Seychelles Sustainable Tourism Policy Framework.

2024 - 2034

Seychelles Sustainable Tourism Policy
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Image credit

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Content

ACRONYMS

GSTC	Global Sustainable Tourism Council
NGO	Non-government organisation
MSMEs	Micro Small Medium Enterprises
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNDP	United Nations Development Program
UNWTO	United Nations World Tourism Organisation

GLOSSARY OF TERMS

Capacity development	The process of developing and strengthening the skills, instincts, abilities, processes and resources that organisations and communities need to survive, adapt, and thrive in Seychelles.
Circular economy	A circular economy is a systemic approach to economic development designed to benefit businesses, society, and the environment. In contrast to the 'take-make-waste' linear model, a circular economy is regenerative by design and aims to gradually decouple growth from the consumption of finite resources.
Community	In the context of this report, a community is defined as a group of individuals that share some common characteristics. Assuming that a group of residents are a community if they share physical proximity or geography with delineated boundaries.
Creative industries	UNESCO define creative industries as those that combine the creation, production and commercialisation of contents which are intangible and cultural i n nature; these contents are typically protected by copyright, and they can take the form of a good or a service.
Environmental Impact Assessment	A tool used to identify the environmental, social and economic impacts of a project prior to decision-making. It aims to predict environmental impacts at an early stage in project planning and design, find ways and means to reduce adverse impacts, shape projects to suit the local environment and present the predictions and options to decision-makers.
Responsible tourism	Tourism that is sustainable while placing an emphasis on individual responsibility, involvement of local people, providing all visitors with an enjoyable and meaningful experience and being culturally sensitive.
Social inclusion	Social inclusion is the process of improving the terms on which individuals and groups take part in society – improving the ability, opportunity and dignity of those disadvantaged based on their identity.
Stakeholders	A stakeholder in the context of this Framework refers to a member of the community who has the power and legitimacy to influence other stakeholders within the community through a series of interactions which shape different elements of tourism development.
Sustainable development	Development that meets the needs of the present without compromising the ability of future generations to meet their own needs. Sustainable development requires the elimination of institutional fragmentation ensuring that environmental, social, and economic concerns are integrated throughout decision -making processes and development that is fair, equitable and just.
Sustainable Development Goals (SDGs)	The Sustainable Development Goals are a collection of 17 interlinked global goals designed to be a "blueprint to ac hieve a better and more sustainable future for all". The SDGs were set in 2015 by the United Nations General Assembly and are intended to be achieved by the year 2030.
Sustainable tourism	Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.
Tourism value chain	The tourism value chain is a sequence of primary and support activities that are strategically essential for the functioning of the tourism sector. Key activities of the tourism value chain include policy - making and integrated planning; product development, promotion and marketing; distribution and sales; education and training and destination operations and services.
Tourism industry	Tourism trade associations, national and local tourism service providers. e.g. hotel businesses, tour operators (inbound and domestic) , suppliers to the sector, e.g. food producers, investors – international and domestic.

Executive Summary

A new model of tourism for Seychelles

Our vision is to strengthen our approach for enhanced quality of life, a prosperous economy, and greater protection of our cultural and natural resources.

The tourism sector is a cornerstone of the Seychelles economy, significantly contributing to economic growth, job creation, export earnings, and domestic value addition. It accounts for approximately 58.8% of the nation's Gross Domestic Product (GDP) from both direct and indirect contributions and employs about two-thirds of the labour force.[1]

Whilst the growth of tourism has resulted in significant benefits, the tourism sector is also facing several challenges. While traditional thinking has assumed that more visitors will lead to more economic benefits it is increasingly recognised that to achieve the best possible outcomes from tourism, further interventions are needed to maximise the economic, social, and environmental benefits.

The Seychelles Sustainable Tourism Policy Framework (SSTPF) represents a new model for tourism growth tourism that is managed responsibly and sustainably, improves the lives of Seychellois through a strong economy, a rich cultural and social life, and a healthy environment. By focusing our attention on and investing in sustainable tourism practices this new model of tourism growth will help us strengthen our competitive edge.

The SSTPF serves as a strategic roadmap to enhance Seychelles' standing as a leader in sustainable tourism. It recognises that to generate the best outcomes, careful planning and purpose driven strategies and actions are essential. It contains goals, strategies and actions focused on dispersing the benefits of tourism across the community, fostering local employment opportunities, strengthening products and experiences, enhancing infrastructure, and safeguarding natural and cultural assets. It focuses on strengthening economic prosperity, eliminating economic leakage and upskilling local communities across the tourism value chain. It calls for existing tourism policies and plans to be updated and investment in experiences and infrastructure to support environmental, economic, cultural and community outcomes.

The goals, strategies and actions in this framework are shaped by the Global Sustainable Tourism Council's four pillars of sustainable tourism: (i) governance and economy (ii) social (iii) culture and community and (iv) environment [2]. The goals of the SSTPF are summarised below and presented in Figure 1.

GOAL 1: ESTABLISH STRONG AND EFFECTIVE GOVERNANCE

The SSTPF recognises that sustainable tourism development requires coordinated government action to ensure that tourism planning and management processes at the national level support the protection of natural resources, promote local investment and support the dispersal of the economic benefits derived from tourism across the nation. The strategies and actions within the SSTPF focus on this outcome and aim to strengthen governance and stakeholder engagement, including private sector involvement and public-private partnerships to support sustainable tourism development.

GOAL 2: PROMOTE INVESTMENT AND BUILD BUSINESS RESILIENCE, CAPACITY AND PRODUCTIVITY

Profitless volume, driven by a focus on visitor numbers rather than the economic contribution of each visitor, is unsustainable. In addition, economic leakage—money that leaves Seychelles—reduces the benefits of tourism to the local community. To address this issue the SSTPF contains strategies and actions to create conditions and incentives for local tourism investment, to provide a productive future for businesses and to build a resilient, high-performing workforce that is globally competitive.

GOAL 3: PROTECT AND PROMOTE OUR NATURAL, CULTURAL & SOCIAL CAPITAL

The SSTPF aims to enhance Seychelles' cultural and natural assets as key tourism elements, ensuring that tourism ensures their ongoing protection.

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[1] World Tourism and Travel Council 2023 Annual Research: Key Highlights, 2023

[2] Global Sustainable Tourism Council, **GSTC Industry Criteria Version 3, 2016**

GOAL 4: EMPOWER CLIMATE RESILIENCE AND RESPONSIBLE ENVIRONMENTAL MANAGEMENT

The SSTPF aims to advance the tourism sector's transition towards sustainable practices through responsible environmental management. It includes strategies and actions to raise awareness and provide tools for tourism businesses and service providers to transition towards more sustainable tourism practices. The strategies and actions specifically target the protection of ecosystems and biodiversity, promoting energy efficiency and the adoption of renewable energy sources, improving solid waste management, sewage and wastewater treatment, mitigating carbon emissions, and conserving water resources.

GOAL5: STRENGTHENING INFORMATION TO SUPPORT SUSTAINABLE TOURISM

The SSTPF includes strategies and actions to collect, integrate and maintain data to measure progress towards more sustainable tourism practices. It focusses on the availability and reliability of information for evidence-based decision making and public-private partnerships for sustainable tourism development.

DESTINATION STEWARDSHIP THROUGH STRONG COLLABORATION

The SSTPF takes a stewardship approach to managing sustainable tourism in Seychelles. It seeks to establish a strong and effective governance model with active participation from public and private sectors, as well as the local community. The Seychelles Government is responsible for many functions that are fundamentally important to the sustainable development of tourism, such as land use planning, labour and environmental regulations, and the provision of infrastructure and social and environmental services. The tourism sector in Seychelles is fragmented into many hundreds of businesses, mainly micro or small enterprises. Collectively their actions can make a difference, while individually they cannot, so coordination is needed.

Successful implementation of the SSTPF requires ongoing and strategic collaboration among the tourism industry, government, and various stakeholders within Seychelles. Above all, there needs to be a joint commitment by the Seychelles Government (through the Tourism Department and other agencies), regional organisations, non – government organisations, tourism industry, development partners, the Seychellois community, and visitors to Seychelles, to develop and implement solutions that effectively contribute to the sustainable growth of tourism. The table below presents the roles and responsibilities of each stakeholder.

Roles and Responsibi lities - SSTPF Implementation

PARTNERS	RESPONSIBILITIES
Government of Seychelles	National development goals support sustainable tourism and implementation of the SSTPF. Increase information availability and governance regarding land use, planning, regulation and inter agency coordination for the sustainable development and management of tourism.
The Tourism Department	Implementation of the Seychelles Sustainable Tourism Policy Framework through enabling legislation, sustainable tourism policy and planning, tourism standards, regulation, infrastructure development and marketing.
International and National Partners	Financial and technical assistance to sustainable tourism and individual programmes and projects.
Private Sector	Accountable for sustainability in planning, operation, production and consumption regarding their tourism services, activities and products, and contribute to positioning of Seychelles as a world-class sustainable tourism destination.
Local communities an d residents	Stimulate communities to take ownership of their natural and cultural capital so that they become strategic partners of the industry's transition towards greater sustainability and benefit from the socioeconomic benefits of tourism.
Education and Training Bodies	Capacity building and training, knowledge gathering and dissemination, specific advice and expertise supporting policy and strategy development and human resource requirements.
Tourists	Promote responsible behaviour and the sustainable consumption of tourism products, services and activities while visiting Seychelles.

