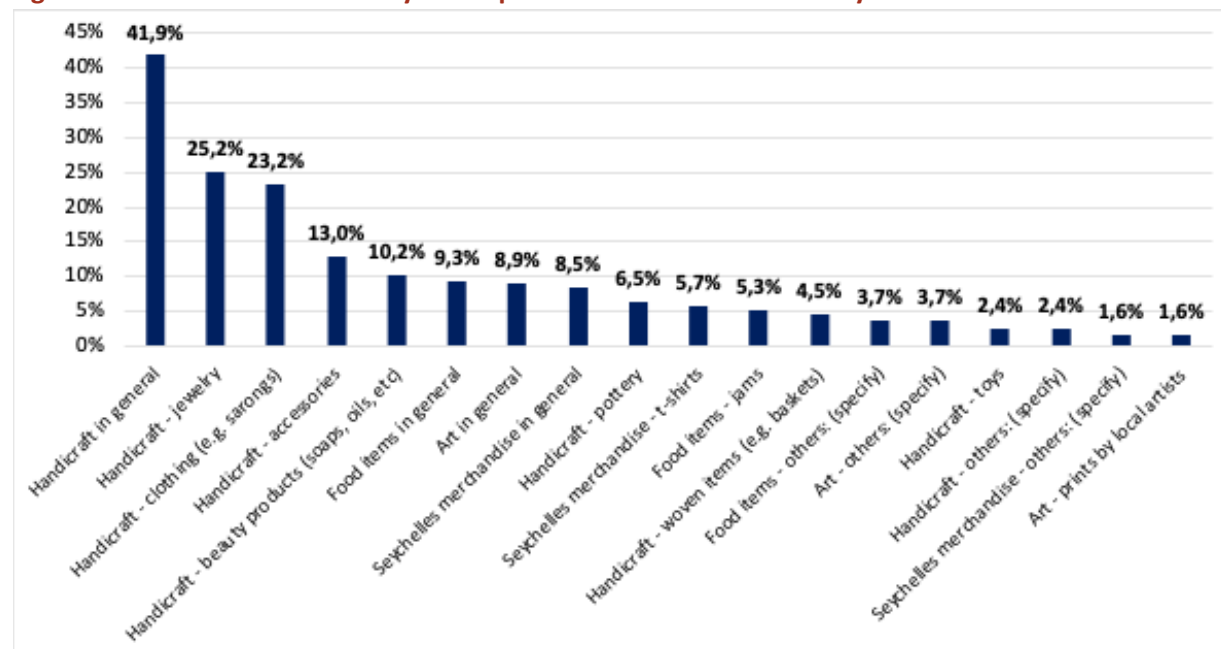
**Figure 48: Distribution of Survey Participants by Status in Taking Part in Organised Shore Excursion and Whether they'd Liked to Purchase more Locally Produced Products**



Source: Own data collection (n = 439)

Considering status in taking part in organised shore excursion and status on whether they'd liked to purchase more locally produced products together, results show that interest in those products is relatively high among both groups. More than half of the individual visitors and just over 60% of excursion participants state they would have liked to purchase more if such products had been on sale.

**Figure 49: Products that Survey Participants would like to see Locally Produced**

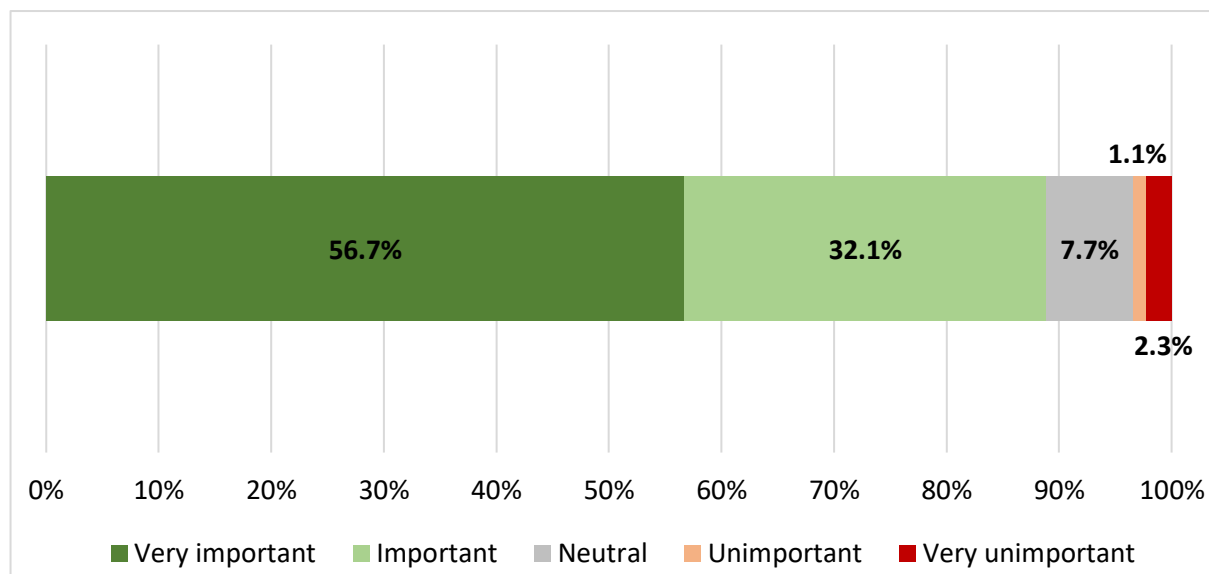


Source: Own data collection (n = 246, multiple answers possible)

Most of the participants that would like to purchase more locally produced products express the highest interest in handicraft items, with nearly 42% of responses falling into this category. Within handicrafts, jewelry, clothing, and accessories are particularly popular. There is also notable interest in food products and art in general, while merchandise such as T-shirts receives less attention.

## Environmental Awareness

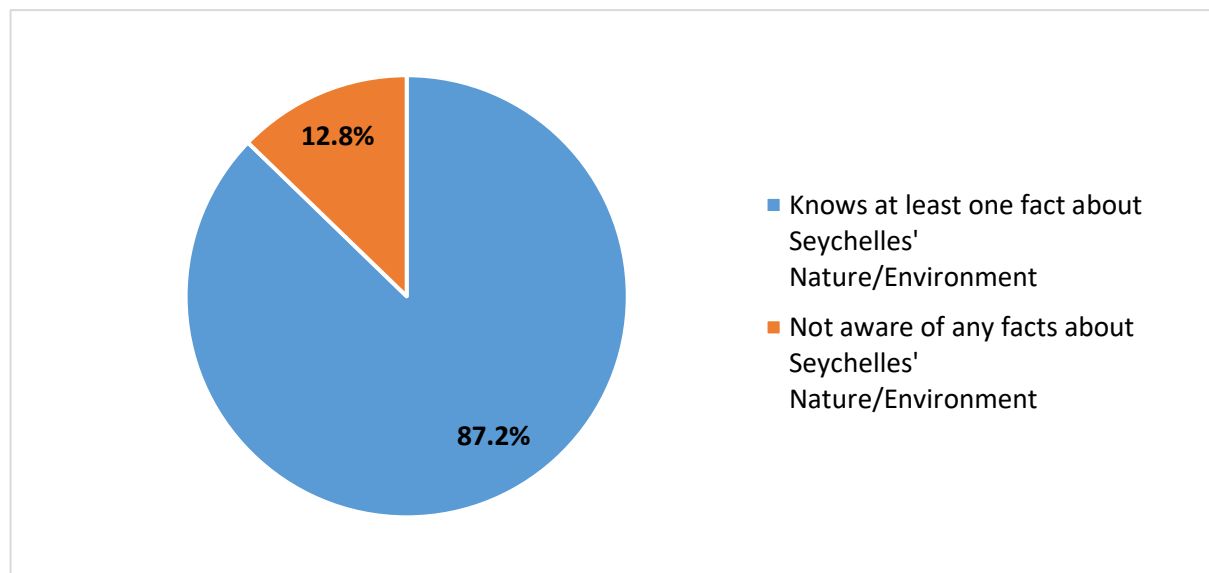
**Figure 50: Importance of Having an Environmentally Friendly Shore Leave**



Source: Own data collection (n = 439)

The survey findings show a strong focus on environmental consciousness during shore leave. More than half of all participants rate eco-friendly practices as very important, and a further one-third consider them important. Only a small proportion (around 3%) regard environmental considerations as unimportant or very unimportant.

**Figure 51: Distribution of Survey Participants by Awareness about Nature/Environment (aggregated)**

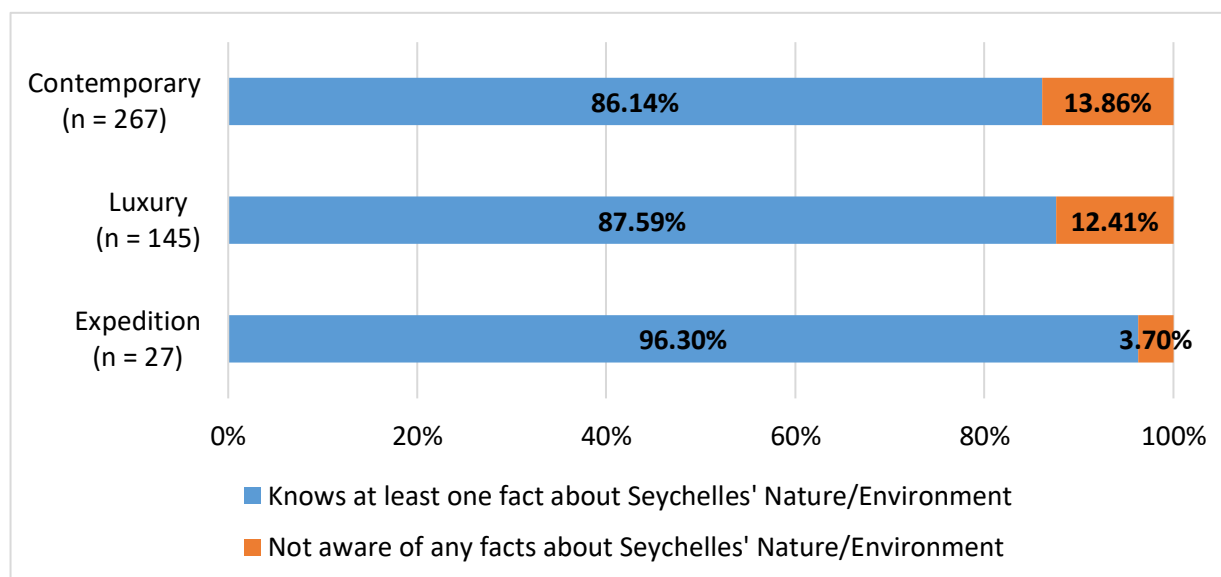


Source: Own data collection (n = 439)

Regarding awareness of Seychelles' nature and environment, the vast majority of survey participants report knowledge of at least one related fact. A smaller portion (12.8%) report no awareness of such information.



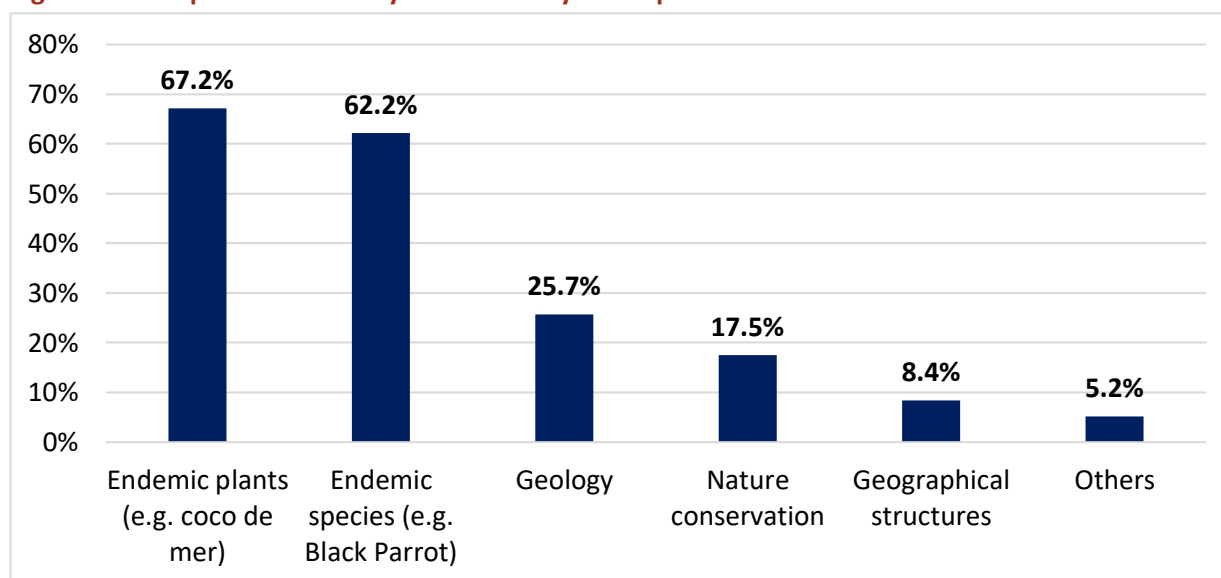
**Figure 52: Distribution of Survey Participants by Ship Type and Facts Aware of About Nature/Environment (aggregated)**



Source: Own data collection (n = 439)

Considering ship type and aggregated facts aware of about nature/environment together, most passengers across all cruise segments are aware of at least one fact about the Seychelles' nature and environment. Awareness is highest among expedition passengers (96.3%), followed by luxury and contemporary travelers. Only a small minority in each segment reports no knowledge at all.

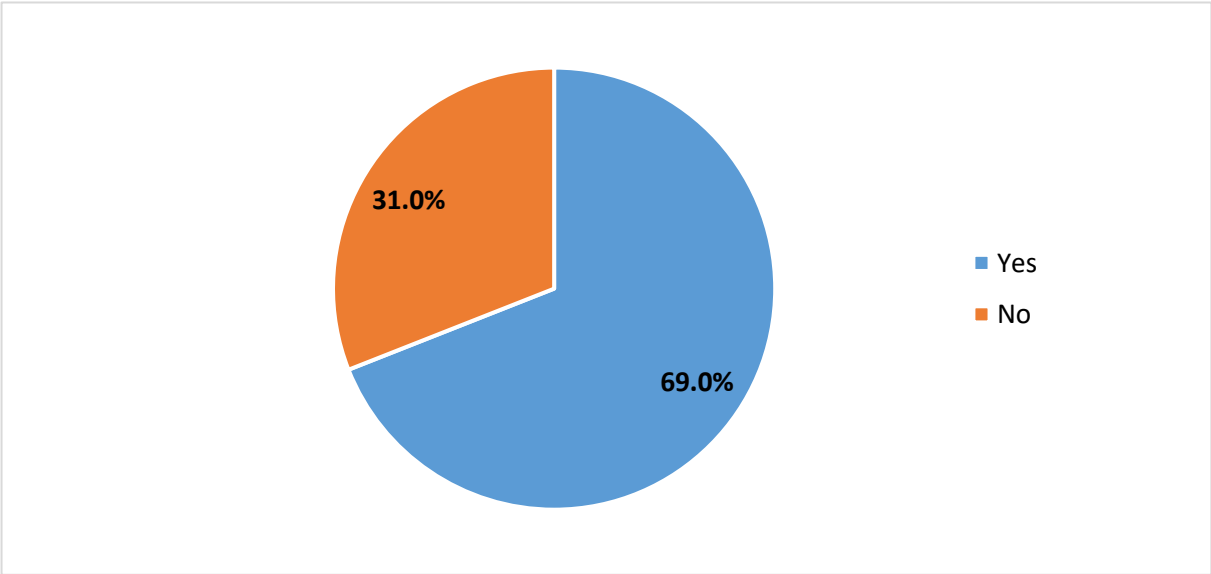
**Figure 53: Top Facts about Seychelles Survey Participants are Aware of**



Source: Own data collection (n = 439, multiple answers possible)

A majority of around two thirds are aware of endemic plants and know of endemic animal species. Awareness of other environmental topics, including geological features and conservation efforts, is reported less frequently.

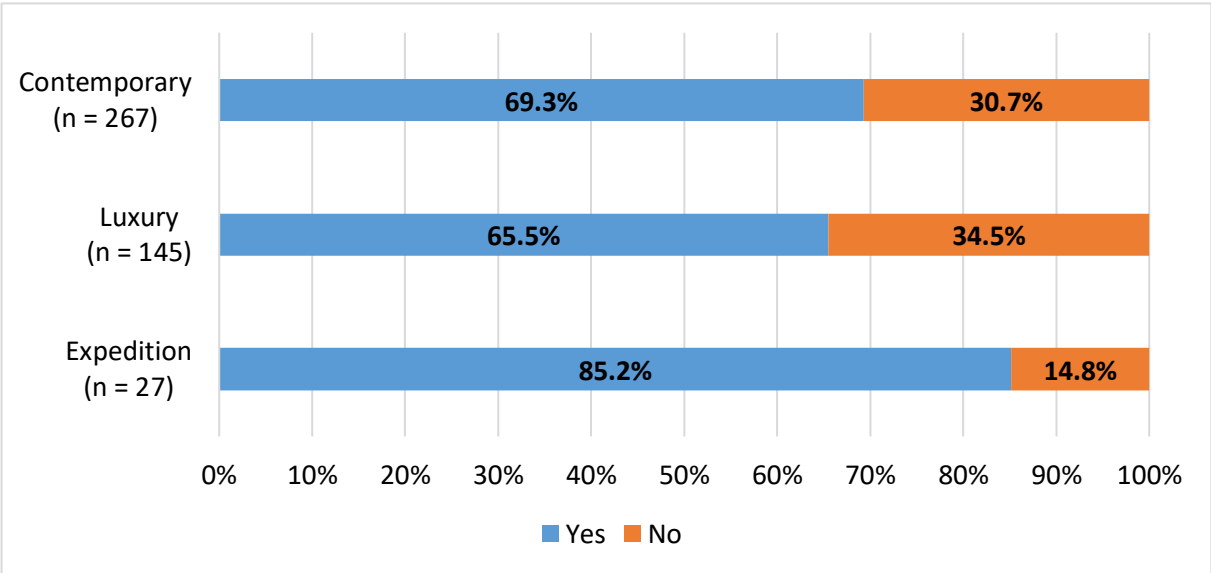
**Figure 54: Distribution of Survey Participants by Willingness to Pay More for Shore Leave, if it's Guaranteed that Funding will Go towards Environment Protection**



Source: Own data collection (n = 439)

The survey shows that most participants (69%) are willing to pay more for shore leave when the additional funds are allocated to environmental protection. Around one-third of respondents (31%) are not willing to pay extra.

