



Direct Economic and Specific Environmental Impact Assessment of the Cruise Activities in Seychelles' Inner Islands, in relation to the MPAs

A study conducted by the Seychelles Sustainable Tourism Foundation (SSTF) in partnership with UniSey and mascontour GmbH with the support of the Seychelles Tourism Department and Seychelles Ports Authority and funded by Seychelles Conservation and Climate Adaptation Trust (SeyCCAT).

BACKGROUND

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 with the 2024-25 cruise season exceeding pre-pandemic levels. 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.



STUDY OVERVIEW

TIMEFRAME: July 2024 – October 2025

STRATEGIC OBJECTIVE: To inform relevant policy makers on direct economic and specific environmental impacts of the local cruise industry, in relation to the Marine Spatial Plan and Marine Protected Areas, and thereby guide evidence-based decision making in the future, especially in relation to the upcoming Seychelles Cruise Strategy.

CRUISE PASSENGER SURVEY AT PORT VICTORIA: 18-question survey instrument, conducted during peak cruise season January – April 2025, sample size: 439 (determined according to established methodological standards)

STAKEHOLDER INTERVIEWS ON MAHE, PRASLIN AND LA DIGUE: grouping of key stakeholders in key categories, at least two representatives from each group, virtual and face-to-face interviews from November 2024 – May 2025, total of 54 interviews.



THREE VESSEL CATEGORIES IN SEYCHELLES



EXPEDITION Averaging **90 to 130 meters** in length and hosting no more than **400 passengers**

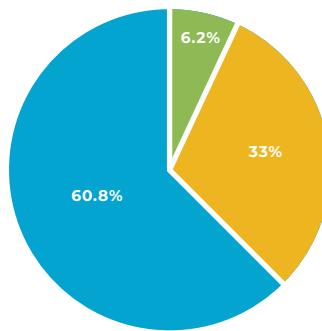


LUXURY Typically measuring between **180 and 240 meters** in length and accommodating around **400 to 999 passengers**



CONTEMPORARY Generally **240 to 300 meters** long – and carry more than **1,950 passengers**

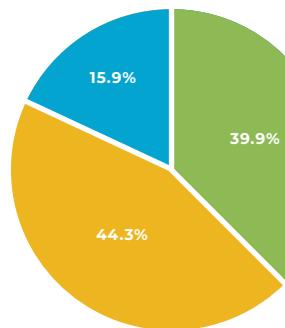
CRUISE PASSENGER DEMOGRAPHICS:



Distribution of Survey Participants by Ship Type

- EXPEDITION
- LUXURY
- CONTEMPORARY

AGE: two thirds of respondents are aged 60 years and above. 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.



Distribution of Survey Participants by Region of Origin

- EUROPE
- AMERICA
- REST OF THE WORLD

82,2% Seychelles is a stop on their cruise, not home port

82,9% visiting Seychelles for first time

STUDY FINDINGS

ADDITIONAL STAY FOR CRUISES USING VICTORIA AS HOME PORT: 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:

- Overall average per night of an additional stay amounts to **306.56 USD**
- The overall average per additional stay is **735.75 USD**
- Average length of additional stay **2.4 nights**

AVERAGE DURATION OF SHORE EXCURSION: 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.

BOOKING: 74,8 % booked their shore excursion via the cruise company

AVERAGE SPENDING:

- The overall average spend for an **organised excursion** is **116.15 USD**.
- The overall average spend for an **individual visit** is **63.06 USD**.

ADDITIONAL SPENDING:

- 71% of organised excursionists** report that they **do not purchase additional goods or services** beyond the cost of their organised tour
- 56% express interest in purchasing more locally produced products** if they were available for sale – specifically **handicraft items**

MOST FREQUENTED AREAS OF VISITATION: City area, harbour area and beaches.

ENVIRONMENTAL:

- More than half of all participants rate eco-friendly practices as very important

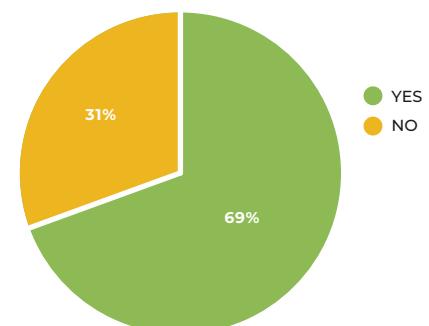
Distribution of survey participants by willingness to pay more for shore leave, if it's guaranteed that funding will go towards environment protection.

WILLINGNESS TO PAY MORE FOR ENVIRONMENTAL PROTECTION

Most participants (69%) are willing to pay more for shore leave when the additional funds are allocated to environmental protection.

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**.

Around **62%** indicating a positive intention to return to Seychelles in the future



WHAT DO THE RESULTS SHOW?

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. Particularly when it comes to strengthening Victoria as a home port, the potential increased positive local economic impacts are clear.

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, creating incentives for home port status, 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.

Download the full report and recommendations here: www.seychellessustainable.org



CONTACT US

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The Seychelles Sustainable Tourism Foundation (SSTF) is a Seychellois NGO which acts as a connecting platform for tourism stakeholders in Seychelles, facilitating partnerships, research, projects and other joint initiatives for sustainable tourism development. SSTF's vision is to make Seychelles an international best practice example for sustainable tourism through an integrated collaborative approach between public, private sector, academia and NGOs.