Seychelles Sustainable Tourism Policy Framework - Overview

Sustainable tourism for Seychelles means taking action to protect and conserve our unique environments, build resilience to climate change, promote our rich and diverse cultures, and work collaboratively with local communities, employees and suppliers to ensure tourism benefits everyone.

Our Vision				
To strengthen our approach for enhanced quality of life, a prosperous economy, and greater protection of our cultural and natural resources.				
Our Aspirations				
COMMUNITY				
We cherish our home and take pride in sharing it with visitors. We possess a strong sense of identity, which is understood and appreciated by our visitors.				
ENVIRONMENT				
We are contributing to the regeneration of our land, water, and wildlife, setting a global example in responsible environmental management.				
VISITOR				
We attract value-aligned visitors who actively contribute to positive impact programs and develop a profound connection with our home.				
ECONOMY				
We aim to grow the net value of our visitor economy to support an innovative, vibrant, and resilient business community, fostering sustainable economic growth.				
INDUSTRY				
Local businesses are thriving, supported by an engaged and skilled workforce. They continually evolve to meet and exceed visitor expectations, ensuring long-term success and satisfaction.				
Our Goals				
GOAL 1 Establish Strong and Effective Governance.	GOAL 2 Promote Investment and Strengthen Business Resilience, Capacity and Productivity.	GOAL 3 Protect and Promote Our Natural, Cultural & Social Capital.	GOAL 4 Empower Climate Resilience and Responsible Environmental Management.	GOAL 5 Strengthening Information to Support Sustainable Tourism.
Focus Areas				
Strengthen governance and stakeholder engagement, including private sector involvement and public-private partnerships to support sustainable tourism development.	Create conditions and incentives for tourism investment, to provide a productive future for businesses and to build a resilient, high-performing workforce that is globally competitive.	Enhance Seychelles' cultural and natural assets as key tourism elements, ensuring that tourism benefits the people and for the prosperity of our islands and ocean.	Advance the tourism sector's transition towards sustainable practices through environmental stewardship.	Promote the continuous generation of information, improve its availability and reliability for evidence-based decision making and public-private partnerships for sustainable tourism development.

Strategic Context

Introduction

Tourism is an economic powerhouse and is one of the main pillars sustaining growth and development in the Seychelles economy. It accounts for approximately 58.8% of the nation's GDP (from both direct and indirect contributions)[3] and employs about two-thirds of the labour force.[4] Prior to COVID-19, tourism was flourishing, with visitor numbers growing by over 10% annually over the last decade. The number of international tourists arriving by air was around 130,000 in 2000 and growing to 384,204 in 2019. During this time the economy also benefited from strong tourism revenues and a buoyant fishing industry.

Seychelles' tourism industry remained resilient and successfully navigated the challenges of COVID-19 by implementing successful marketing campaigns as well as strict health protocols which enabled the sector to rebound strongly in 2022 and 2023.[5] A successful vaccination program also helped reduce the COVID-19 pandemic's impact on the community.

Despite its robust economic growth, Seychelles faces several challenges. As a Small Island Developing State (SIDS), Seychelles struggles with a small domestic market, distance from export markets, limited economies of scale, dependence on fossil fuel imports, land scarcity, and a restricted labour supply. These factors hinder economic diversification and heighten the vulnerability to external shocks. Multidimensional poverty affects 32% of the population, encompassing shortfalls in living standards, education, health, nutrition, and employment.[6]

Due to its geographical layout and main economic activities, Seychelles is highly vulnerable to the impacts of climate change. The country is experiencing a notable rise in temperatures, an increase in warm days, heavily localised rainfall and higher sea levels caused by storm surges. These climatic changes are adversely affecting marine and coastal life, impacting on both the tourism and fisheries sector. Additionally, beach erosion and coral bleaching pose serious risks to the tourism sector.[7]

The Tourism Department has prioritised the development of a new policy framework underpinning tourism growth in Seychelles, moving away from a growth-oriented approach that prioritises increasing visitor numbers without adequate consideration for infrastructure, environmental impacts, and the community's desire and capacity to accommodate increased tourism. Recent policy shifts include a value-over-volume approach which emphasises the importance of increasing value (through visitor expenditure) over volume in visitor arrivals. The Department recognises that achieving this goal, along with other policy objectives, requires a more integrated policy approach that addresses the interconnected challenges across various sectors to facilitate sustainable tourism outcomes.

The desired objective is a future where tourism 'success', is not measured in visitor numbers alone, but the positive impacts that tourism can provide, and the benefits delivered to the Seychellois economy and community. The tourism sector's performance needs to be judged not by demand but by its effectiveness in providing livelihoods, contributing to the local economy and the net benefits to the nation, community and the natural and cultural resources on which it depends.

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[3] World Tourism and Travel Council 2023 Annual Research: Key Highlights, 2023

[4] Ibid

[5] African Development Bank Seychelles Economic-Outlook 2023

[6] NBS (2019a). National Bureau of Statistics Statistical Bulletin. 2018 Annual National Accounts Statistics. Catalogue Number: ANA.2018

[7] Investment Policy Review, Seychelles, the United Nations Conference on Trade and Development (UNCTAD) 2020

A New Model for Seychelles

The Seychelles Sustainable Tourism Policy Framework (SSTPF) presents a new model of tourism based on the following:

Sustainable Tourism: An Industry-wide Principle

The SSTPF aims to break away from the paradigm that sustainable tourism is focused on reducing the environmental impact of tourism activities. Sustainability is a much broader concept that is applicable to all types of tourism, in all locations and all stakeholders in the value chain. Sustainability is a principle that must be applied to all industry segments, and all activities, products and services must encompass a vision of environmental responsibility that underpins its value and guarantees its long-term development.

Sustainability as a Value Add

Recent changes in consumer preferences represent opportunities for sustainable tourism. Tourists are manifesting increased solidarity with local communities and industry stakeholders, as well as a greater level of consciousness about the values of the businesses they give their money to, and the potential environmental impact of the activities they participate in during their travels. As a result, a significant number of travellers now understand that their decisions have the potential to transform the industry and they are willing to choose more sustainable tourism products and options.

Sustainability as a Factor of Competitiveness

The implementation of sustainable tourism practices results both in environmental benefits such as reduced natural resource use and extraction, and decreased pollution and in a greater contribution to economic growth. The SSTPF is based on this principle, and supports the protection of natural and cultural capital, community wellbeing and economic prosperity, high-quality experiences and increasing the competitiveness of tourism businesses. From a business perspective, the SSTPF incentivises businesses to view sustainability as a competitive advantage that contributes to achieving a more comprehensive business vision, improves operational efficiency, reduces the cost of basic services, increases local job creation, attracts foreign investment, enhances customer loyalty and achieves a greater brand value. From a destination perspective, the SSTPF supports the view that it is fundamental for Government to align tourism planning and management with sustainability criteria to ensure the long-term preservation of resources, strengthen supply chains, improve working conditions and ensure tourism's longevity.

Sustainability as a Factor of Local Social and Cultural Development

The SSTPF views improved sustainability and competitiveness as a positive factor in supporting local businesses, strengthening supply chains, supporting community wellbeing. From this perspective, it also regards sustainable tourism as a key factor for social development in areas where tourism takes place; addressing social inequality and ensuring the fair distribution of benefits derived from tourism. Given that in many parts of the country, ecosystems and communities not only coexist, but are also closely interdependent, the benefits of sustainable tourism transcend the environment and can also be seen in people, their culture and local enterprise.

National Development Priorities

The nation's strategic plan, Vision 2033, seeks a significant transformation that positions Seychelles as a knowledge-based and innovation-driven economy. In this new model, private investment and entrepreneurship are key drivers. The vision is to be achieved through the implementation of the National Development Strategy which focusses on six pillars for development: good governance, people at the centre of development, social cohesion, innovative economy, economic transformation, and environmental sustainability and resilience.

The Government envisions transforming the country into a global exemplar of sustainable, responsible, and ethically driven tourism. The Tourism Department is mandated to encourage the development of the tourism industry in Seychelles and carries out its functions according to the Strategic Plan. Selected plans, strategies and policies related to tourism are presented in Table 1.

Legislation and Regulations

The nation has a strong legislative framework promoting sustainable development. The tourism sector is governed by several laws and regulations designed to facilitate sustainable development and responsible management of tourism activities including:

- The Tourism Development Act, 2019 and regulations
- Tourism Marketing Tax Act, 2013
- Accommodation Turnover Tax Act, 2022
- Seychelles Parks and Gardens Authority Act, 2022
- The Environmental Protection Act, 2016
- The Conservation and Climate Adaptation Trust of Seychelles Act, 2015.