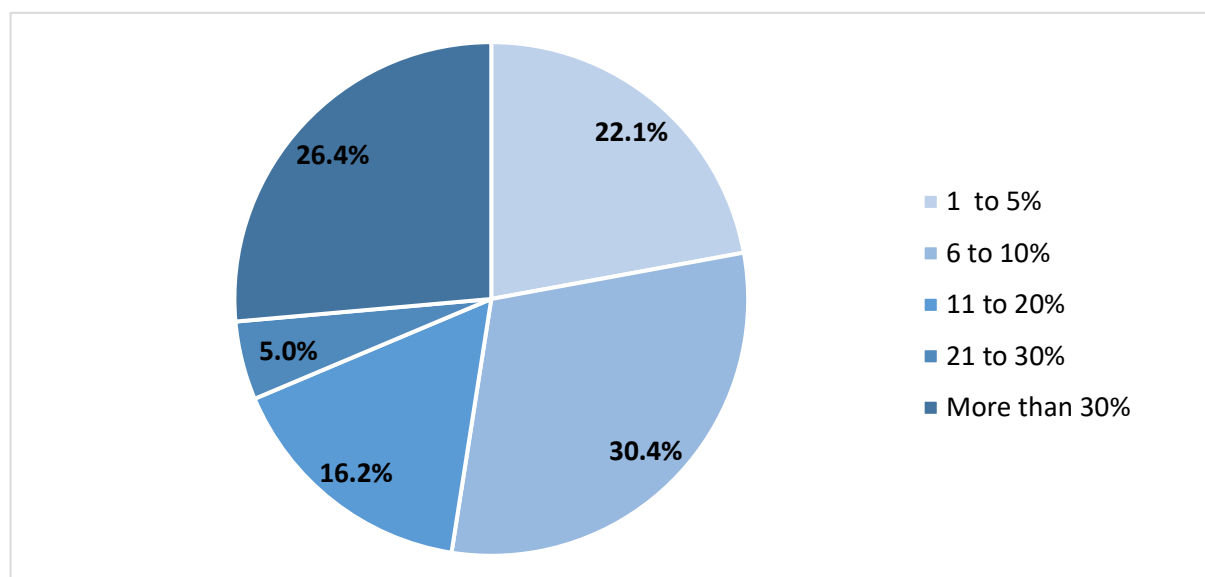
**Figure 55: Distribution of Survey Participants by Ship Type and Willingness to Pay More for Shore Leave, if it's Guaranteed that Funding will go Towards Environment Protection**



Source: Own data collection (n = 439)

Considering ship type and willingness to pay more for shore leave together, expedition passengers show the strongest willingness, while contemporary and luxury passengers are less inclined. In all groups, fewer than 35% are unwilling to pay more.

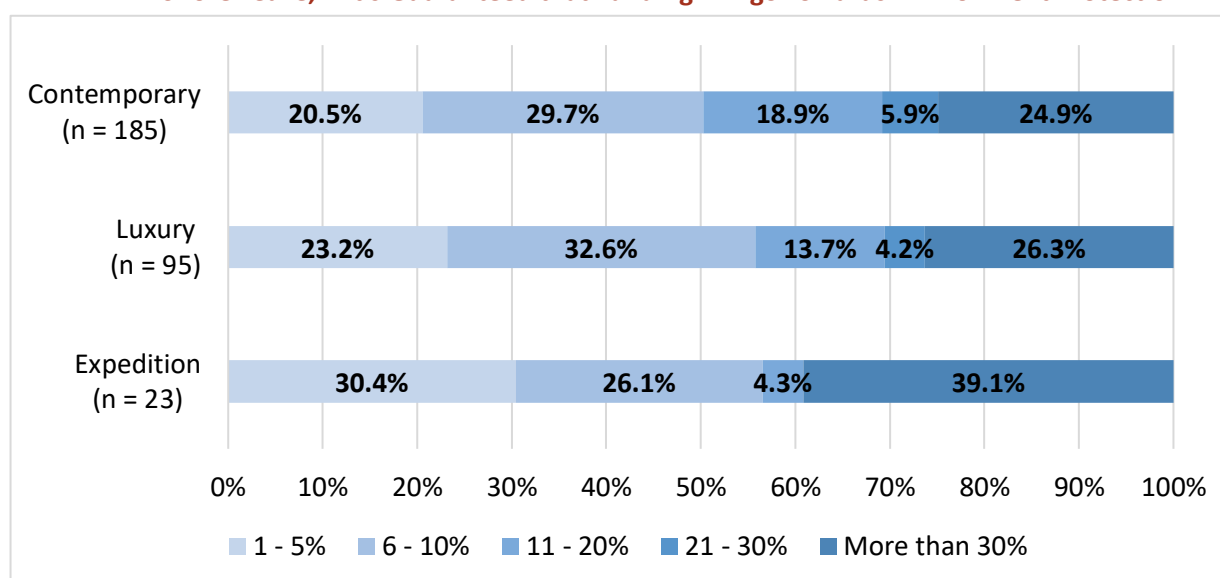
**Figure 56: Distribution of Survey Participants by Proportion Willing to Pay More for Shore Leave, if it's Guaranteed that Funding will Go towards Environment Protection**



Source: Own data collection (n = 303)

Among those survey participants that are willing to pay more for shore leave, if the additional funds go toward environmental protection, the largest groups are willing to pay small to moderate amounts (1-10% more), while a significant share is prepared to contribute over 30% more. Smaller proportions fall within the mid-range contributions of 11-30%.

**Figure 57: Distribution of Survey Participants by Ship Type and Proportion Willing to Pay More for Shore Leave, if it's Guaranteed that Funding will go Towards Environment Protection**

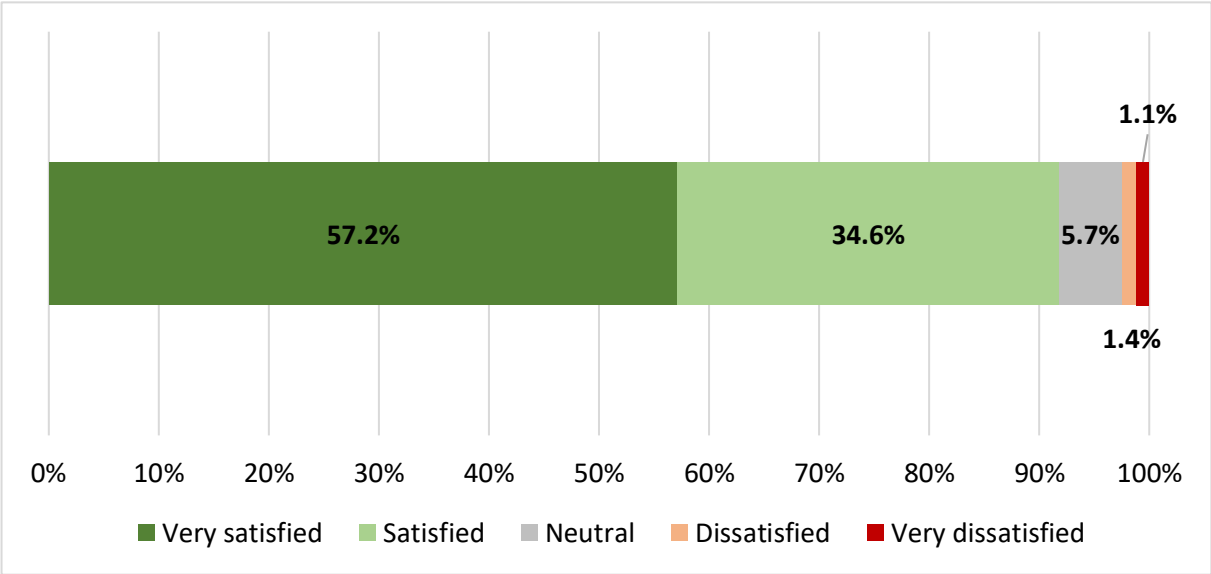


Source: Own data collection (n = 303)

Considering ship type and proportion willing to pay more for shore leave together, passengers on contemporary and luxury ships most often accept up to 10% additional costs if the funds go towards environmental protection. About a quarter in both segments are willing to contribute over 30%. Expedition passengers, by contrast, cluster at both ends: nearly 40% are prepared to pay more than 30%, yet they also show the highest share in the 1-5% range compared to other ship types.

Visitor Perceptions and Return Intentions

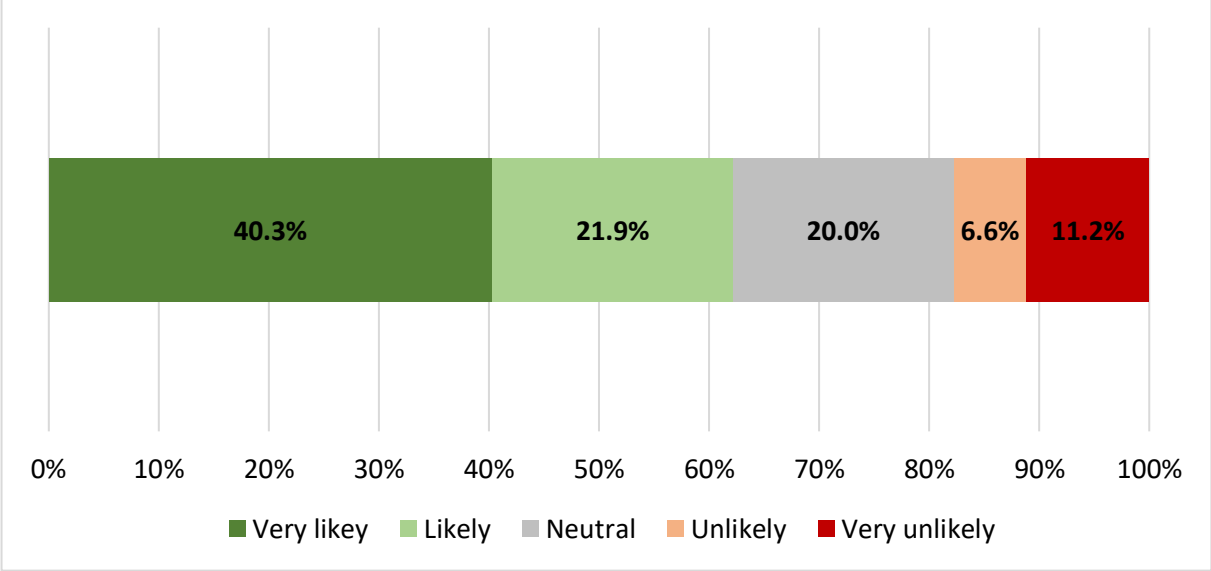
Figure 58: Distribution of Survey Participants by Satisfaction with Shore Leave



Source: Own data collection (n = 439)

Survey results on participants’ satisfaction with shore leave show a generally high level of contentment. Most participants are satisfied or very satisfied, with over 90% reporting positive experiences. A small proportion is neutral, while only a few participants report negative experiences.

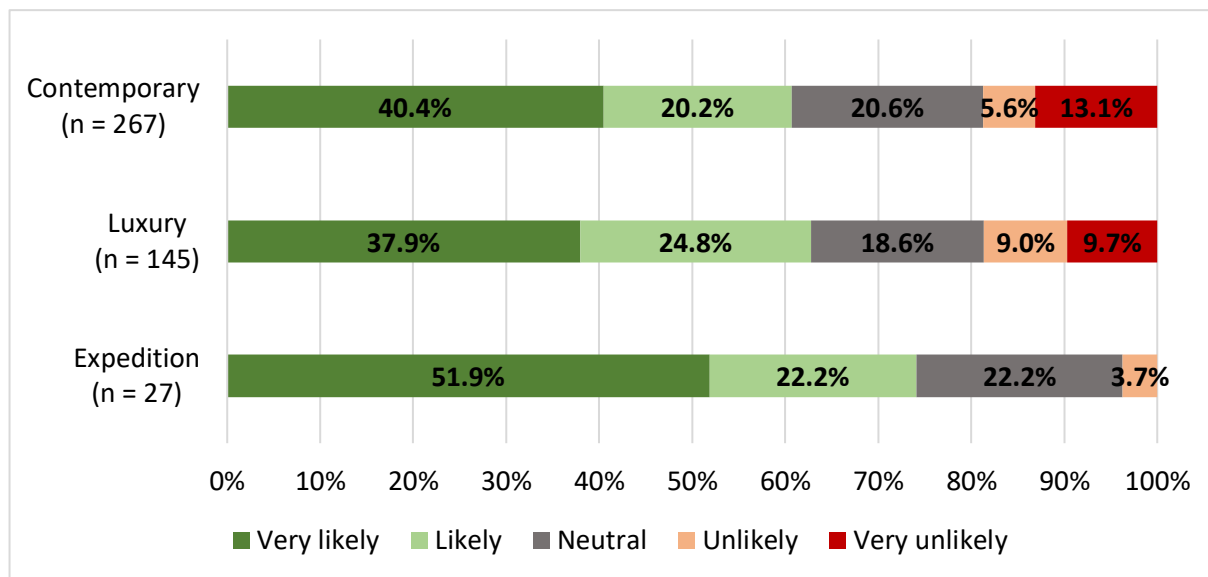
Figure 59: Distribution of Survey Participants Rating on Likelihood of Returning to Seychelles



Source: Own data collection (n = 439)

The distribution of survey participants based on their likelihood of returning to Seychelles shows that most participants are likely to come back, with around 62% indicating a positive intention. About one-fifth of respondents are neutral, while smaller proportions express reluctance to return.

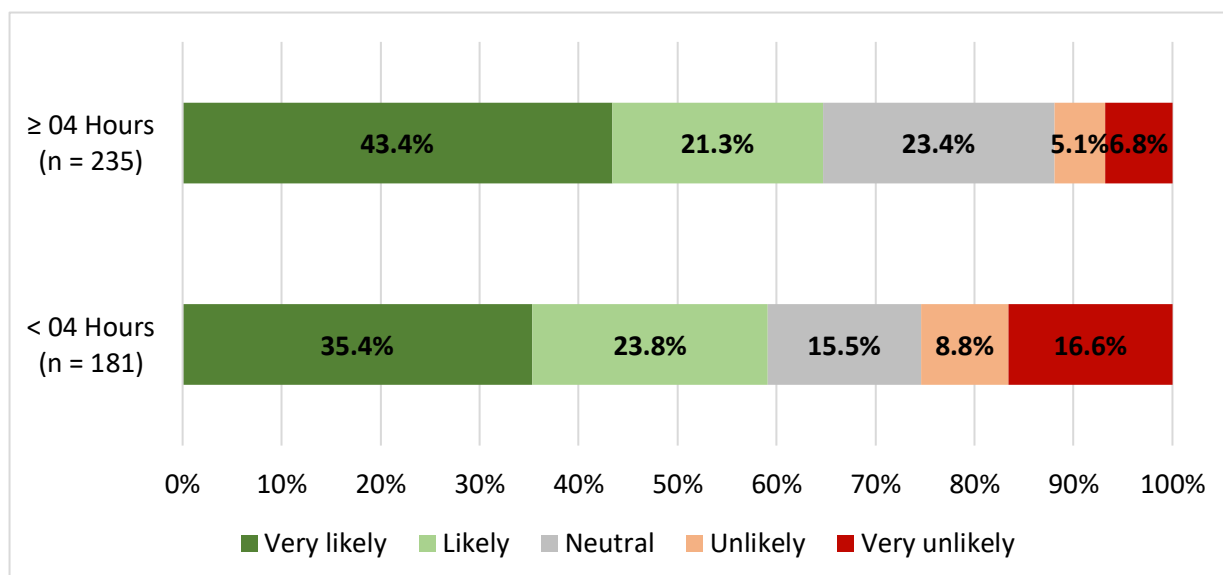
**Figure 60: Distribution of Survey Participants by Ship Type and Rating on Likelihood of Returning to Seychelles**



Source: Own data collection (n = 439)

Considering ship type and rating on likelihood of returning together, expedition passengers show the strongest intention to return to the Seychelles. Over half state that they are very likely to revisit, compared to about 40% of contemporary and 37.9% of luxury passengers. Shares rating a return as likely are similar across all ship types, while expedition passengers record the lowest proportion of “very unlikely” responses.

**Figure 61: Distribution of Survey Participants by Hours stayed Ashore and Rating on Likelihood of Returning to Seychelles**



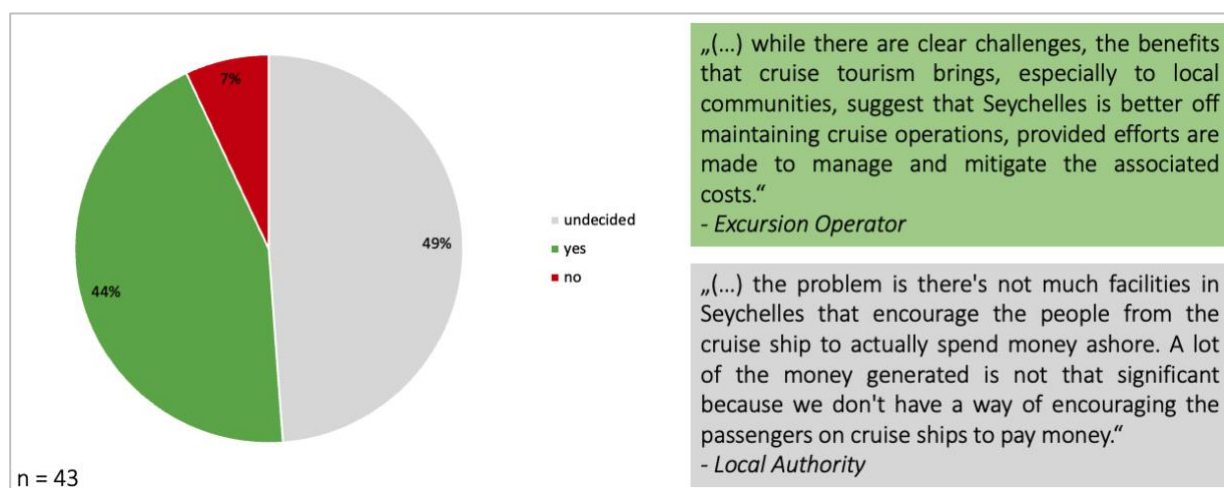
Source: Own data collection (n = 416)

When asked about the likelihood of returning to the Seychelles, around 60% of all passengers consider it very likely or likely, regardless of their length of stay ashore. Among those staying less than four hours, however, 25% rate a return as unlikely or very unlikely, compared to just 12% of longer-stay passengers.

## 2.2.2 Qualitative Stakeholder Interviews

### Economic Aspects of Cruise Tourism on Seychelles

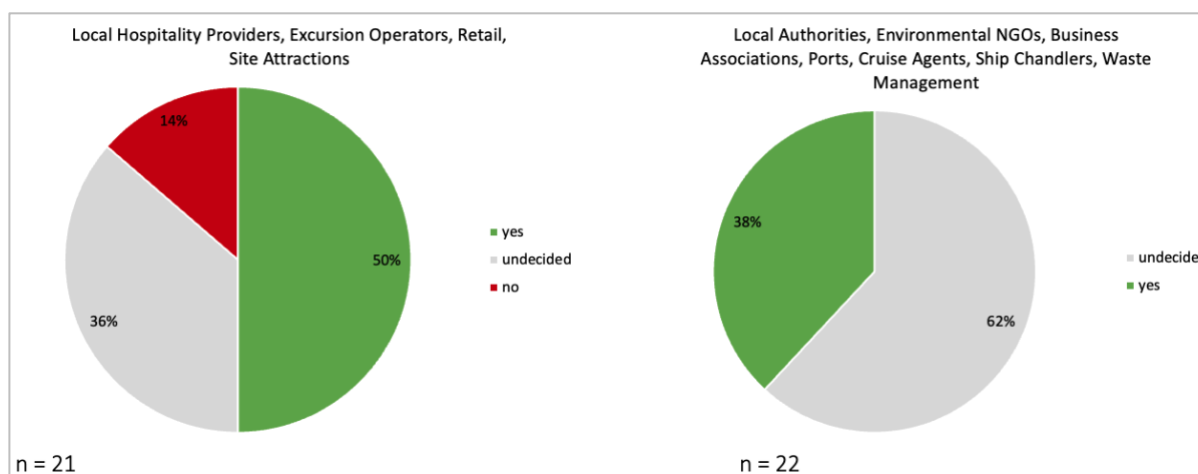
**Figure 62: Stakeholder Perspectives on Economic Benefits from Cruise Tourism**



Source: Own data collection

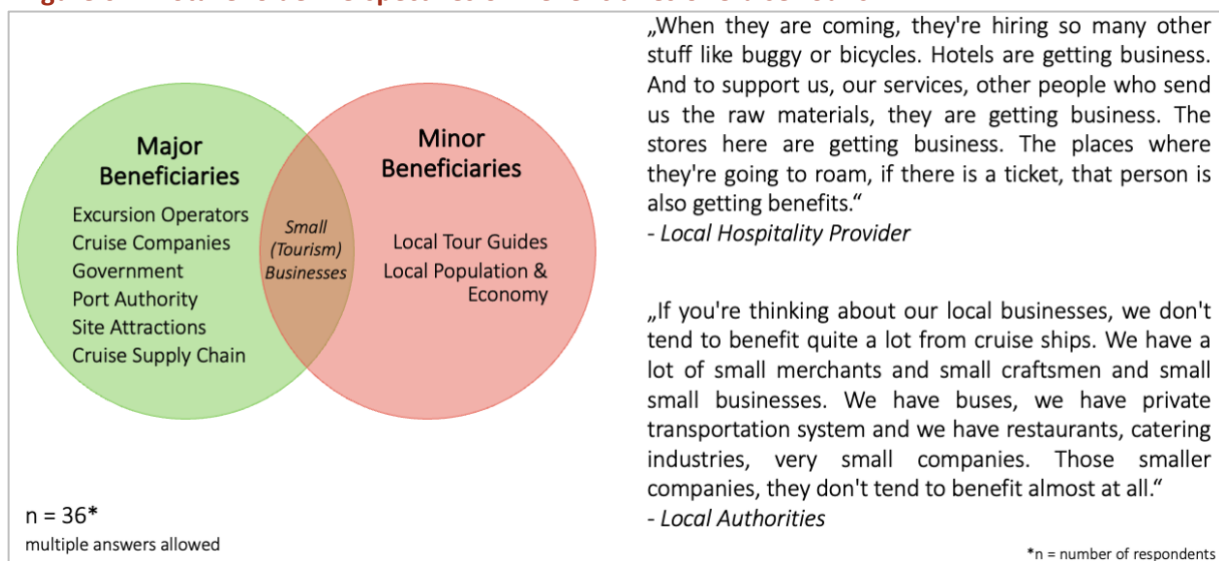
The interviewed stakeholders express mixed views regarding the economic benefits of cruise tourism for the Seychelles. Very few completely deny that the sector contributes economically, while about half remain undecided. A common concern is that cruise passengers usually spend only a short time onshore and make relatively little direct economic contribution. At the same time, several stakeholders acknowledge that cruise tourism does bring some economic benefits, though the magnitude and distribution of these benefits remain subjects of debate.

**Figure 63: Stakeholder Perspectives on Economic Benefits from Cruise Tourism by Group**



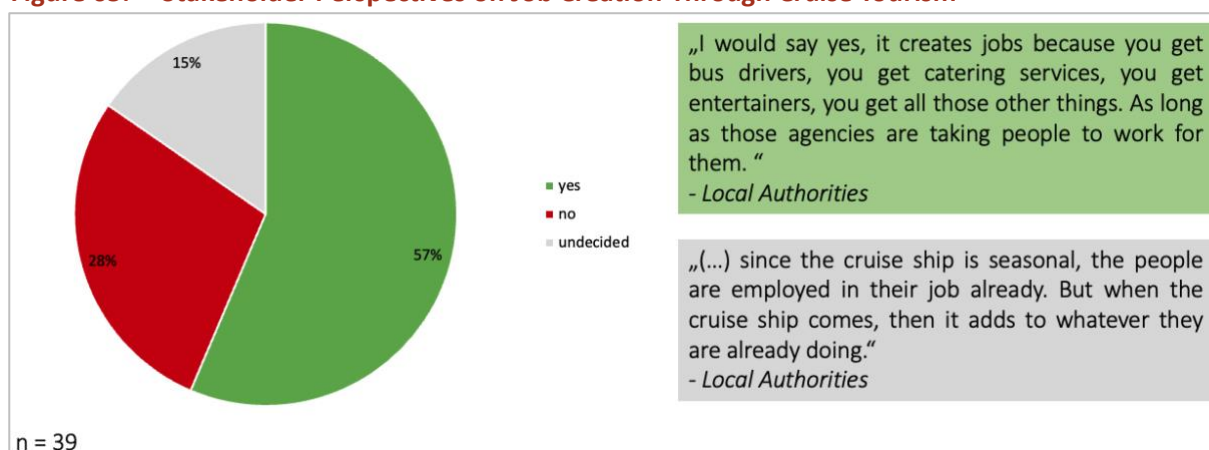
Source: Own data collection

When differentiating between stakeholder groups, it is evident that the negative opinions on cruise tourism's benefits are stated by those directly in contact with passengers (e.g., local hospitality providers). Interestingly, this group also reports a higher share of positive opinions. In contrast, the vast majority of stakeholders who mainly interact with cruise companies or are indirectly connected to the sector (e.g., local authorities) remain undecided.

**Figure 64: Stakeholder Perspectives on Beneficiaries of Cruise Tourism**

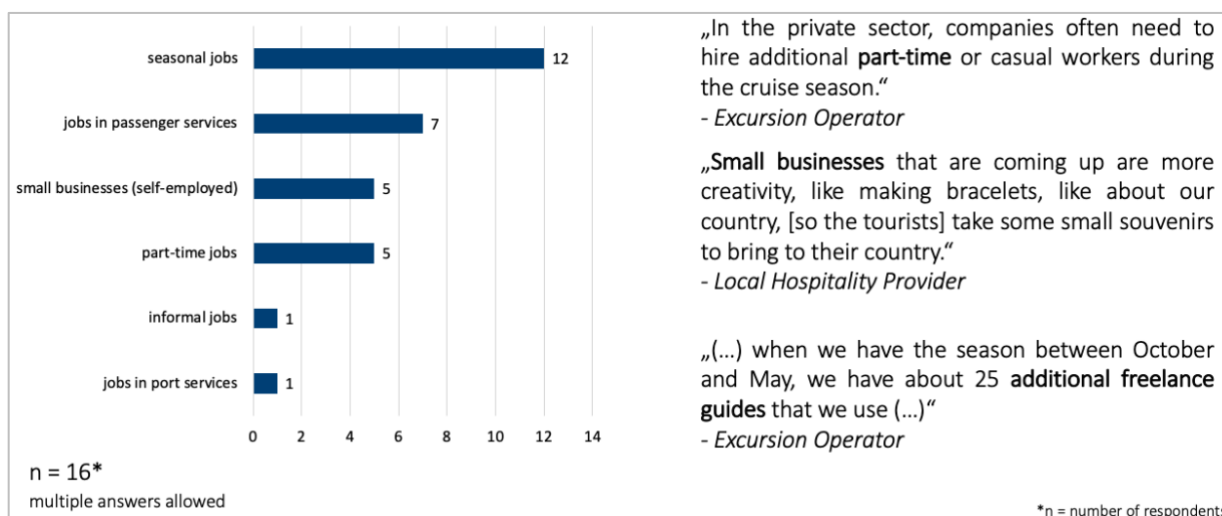
Source: Own data collection

There is a diverse range of beneficiaries of cruise tourism in Seychelles, both major and minor. The primary beneficiaries include excursion operators, cruise companies, government institutions, the port authority, site attractions, and actors within the cruise supply chain, all of whom directly benefit from cruise ship arrivals. Minor beneficiaries, such as local tour guides and the wider population, also experience positive impacts, though on a smaller scale. However, the extent to which small tourism businesses benefit, remains debated among stakeholders. While some perceive indirect gains through linkages with larger operators and service providers, others highlight that many small enterprises see little financial return from cruise visitors due to limited interaction and short excursion times.

**Figure 65: Stakeholder Perspectives on Job Creation Through Cruise Tourism**

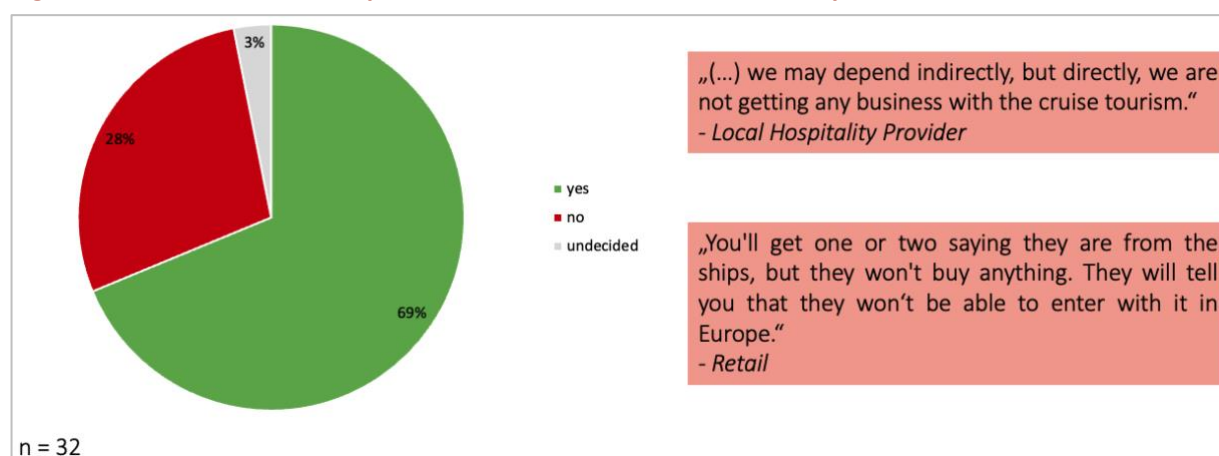
Source: Own data collection

Most stakeholders interviewed recognize that the cruise sector creates job opportunities, highlighting its importance as a source of income and livelihoods for the local population. However, some reported not experiencing any employment benefits, indicating that such opportunities may be unevenly distributed or concentrated in specific areas like tour operations, hospitality, and port services. While some respondents were uncertain, reflecting a lack of clarity regarding the extent of employment generated within the cruise tourism value chain, others emphasized that such work tends to complement existing jobs rather than providing full-time or year-round positions.

**Figure 66: Stakeholder Perspectives on Employment Opportunities Through Cruise Tourism**

Source: Own data collection

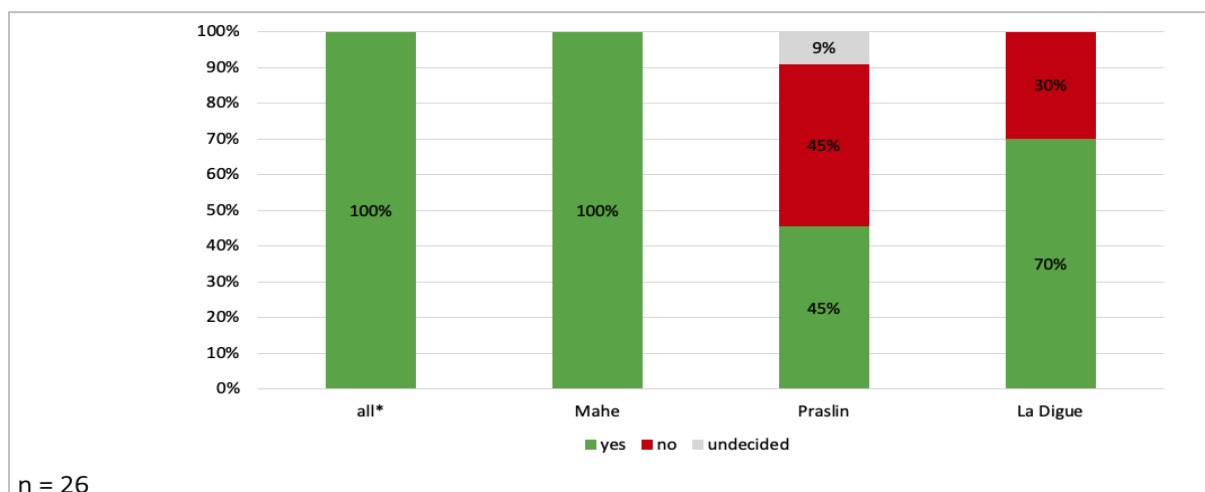
Stakeholders indicate that employment in the cruise sector is predominantly seasonal, with temporary and part-time positions created to meet fluctuations in visitor demand. Small businesses and self-employed individuals benefit primarily through the provision of local products and services, often linked to tourist purchases. These roles offer supplementary income, while opportunities in port services and other informal work remain comparatively limited.

**Figure 67: Stakeholder Perspectives on Income for Individual Companies from Cruise Tourism**

Source: Own data collection

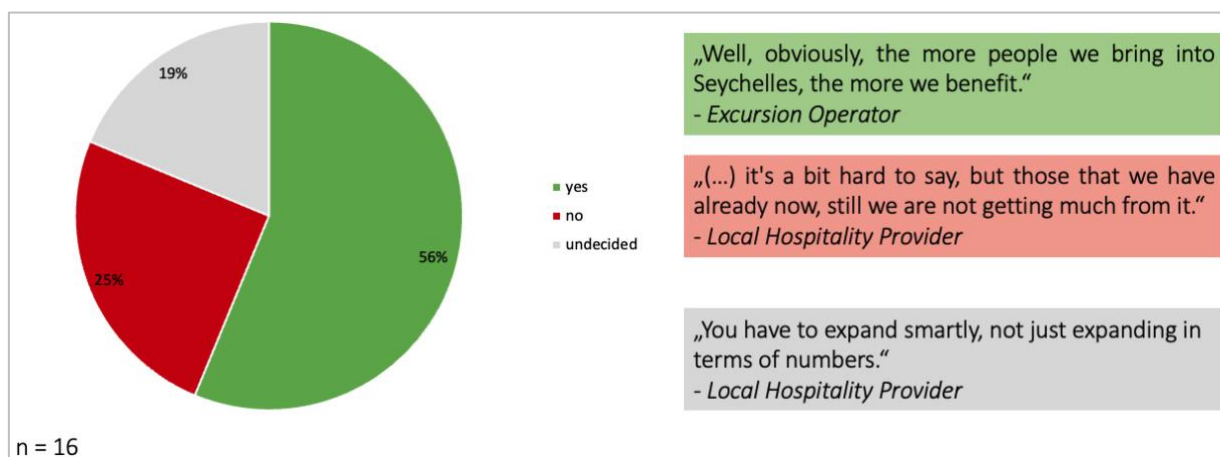
Cruise tourism plays a key role in generating foreign exchange and income for businesses in Seychelles. The majority of stakeholders reported that businesses benefit financially from cruise visitor arrivals, highlighting the sector's contribution to revenue inflows and support for foreign exchange reserves. However, some respondents emphasized that benefits are often indirect or limited, with certain businesses, particularly in retail or hospitality, experiencing little direct income from cruise tourists. In some cases, purchases are restricted due to external factors, limiting potential sales. A portion of participants remained undecided, reflecting limited awareness or indirect exposure to the financial impacts of the cruise industry.



**Figure 68: Stakeholder Perspectives on Cruise Tourism Income for Individual Companies by Island**

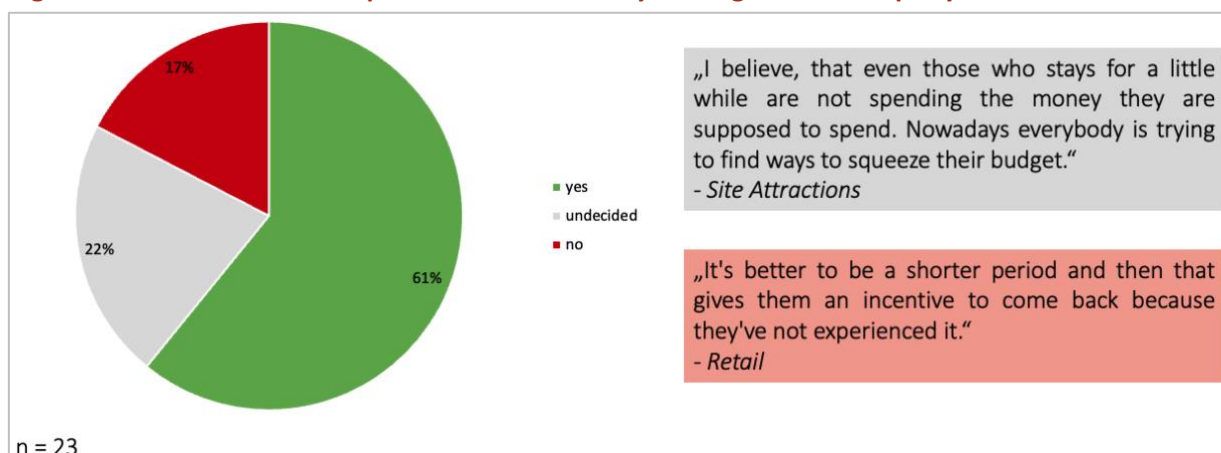
Source: Own data collection (\*The excursion operators have business on all three islands.)