National Tourism Policy and Plans

The Tourism Department of Seychelles, through its Strategic Plan sets out priorities for policy, marketing, product development, human resources, investment and quality standards within the context of sustainable tourism. Table 1 presents a summary of the strategies and plans most relevant to the SSTPF.

Seychelles Tourism Master Plan

The Seychelles Tourism Master Plan: Part I and Part II proposes a gradual increase in visitor arrivals while adopting a balanced approach to tourism bed supply, air seat supply and visitor annual targets. It recommends a modest growth in visitor numbers and a focus on quality versus quantity of visitors. The Tourism Master Plan contains 8 priority areas:

1. Drive brand development.

2. Invest in market penetration and development.

3. Improve product diversification.

4. Address Seychelles competitiveness as a tourism destination.

5. Invest in local talent development and management.

6. Increase investment in sustainable tourism practices.

7. Deliver key enabling factors.

8. Improve capacity of government agencies to facilitate tourism.

Priority 8 includes an action to adopt a whole-of-government approach to tourism issues in recognition that several key policies are not available, including a general policy for sustainable tourism, an over-arching marine tourism policy and a cruise tourism policy. Implementation of the Tourism Master Plan has been delayed due to the impact of Covid 19 pandemic and resource availability.

Carrying capacity studies

Seychelles has had five carrying capacity studies completed for the islands of La Digue, Mahe and Praslin in the last ten years. Each study establishes a carrying capacity baseline and recommendations for a tourism development model centred on higher value lower impact tourism. The concept of carrying capacity and the application to tourism destinations has several practical and conceptual limitations[8]. These challenges relate to its complexity, measurement challenges, subjectivity, resource constraints, economic pressures, changing tourist behaviour, and external factors. Major institutions addressing sustainable tourism development do not recommend using carrying capacity (including the World Bank, UNESCO, and the IUCN).[9] These limitations highlight the need for adaptive management approaches and continuous monitoring to effectively address the dynamic and multifaceted nature of tourism in Seychelles.

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[8] For an overview, see Butler, R. W (2019) op. cit. and Butler, R. W. and Dodds, R. (2022) Overcoming overtourism: a review of failure, Tourism review, 77 (1) 35-53) and Lindberg, K., McCool, S., Stankey, G. (1996) op. Cit.

[9] See Twining-Ward, L., Wendy, L.; Bhammar, H., Wright, E. (2018) Supporting Sustainable Livelihoods through Wildlife Tourism. Tourism for Development; World Bank, Washington, DC. © World Bank. https://openknowledge.worldbank.org/handle/10986/29417 License: CC

Table 1 National Plans and Strategies for Tourism

SCOPE	
National Development	Vision 2033
	National Development Strategy 2024-2028
	Government of Seychelles' Updated Nationally Determined Contribution
Private sector development - related	Seychelles Inclusive Industrial Competitiveness Policy 2015–2020
	SME Development Policy and Strategy 2016
	Sector Strategic Plan 2018–2022
	Seychelles National Investment Policy 2018
	Seychelles Made Policy 2020
Sectoral	Seychelles Blue Economy Strategic Policy Framework and Roadmap (2018-2030)
	Seychelles National Investment Policy 2018
	Seychelles National Investment Board Roadmap
	Seychelles' Protected Areas Policy
	The Seychelles Coastal Management Plan 2019–2024
	The Seychelles Marine Spatial Plan
	Seychelles National Climate Change Strategy
	Seychelles National Biodiversity Strategy and Action Plan 2015-2020
Tourism	The Tourism Department Corporate Plan
	Seychelles Tourism Master Plan

Seychelles Tourism and the Sustainable Development Goals

The Sustainable Development Goals (SDGs) are a set of 17 interconnected and ambitious objectives established by the United Nations as part of the 2030 Agenda for Sustainable Development. The SDGs are designed to address social, economic, and environmental issues, and they are intended to be a universal call to action for governments, businesses, civil society, and individuals. The SDG's serve as a roadmap for governments, organisations, and individuals to work collectively towards a more sustainable and equitable future by 2030. All 17 goals are relevant to tourism.

Aligning the SSTPF with the SDGs remind us of how tourism can contribute to global challenges and enhance Seychelles reputation as a leading sustainable destination. The SDGs help us to remain accountable to our purpose. Each goal in the SSTPF directly supports several SDGs and are presented accordingly.

12 Aims of Sustainable Tourism

The SSTPF has been designed to align with the 12 aims of sustainable tourism identified by the United Nations World Tourism Organisation (UNWTO).

ECONOMIC VIABILITY	To ensure the viability and competitiveness of tourism destinations and enterprises, so that they can continue to prosper and deliver benefits in the long term.
LOCAL PROSPERITY	To maximise the contribution of tourism to the prosperity of the host destination, including the proportion of visitor spending that is retained locally.
EMPLOYMENT QUALITY	To strengthen the number and quality of local jobs created and supported by tourism, including the level of pay, conditions of service and availability to all without discrimination by gender, race, disability or in other ways.
SOCIAL EQUITY	To seek a widespread distribution of economic and social benefits from tourism throughout the recipient community, including improving opportunities, income and services available to the poor.
VISITOR FULFILMENT	To provide a safe, satisfying and fulfilling experience for visitors, available to all without discrimination by gender, race, disability or in other ways.
LOCAL CONTROL	To engage and empower local communities in planning and decision making about the management and future development of tourism in their area, in consultation with other stakeholders.
COMMUNITY WELLBEING	To maintain and strengthen the quality of life in local communities, including social structures and access to resources, amenities and life support systems, avoiding any form of social degradation or exploitation.
CULTURAL RICHNESS	To respect and enhance the historic heritage, authentic culture, traditions and distinctiveness of host communities.
PHYSICAL INTEGRITY	To maintain and enhance the quality of landscapes, both urban and rural, and avoid the physical and visual degradation of the environment.
BIOLOGICAL DIVERSITY	To support the conservation of natural areas, habitats and wildlife, and minimise damage to them.
RESOURCE EFFICIENCY	To minimise the use of scarce and non-renewable resources in the development and operation of tourism facilities and services.
ENVIRONMENTAL PURITY	To minimise the pollution of air, water and land and the generation of waste by tourism enterprises and visitors.

Tourism Trends and Performance

Seychelles is the most prosperous nation in Sub-Saharan Africa. Its economy is highly dependent on tourism and fisheries. Tourism is a critical component of Vision 2033 and the National Development Strategy.

ECONOMIC VALUE

Tourism is the single largest sector in the economy contributing 58.8% of total GDP in 2022 (USD 1,071.2 MN).[10] Economic leakages remain a major constraint to sustainable local economic growth. Micro, small, and medium enterprise constitute the lion's share of formally registered enterprises.

ARRIVALS

International visitor arrivals by air have more than doubled over the last 20 years. 384,204 in 2019 (pre COVID-19 pandemic) compared to 130,000 in 2000. Cruise tourism has increased from 15,634 arrivals in 2010 to 43,978 in 2019.[11]

EMPLOYMENT

Tourism related industries generate 27.9% of all employment.[12] Foreign employees make up 21% of the workforce.[13]

INVESTMENT

29% of total capital investment is from the tourism sector and mostly foreign investment.[14]

ACCOMMODATION

The accommodation sector is the largest employer. There are 793 accommodation establishments and 7683 rooms available. 60% of hotel accommodation is foreign-owned and 87% of tourists' spending is on accommodation. It is forecasted that there will be a 73% increase in room supply by 2028.[15]

A GLOBAL BIODIVERSITY HOTSPOT

There are 115 islands located within a rich tropical marine ecosystem in the western Indian Ocean.

It is a global biodiversity hotspot and a centre of plant biodiversity.

There are 1000 species of plants of which 250 are indigenous (with 85% being located in the national parks).

There are many endemic species, including both terrestrial and marine animals – some of these are rare, threatened or critically endangered.

There are 4 terrestrial national parks, 6 marine parks, 13 marine protected areas and 2 UNESCO World Heritage Sites.

50% of land territory is protected for conservation.

30% of marine protected areas are in the Exclusive Economic Zone.

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[10] NBS (2019a). National Bureau of Statistics Statistical Bulletin. 2018 Annual National Accounts Statistics. Catalogue Number: ANA.2018

[11] Tourism Carrying Capacity for the inner islands of Seychelles (Mahe and Praslin), Sustainable Travel International, 2019

[12] National Bureau of Statistics, Statistical Bulletin March 2024

[13] Ibid

[14] United Nations Sustainable Development Cooperation Framework - Seychelles 2024 – 2028, UNDP 2023

[15] Tourism carrying capacity study of Mahe and Praslin, Seychelles The Tourism Department 2021

Tourism Opportunities and Challenges

The following brief overview of tourism resources and challenges in Seychelles provides useful context for the SSTPF. It has been informed by extensive background research and stakeholder consultation. More details on specific topics are included under each goal in the SSTPF.