Income and foreign exchange earnings from cruise tourism should also be examined at the island level. Excursion operators conduct business across all three islands, providing a consistent source of foreign exchange from cruise tourism. On Mahé, all respondents reported that businesses benefit from cruise visitor spending, reflecting the island's role as the main port of entry and economic hub. Perceptions on Praslin were more mixed, with some stakeholders acknowledging positive earnings, others reporting no benefits, and some undecided, indicating uneven distribution of cruise-related spending. On La Digue, participants recognized foreign exchange gains, but a portion reported no benefits, showing that while the island captures a share of cruise spending, not all businesses benefit equally.

**Figure 69: Stakeholder Perspectives on Desirability of Additional Cruise Ship Calls**

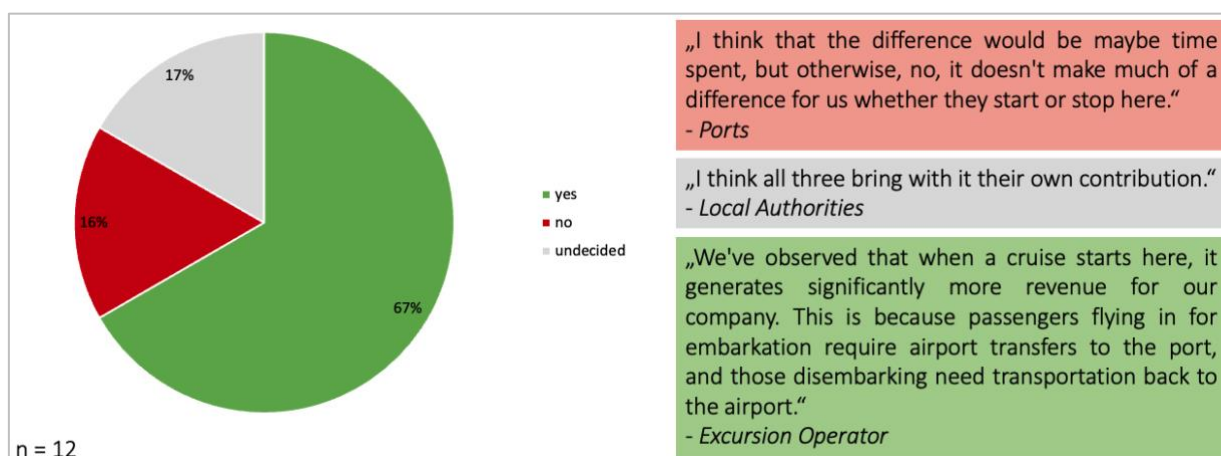
Source: Own data collection

The interviews indicate a generally positive perception of increasing cruise ship calls in Seychelles, with many respondents recognizing potential economic benefits. At the same time, some stakeholders noted that the actual gains for certain businesses are limited, particularly among hospitality providers and smaller enterprises. Others stressed that any growth in cruise arrivals should be carefully managed, emphasizing the importance of strategic planning to avoid negative consequences. A portion of participants remain undecided, reflecting uncertainty or limited information about the effects of higher cruise traffic.

**Figure 70: Stakeholder Perspectives on Desirability of Longer Cruise Ship Layovers**

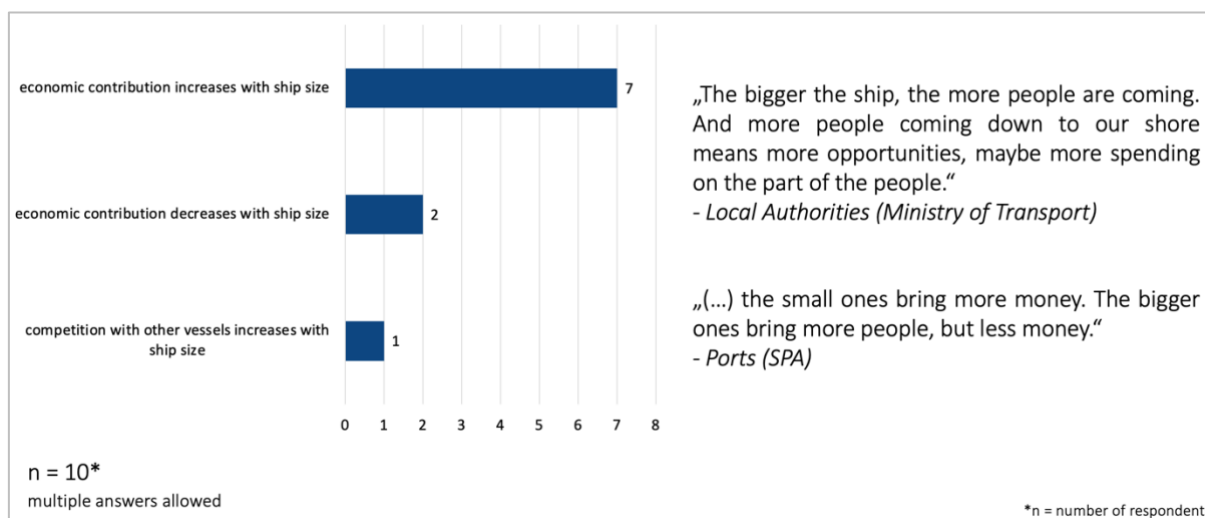
Source: Own data collection

The interviews also indicate a generally positive perception of longer cruise ship calls in Seychelles, with respondents considering them desirable. This preference reflects the potential for extended economic benefits, as longer stays give passengers more time to explore the islands, spend on excursions, local products, and services, and engage more fully with the tourism offerings. Conversely, some stakeholders viewed longer layovers as undesirable, likely due to concerns about congestion, resource pressure, or environmental impacts. A portion of participants remained undecided, indicating uncertainty or limited experience with the effects of extended cruise visits.

**Figure 71: Stakeholder Perspectives on Economic Advantage of Seychelles as Home Port**

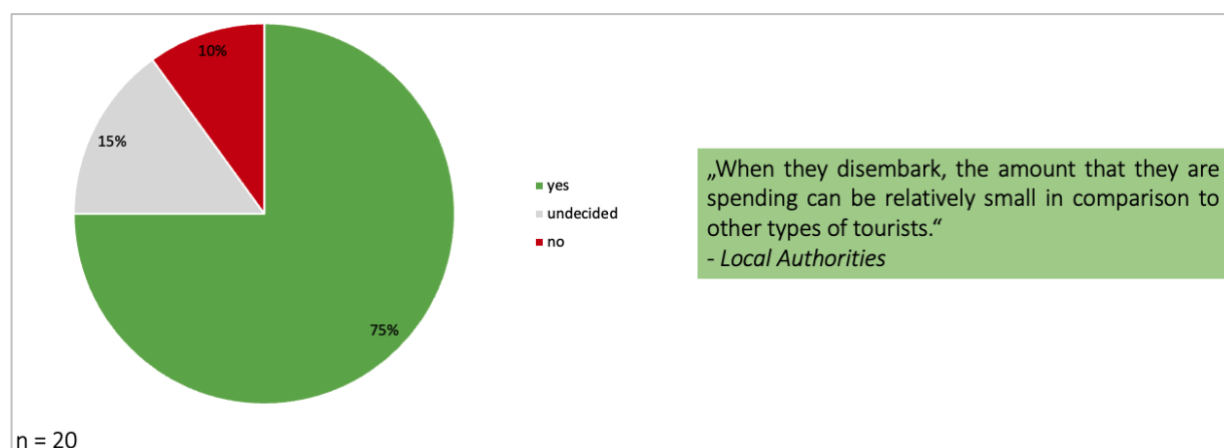
Source: Own data collection

Starting or ending cruise itineraries in Seychelles is generally perceived as an economic advantage by the interviewed stakeholders, with multiple respondents highlighting the potential for greater passenger spending on local services, excursions, and supplies. Homeporting is viewed as particularly beneficial for transport and excursion providers, as it generates additional demand for airport transfers, logistics, and related services, thereby stimulating wider economic activity. Some stakeholders, however, emphasized that the overall impact depends on the specific operational model, noting that each type of cruise call offers distinct benefits. A few participants saw little difference in economic outcomes, suggesting that potential gains may not be equally distributed across sectors. Others remained undecided, reflecting limited familiarity with the broader implications of homeporting.

**Figure 72: Stakeholder Perspectives on Correlations between Ship Size and Economic Impacts**

Source: Own data collection

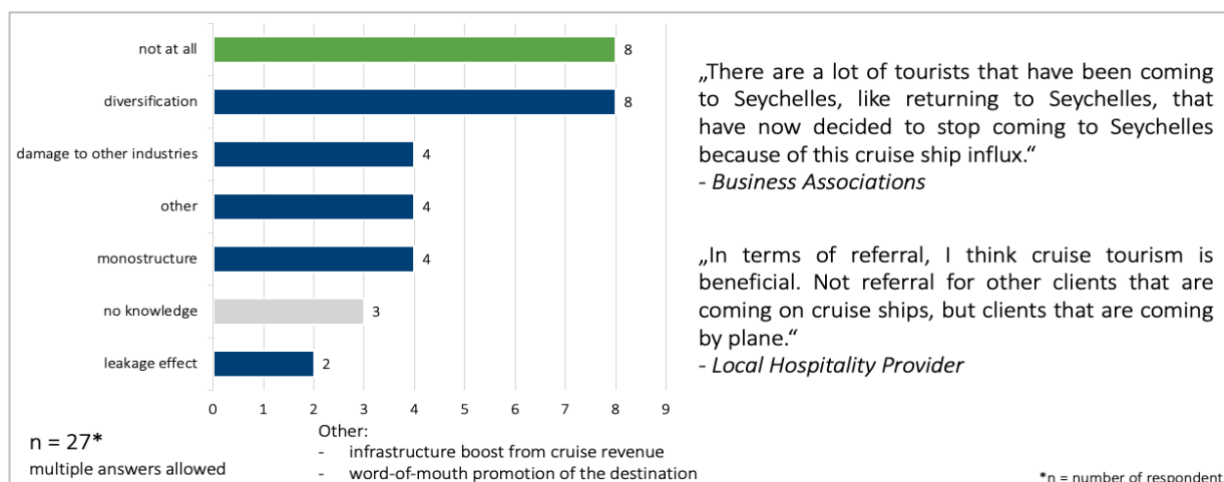
Regarding the relationship between ship size and economic impact in Seychelles, most interviewees indicate that larger ships generate greater economic benefits, as they bring more passengers, higher overall spending potential, and increased business opportunities for local suppliers. In contrast, a smaller number of respondents believes that smaller vessels contribute more per passenger, as their clientele tends to have higher purchasing power. One stakeholder also pointed out that smaller ships may pose fewer logistical challenges, since their calls do not disrupt container shipping operations.

**Figure 73: Stakeholder Perspectives on Cruise Tourists being Less Economically Relevant than Other Forms of Tourists**

Source: Own data collection

Cruise tourists are generally perceived as less economically significant than other visitor types in Seychelles. Interviewed stakeholders often link this to the shorter duration of cruise visits, noting that limited time onshore reduces opportunities for spending on accommodation, dining, and other services. Only a few participants viewed cruise tourists as equally or more valuable than other segments, while some remained undecided, reflecting uncertainty about the issue.

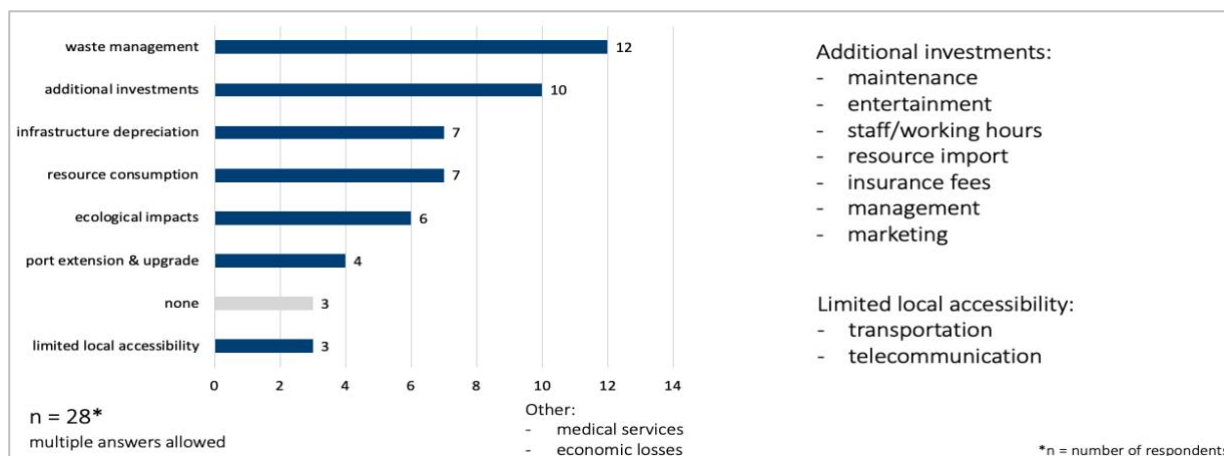
**Figure 74: Stakeholder Perspectives on Cruise Tourism Changing the Structure of the Local Economy**



Source: Own data collection

Perceptions of cruise tourism's impact on the structure of the local economy in Seychelles are mixed. Some stakeholders feel that cruise tourism has little or no influence on the overall economy. Others view it as a driver of economic diversification within the tourism industry, providing an additional source of income for local residents. In contrast, a smaller group points to potential negative effects, such as damage to the stay-over tourism industry due to overcrowding from cruise visitors, economic concentration in the hands of a few major players, and revenue leaking outside the local economy. A few respondents mentioned other types of impacts, while others report having no knowledge of the sector's broader economic implications.

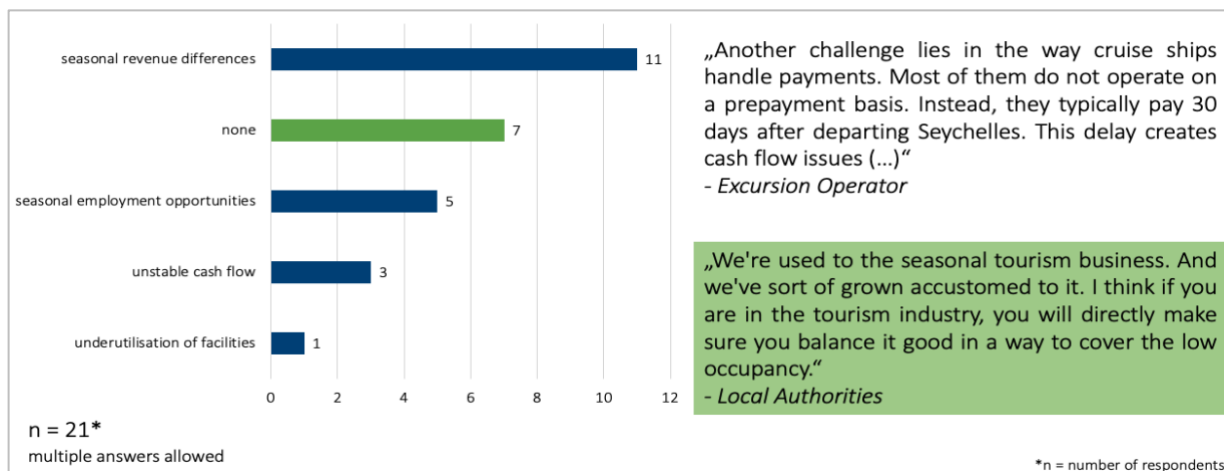
**Figure 75: Stakeholder Perspectives on Hidden Costs generated from Cruise Tourism**



Source: Own data collection

Cruise tourism in Seychelles carries several hidden costs, encompassing both environmental and infrastructural challenges. Waste management is the most frequently cited concern, with stakeholders highlighting increased pressure on disposal and recycling systems. Additional investments and infrastructure depreciation were also noted, suggesting that accommodating cruise vessels requires continuous financial outlays and maintenance for ports, roads, and public facilities. Resource consumption and ecological impacts further emphasize the environmental strain associated with high passenger volumes, while port expansions and upgrades indicate substantial long-term capital needs. A smaller number of respondents mentions limited local accessibility, while some report no hidden costs.

**Figure 76: Stakeholder Perspectives on Economic Seasonality Effects generated from Cruise Tourism**

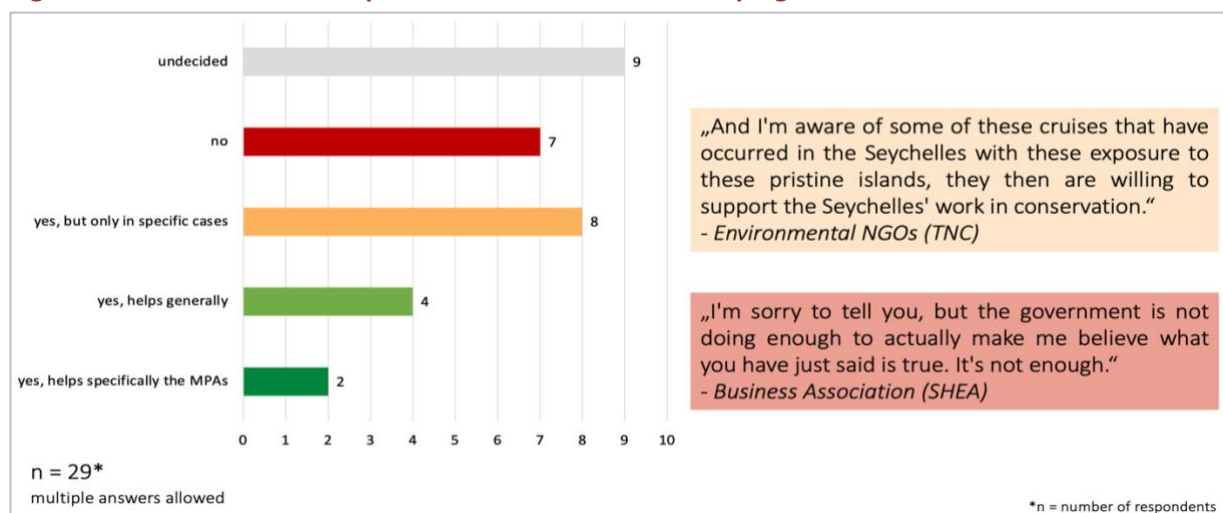


Source: Own data collection

Regarding seasonal economic effects from cruise tourism in Seychelles, the most frequently cited impact is seasonal revenue variation, with interviewees noting significant fluctuations in business income based on the cruise schedule. Seasonal employment opportunities further demonstrate that jobs linked to cruise arrivals are often temporary, resulting in inconsistent income for workers. Stakeholders also mention unstable cash flow, reflecting the sector's highly cyclical nature, while underutilized facilities suggest that infrastructure investments are not fully optimized year-round. Some participants report no noticeable seasonality effects, indicating that certain businesses experience consistent engagement.

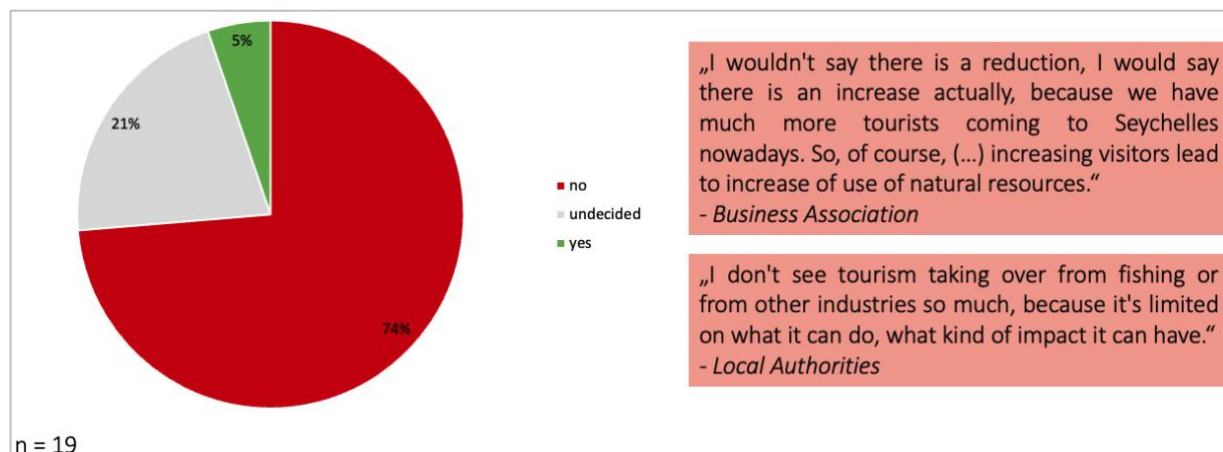
## Environmental Aspects of Cruise Tourism on Seychelles

**Figure 77: Stakeholder Perspectives on Cruise Tourism Helping Nature Conservation**

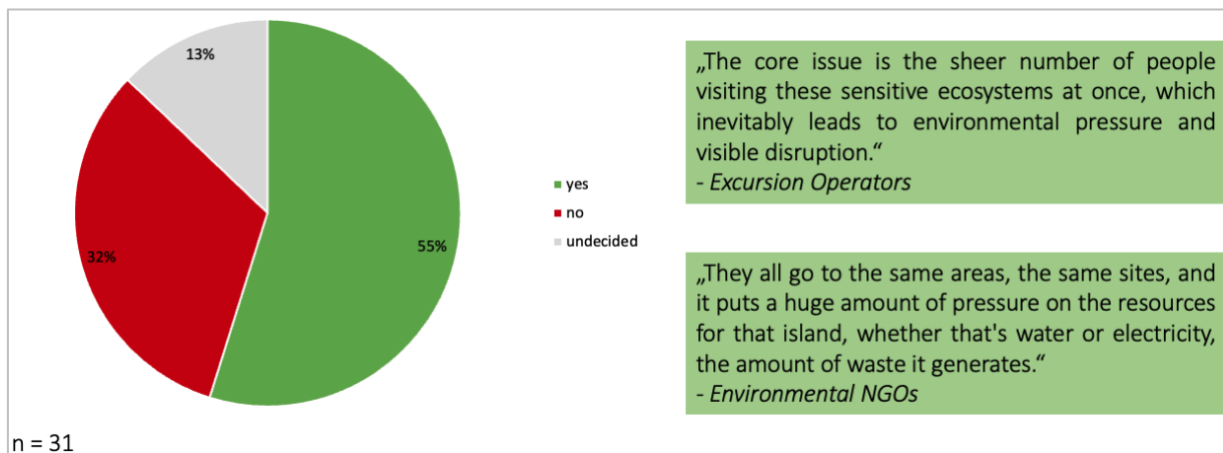


Source: Own data collection

Stakeholder opinions on cruise tourism's contribution to nature conservation in Seychelles are mixed. A significant number of respondents are undecided, while some feel that cruise tourism provides no meaningful conservation benefits. Others recognize potential contributions, but primarily when activities are linked to environmentally conscious cruise operators. A smaller group sees cruise tourism as offering general support for conservation, with only a few noting direct support for the protection of Marine Protected Areas. It was also highlighted that the contributions vary by cruise line.

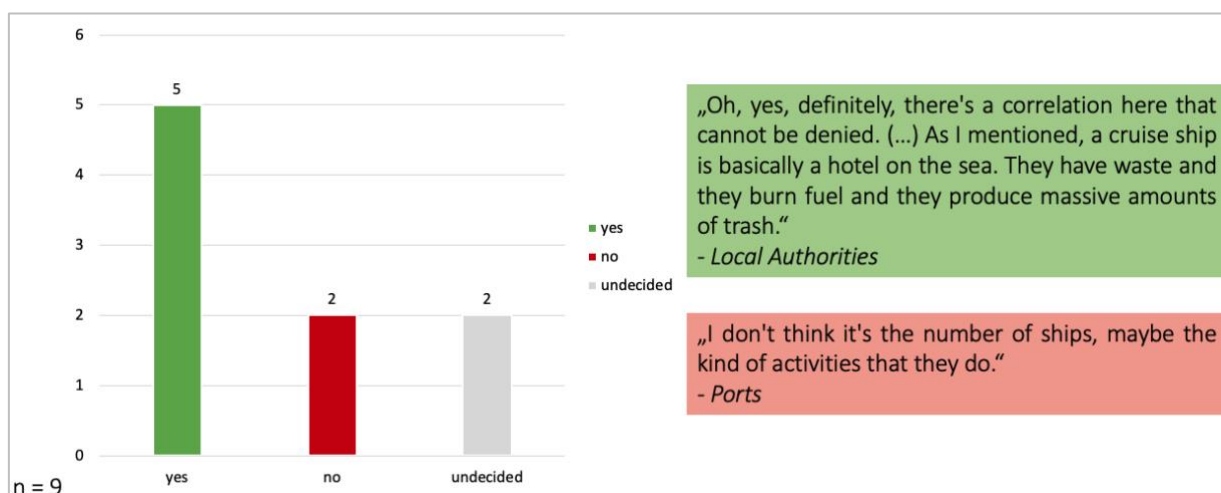
**Figure 78: Stakeholder Perspectives on Cruise Tourism Lowering the Pressure on Natural Resources**

The vast majority of interviewed stakeholders indicate that cruise tourism does not reduce pressure on natural resources, suggesting that the sector may instead exacerbate existing challenges regarding resource availability. It was also noted that, since the Seychelles' economy relies on two main pillars – fisheries and tourism – it is neither feasible nor desirable for one to replace the other and thus lower the pressure on natural resources. Only a small proportion believes that cruise tourism could help to ease pressure on resources, while others remain undecided.

**Figure 79: Stakeholder Perspectives on Cruise Tourism Having an Impact on Ecological Seasonality**

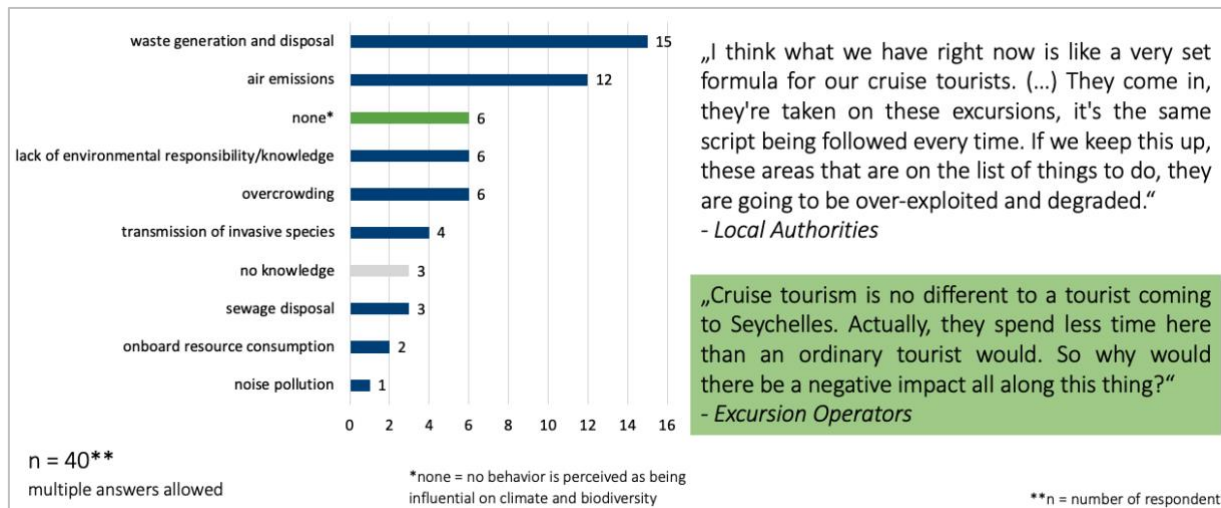
Most interviewees believe that cruise tourism affects ecological seasonality, mainly due to the sudden influx of large visitor groups at specific sites such as Anse Source d'Argent on La Digue or Vallée de Mai on Praslin. Such concentration is seen to cause overcrowding, environmental stress, and disturbance to natural patterns. Several respondents emphasized the need for better visitor management and diversification of activities to distribute pressure more evenly across islands. A smaller number felt that cruise tourism does not produce such effects, while others remained undecided.



**Figure 80: Stakeholder Perspectives on Incoming Cruise Ship Numbers as an Ecological Problem**

Source: Own data collection

When asked whether the total number of incoming cruise ships is perceived as an ecological concern, the majority of respondents answers yes, reflecting worries about the environmental pressures associated with cruise arrivals. In contrast, some stakeholders did not view the number of ships as an ecological issue, while others remained undecided, suggesting that ship size and passenger volume are the more critical factors.

**Figure 81: Stakeholder Perspectives on Most Influential Behaviors Affecting Climate and Biodiversity**

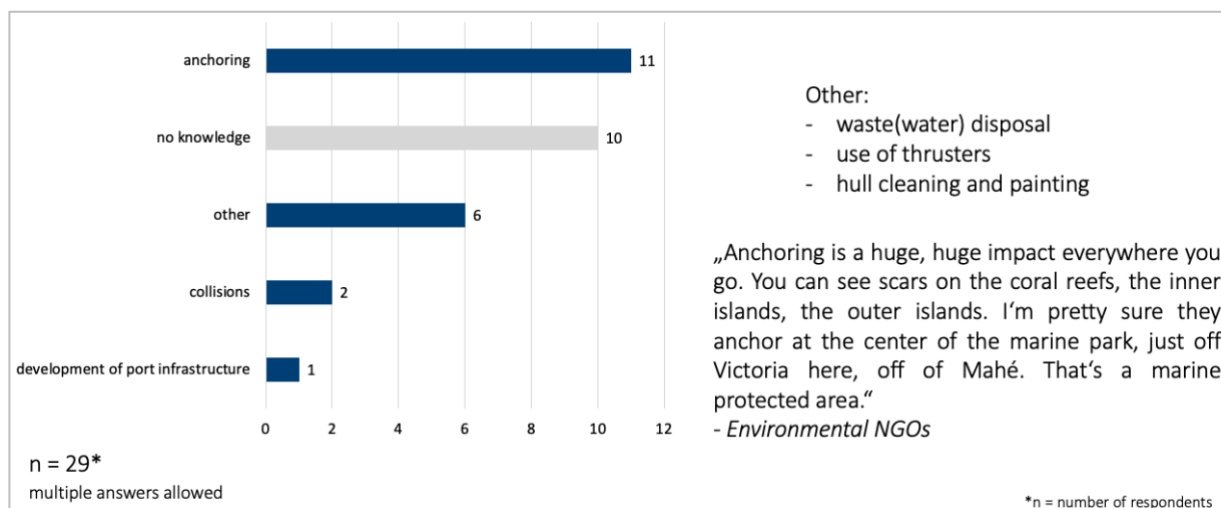
Source: Own data collection

The interviewed stakeholders identify several behaviors of cruise lines, passengers, and crew members as having the greatest impact on climate and biodiversity. The most frequently mentioned concern is waste generation and disposal, followed closely by air emissions. Other issues include insufficient environmental responsibility or awareness, overcrowding at destinations, and the spread of invasive species. Sewage disposal, onboard resource consumption, and noise pollution were also raised, though less frequently. A smaller number of respondents reports either no significant impacts or limited knowledge of the issue.

**Figure 82: Stakeholder Perspectives on Incoming Cruise Ships' Size as an Ecological Problem**

Source: Own data collection

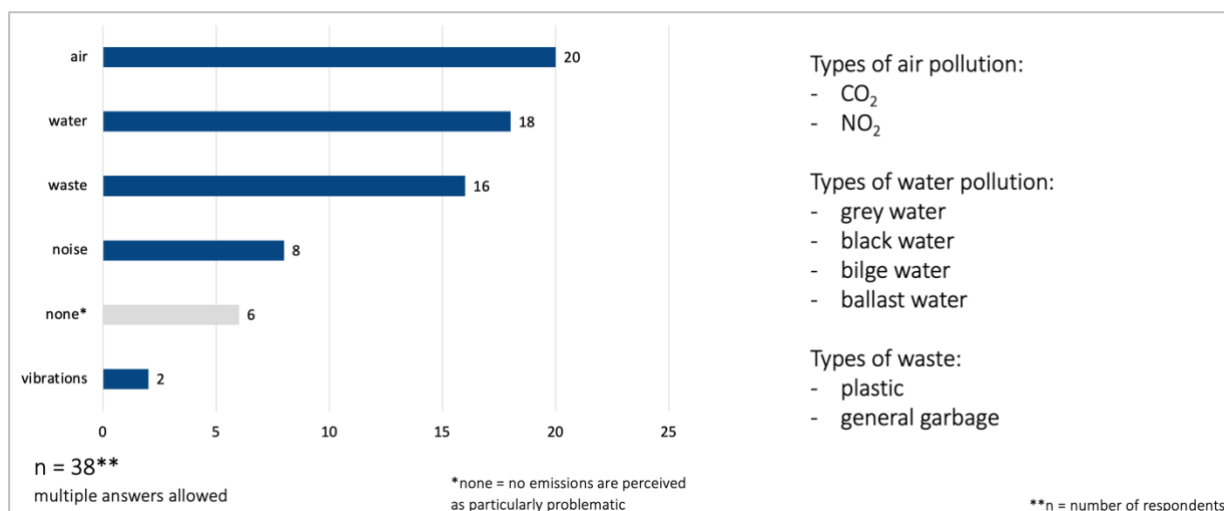
The size of cruise ships visiting Seychelles is largely perceived as an ecological concern, with most stakeholders viewing it as a problem while others remain undecided. The prevailing perception is that larger vessels pose greater environmental risks — including higher emissions, increased waste generation, potential harm to fragile marine ecosystems, and added pressure on coastal infrastructure. It was emphasized that smaller ships with fewer passengers would naturally create less waste and overall impact. Although some uncertainty remains, the overall sentiment reflects a strong awareness of the ecological challenges associated with large cruise ships.

**Figure 83: Stakeholder Perspectives on Cruise Operation Facets Affecting Marine Habitats**

Source: Own data collection

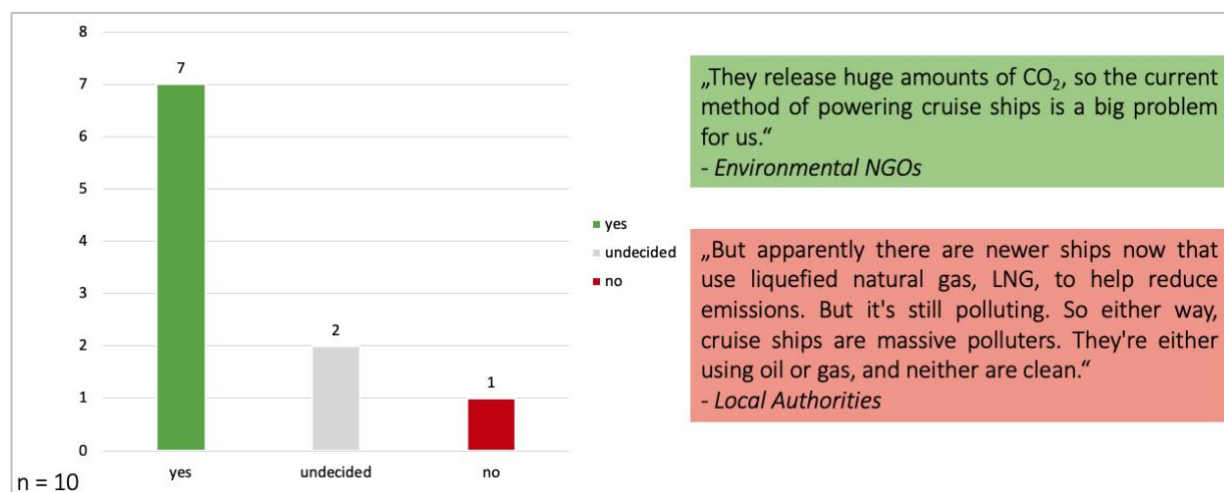
Several aspects of cruise operations in Seychelles are perceived as harmful to marine habitats. Anchoring is most frequently identified as damaging, as it physically affects coral reefs that are vital both for marine biodiversity and as tourist attractions. Other reported impacts include waste and water pollution, while collisions with marine species and port infrastructure development are mentioned less frequent and seen as less relevant. However, a significant number of stakeholders reports limited knowledge of these impacts, indicating that such environmental concerns are not yet widely recognized or salient.