Economic Leakage : The prevalence of international investment and a small economy result in significant foreign exchange earnings leakage due to the importation of construction materials, consumer goods, and the repatriation of profits by foreign investors.

Governance: The importance of tourism is well recognised in national policy . The lack of coordination across various government agencies and limited technical and financial resources impacts on the implementation and enforcement of policies to support sustainable tourism.

Climate Change: Adverse effects of global warming, such as storm surges, rising sea levels, coastal erosion, and coral bleaching, pose direct and indirect threats to the tourism industry.

National Determined Contributions : The National Determined Contributions Scheme relies on the sector to reduce emissions however human, technical and financial resources are limited .

Limited Product Diversification: There is an unbalanced distribution in the range of tourism products, with limited investment outside the accommodation sector.

Natural Resource Limitations: There is a finite capacity of the islands' resources, notably land, water, coastlines, biodiversity, and energy, given their scarcity and fragility .

Workforce Shortages: The tourism sector faces a lack of qualified and skilled local employees, affecting the quality -of- service delivery. There are concerns about the level of interest in the sector amongst young people and perceptions of tourism as a career.

Service Quality: While there are many examples of operators delivering an exceptional visitor experience, quality remains mixed and inconsistent. Competitiveness, value for money and quality when compared with other destinations are important concerns for the sector in Seychelles.

Local Tourism Planning: Local destination development plans for La Digue and Victoria provide new opportunities for coordinating and delivering sustainable tourism actions, but they require stakeholder support and resources for their implementation.

Climate Resilient Infrastructure: Many areas are suffering from poor infrastructure, including transport and other services. Stronger land use planning policies are required to direct and control development, notably in the light of climate change which presents a major threat to the future of tourism.

High Tourist-to-Resident Ratio: Seychelles has a resident-to-tourist ratio of approximately 1:4, indicating its status as a high-volume tourism destination relative to its small population. This ratio highlights the challenges of managing tourism sustainably without compromising the quality of life for residents or the visitor experience.

Seychelles Sustainable Tourism Policy Framework

Vision

To strengthen our approach for enhanced quality of life, a prosperous economy, and greater protection of our cultural and natural resources.

Our Aspirations

COMMUNITY

We cherish our home and take pride in sharing it with visitors. We possess a strong sense of identity, which is understood and appreciated by our visitors.

ENVIRONMENT

We are contributing to the regeneration of our land, water, and wildlife, setting a global example in responsible environmental management.

VISITOR

We attract value-aligned visitors who actively contribute to positive impact programs and develop a profound connection with our unique place.

ECONOMY

We aim to grow the net value of our visitor economy to support an innovative, vibrant, and resilient business community, fostering sustainable economic growth.

INDUSTRY

Local businesses are thriving, supported by an engaged and skilled workforce. They continually evolve to meet and exceed visitor expectations, ensuring long-term success and satisfaction.

Our Goals

1. Establish Strong and Effective Governance

2. Promote Investment and Strengthen Business Resilience, Capacity and Productivity

3. Protect and Promote Our Natural, Cultural & Social Capital

4. Empower Climate Resilience and Responsible Environmental Management

5. Strengthening Information to Support Sustainable Tourism

Guiding Principles

The following guiding principles are intrinsic to achieving this vision and will guide all decision-making and actions in the development and application of sustainable tourism development. A commitment to them by all partners will facilitate progress toward sustainable tourism in Seychelles.

Competitive

Tourism businesses and the sector must be economically viable and able to compete effectively in the marketplace.

Balanced

Tourism should be well integrated with the rest of the economy, avoiding over-dependency on the sector or on particular types of products or markets.

Resilient

Tourism planning and development should look to the long term, building in an ability to adapt to environmental and other changes.

Socially inclusive

Tourism should provide opportunities for residents and visitors of all kinds, without discrimination by gender, race, religion, sexual orientation, disability or in other ways.

Environmentally responsible

Tourism should be responsible for its global and local impacts and respect the integrity of ecosystems in which it occurs, avoiding and minimising the use of scarce and precious resources and the generation of waste and pollution and contributing to the conservation, management and maintenance of natural assets.

Culturally sensitive and authentic

Tourism development and activities should uphold the human rights of all Seychellois and respect local cultural traditions, avoiding degradation and providing visitors with a meaningful and authentic experience.

Fulfilling and safe

Tourism development and activities should ensure the well-being, safety and security of visitors, employees and the local communities in which they occur.

Shared responsibility and accountability

The planning, management and development of tourism should involve businesses, other stakeholders and local communities affected by it. All responsible agencies should be accountable to the stakeholders for their actions and be open and transparent in their reporting of them.

Our Focus Areas

- Strengthen governance and stakeholder engagement, including private sector involvement and public-private partnerships to support sustainable tourism development.

- Create conditions and incentives for tourism investment, to provide a productive future for businesses and to build a resilient, high-performing workforce that is globally competitive.

- Enhance Seychelles' cultural and natural assets as key tourism elements, ensuring that tourism benefits the people and the prosperity of our islands and ocean.

- Advance the tourism sector's transition towards sustainable practices through responsible environmental management.

- Promote the continuous generation of information, improve its availability and reliability for evidence-based decision making and public-private partnerships for sustainable tourism development.

Roles and Responsibilities

Successful implementation of the SSTPF requires ongoing and strategic collaboration among the tourism industry, government, and various stakeholders within Seychelles. Above all, there needs to be a joint commitment by the Seychelles Government (through The Tourism Department and other agencies), regional organisations, non – government organisations, tourism industry, development partners, the Seychellois community, and visitors to Seychelles, to develop and implement solutions that effectively contribute to the sustainable growth of tourism.

The Seychelles Government and its ministries and departments have a crucial role to play in the development of sustainable tourism. The key reasons for the importance of the role of government are as follows:

- The Seychelles Government is responsible for many functions that are fundamentally important to the sustainable development of tourism, such as land use planning, labour and environmental regulations, and the provision of infrastructure, social and environmental services.

- The tourism sector in Seychelles is fragmented into many hundreds of businesses, mainly micro or small enterprises. Collectively their actions can make a difference, while individually they cannot, so coordination is needed.

  To effectively integrate sustainability objectives and principles with tourism, along with other sector policies and tools, a more methodical approach is required. It is incumbent upon Government to develop its policies and strategies that align with it national sustainable development and climate action objectives.

Table 2 Roles and Responsibilities - SSTPF Implementation

PARTNERS	RESPONSIBILITIES
Government of Seychelles	National development goals support sustainable tourism and implementation of the SSTPF. Increase information availability and governance regarding land use, planning, regulation and inter agency coordination for the sustainable development and management of tourism.
The Tourism Department	Implementation of the Seychelles Sustainable Tourism Policy Framework through enabling legislation, sustainable tourism policy and planning, tourism standards, regulation, infrastructure development and marketing.
International and National Partners	Financial and technical assistance to sustainable tourism and individual programmes and projects.
Private Sector	Accountable for sustainability in planning, operation, production and consumption regarding their tourism services, activities and products, and contribute to positioning of Seychelles as a world-class sustainable tourism destination.
Local communities and residents	Stimulate communities to take ownership of their natural and cultural capital so that they become strategic partners of the industry's transition towards greater sustainability and benefit from the socioeconomic benefits of tourism.
Education and Training Bodies	Capacity building and training, knowledge gathering and dissemination, specific advice and expertise supporting policy and strategy development and human resource requirements.
Tourists	Promote responsible behaviour and the sustainable consumption of tourism products, services and activities while visiting Seychelles.

Sustainable tourism - Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.
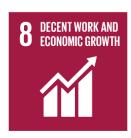
Responsible tourism - Tourism that is sustainable while placing an emphasis on individual responsibility, involvement of local people, providing all visitors with an enjoyable and meaningful experience and being culturally sensitive.

GOAL 1: Establish Strong and Effective Governance

This goal aims to strengthen governance and stakeholder engagement, including private sector involvement and public-private partnerships to support sustainable tourism development.

The strategies and actions in this section specifically support the following SDGs:

What problem does it solve?

Low levels of coordination between the tourism sector and government authorities and outdated policies that do not reflect sustainable tourism objectives. Limited integration of tourism sustainability objectives in non-tourism sectors.

What are its causes?

National Policy Influence on Tourism Sustainability: The national government's strategies and policies in non-tourism sectors heavily influence the sustainability of tourism however there are low levels of co-ordination across relevant agencies.

Coordination and Accountability Issues: Insufficient coordination between tourism and other government agencies and a lack of accountability for sustainable outcomes highlight the need for a more unified and responsible governance framework.

Role of National Determined Contributions: The commitment to reduce emissions through the National Determined Contributions strategy necessitates significant contributions from the tourism sector.