**Figure 84: Stakeholder Perspectives on Particularly Problematic Emissions**

Source: Own data collection

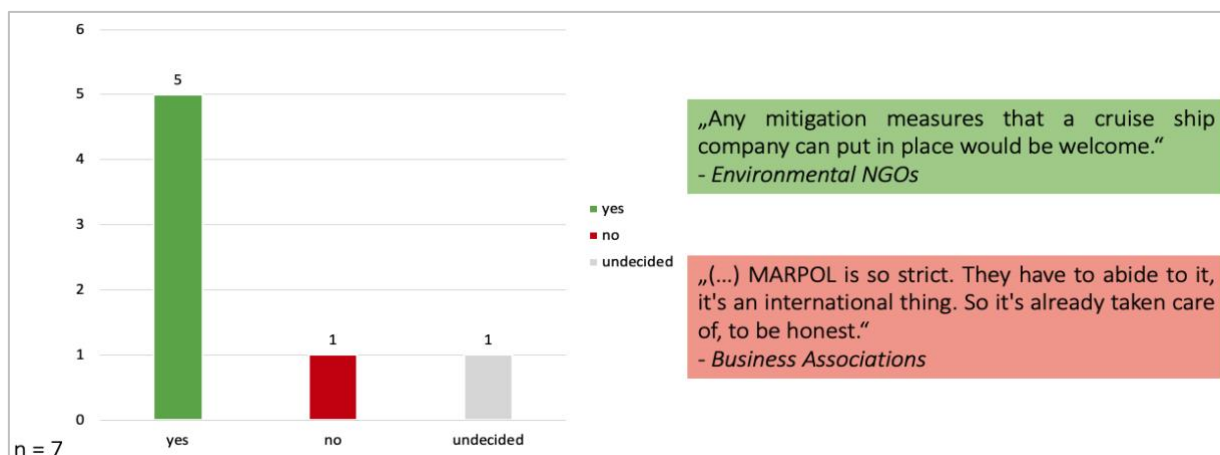
Regarding emissions from cruise tourism, interviewed stakeholders identify several types as particularly problematic. Air emissions are the most frequently cited, due to their contribution to air pollution and potential impacts on public health and fragile ecosystems. Water emissions followed closely, as the discharge of sewage, greywater, and other pollutants can degrade marine quality and threaten biodiversity. Waste generation and disposal are also highlighted, raising concerns about marine litter and insufficient waste management. Noise pollution was noted for disturbing both marine life and local communities, while a small number of stakeholders considered these emissions less problematic. Vibrations were mentioned as a minor concern, though still acknowledged for their localized effects on sensitive habitats and species.

**Figure 85: Stakeholder Perspectives on Cruise Ships' Form of Powering as an Ecological Challenge**

Source: Own data collection

The form of powering cruise ships is widely perceived as an ecological challenge by interviewees. Most stakeholders highlighted concerns about high CO<sub>2</sub> emissions and the overall environmental impact of conventional fuel use. While some noted that newer ships using liquefied natural gas (LNG) may reduce emissions to a degree, they emphasized that cruise vessels remain significant polluters. A few respondents were uncertain, and one expressed skepticism regarding the severity of the issue.

**Figure 86: Stakeholder Perspectives on Other Cruise Ship Features Perceived as Reducing Emissions**



Source: Own data collection

When asked whether other features of cruise ships apart from the form of powering are perceived as a way to reduce emissions, the majority of interviewed stakeholders express a positive outlook, with several respondents indicating “yes.” This suggests that design improvements, adoption of cleaner technologies, and environmentally friendly onboard systems are recognized as potential tools to mitigate the environmental footprint of cruise operations. One interviewee answered “no,” noting that existing regulations are already so strict that additional measures might have little effect, while another remains undecided, reflecting uncertainty about what measures are actually implemented onboard.

**Figure 87: Stakeholder Perspectives on Minimizing Cruise Tourism’s Environmental Impact**

Actions to be taken by the Seychelles	Actions to be taken by cruise companies
<ul style="list-style-type: none"> <li>enforcement of environmental regulations</li> <li>ship approval based on environmental criteria &amp; passenger capacity</li> <li>expansion of environmental funding mechanisms</li> <li>enhancement of biosecurity measures</li> <li>infrastructure adjustment</li> <li>provision of an OPS system</li> <li>diversification of shore excursions</li> <li>conduction of water quality tests</li> <li>establishment of a low-sulfur emissions control zone</li> <li>implementation of carrying capacities</li> <li>requirement and enforcement of transparent sustainability reporting</li> <li>decentralization of port activities</li> <li>installation of mooring buoys</li> </ul>	<ul style="list-style-type: none"> <li>use of environmentally-friendly onboard equipment</li> <li>transition from fossil fuels to other forms of powering</li> <li>biodiversity education for passengers</li> <li>implementation and enforcement of an emissions reduction protocol</li> </ul>
Shared actions	
<ul style="list-style-type: none"> <li>improvement of waste management</li> <li>collaboration between cruise industry and environmental NGOs</li> </ul>	

n = 25\*  
multiple answers allowed

\*n = number of respondents

Source: Own data collection

Stakeholders indicate that reducing emissions and minimizing the environmental impact of cruise tourism in Seychelles requires coordinated national and industry actions. Suggested national measures include enforcing regulations, approving ships based on environmental performance, strengthening biosecurity, providing onshore power supply, diversifying shore excursions, and monitoring water quality. Additional proposals focus on emissions control zones, carrying capacities, transparent sustainability reporting, and managing port activities. From the cruise operators’ side, key actions include using cleaner onboard technologies, transitioning to alternative fuels, and promoting passenger awareness of biodiversity. Together, these measures highlight the shared responsibility of Seychelles and cruise companies to protect the environment while sustaining the economic benefits of cruise tourism.

## 2.3 Discussion of Quantitative and Qualitative Findings

This chapter consolidates the main findings from both the quantitative passenger survey and the qualitative stakeholder interviews conducted as part of this study. The combined analysis provides a holistic understanding of the current state and challenges of cruise tourism in Seychelles and forms the analytical basis for the strategic recommendations presented in the following chapter.

### 2.3.1 Economic Significance and Spending Behaviour

Overall, the findings indicate that the economic footprint of cruise tourism remains modest and concentrated in specific areas. Many stakeholders expressed uncertainty about the true contribution of the sector to the local economy and voiced concern that financial benefits are largely captured by international cruise companies and agents rather than local enterprises. The limited share of direct bookings with local providers – only around two percent of organised excursions are booked directly in Seychelles – combined with the dominance of sales through the cruise lines themselves, reinforces this pattern of revenue leakage.

Visitor expenditure data support these perceptions. Organised excursions generate the highest onshore spending, averaging 116 USD per person, while individual visits result in approximately 63 USD per person. Yet more than 70 percent of cruise passengers do not spend beyond their excursion package. There is, however, a clear link between the length of stay ashore and the total amount spent: passengers staying four hours or more are almost one-third more likely to make additional purchases. This relationship shows that extending layovers or encouraging longer shore visits could significantly increase local revenue.

Spending differences between ship categories further illustrate market segmentation. Luxury and contemporary passengers display moderate spending levels, while expedition passengers record lower on-site expenditures but frequently stay in Seychelles before or after their cruise. Among those whose cruise began or ended in Port Victoria, 70.5 percent spent or intended to spend additional time in Seychelles, with this share particularly high among expedition and luxury travellers. This pattern implies that their overall economic contribution may extend beyond the cruise visit itself and suggests targeting smaller, high-value vessels.

Stakeholders also pointed to the ad-hoc nature of cruise operations and the lack of timely coordination among local actors. Cruise schedules are often communicated at short notice, leaving small businesses and service providers with limited opportunity to adjust their operations. This lack of structure reduces the potential for local enterprises to participate effectively and to benefit from cruise arrivals.

### 2.3.2 Visitor Segments and Market Orientation

Distinct behavioural and demographic profiles emerge across ship types. Passengers on expedition cruises are generally younger – fewer than one-third are aged 60 and above – and display higher environmental awareness. They are also more willing to pay additional costs for environmental funding and more likely to return to Seychelles in the future. In contrast, passengers on contemporary and luxury ships tend to be older, with over two-thirds aged 60 or above, and are less engaged in environmentally oriented or physically demanding activities.

These distinctions emphasize that future cruise strategies could benefit from focusing more strongly on smaller expedition and boutique ships whose clientele aligns better with Seychelles' vision of a high-

quality, low-impact tourism model. Such travellers typically seek authentic, nature-based experiences and expect a higher standard of service, which also creates opportunities for innovative and locally designed excursion products.

Differences in perception and benefit also appear across the Inner Islands. Stakeholders from Praslin expressed the highest level of scepticism toward cruise tourism, noting that economic benefits remain limited beyond a few sectors such as transport and visits to Vallée de Mai. Both Praslin and La Digue stakeholders underlined the dominant role of DMCs in determining itineraries, which leaves little space for local businesses to influence product design or pricing. On La Digue, doing business is generally more expensive, and passengers were described as highly price-conscious and often rushed due to tight excursion schedules. This, combined with crowding at key attractions such as Anse Source d'Argent – where a 2021 carrying-capacity study already raised concerns – has led to congestion during peak cruise times and a noticeable decline in the quality of the overnight visitor experience. Overall, around 75 percent of stakeholders from the smaller islands considered cruise tourism economically less relevant than regular tourism, underlining the need for more balanced benefit distribution and better visitor flow management.

### **2.3.3 Shore Excursion Patterns and Product Development**

The data show that most cruise visitors – regardless of whether they participate in organised excursions or explore independently – concentrate their activities in the city and harbour area of Mahé. Visits to other islands or to protected areas remain the exception: fewer than 5 percent of passengers reported visiting a designated marine or terrestrial protected area. This concentration limits the spread of tourism benefits and contributes to congestion during peak cruise days, which can affect the experience of overnight guests.

Encouraging a broader distribution of visitor flows therefore offers significant potential. Independent travellers in particular appear to lack sufficient information or logistical options to move beyond the port area. Establishing a small visitor information point at Port Victoria, improving public transport connections and promoting rental options could help address this gap.

For organised excursions, the integration of locally made products and encounters with Seychellois culture remains limited. Over 60 percent of passengers on organised tours stated they would have liked to purchase more locally made products if they had been available. DMCs could therefore play a central role in including artisanal products and community-based experiences in their itineraries. Doing so would not only diversify the visitor experience but also create tangible benefits for artisans and small businesses.

### **2.3.4 Environmental Awareness and Sustainability**

Environmental considerations are a recurring theme across both datasets. Nearly 89 percent of survey participants reported that the ecological impact of their visit was important to them, and 69 percent expressed willingness to pay more for environmental protection if the funds were transparently allocated. Among them, about one-quarter of contemporary and luxury passengers said they would pay more than 30 percent extra, while nearly 40 percent of expedition passengers were willing to do so—an especially strong indicator of environmental commitment within this segment.

At the same time, waste management emerged as the principal environmental concern among stakeholders. Although Seychelles is a signatory to international maritime conventions, weak

enforcement and insufficient onshore waste infrastructure continue to undermine compliance. Reports that waste is recombined after offloading point to systemic shortcomings that require coordinated improvement.

Stakeholders also highlighted that, despite Seychelles' accession to several International Maritime Organisation (IMO) conventions, many provisions have not yet been fully transposed into national law. This legal gap limits the effectiveness of monitoring and enforcement mechanisms, ultimately weakening environmental governance. Strengthening both infrastructure and legal frameworks will therefore be essential to ensure that environmental standards are consistently applied and upheld.

### **2.3.5 Governance and Policy Context**

Stakeholder feedback reveals a widespread perception that the governance of cruise tourism lacks coherence and clear direction. Regulatory inconsistencies – such as the partial application of business-tax obligations to cruise ships – lead to lost public revenue and uncertainty. Only a small proportion of vessels use Port Victoria as a home port and therefore fall under the current taxation framework.

Furthermore, administrative requirements such as the temporary import permit have unintentionally discouraged expedition vessels from basing in Seychelles. Between the 2022–2023 and 2023–2024 seasons, the number of vessels operating under home-port status fell by more than 50 percent, illustrating how regulatory design can influence market composition. A review of these provisions could help attract longer stays by smaller, sustainability-oriented ships.

Stakeholders also emphasised the importance of strengthening cooperation with cruise lines to channel funding and expertise into conservation initiatives. Many expedition operators already employ local guides or support environmental projects, suggesting that partnerships could be deepened further. Given the limited influence of a single island state in global cruise dynamics, regional collaboration across the Indian Ocean could provide a stronger collective platform for sustainable cruise management and shared standards.

## 3 CONCLUSION

### 3.1 Recommendations that Support Evidence-based Planning, Policy & Decision Making

From the onset of this study, the aim was to produce findings that can be publicly shared and of use for all cruise stakeholders to further advance, develop and manage the cruise sector in Seychelles in a sustainable, evidence-based manner. By conducting the first of this kind of extensive primary data collection on cruise visitor spendings and environmental awareness in Seychelles we have a first blueprint and a tool that shall serve policy making, planning regulations and management going forward.

The following recommendations were discussed with stakeholders during a series of validation workshops that took place on Mahe, Praslin and La Digue in August 2025. Research findings were presented to attendees from public, private, NGO sector and academia alongside the proposed recommendations, which were discussed and validated together with recommendations for improvements, which have been followed up on and are incorporated in the following recommendations.

There are three main recommendation sections: Destination Governance, Revenue Optimization from Cruise Tourism and Cruise Sustainability and Environmental Management. In each section, where applicable, there are island-specific notes, considering that the three main Inner Islands will have their own unique challenges and needs in relation to a sustainable cruise approach going forward.

#### 3.1.1 Integrating Cruise Tourism into Sustainable Destination Governance

Currently there is a real momentum when it comes to cruise tourism in Seychelles. Several parallel ongoing studies and initiatives investigated its diverse facets and stakeholders have discussed in various formats. This study further contributes to this discussion by providing evidence-based recommendations in the areas it has assessed, which relate also directly to the broad picture of sustainable destination governance, how Seychelles can position itself as a sustainable cruise tourism destination going forward. It is recommended for the **Cruise Tourism Strategy**, which is currently under development by UNECA on behalf of Tourism Department, to define both the desired scale and the qualitative direction of future cruise tourism development in Seychelles. This strategy ideally should be guided by the Global Sustainable Tourism Council (GSTC) Destination Standard and should ensure full coherence with the principles and priorities outlined in the Seychelles Sustainable Tourism Policy Framework (SSTPF).

It is recommended that a central objective of the upcoming strategy is to ensure the effective translation of Seychelles' overarching tourism vision – *that sustainable tourism enhances the quality of life of all Seychellois, supports a prosperous economy, and safeguards the nation's cultural and natural heritage* – into the cruise tourism sector.

In support of this objective, a **comprehensive review of national policy and regulatory frameworks** needs to be undertaken to identify existing gaps and ensure consistency with current and emerging developments in the cruise industry. Particular attention needs to be given to alignment with technological advancements and the increasing need for climate resilience within the sector.

The **Cruise Committee** established in the framework of this SSTF project should continue to serve as a multi-stakeholder coordination and advisory group, with meetings on a regular basis, at a minimum



biannually, to facilitate dialogue, review progress, and inform policy direction. It was recommended by stakeholders to consider the establishment of sub-committees for Praslin and La Digue to enable the effective inclusion of island-specific perspectives and priorities.

As part of the cruise strategy development, it was put forward to set clear quality criteria for tourism. The research data strongly suggests that **the smaller the vessel, the higher the environmental contribution and willingness to return, with high potential for increasing expedition and luxury passengers' spending**. With the economic importance of Seychelles as a home port and the strategic role of expedition and luxury ships in this context in mind, the recommendation is for Seychelles to develop positioning in relation to:

- a) **Ship type:** marketing and active relationship management **targeting expedition and luxury cruises and avoiding contemporary**
- b) **Ship size:** Identify size limit for incoming cruise ships, with maximum 999 passengers

This would mean from a Tourism Department perspective to focus relationships and marketing efforts on the expedition and luxury sector. From a regulatory perspective and especially when it comes to SPA's role, this would mean developing criteria, as part of the cruise strategy, which should be embedded into the Harbour Regulations going forward. The following criteria considerations have been proposed as part of the validation workshops, and were met no objections from stakeholders, but would need to be further discussed and refined for the purpose of the Cruise Strategy:

- a) What is the **maximum number of vessel calls** authorized per week, month, and year?
- b) How shall vessel calls be **scheduled and distributed over time**, taking into account considerations of overtourism and seasonality?
- c) Is there a prescribed **minimum port stay** requirement for vessels?
- d) Which categories of vessels are to be granted port entry authorization?
  - i. **Size-related criteria:** based on gross tonnage and maximum passenger capacity
  - ii. **Market segment criteria:** such as Contemporary, Luxury, or Expedition
  - iii. **Propulsion criteria:** including conventional fuels (heavy fuel oil, marine diesel), alternative fuels (LNG, methanol, hydrogen), and non-conventional propulsion (sail, hybrid, electric)
  - iv. **Technical and environmental performance criteria:** including availability of shore power connection, exhaust gas cleaning systems (scrubbers), and certified waste and wastewater management facilities

### Island Specific Cruise Destination Governance

2021 Carrying Capacity study had raised concern about beach density on La Digue already. Stakeholders reminded that cruise tourism currently is harming the La Digue visitor overnight experience in peak season. Synergies with the **La Digue Visitor Use Management Plan** should be established by taking into account the **zoning of La Digue** when planning cruise passenger itineraries and managing visitor flow across the island.

The establishment of **cruise sub-committees** for both Praslin and La Digue would foster stakeholder coordination, communication and joint accountability to ensure that cruise activities align with overall destination governance.

### 3.1.2 Increasing and Optimising Revenue from Cruise Tourism

#### 3.1.2.1 Increasing Cruise Vessel Revenue

Under the current business tax framework, all vessels embarking goods or passengers in Seychelles are subject to taxation. The legislation requires all non-resident ship masters, represented locally by their cruise agents, to pay a 3% tax on the gross revenue derived from the carriage of passengers, livestock, mail, merchandise, or goods embarked in Seychelles. However, indications suggest that, to date, only cargo vessels have complied with this provision, while cruise operators have not been subjected to, or have not fulfilled, this tax obligation.

Furthermore, only a small proportion of cruise calls utilize the Port of Victoria as their home port, thereby limiting the number of vessels formally liable for this tax. At the same time, expedition vessels, which tend to spend longer periods within Seychelles' waters and typically contribute more to the local economy, are being discouraged by the current temporary import permit system. This disincentive has already become evident, with the **number of vessels holding home-port status declining by more than 50% between the 2022–2023 and 2023–2024 seasons**. This has significant economic implications, see calculation in chapter 3.1.1

Addressing these regulatory and fiscal gaps is essential to strengthen the integrity and equity of Seychelles' maritime taxation regime, while ensuring that the cruise tourism sector contributes fairly to national revenues and environmental management. Aligning fiscal measures with sustainability objectives will support the country's Blue Economy vision, promoting efficient resource use, fair competition, and long-term economic resilience. Furthermore, a more transparent and balanced regulatory environment will enhance Seychelles' attractiveness as a home port and encourage responsible, longer-term cruise operations that generate greater local value and employment opportunities. The strategic recommendations for increasing the revenue per ship are as follows:

- a) **Inter-agency cooperation and review of the tax framework:** The Seychelles Revenue Commission (SRC), in collaboration with cruise agents and other relevant stakeholders, should undertake a comprehensive review of the scope and legal applicability of the business tax on cruise vessels. Consideration should be given to a revised taxation approach based on vessel size or capacity, rather than port status, to ensure equity and compliance across all operators.
- b) **Assessment of environmental levy and marine protection dues utilization:** A review of the current utilization of revenues collected from the environmental levy per call and the marine environment and protection dues (charged per 48 hours by the Seychelles Ports Authority) should be conducted to enhance transparency and ensure that funds are effectively allocated toward marine conservation, environmental monitoring, and sustainable port management initiatives.
- c) **Revision of temporary import and port permit regimes:** The temporary import permit system and associated port levies should be reviewed with the objective of incentivizing longer vessel stays and encouraging the use of Victoria as a home port. This could include reduced levies for vessels remaining beyond a defined duration and the development of improved port provisioning infrastructure, thereby increasing local economic retention and strengthening Seychelles' position as a sustainable and competitive cruise destination.

#### 3.1.2.2 Increasing Revenue for Environmental Conservation

Findings indicate a high willingness among cruise passengers to contribute financially to environmental protection efforts in Seychelles. A total of **69% of respondents expressed willingness to pay an**



**additional fee earmarked for conservation purposes**, with 52.5% indicating readiness to contribute 21% or more above the current fee levels. Importantly, stakeholders emphasized the need for a clear and visible allocation of such funds to ensure transparency and trust in how contributions are utilized.

These findings demonstrate a strong public mandate to implement a dedicated environmental or biodiversity levy within the cruise tourism sector. The data reinforces recommendations made in the recent biodiversity levy study as well as in the 2019 willingness to pay study commissioned by SeyCCAT. The validation workshops however highlighted that to date there is a lack of transparent use and initiatives when it comes to allocating funding from environmental taxes or levies towards sustainability projects. It is hence recommended for the upcoming biodiversity levy to consider the following recommendations:

- a) **Evidence-based introduction of the biodiversity levy:** The survey results provide robust evidence in support of the proposed biodiversity cruise levy, confirming passenger acceptance and willingness to contribute.
- b) **Advance communication and predictability:** The introduction of the new biodiversity cruise levy should be announced well in advance, providing cruise operators and agents sufficient time to integrate the levy into their pricing and operational frameworks.
- c) **Transparent fund management:** All revenues generated through the levy should be channelled through the Environmental Trust Fund (ETF) to ensure transparency, accountability, and alignment with established national environmental financing mechanisms.
- d) **Clear communication to stakeholders and visitors:** Information regarding the purpose, amount, and utilization of the biodiversity levy should be clearly communicated to both industry stakeholders and visitors to build awareness and trust.
- e) **Efficient collection mechanism:** The levy should be collected through cruise agents, as recommended in the 2025 Biodiversity Levy Report, possibly beginning October 2026. The collection process should mirror existing fee mechanisms and be based on the passenger manifest, ensuring administrative efficiency and consistency across operators.

### Island Specific Input on Levies for Environmental Conservation

Stakeholders flagged danger that funding from the biodiversity levy could get misused similar to the sustainable tourism levy. Funding needs to be allocated in a specific manner, supporting small businesses and communities. Not a centralised fund but via a needs-based community and NGO driven approach to find solutions for each island, e.g. specific needs such as a plastic bottle redeem centre on Praslin.

#### 3.1.2.3 Increasing Local Revenue and Average Spend per Passenger

Survey data reveals that approximately 70% of cruise passengers do not engage in any additional spending beyond their shore excursion packages. This indicates that the majority of economic benefits related to shore visits currently accrue to the cruise companies, local DMCs and other local transport providers.

At the same time, there is a strong and clearly expressed interest among passengers in purchasing artisanal products and engaging with authentic local experiences. Contribution from Enterprise Seychelles Agency (ESA) during validation workshops and in a dedicated additional workshop session organised by SSTF in collaboration with ESA, specifically for local artisans to present them with research results and discuss recommendations, found that 8 out of 10 souvenirs sold in Seychelles are imported. Upmarket cruise passengers, who are well travelled, can differentiate imported, locally adapted

products from genuine authentic handicraft. ESA is working on a “Seychelles made” brand, which will be launched in the near future.

Currently cruise operations are run on an ad-hoc, last minute basis due to lack of coordination and timely circulation of information and coordination of local stakeholders. Enabling conditions – such as flexible operating hours, better information dissemination, and structural support for small businesses – will be essential to ensure that local enterprises can participate effectively and competitively in the cruise tourism market:

- a) **Product development and diversification:** In terms of product diversification and product development, the cruise experiences around MPAs should be reviewed to assess whether they need to be more adapted to senior citizens and/or a younger more adventurous demographic (when it comes to expedition vessel passengers). A partnership between Tourism Department, local artisans and the Major of Victoria should be initiated to further enhance the entertainment offer and visitor experience offer in Victoria, e.g. in the form of events, strategically placed on high cruise frequentation days, such as the *Creole Rendezvous*, which was highlighted by stakeholders as a popular and well organised event series showcasing local cultural heritage. Self-guided city tours for cruise visitors could be developed which incorporate stops at key cultural and historic sites (for this the *Hidden History* map developed by SSTF in 2019 could be updated and circulated via an information booth at the Port). For product development there is also the recommendation to combine product development with hands-on educational experiences: SPGA confirmed the potential and opportunity to develop and include environmental tour offers, such as mangrove planting or beach cleanups in partnership with local NGOs. This type of offer would need to be developed in partnership with the DMCs to ensure cruise related requirements are incorporated in the activity planning and it is subsequently made part of itineraries where feasible.
- b) **Enhanced pre-arrival information and marketing:** Passengers should be provided with detailed information in advance about available local experiences – for instance, visits to artisanal markets, weaving or pottery workshops, cooking classes, and guided eco-tours. This could be achieved through digital brochures or printed materials distributed onboard, thereby encouraging longer and more meaningful onshore engagement, as well as integration into the Seychelles visitor app.
- c) **Capacity-building and structural support for small businesses:** Small and medium-sized local enterprises and artisans require targeted trainings (e.g. on product preferences by the cruise market, refinement of local techniques to meet demand) and technical assistance to strengthen their ability to meet operational and insurance requirements set by cruise companies. Vanuatu experience highlighted small items, products for children, t-shirts and products with a story as preferred items for cruise passengers. Training programmes targeting youth, fostering inter-generational exchange and regional or international cooperation models, e.g. designer from a cruise source market to work with local artisans to create locally made products for an international audience have been met with interest by the artisans that were engaged as part of this study.
- d) **Integration of local enterprises by DMCs:** DMCs should be encouraged to incorporate a greater number of small, locally owned businesses into their cruise excursion itineraries. A structured assessment in collaboration with DMCs should be undertaken to determine the specific needs and support mechanisms required to facilitate this integration, such as quality standards, safety compliance, and insurance requirements. This could also come as a requirement for any itinerary for cruise passengers on the island to include at least one “local consumption stop” for passengers.

- e) **Facilitating a conducive business environment:** Relevant authorities should review and adjust regulatory and operational conditions – such as shop opening hours – to create a more conducive environment for visitor spending. This could include weekend operations, extended evening hours during cruise calls, and the establishment of night artisan markets at or near port areas.
- f) **Improved information sharing among stakeholders:** The regular and timely circulation of cruise ship schedules to relevant stakeholders across all Inner Islands should be institutionalized to allow local businesses, artisans, and service providers to prepare and align their operations with cruise arrivals, thereby maximizing opportunities for engagement and sales. Stakeholders confirmed that WhatsApp would be the most popular channel to share such information, hence SSTF has created an open WhatsApp group, co-administered by SPA, which can be used to share relevant information on the cruise schedule, timings etc. The group is open to all stakeholders and SSTF will ensure that the information is widely shared for stakeholders to join: <https://chat.whatsapp.com/LTXmqDXiY6F84MG9FWCR7Z>
- g) **Enhancement of visitor reception and information services:** A dedicated information kiosk at Port Victoria to serve as a central point for visitor orientation and assistance should be established. It would enable a better visitation experience of cruise passengers to Victoria by providing all necessary information. The facility should provide maps, brochures, and digital access points encouraging visitors to download the “Visit Seychelles” mobile application, offering up-to-date information on local attractions, cultural sites, sustainability initiatives, and safety guidance. Attention needs to be given to the staffing of this info point, ensuring that on high cruise visitation days, a sufficient number of staff is on site to handle all queries. This staff should be trained in visitor management techniques, guiding visitors to various sites to avoid overcrowding. Ideally this info point can serve as a hub for sharing information for individual shore visitors who wish to make a last-minute booking for their shore visit. Local operators can be given the opportunity to showcase their offers at the info point.

### Island specific recommendations on Increasing Local Revenue and Passenger Spending

**Sub-cruise committees to hold cruise coordination meetings:** Validation workshops on Praslin and La Digue showed a lack of coordination between the main cruise stakeholders, i.e. DMC representatives, attraction providers, tourism office representatives and SPA representatives. A cruise committee which meets on a regular basis to inform, coordinate efforts and identify opportunities at respective island level would help tremendously in terms of enabling quick wins when it comes to increasing the inclusion of cruise experience into the local value chain, e.g. by communicating information in advance rather than on an ad-hoc basis, by organising joint initiatives, such as a welcoming committee with island representatives at the jetties during peak season, by coordinating a dialogue between attraction providers and DMCs to ensure that itineraries can incorporate e.g. stop-overs at local artisans. Ideally the sub-committees could report back to the overall cruise committee on Mahe, via the SPA representative.

**Dedicated spaces on each island for artisanal and creative industry promotion:** The designation of dedicated spaces within or near port facilities for selling high-quality authentic products needs to be facilitated and effectively communicated: For Mahe the Cooperative des Artisans is planning to set up a small market at their centre during cruise days; for Praslin possibly one of the empty shops at the Jetty could be used to install an information point and showcase some handicraft with information for other sales points; for La Digue stakeholders expressed the need for setting up a small mini bazaar at the jetty during cruise days and to liaise with Union Estate closely as they are planning a Creole village in the current revamp of the parc. In the dedicated workshop session for artisans, artisan representatives from

fellow cruise island destination Vanuatu presented their experiences and highlighted the positive benefits arising from the dedicated sales space on the main island and dedicated handicraft hubs in the island provinces. It was highlighted that artisan spaces are managed by the Vanuatu Government and in connection to the local label to ensure products are designed, made or grown on the islands and include inspections on ways how products were manufactured and reviewing certificates.

### 3.1.3 Cruise Sustainability and Environmental Management

#### 3.1.3.1 Enhancing Shore Visit Sustainability

Survey results demonstrate that 88.8% of cruise passengers consider environmentally friendly shore leave to be important, confirming strong visitor support for sustainability-oriented practices and responsible tourism management. This finding underscores the need to further integrate environmental standards into both port operations and onshore excursion management to ensure that cruise tourism growth aligns with Seychelles' broader sustainability objectives.

- a) **Development of sustainable tourism information for cruise passengers:** Develop tailored sustainable tourism guidelines and educational material specifically designed for cruise passengers. This content should highlight best practices for responsible behavior, environmental protection, and cultural respect. It is recommended that these materials be shared with cruise liners in advance for onboard circulation, as well as integrated into the Visit Seychelles app and displayed at Port Victoria. SSTF has approached these guidelines three-fold as part of this project: Integration of responsible cruise visitor guidelines into the Visit Seychelles app; sign board at Port Victoria and Praslin and La Digue jetties; publication of responsible tourism guidelines (with relevance for cruise tourism) published on SSTF website.
- b) **Port of Victoria to Join the World Ports Sustainability Program (WPSP):** The Port of Victoria should formally join the World Ports Sustainability Program, aligning its development and operational practices with the United Nations Sustainable Development Goals (SDGs). This initiative would entail developing and implementing a Port Sustainability Action Plan, including:
  - i. Short-term measures ("quick wins") such as the installation of LED lighting, air quality monitoring, and waste segregation systems. Note: SSTF has partnered with Sustainability for Seychelles (S4S) as part of this study and an air quality sensor was installed at New Port in April 2025, as part of S4S's work on measuring air pollution across various locations on Mahe. The data suggested that air quality at New Port is the worst in Seychelles (this does not only capture cruise ships but all ships in general). For now, the air quality sensor will stay installed at New Port and if maintained properly can provide important insights into seasonal pollution changes.
  - ii. Long-term investments in solar energy infrastructure, and the creation of incentive schemes for cleaner, low-emission vessels.

The Port Authority should also actively communicate its sustainability commitments and progress to visiting passengers and operators, reinforcing Seychelles' image as a green maritime hub.

- c) **Sustainability integration in port expansion plans:** The Cruise Committee should be formally involved in consultations and decision-making related to future port expansion and modernization projects. This will ensure that sustainability considerations remain central to infrastructure planning, environmental impact mitigation, and community engagement processes.

- d) **Encouraging sustainable certification:** DMCs should be encouraged to obtain third-party sustainable tourism certification, for example through the Sustainable Seychelles Certification Scheme. Such certification will promote responsible business practices, enhance market credibility, and align the sector with international sustainability standards. Currently none of the three main DMCs are third party certified, but Tourism Department is ready to support under the Sustainability Seychelles campaign, and it would send a strong image as a cruise destination if all ground handling was done by certified DMCs.

### Island Specific Input on Enhancing Shore Visit Sustainability

**Visitor management and carrying capacity measures:** To protect sensitive natural and cultural sites, authorities, site managers and DMCs should consider the establishment of maximum group sizes for excursions, particularly in areas experiencing congestion during cruise days (e.g., *Anse Source d'Argent* and *Vallée de Mai*). Splitting groups and staggering visitation schedules will reduce environmental pressure and improve visitor experience quality. SIF manager emphasized that Fond Ferdinand is ready to host more cruise passengers and offers the same attractions as Vallée de Mai adapted for senior citizens. DMCs highlighted the difficulty in adding new attractions to the popular main cruise itineraries. Ideally a dialogue between cruise company product managers, DMCs and attraction providers can be initiated (possibly through SSTF) to discuss what would be needed to relieve pressure of the most popular sites and propose sustainable alternatives.

**Anchoring of cruise ships at Praslin:** Stakeholders urged for assessing feasibility of anchoring only at Praslin and division of passengers between Praslin and La Digue in order to reduce the pressure on La Digue and further support visitor management approaches. This would need to be further investigated with all affected stakeholders. In this context there is need for a continuous exchange between SPGA and cruise agents to ensure the clear communication of recently mapped anchoring sites to cruise ship captains.

### 3.1.3.2 Fostering Usage of Clean Technologies and Addressing Hidden Costs

Stakeholder consultations underscored the importance of ensuring that cruise operators calling at Seychelles ports comply fully with the International Convention for the Prevention of Pollution from Ships (MARPOL), to which Seychelles is a signatory. While the country has acceded to several key IMO conventions, it was noted that many of their provisions have not yet been fully transposed into national legislation, thereby limiting the effectiveness of monitoring, compliance, and enforcement mechanisms.

**Waste management has been identified as a major hidden cost for Seychelles,** requiring significant collaboration among stakeholders and improvement of onshore facilities. MARPOL regulations mandate segregation of waste before disposal, but in practice, effectiveness is undermined by insufficient waste management infrastructure onshore, with reports indicating that segregated waste is often recombined upon offloading at local facilities. A lack of circulation of data on cruise related waste quantities and composition further exacerbates the problem and the difficulties to tackle it in a coordinated manner.

In response to feedback from the validation sessions, SSTF reached out to the waste contractors and PUC (for wastewater). SPA provided further insights into waste data collected from cruise ships.

Waste data is collected from cruise ships via the PVMIS system where each vessel submits its waste declaration form. Based on interviews and validation workshops, this information is not yet shared with relevant other authorities, e.g. LWMA, hence the amount of waste generated per type of cruise ship is not yet industry knowledge. It was found that for **cruise ship season October 2024 to May 2025 a total of 822.13 cubic meters of waste was declared across various cruise ship vessels arriving into Port**

**Victoria.** MSC MAGNIFICA was the highest contributor of waste with a total of 106.25 cubic meters of waste. The data shows that domestic waste is the most common with 450 cubic meters, follows plastic waste 121 cubic meters. Comparing the data based on ship type, it shows that the average for contemporary cruise vessel waste is at 47.01 m<sup>3</sup>, average for luxury vessel waste at 21,96m<sup>3</sup> and average for expedition vessel waste at 33,9m<sup>3</sup> for the studied season.

Given the limited capacity in Seychelles to handle separated waste and to treat and recycle accordingly, it becomes clear that domestic waste, including food waste is a priority area of concern.

In relation to wastewater the situation was described by PUC as follows: PUC does not offer wastewater collection services to cruise ships. Privately owned cess-pit emptier trucks are sought by either the Port Authority or cruise ship companies to assist with discharging of wastewater. In fact, some cruise ships even have their own wastewater treatment facilities on board. Currently there is no log of the volume originating from the cruise ships specifically at the PUC wastewater treatment facility.

Strengthening the domestic legal and institutional framework is therefore essential to uphold Seychelles' international commitments and protect the marine environment.

a) **Development of Seychelles Ports Environmental Guidelines for cruise ships:**

In line with the MARPOL Convention, and aligned with SPA's plans for a comprehensive waste management policy and action plan, for which it is collaborating with the Port de La Réunion to implement best practices, Seychelles should develop a comprehensive set of "Ports Environmental Guidelines for Cruise Ships", establishing clear environmental criteria and operational standards. These guidelines should explicitly prohibit the discharge of untreated sewage, greywater, oily waste, and other pollutants, while requiring either treatment onboard or disposal at designated port reception facilities. Additional provisions should include:

- i. Lower sulphur limits for fuel use,
- ii. Restrictions on scrubber discharge, and
- iii. Stricter controls on nitrogen oxide (NOx) and other air pollutants.
- iv. Strengthened enforcement and monitoring mechanisms: A robust system of inspections, monitoring, and penalties should be instituted to ensure compliance with environmental regulations. This may include regular environmental audits of vessels, random port inspections, and graduated sanctions for non-compliance, ranging from administrative penalties to denial of port entry for repeated offenders.
- v. Incentive scheme for high-performing vessels: To complement enforcement measures, an incentive scheme should be introduced, granting reduced port fees or priority berthing rights to vessels that exceed baseline environmental standards. This approach would encourage operators to adopt cleaner technologies and best practices, reinforcing Seychelles' image as a sustainability leader in the cruise sector.