Resource Shortages for Sustainability Programs: The lack of human, technical, and financial resources limit the implementation of sustainable tourism programs and practices.

Integration with Environmental and Other Policies: The lack of integrated destination development with environmental, biodiversity, and climate policies can be addressed through stronger governance, ensuring that tourism development does not occur at the expense of social, cultural and environmental values.

Enforcement of Sustainable Laws and Regulations: Limited enforcement of laws and regulations intended to support sustainable tourism leads to non-compliance which undermine the intent of the regulatory frameworks.

Focused Investment and Infrastructure Development: Historically, investment has concentrated on accommodation development with insufficient focus on essential public infrastructure to support high volumes of tourism.

Destination Development : The challenges faced by local tourism associations in sustaining their operations due to resource constraints can be mitigated through effective governance, which would support these associations and enhance local destination development.

Transparency in Fund Utilisation: Concerns about the transparency in the collection and use of the Seychelles Tourism Environmental Sustainability Levy indicate a need for governance that ensures clear and accountable financial practices, fostering trust among tourism stakeholders and visitors that the levy will be used to support the sector.

How can it be addressed?

National Commitment to Sustainable Tourism : A robust national commitment to sustainable tourism should be articulated through relevant and integrated national strategies and policies. It is essential that these policies are supported by adequate financial, human, and technical resources to ensure their successful implementation and adherence.

Coordinated Governance for Sustainable Tourism : Sustainable tourism development necessitates a governance model that incorporates considerations for the availability and protection of natural resources, compatible land use, and infrastructure development. Such coordinated governance will ensure that business investments align with community needs, allowing destinations in Seychelles to manage growth sustainably.

National Coordinating Mechanism: To enhance coordination between different sectors, the establishment of a national coordinating mechanism is critical. This mechanism should include various ministries whose policies impact on or benefit from sustainable tourism, such as those related to climate mitigation and adaptation, biodiversity, and resource use. Effective integration of these policy areas is crucial for sustainable tourism.

Regulatory Environment: A conducive regulatory environment is fundamental to facilitating necessary investments in local infrastructure and the development of local enterprises. This involves creating clear guidelines and standards for compliance to ensure that all tourism operators adhere to sustainable practices.

Clear Guidelines and Standards: Uniform compliance efforts are essential for effective regulatory implementation. Enhanced communication and outreach are required to clarify the applicability of regulations and promote understanding among tourism operators, government agencies, and other relevant parties.

Effective Stakeholder Engagement: The complex and multifaceted nature of the tourism sector requires effective engagement and coordination among all stakeholders, including private sector associations, NGOs, and local communities. These groups play a critical role in the successful development, communication, and delivery of sustainable tourism policies and frameworks.

Improved Structures for Collaboration: Developing improved structures that facilitate collaboration among the public, private, NGOs and civil society sectors will enhance mutual support and effective action. Better communication within these structures will lead to increased understanding and collaboration, significantly benefiting sustainable tourism initiatives.

Strategies for Establishing Strong and Effective Governance

Strategy 1.1 Establish a National Commitment to Sustainable Tourism

This strategy aims to maximise the economic, environmental, social and cultural benefits of tourism for the Seychellois community through a robust governance model that includes active participation from all relevant sectors.

It seeks to raise awareness of the sustainability challenges facing tourism at a national level and develop international partnerships that increase the range of resources that can support and contribute to implementation of the SSTPF.

Actions

SUSTAINABLE SEYCHELLES TOURISM COMMITTEE (SSTC):

a. Review and expand the SSTC to include key ministries and agencies, covering areas like trade, culture, and environment, to ensure a holistic approach to sustainable tourism.

b. Develop comprehensive Terms of Reference for the SSTC, supported by a dedicated secretariat, to facilitate the effective coordination of the SSTPF across all relevant agencies.

c. Implement a systematic approach to monitoring and reporting (refer to Goal 5) using defined metrics to evaluate the effectiveness of tourism initiatives and their alignment with the Sustainable Development Goals (SDGs).

SUB-SECTOR SUSTAINABLE TOURISM AGENDAS:

d. Create specific agendas within the SSTC to address the unique challenges of different tourism sub-sectors, including detailed action plans for integrating sustainable practices like renewable energy and effective waste management.

e. Formulate partnerships with agencies responsible for national sustainability programs to integrate tourism with broader environmental and economic policies.

INTEGRATED POLICY DEVELOPMENT FOR SUSTAINABLE TOURISM:

f. Align national tourism development strategies with all relevant SDGs, particularly focusing on sustainable economic growth, sustainable consumption, and the conservation of oceans.

g. Update and align national policies related to tourism, culture, environment, climate change, and disaster resilience to support sustainable growth and ensure they are conducive to the objectives of the SSTPF.

h. Review the tourism sector initiatives identified in the Seychelles' Updated Nationally Determined Contribution plan and ensure relevant policies are updated to support implementation of the initiatives.

i. Develop a timeline for the review of tourism-related policies and establish a mechanism for review and adaptation over the life of the SSTPF.

j. Create Sustainable Tourism Industry Best Practice Guidelines(Planning and Investment)that provide best practice advice for investors on how to develop tourism facilities and experiences that are ecologically sustainable and ensure, to the greatest possible extent, the protection of natural and cultural values and resources.

   The National Guidelines will provide information to proponents how facilities can be effectively planned through awareness of site values and constraints, appropriate site layout, design and construction, low energy footprint, water and waste systems, appropriate visitor interpretation and activities and community partnerships.

FORMAL PARTNERSHIPS FOR SUSTAINABLE TOURISM:

k. Enhance local governance participation by involving diverse community groups in planning and managing tourism, ensuring equitable distribution of tourism benefits.

l. Actively participate in and form coalitions with international organisations (e.g., UNWTO, OECD, UNEP, GSTC) to raise the profile of Seychelles' sustainable tourism efforts.

m. Actively communicate the work performed by all public sector institutions and agencies, including the Tourism Department through the development and use of a specific industry communication strategy.

Strategy 1.2 Institutional Capacity and Resources

This strategy focusses on the funding and resource requirements to enable implementation of the SSTPF.

Actions

a. Designate a focal point with the necessary authority and resources to lead the SSTPF implementation.

b. Invest in training for government stakeholders on sustainable tourism for better management and transparency in tourism activities.

c. Track the application of public sector and development partner spending on tourism-related investments to learn from the lessons gained and to better assess the feasibility of similar investments in the future.

Strategy 1.3 National and Local Tourism Planning

This strategy will improve knowledge, resources and competences related to destination management by tourism organisations and reinforce national and local destination planning and development.

Actions

a. Develop and make available a corresponding, up-to-date, multi-year national destination strategy, emphasising an integrated approach that encompasses environmental sustainability, economic resilience, social and cultural enrichment, alongside quality, health and safety. Developed through extensive public participation, the strategy will aim to balance visitor interests with local community and environmental needs, promoting sustainable tourism development.

b. Support local tourism organisations with capacity building and access to an information portal on tourism department website. Encourage their active involvement in destination development and the implementation of local plans aligned with the national strategy.

c. Update/develop specific management plans for Mahe, Praslin, and La Digue, focusing on infrastructure improvements and environmental risk management. The plans should identify public infrastructure improvements within local destinations, such as energy, water, and sanitation, including connectivity requirements such as telecommunications and transport.

d. Monitor and report on the implementation of the local destination plans and review and renew them every five years.

e. Develop a Seychellois Tourism Values Statement to reinforce the links between community, culture, and tourism for use by the public and private sectors and inclusion in the national tourism strategy.

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GOAL 2: Promote Investment and Strengthen Business Resilience, Capacity and Productivity

This goal aims to create conditions and incentives for tourism investment, to provide a productive future for businesses and to build a resilient, high-performing workforce that is globally competitive.

The strategies and actions in this section specifically support the following SDGs:
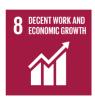

What problem does it solve?

The economic growth in Seychelles, largely driven by tourism, does not benefit all sectors of the population evenly. There is a significant amount of economic leakage from tourism activities.

What are its causes?

Structural Economic Limitations: Seychelles is a net importing country heavily reliant on imports for its tourism industry. This dependency is due to limited domestic production and export capacity, which are restricted by land scarcity, a limited labour supply, and high input costs.

Economic Leakage: A significant portion of visitor spending exits the local economy, flowing to offshore companies that own, promote, or sell experiences resulting in a low distribution of benefits to local communities.

Inadequate Local Integration: There are insufficient mechanisms to integrate local suppliers into the tourism value chain, limiting local economic benefits.

Barriers to MSME Growth: A weak business environment, limited access to finance, and a lack of skilled labour impede the growth of micro, small, and medium enterprises (MSMEs).

Ineffective Incentive Schemes: Overlapping incentive schemes for small businesses suffer from poor coordination and lack of awareness in the private sector, complicating performance tracking.

Competitive Disadvantages: High interest rates on bank lending prevent local developers from competing with foreign counterparts who enjoy more favourable rates abroad.

Labor Market Issues:

- Perceptions of Employment: There are notable disparities in working conditions and pay between local and expatriate workers, contributing to perceived unfairness in employment.
- Mismatch of Skills: The available labour supply does not meet the industry's demands in terms of quality or quantity.

- Career Development and Training: Training facilities and curricula at tourism training institutions fail to meet industry needs, leading to a shortage of managerial and supervisory skills among local employees. This shortage limits their career advancement opportunities.

Work Culture: There is a widespread reluctance among Seychellois to work non-traditional hours, which is often a requirement in the hospitality industry, further deterring local employment.

Cost of Foreign Labour: The high costs associated with importing foreign workers increase overall pricing and reduce the destination's price competitiveness.

How can the problem be addressed?

Enhancing Local Investment in Tourism: Tourism is a cornerstone for social and economic advancement in Seychelles. Increased local investment is essential to develop a competitive and sustainable tourism sector, which in turn ensures that economic benefits are retained within the local community, promoting broader economic stability.

Empowering MSMEs for Sustainable Growth: Given the dominance of MSMEs in the tourism sector, enhancing the business environment and building their capacity is crucial. Such support not only drives sustainable and inclusive economic growth but also creates job opportunities, strengthening the local economy.

Diversifying Tourism Offerings: Research indicates that diversifying tourism to include cultural, historical, and eco-tourism attractions would substantially benefit Seychelles. These initiatives necessitate government resources and financial incentives to support the private sector in developing new enterprises and products. Without this support, progress in enhancing the tourism portfolio will be limited, affecting potential growth and attraction diversification.

Enabling the advancement of sustainable tourism practices: Strengthening the minimum requirements as set out in the Tourism Development (Standards) Regulations, 2023 through the Sustainable Seychelles programme.

Incentive Schemes for Sustainable Practices: Developing incentive schemes to support the private sector in creating differentiated products and sustainable practices is vital. These incentives will facilitate the construction of sustainable supply chains and the development of unique tourism products, directly contributing to local economic enhancement and environmental conservation.

Enhancing Inter-Sectoral Linkages: Strengthening connections between tourism and other sectors such as agriculture, culture, and heritage enriches the tourism experience and boosts local economies. These linkages enable the production of distinctive local goods and services, showcasing Seychelles' unique assets and fostering economic benefits across multiple sectors.

Addressing the Critical Role of Skilled Labour: The availability of skilled labour is fundamental to the success of tourism enterprises. Ensuring good working conditions, welfare, and accessible employment opportunities not only fulfils the principles of sustainable tourism but also attracts and retains a competent workforce, thereby enhancing the overall quality of the tourism experience.

Improving Visitor Experiences through Employee Engagement: The interaction between tourism employees and visitors profoundly affects the quality of the visitor experience. Elevating the standards of quality and safety in tourism facilities and services is imperative to ensure they are reliable and consistent, thereby enhancing visitor satisfaction and promoting repeat visitation.

Encourage inclusiveness and Seychellois participation in all aspects of the tourism industry: The prevalence of self-catering accommodations owned by locals and the initiation of tourism clubs in schools, suggests a strategic move towards more inclusive tourism which will benefit communities.

Strategies to promote Investment, strengthen business resilience, capacity and productivity

Strategy 2.1. Promote investment in product development

This strategy focuses on creating a dynamic and supportive ecosystem for investment and entrepreneurship and includes interventions to strengthen:

- co-ordination among different national agencies private/public sector co-ordination

- access to appropriate funding, possibly through microfinance tailored to tourism
- regulations and standards that are achievable by small enterprises
- access to markets and effective promotion
- access to capacity building and training

Actions

INVESTMENT SUPPORT AND ENCOURAGEMENT:

Review policy, legal, institutional and regulatory conditions that govern business activities to ensure that the often-complex set of licenses and taxes that tourism businesses are required to obtain are simplified and encouraging for the start-up of more businesses.

a. Review existing incentive schemes and coordination mechanisms for investment promotion and increase awareness across the private sector about the specifics of these schemes.

b. Update relevant government websites with relevant information for business procedures relevant to tourism investors and entrepreneurs, entailing information on investment, business establishment, access to land, labour, recruitment of foreigners, taxation and EIAs.

c. Revise domestic and foreign investment policies to reflect the need to promote opportunities for tourism investment while ensuring sustainable tourism principles are clearly defined.

d. Work with Seychelles Investment Board and other agencies to review existing, and where necessary, develop new fiscal incentives, and mechanisms to access microfinance to encourage investment for MSMEs.

e. Develop financial support programs, including grants and low-interest loans, along with business development services, specifically for young entrepreneurs in tourism-related sectors such as agri-tourism, nature based and cultural tourism.

f. Create an information portal for MSMEs that offers comprehensive details on investment opportunities in tourism, including the types of projects sought, clear guidelines on regulations, land use plans, and sustainability criteria, as well as financing options and other essential information for small businesses.

g. Establish a system to track tourism investments (both foreign direct investment and small and medium-sized enterprise investment) using coordinated efforts from various agencies, including the National Bureau of Statistics and the Seychelles Investment Board, to assess the effectiveness of implemented measures.

h. Actively promote and support locally owned and operated tourism businesses through national marketing campaigns and initiatives.

i. Prioritise support for both existing and newly established MSMEs through capacity-building initiatives. These should include training in business skills, market access, information and communication technology (ICT) skills, accessible financing, standard-setting, and marketing.

j. Implement mentorship programs that connect aspiring entrepreneurs with established business leaders within the tourism industry, fostering knowledge exchange and professional growth.

STRENGTHENING THE TOURISM SUPPLY CHAIN:

These actions are focused on strengthening links into the tourism value chain such as agriculture and fisheries, other economic sectors and local communities, through the supply of products and services.

k. Initiate the formation of tourism business clusters, facilitated by the tourism department, to foster product development, integrate business value chains, and support the establishment of MSMEs. These clusters, composed of interconnected firms such as local growers, artisans, tour operators, and accommodation providers, aim to capture a larger share of the tourism market. The program will strengthen the entire tourism supply chain by connecting MSMEs with larger tourism entities. For instance, providing training and support to small tour operators could help them partner with hotels and travel agencies, thereby enhancing the tourist experience and promoting MSME growth.

l. Launch a business linkages program to enhance supplier relationships between MSMEs and larger investors, including international stakeholders. This program will be managed collaboratively by the Seychelles Investment

Board, the Tourism Department, and other relevant agencies. The initiative aims to create networks and partnerships that strengthen the tourism sector's value chain. Examples of potential projects include:

Agri-Tourism Networks: Link local farmers with tourism-related businesses such as hotels, restaurants, and tour operators. For example, a project might facilitate agreements between local organic farms and resorts to supply fresh produce, enhancing the dining experience for tourists while supporting local agriculture.

Craft and Souvenir Partnerships: Connect local artisans with tourism retailers to ensure that handmade crafts and souvenirs are available in hotels and gift shops, promoting local culture and craftsmanship.

Community-Based Tourism (CBT) Networks: Establish connections between community-run tourism enterprises and larger tourism operators. For instance, a project could link a village homestay network with national and international tour operators to broaden the market reach and increase visitor numbers to local communities.

Culinary Tourism Initiatives: Bring together chefs, local food producers, and tourism operators to create unique gastronomic experiences. An example is a culinary trail that showcases local food specialties, with restaurants sourcing ingredients directly from local farmers and fishers, thereby promoting regional cuisine and supporting local supply chains.

Eco-Tourism Linkages: Develop projects that connect eco-tourism operators with environmental conservation groups and local communities. For example, a partnership between wildlife tour operators and conservation NGOs could create tours that fund and support local conservation efforts, ensuring that tourism activities contribute to environmental sustainability.

Cultural Tourism Collaborations: Facilitate partnerships between cultural heritage sites, local performers, and tourism service providers to develop and promote cultural tours and events, thus enhancing the cultural tourism offerings while preserving and celebrating local heritage.

Strategy 2.2 Support and Celebrate Sustainable Tourism Business Excellence

These actions are focused on strengthening the Sustainable Seychelles program to foster continual improvement in quality and sustainable practices across the sector.

Actions

a. Continue to develop the Sustainable Seychelles Framework as the unifying national sustainable tourism standard incorporating the Seychelles Hotel Classification Programme and Seychelles Secrets Programme and include other programmes as they are developed. Align the Sustainable Seychelles programme with the Global Sustainable Tourism Council standards.

b. Continue to strengthen and update the minimum requirements set out in the Tourism Development (Standards) Regulations, 2023 to ensure alignment with the Sustainable Seychelles Framework and Global Sustainable Tourism Standards. The minimum requirements should act a starting point for all stakeholders, particularly those who are embarking on their sustainability journey and help raise awareness of the minimum level of sustainability expected across the sector.

c. Establish an industry network to provide input into the development of the Sustainable Seychelles Framework and minimum standards to ensure that they represent the most transversal sustainability actions across the sector and encourage and promote compliance.

d. Collect and analyse visitor satisfaction levels, consumer feedback and customer-generated ratings, and make effective use of this as a tool and incentive for raising quality.

e. Develop information and guidelines for the sector to improve quality, safety and sustainable tourism practices for different types of tourism business, with a particular priority given to gastronomy, marine tourism and high-risk activities.