- b) Waste management strengthening: **Monitor waste separation systems** onboard vessels and at ports, with particular emphasis on preventing **organic waste from being sent to landfills**. Require cruise ships to **take back a larger proportion of their waste** to avoid over-reliance on local disposal facilities and reduce environmental risks. Stakeholders, especially on La Digue, voiced concern about the amounts of plastic bottles brought ashore from the cruise ships for the passengers, as well as F&B provisions being sent ashore by cruise companies for beach BBQs on La Digue. This raises two concerns: limiting local expenses and secondly leaving behind large quantities of (plastic) waste. A ban of plastic bottles for cruise ships was therefore proposed and



would need to be further assessed in relation to its feasibility, or even a full ban on bringing any supplies from cruise vessels on land for excursions could have a two-fold benefit: more possibility of local value creation and less wastage.

- c) Further investigation needed into the waste, wastewater, cleaning agent discharge etc.
- d) Allocate a portion of revenues from the **proposed biodiversity levy** to fund **sustainable waste management initiatives**, including infrastructure upgrades and capacity-building for port reception facilities.

### 3.1.3.3 Safeguarding Inner Island's Marine Protected Areas (MPAs)

The effects of cruise operations on the MPAs of Seychelles Inner Islands was one of the focus areas of this study. It was confirmed by stakeholders that cruise operations have a (seasonal) effect on the MPAs, especially when it comes to anchoring and increased pressure and visitation during high cruise season.

In collaboration with local NGOs, the Government should develop a **“Charter on Sustainable Cruising in Seychelles’ MPAs”**, designed to promote responsible cruise operations while safeguarding the country’s marine biodiversity. Examples of similar charters of this type exist in the Mediterranean with the Charter on Sustainable Cruising in the French Mediterranean. The charter should:

- a) Highlight important species and sensitive habitats within Seychelles’ MPAs, providing clear guidance for cruise operators on environmental stewardship.
- b) Offer practical operational recommendations, including:
  - i. Slow steaming to reduce underwater noise disturbance;
  - ii. Prohibition of polluting devices at sea, such as open-loop scrubbers;
  - iii. National situation in relation on waste disposal and treatment, with an emphasis on promoting minimizing pollution and fostering recycling, and reuse initiatives;
  - iv. Establishment of a low-sulphur emissions control zone within sensitive areas.

The charter should be informed by the Seychelles Marine Spatial Planning Initiative, as well as relevant international conventions, including the Convention on Biological Diversity and the Convention on the Conservation of Migratory Species of Wild Animals.

All cruise companies operating within Seychelles waters should be required to become signatories to the charter, ideally linking their commitment to joint initiatives and collaborative conservation projects. Additionally, structured exchanges between the Seychelles Ports Authority (SPA) and cruise agents should be established to ensure that recently mapped anchoring sites are clearly communicated to ship captains, minimizing environmental impacts and protecting sensitive marine areas.

### 3.1.3.4 Partnerships with Cruise Companies for Conservation Funding and Community Support

Stakeholder consultations highlighted that expedition vessels are generally perceived as demonstrating stronger environmental commitments, often employing local guides or speakers and maintaining a charitable wing that funds conservation-related activities. Building constructive relationships with cruise operators is therefore critical to harness their potential as partners in Seychelles’ conservation and community development initiatives.

- a) **NGO-Led Partnerships:** Encourage NGOs to pursue partnerships with cruise companies to support conservation initiatives and local communities, aligning with their corporate social responsibility objectives.
- b) **Government and Outer Island Support:** Facilitate strategic partnerships through government agencies and Outer Island organisations, such as the Seychelles Islands Foundation (SIF), to strengthen collaboration with cruise operators.
- c) **Targeted Engagement with Cruise Operators:** Identify priority cruise operators for partnership based on existing commitments and capacity:
  - i. **Ponant:** Potential support for projects such as Aldabra cleanups, leveraging staff recommendations.
  - ii. **Noble Caledonia:** Build on existing relationships with SIF.
  - iii. **MSC Foundation:** Explore initial engagement opportunities, particularly in regions of the Indian Ocean where operations have not yet been established.
- d) **Priority Areas for Funding:** Direct funding and support towards environmental initiatives, including recycling programs, waste management projects, and other conservation priorities aligned with national sustainability objectives.
- e) **Regional cooperations:** when partnering with other NGOs from the region to explore opportunities to tap into cruise liner funding, e.g. from MSC Foundation



### 3.2 Limitations

Several challenges were encountered during primary data collection at Port Victoria, which limit the generalizability of the study findings in one area to a certain extent. The survey was conducted by trained surveyors and field supervisors from UniSey. A key constraint arose in approaching cruise passengers returning from organised shore excursions managed by DMCs. DMC buses typically drove directly to the cruise ship gangway, and most passengers – often elderly and fatigued from their excursions – were unwilling to participate in interviews at that stage.

Efforts were made to collaborate with DMCs to allow buses to park farther from the gangway, thus providing surveyors more time to approach passengers. However, DMCs indicated that such an arrangement was not permitted by the cruise companies. Following this, the SSTF project manager engaged with the SPA and cruise agents to request permission for surveyors to board vessels to collect data directly from returning excursionists. These requests were declined by cruise lines due to security protocols, public relations considerations, and the short notice of the request.

As a mitigation measure, the survey team partnered with one DMC to interview excursion participants at Beau Vallon Beach during their excursion. This approach improved participation rates among DMC excursionists. Nevertheless, the final dataset reflects a distribution of approximately two-thirds independent excursionists and one-third DMC excursionists. While this distribution may reasonably represent the situation on Mahé – given the proximity of Port Victoria to the capital and the island’s perceived safety and accessibility – it is unlikely to reflect passenger behavior on Praslin and La Digue. Stakeholders there reported a stronger dominance of DMC-organised activities, as reflected in the concentration of cruise visitors at established attraction sites typically included in DMC itineraries.

Therefore, this limitation should be considered when interpreting the findings, particularly regarding passenger typologies and excursion preferences. Future surveys would benefit from formal collaboration with DMCs to enable interviews during excursions, or from prior authorization by cruise lines to conduct data collection on board vessels.

### 3.3 Recommended next Steps

This study constitutes an important baseline for cruise related primary data collection in Seychelles. The survey tools, namely the qualitative interview guidelines and quantitative questionnaire have been developed in a participatory manner and were subsequently applied successfully and are available for replication by stakeholders in the future. The research consortium and its partners, such as Tourism Department, SPA and also NBS, have gathered the necessary experience to advise future studies of similar scope and scale.

In terms of recommended next steps, the consortium advises the following:

#### Immediate:

- Close communication and support, wherever needed, in relation to the development of the national Cruise Strategy for Seychelles.
- Active dissemination of the Responsible Cruise Visitor Guidelines by SSTF via various outlets (signboard at Port Victoria, Visit Seychelles app and publication via SSTF website).

- Creation of Cruise Sub-Committees by SPA and regular meetings in preparation, during and after each cruise season.
- Continued communication of cruise schedule and ship arrivals or changes throughout the season in newly created WhatsApp group administered by SPA.
- Showcase of results on a global scale. Internationale Tourismus Börse (ITB) Berlin is the largest travel fair in the world. It takes place each year in March and brings together policy makers, industry leaders, media representatives etc. to discuss latest trends and developments in various formats. Through consortium partner mascontour, SSTF has the opportunity to present the results of this study in March 2026 to a global audience and organize a panel discussion, hosting representatives from Tourism Department and other regional tourism destinations to discuss sustainable cruise strategies. Mascontour is a well-established name at ITB and holds more than 20 years' experience in hosting successful events at the fair, which would help to disseminate the findings of this study and bring the discussion around sustainable cruise practices to a wider audience.

#### **Continuous:**

- Utilization of study results and UNECA cost-benefit analysis as baseline indicators on economic spend per passenger and monitor annually going forward. This can be implemented in a consortium between SPA, Tourism Department, UniSey and NBS.

#### **Mid-term:**

- Sustainable cruise tourism should ideally be approached from a regional Indian Ocean perspective. There is a far bigger chance to get all major cruise companies around one table to discuss sustainable cruise practices, when uniting as a regional Indian Ocean cruise voice.
- Building on the recent publication by the Blue Tourism Initiative<sup>6</sup>, the results of this study and the upcoming Cruise Strategy, stakeholders from Seychelles should seize the moment to leverage regional organisations such as IORA, Nairobi Convention WIO and Vanilla Island Association to solicit funding, initiate forums of exchange and aligning sustainable practices.
- For Seychellois NGOs, partnering with other NGOs from the region to explore opportunities to tap into cruise liner funding, e.g. from MSC Foundation is a real opportunity to develop regional community and conservation projects that.

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<sup>6</sup> : Balestracci, G., Sciacca, A., Fosse, J. and Rochette, J., Milo R. (2025). Policy pathways towards a more sustainable cruise sector. Edited by Blue Tourism Initiative.

## ANNEX

### Annex 1

Literature Review (available upon request from SSTF as a separate document)

### Annex 2

#### Research tools: Survey questionnaire

##### Organisational data

##### 1.1 Name of surveyor

##### 1.2.1 Time of interview

##### 1.3 Name of ship/vessel

##### 1.4 Arrival time of ship/vessel

##### Context information:

Who is contacted: person who wants to (re-/) embark on a cruise ship

Why? Data collection through a survey amongst cruise passengers who have spent some time (e.g. in the context of a shore leave) in Seychelles

What is the aim? To better understand the impact of cruise tourism on the Seychelles

Would you be willing to take a few minutes to answer our questions? That would be a great help to us.

##### Have been reminded of the above context?

Yes / No

##### 2.1. Did the respondent agree to participate?

Yes / No

##### 3. Are you starting/ending your cruise here or has Port Victoria been a stop on your route?

- Home Port: My cruise starts/ends in Port Victoria
- Port-of-Call: Port Victoria is a stop on my cruise route

##### 3.1. Have you been spending time in the Seychelles before the cruise?/ Will you be spending time in the Seychelles after the cruise?

Yes / No

##### 3.1.1. How many additional nights have you been/are you staying in the country?

##### 3.1.2. Approximately how much did you spend per person/ do you intend to spend for this additional stay (including accommodation, meals, transport/transfers, activities)?

estimated expenses for the additional stay in the Seychelles per person

**3.1.2.1. Currency reported in:**

- Seychelles Rupees
- Euro
- US Dollar
- British Pound
- Other (Please specify)

**3.1.2.2. Other currency, please specify:****4. Is this your first visit to the Seychelles?**

Yes / No

**5. During your current stay in Seychelles, which of the following areas did you visit/ are you planning to visit?**

- ☐ the harbour area
- ☐ the city area (i.e. Victoria)
- ☐ other agglomerations (e.g. Bel Ombre, Anse Royale, Takamaka)
- ☐ other islands (e.g. Ile au Cerf, Praslin, La Digue)
- ☐ nature - land based (e.g. mountains, forests, gardens)
- ☐ nature - water based (e.g. beaches, ocean)
- ☐ designated protected areas (e.g. MPA'S, National Parks)
- ☐ Other (Please specify)

**6. During your current stay in Seychelles, which of the following activities did you engage in/ are you planning to engage in?**

- ☐ strolling shopping
- ☐ sunbathing
- ☐ photography
- ☐ bus/van/jeep roundtrip
- ☐ visiting cultural facilities and monuments (e.g. churches, public buildings)
- ☐ visiting places of everyday life (e.g. (fish) markets)
- ☐ visiting tourist attractions (e.g. botanical gardens, production facilities)
- ☐ visiting designated protected areas (e.g. MPAs, National Parks)
- ☐ sport activities landside (e.g. hiking, riding a bike)
- ☐ sport activities waterside (e.g. swimming, diving, snorkelling, fishing, SUP) boat tours (e.g. island cruise, sailing, submarine, glass bottom boat)
- ☐ breakfast/lunch/dinner snack/coffee/drink

☐ nightlife (bars, discos)

☐ visiting family, friends

☐ Other (Please specify)

**7. Speaking about today: Approximately how long were you ashore?**

length of stay in hours

**8. With a focus on the organisation of your shore leave today: Have you taken part in organised excursions or have you explored the Seychelles individually?**

- I have booked (an/several) organised excursion(/s)
- I organised my visit individually
- None of the above

**8.1.1. How did you book the shore excursion?**

- with the cruise company
- through an international agent (e.g. Get Your Guide)
- through a local agent (e.g. Masons, Creole Tavel, 7° South)
- directly with a local provider (e.g. taxi)
- Other (Please specify)

**8.1.2. When was the shore excursion booked?**

- in advance from home
- in advance on board
- spontaneously/ after debarkation

**8.1.3. Which of the following services were included in the organised shore excursion you booked?**

- ☐ gastronomy & food purchases
- ☐ other purchases, retail, souvenirs
- ☐ entertainment & sports, attractions & activities
- ☐ transportation
- ☐ Other (Please specify)

**8.1.4. How much did you pay per person for the organised shore excursion you booked?**
**8.1.4.1. Currency reported in:**

- Seychelles Rupees
- Euro
- US Dollar
- British Pound
- Other (Please specify)

**8.1.5. Did you have any other expenses today apart from the cost of the organised tour you booked?**

Yes / No

**8.1.5.1. Beside your payment for the organised shore excursion you booked, approximately how much did you spend ADDITIONALLY per person in these service areas today?**

- gastronomy & food purchases
- other purchases, retail, souvenirs
- entertainment & sports,
- attractions & activities
- transportation
- Other (Please specify)

**8.1.5.1.1. Gastronomy and food purchases: Enter 99998 if respondent did not specify**

**8.1.5.1.3. Entertainment and sports, attractions and activities: Enter 99998 if respondent did not specify**

**8.1.5.1.4. Transportation:**

**8.1.5.1.5. Other:**

**8.1.5.2. Currency reported in:**

**8.2.1. Which of the following services did you take advantage of today?**

- gastronomy & food purchases
- other purchases, retail, souvenirs
- entertainment & sports,
- attractions & activities transportation
- Other (Please specify)

**8.2.2.1. Gastronomy and food purchases: Enter 99998 if respondent did not specify**

**8.2.2.2. Other purchases, retail, souvenirs: Enter 99998 if respondent did not specify**

**8.2.2.3. Entertainment and sports, attractions and activities: Enter 99998 if respondent did not specify**

**8.2.2.4. Transportation: Enter 99998 if respondent did not specify**

**8.2.2.5.: Enter 99998 if respondent did not specify**

**8.2.3. Currency reported in:**

**9. Would you have liked to purchase more locally produced products if it had been on sale?**

Yes / No

**9.1. Please make suggestions which products you would like to see produced locally?**

- ☐ Handicraft in general
- ☐ Handicraft - beauty products (soaps, oils, etc)
- ☐ Handicraft - pottery
- ☐ Handicraft - jewellery
- ☐ Handicraft - clothing (e.g. sarongs)

- ☐ Handicraft - accessories
- ☐ Handicraft - toys
- ☐ Handicraft - woven items (e.g. baskets)
- ☐ Handicraft - others: (specify)
- ☐ Food items in general
- ☐ Food items - jams
- ☐ Food items - others: (specify)
- ☐ Seychelles merchandise in general
- ☐ Seychelles merchandise - t-shirts
- ☐ Seychelles merchandise - others: (specify)
- ☐ Art in general
- ☐ Art - prints by local artists
- ☐ Art - others: (specify)

**9.1.1. Handicraft - others: (specify)**

**9.1.2. Food items - others: (specify)**

**9.1.3. Seychelles merchandise - others: (specify)**

**9.1.4. Art - others: (specify)**

**10. How important was it for you to have an environmentally friendly shore leave today?** 1-10 rating with 1 = not important and 10 = extremely important

**11. The Seychelles is a unique destination for a number of reasons. Which of the following facts about nature/ environment are you aware of (possibly only since today's shore leave)?**

- ☐ endemic plants (e.g. Coco de Mer, specific palm species, cf. MACCE)
- ☐ endemic species (e.g. birds: Black parrot, reptiles: Tortoises, cf. MACCE)
- ☐ geology (e.g. only mid-oceanic granitic islands in the world)
- ☐ nature conservation (e.g. one third of marine habitats under special protection)
- ☐ geographical structure (e.g. no place in the country is situated further than 5km from the coast)
- ☐ Other (Please specify)

**12. Did your shore leave today include any of the following activities?**

- ☐ Excursions/Hikes beyond designated trails
- ☐ Off-road tours with all-terrain vehicles, motorcycles or quads
- ☐ Boat trips into shallow water zones without keeping appropriate distance to the shore

- ☐ Sightseeing flights with airplanes and helicopters
- ☐ Jet-skiing
- ☐ Consumption/Hunting/Acquisition (esp. as souvenirs) of animal or plant species, which are in danger of extinction
- ☐ Visits to animal establishments with no species-appropriate animal husbandry (animals trapped only for touristic purposes)
- ☐ Other (Please specify)

**13. Would you be prepared to pay more for your shore leave or stay if there was a guarantee that the additional income would go exclusively to the protection of nature/the environment in the Seychelles?**

Yes / No

**13.1. Please let us know how much**

- 1-5%
- 6-10%
- 11-20%
- 21-30%
- More than 30%

**14. How satisfied were you with your shore leave today?** 1-10 rating with 1 = completely dissatisfied and 10 = extremely satisfied

**15. How likely is it that you will return to the Seychelles at a later date?** 1-10 rating with 1 = completely unlikely and 10 = extremely likely

**16. Are you:**

Male / Female / Other / No answer

**17. How old are you?**

20-29

30-39

40-49

50-59

60-69

More than 70

No answer

**18. Where are you from?**



## Annex 3

List of members of cruise committee

Organisation
Seychelles Parks and Garden Authority (SPGA)
Seychelles Ports Authority (SPA)
Blue Economy Research Institute (BERI)
Department of Tourism
Ministry of Agriculture, Climate Change and Environment (MACCE)
Department of Blue Economy
Ministry of Transport
Creole Travel Services
Mason's Travel
Sustainability For Seychelles (S4S)
Seychelles Hospitality and Tourism Association (SHTA)
Hunt Deltel
Mahe Shipping
Island Conservation Society (ICS)
The Nature Conservancy (TNC)
Seychelles Revenue Commission (SRC)