Strategy 2.3 Developing a resilient, high-performing and sustainable tourism workforce

The Tourism Department is currently finalising a Tourism Human Resources Development Strategy, detailing specific actions and recommendations. The objectives of this strategy are to:

• develop a supportive regulatory environment for importing skills for the tourism industry

- review and revise identified regulations to support employment of single mothers
- improve the quality and extent of training supply to the tourism industry
- create awareness of tourism as a viable career among the youth of Seychelles
- strengthen public sector capacity for the implementation of the strategy

Each of the strategies has a series of specific activity areas ranked in order of importance and priority.

Actions

TOURISM HUMAN RESOURCES DEVELOPMENT:

a. Finalise and implement the Tourism Human Resources Development Strategy, with clear actions, responsibilities, and timelines.

b. Establish a national coordinating mechanism that includes senior-level representatives from private, public, and NGO sectors involved in tourism, human resources, and education. This group will oversee the implementation of the plan and ensure it stays relevant to both industry needs and global trends.

DECENT WORK FOR ALL:

The following actions target areas that fall outside the Tourism Sector Human Resources Development Strategy to encourage decent work for all.

c. Ensure that tourism jobs in Seychelles comply with international standards for decent work, including fair levels of pay, conditions, working hours, social security, opportunities for advancement and access to representation. Implement the Tourism Human Resources Development Strategy recommendations that support work-life balance, particularly for woman.

d. Offer tax incentives or subsidies to businesses that provide housing or housing allowances to Seychellois employees.

Strategy 2.4 Strengthening Resilience

This strategy is focused on awareness and capacity building programs for the tourism sector to enable them to integrate crisis preparedness and resilience response into business operations.

Actions

a. Create a national template for tourism crisis and resilience planning to be included in the Guidelines for Sustainable Tourism Development (Refer Strategy 1.1 and Strategy 4.1), aiding tourism businesses in effectively preparing for and responding to crises.

b. Establish a Tourism Resiliency Knowledge Hub to facilitate the sharing of information and provide access to resources such as training, financial assistance, business advice, and industry connections. This hub could also offer online training tailored to specific needs, enhancing the sector's overall resilience.

c. Develop a national online self-assessment tool for businesses to determine if they are prepared for and able to maintain operations during multiple crisis and recover in a way that strengthens their resilience. Businesses should be encouraged to undertake the assessment tool as part of the business licensing process. Include the program and /or as a requirement of the Sustainable Seychelles Framework.

d. Develop and publish guidelines for mitigating and adapting to climate change in i) tourism planning; ii) the design and diversification of tourism products; iii) services and operations in different types of tourism, particularly those most vulnerable to climate change.

e. Carry out a diagnostic study on the consequences of climate change for tourism supply management, with particular emphasis ecosystems and types of tourism that are highly dependent on climate conditions and ecosystem integrity such as e.g. marine and coastal tourism.
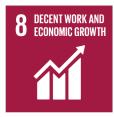
GOAL 3: Protect and Promote Our Natural, Cultural & Social Capital

This goal seeks to enhance Seychelles' cultural and natural assets as key tourism elements, ensuring that tourism benefits the people and for the prosperity of our islands and ocean.

The following strategies and actions included in this section specifically support the following SDGs:

What problem does it solve?

The limited diversity of tourism products and experiences in Seychelles, that reflect the culture, traditions, and unique natural values of the islands and oceans, and impacting on the average spend per visitor and the competitiveness of Seychelles as a destination.

What are its causes?

Focus on accommodation and beach tourism: Over recent decades, Seychelles' tourism strategy has concentrated primarily on expanding accommodation capacity and promoting beach-centric activities. This narrow approach has resulted in limited diversity in visitor experiences and spending opportunities.

Heavily reliance on key attractions: Additionally, the heavy reliance on a few key sites has increased pressure on these areas, potentially degrading their quality and attractiveness over time.

Limited nature-based tourism product: While there is increasing market interest in nature-based tourism, soft adventure and more challenging experiences in natural areas, the product in Seychelles is not fully developed.

Marine tourism: Although the Marine Spatial Plan provides a mechanism for a unified marine tourism policy and strategy, it has not been fully implemented. This fragmentation prevents cohesive development and promotion of maritime-based tourism activities.

Cruise tourism: Seychelles is a frequent destination for cruise ships and cruise tourism is identified as a key product. The cruise market has seen significant growth with new ships adding to the capacity and further growth predicted. Its development in Seychelles, as elsewhere, has been controversial, with widespread concern about the impact on the character of the destination as well as recognition that the economic benefits for Seychellois may be limited.

Limited market research and innovation: There is limited market research to identify emerging trends and visitor preferences. This can result in missed opportunities for creating innovative tourism products that align with current demand.

Limited cultural tourism product: A cultural audit was completed in every district on Mahe, Praslin and La Digue to identify marketing and record all businesses and families that possess in-depth cultural/traditional knowledge and Creole culinary and handcrafting skills. The audit found that whilst there are many opportunities, there are limitations imposed by Seychelles Licencing Authority and Public Health on the delivery of such products which makes it difficult for businesses to invest in new tourism ventures.

Lack of Collaboration and Partnerships: Insufficient collaboration between different stakeholders in the tourism sector, including government agencies, local businesses, and communities. This lack of partnership can hinder coordinated efforts to develop and promote new tourism products.

Infrastructure Challenges: General infrastructure issues, such as inadequate transportation networks, limited access to remote areas, and poor maintenance of existing facilities, can make it difficult for tourists to explore and enjoy diverse experiences across the islands.

How can it be addressed?

Diversify the tourism portfolio by developing and promoting tourism experiences based on the following pillars: Nature (including marine); Arts and Culture; Wellness; Food and Drink.

Cultural tourism: Create more Creole dining experiences, develop museums, and offer specialised guided tours that highlight Seychelles' rich heritage. Address the regulatory constraints that hinder the development of cultural and traditional tourism products.

Nature-based tourism: Invest in infrastructure to support eco-tours, wildlife experiences, and adventure activities such as hiking, diving, and birdwatching. Capitalise on the growing market interest in adventure and trail tourism and develop new trails; identify and develop lesser-known attractions that can offer unique experiences to tourists; highlight Seychelles' marine biodiversity through specialized tours, diving expeditions, and marine conservation programs.

Event-based tourism: Organise and promote cultural festivals, food fairs, and art exhibitions to attract visitors interested in unique cultural experiences.

Training and certification: Offer training programs for guides and operators in adventure tourism to ensure safety and quality.

Conduct regular market research: to stay updated on emerging trends and visitor preferences. Collect data from visitors and analyse trends to identify new opportunities.

Information for visitors: Information can be provided to inform them about how to act in an ecologically and culturally responsible manner during their stay. For example, The Palau Pledge is a unique initiative that requires visitors to sign a pledge, stamped in their passports, promising to act in an ecologically and culturally responsible manner during their stay in Palau. It is accompanied by educational campaigns and materials that inform tourists about the importance of sustainability and conservation. Another example is the New Zealand's Tiaki Promise which encourages travellers to care for New Zealand, respect the environment, and preserve it for future generations

Strategies for developing authentic and unique visitor experiences that reflect our vibrant culture and natural assets.

Strategy 3.1 Refocus the Seychelles Brand on Sustainable Tourism

This program is focussed on developing a brand position that reflects community values, differentiates Seychelles in ways that build its competitive edge, and inspires visitors and industry to care for Seychelles.

Actions

a. Strengthen partnerships/collaborative efforts to support the sustainable brand (both local and international).
b. Promote and support in-market stewardship messaging and education to visitors to increase understanding of community and values and invite others to share them.
c. Establish and promote a visitor code aimed at fostering responsible conduct and sustainable consumption habits, promote marine conservation, and biodiversity protection (refer strategy 4.1).

d. Develop educational materials for visitors that promote responsible tourism practices in Seychelles and produce informative content about sustainability efforts and businesses that meet the minimum standards.
e. Review marketing materials to evaluate the presence of material focused on local food, handicrafts, cultural and other areas prioritise gaps for development.
f. Expand the Creole Rendezvous experience by creating sustainability-themed events (sustainable art exhibitions, green technology fairs etc).

Strategy 3.2: Cultural Tourism Product Development

These actions are focused on developing and promoting cultural heritage assets as tourism products while managing and preserving their authenticity and integrity.

Actions

STRENGTHEN INTER-MINISTERIAL COLLABORATION:

•   Support the development of cultural tourism products in association with the Ministry for Culture and the private sector.
•   Establish a framework to protect the intellectual property rights of communities and creative enterprises.
•   Support the promotion of distinctive products with the branding of "Made in Seychelles".

ENHANCE ARTISAN SKILLS AND MARKET READINESS:

•   Implement targeted training programs to enhance artisans' understanding of market trends and tourism opportunities. Cover various aspects such as product development, quality control, and marketing in these programs.

STREAMLINE REGULATORY PROCESSES:

•   Work with the Seychelles Licensing Authority, Public Health and other relevant authorities to streamline regulations that allow for safe and feasible cultural tourism activities.
•   Develop clear guidelines and checklists to help entrepreneurs understand and comply with necessary requirements.

PROMOTE CULTURALLY APPROPRIATE STORYTELLING:

•   Provide culturally appropriate storytelling and interpretation at natural and cultural sites, developed in collaboration with local communities.

INCREASE FINANCIAL RESOURCES FOR CONSERVATION:

•   Work with relevant agencies to increase financial resources from tourism for the conservation and management of cultural heritage sites. Explore funding sources such as admission fees, sponsorships, donations, and income-earning activities like trading, concessions, and visitor gifting.

ENHANCE VISITOR EXPERIENCE THROUGH INNOVATION:

•   Collaborate with local communities to enhance visitor experiences and appreciation of culture through creative interpretation. Involve local communities in planning cultural tourism projects through consultations and participatory workshops.
•   Use sites as venues for living cultural heritage events and activities and develop creative Creole walking trails promoting local artists.

PROMOTE SEYCHELLOIS CREATIVE INDUSTRIES:

•   Designate spaces for promoting and exhibiting Seychellois creative industry products and services during cruise ship visits.

ENCOURAGE LOCAL CULTURAL ELEMENTS IN INFRASTRUCTURE DEVELOPMENT:

- Promote the use of local materials, architectural styles, linguistic traditions, and other cultural elements in tourism and infrastructure projects and reference in the Guidelines for Sustainable Tourism Development (refer Strategy 1.1).

Strategy 3.3: Nature Based Tourism Product Development

Actions

STRENGTHEN INTER-AGENCY COLLABORATION:

a. Collaborate on the development of infrastructure, tourism experiences, information, and marketing strategies with the ministries and agencies responsible for tourism and natural heritage, including the Seychelles Parks and Gardens Authority, relevant NGOs, and management bodies.

DEVELOP A NATURE TOURISM POLICY AND STRATEGY:

b. Work with relevant authorities to incorporate Tourism into the Seychelles Policy on Protected Areas and develop a strategy for nature tourism opportunities.

IMPLEMENT VISITOR USE MANAGEMENT FRAMEWORKS:

c. Collaborate with relevant agencies to develop a visitor management framework to manage visitor flows and destination /attraction readiness.
d. Establish monitoring and management processes and communicate regulations and guidelines to visitors.

PROMOTE QUALITY AND INNOVATIVE INVESTMENT IN INFRASTRUCUTRE:

e. Encourage and support high-quality and innovative investments in appropriate infrastructure, such as trails, signage, interpretation, activity equipment, and other facilities in natural areas.

Strategy 3.4: Marine Tourism

Actions

DEVELOP MARINE TOURISM GUIDELINES:

a. Develop marine tourism guidelines for tourism operators, including cruise and yacht operators.
b. Ensure these guidelines align with the Marine Spatial Planning Initiative, the Convention on Biological Diversity, and the Convention on Marine Species.

ESTABLISH AND IMPLEMENT COASTAL TOURISM PLANS

c. Develop remaster plans for coastal tourism precincts on Mahe, La Digue, and Praslin.
d. Ensure these precincts provide visually appealing, safe, and walkable experiences with attractive visitor infrastructure, including signage, information, toilets, and garbage disposal.

Strategy 3.5 Cruise Tourism

Actions

DEVELOP AND IMPLEMENT A CRUISE TOURISM DEVELOPMENT AND MANAGEMENT PLAN:

a. Create a comprehensive Cruise Tourism Development and Management Plan based on stakeholder consultation to address the following:
- Provision of high-quality reception, handling, information, entertainment, retail, and other facilities for cruise passengers arriving in Seychelles.

- Provision of locally owned and managed facilities and services that cater to cruise passengers to optimise local benefits and provide an authentic Seychellois experience for guests.
b. Establish and maintain a structure for ongoing dialogue with cruise company representatives and the tourism sector representatives.
c. Ensure the plan is regularly reviewed and updated to reflect changing conditions and feedback.

CONTROL AND MANAGE GROWTH IN SHIP ARRIVALS AND PASSENGER NUMBERS:

d. Ensure that any planned growth in ship arrivals and passenger numbers is controlled and carefully managed within identified limits.
e. Collaborate with managers of sites visited by cruise passengers to ensure sustainable visitor numbers.
f. Maintain a maximum limit on the number of cruise passenger arrivals onshore per day for Mahe, La Digue, and Praslin.
g. Manage and publicise the scheduling of ship arrivals and passenger movements onshore.
h. Enable non-cruise visitors to avoid peak times by providing clear scheduling information.

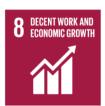# GOAL 4: Empower Climate Resilience and Responsible Environmental Management

This goal aims to advance the tourism sector's transition towards sustainable practices through responsible environmental management.

The strategies and actions contained in this section aim to raise awareness and provide tools for tourism businesses to embed sustainability in their business practices. They aim to encourage tourism industry stakeholders and visitors to reduce their energy use, particularly from non-renewable sources, protect and conserve water, reduce waste, protect biodiversity and safeguard cultural assets.

These strategies and actions contained in this section specifically support the following SDGs:

What problem does it solve?

Limited understanding and slow uptake of sustainability measures across the tourism sector to transition to a low-carbon economy and support the targets set in the Nationally Determined Contributions (NDCs).

What are its causes?

Structure of the sector: The nature of the tourism industry, comprising many small and micro enterprises, creates challenges. Without coordinated efforts and comprehensive support, these businesses struggle to adopt and implement sustainable practices effectively. The absence of strategic collaboration between the government, industry stakeholders, and the community further impedes the progress towards a sustainable tourism model.

Policy and finance gaps: There are gaps in financing and policy implementation that needs to be addressed to encourage the sector to mitigate and adapt to climate change impacts as part of the National Determined Contributions.

Infrastructure limitations : Solid waste management solutions remain an issue due to funding and capacity constraints, high transportation costs, lack of engineered landfills, and limited land availability.

Lack of pathway for emission reduction - There is limited information available on how the sector can contribute such as increasing the use of renewable energy, reducing energy consumption overall, and reducing waste are practical responses to reduce carbon emissions and address climate change.

Data Deficiency: There is lack of data on industry carbon footprint and contribution to emission targets.

Incentives and Support: Small establishments face a shortage of targeted information, training programs, and financial incentives to upgrade or change their practices.

Awareness Programs: There is a lack of information for visitors on responsible tourism practices and how to care for Seychelles, respect the environment, and preserve it for future generations.

How can it be addressed?

Seychelles has defined targets to reduce overall GHG emissions from tourism by 20% per visitor/day by 2030 and to develop a roadmap for a phased transition to circular economy with the aim of contributing towards climate change mitigation. Developing incentive schemes and green credit to support the private sector to transition is critical. These incentives will facilitate the construction of sustainable supply chains and the development of unique tourism products, directly contributing to local economic enhancement and environmental conservation.

Strategies for empowering climate resilience and responsible environmental management

Strategy 4.1. Embed sustainable tourism business practice across the sector.

This strategy establishes the foundations for a sector wide business culture that incorporates sustainability practices into its business models. It consists of raising awareness, providing training and encouraging the adoption of sustainable practices. It includes the development of tools to establish guidelines and conditions that improve environmental performance.

Actions

RAISE AWARENESS AND PROVIDE SECTOR WIDE TRAINING:

a. Conduct workshops and training sessions to educate tourism businesses on the impacts of climate change on tourism and the need for the sector to prepare for potential impacts and to embed sustainability practices in their business.

b. These guidelines should include a practical guide or checklist that tourism businesses (accommodation facilities, food establishments, air transport, land transport, travel agencies, tour operators, cruises, marine tourism operators etc.) can adopt to reduce their environmental footprint by: i) reducing the volume of solid waste the produce and disposing of it properly; ii) conserving and using water efficiently; iii) managing energy and investing in renewable energy sources; iv) reducing greenhouse gas emissions; v) treating wastewater; and vi) protecting biodiversity and ecosystems (marine and terrestrial). These guidelines should be based on the Sustainable Seychelles minimum standards and GSTC Standards identified in Goal 2.

PROMOTE INVESTMENT IN SUSTAINABLE TOURISM PRACTICES:

c. Develop a detailed proposal to modify the tourism industry's regulatory framework to include adjustments to existing tax benefits and other incentives to encourage investments in environmental sustainability. Focus areas should support investments in clean energy sources such as solar, wind, and other renewable options, promote better waste disposal strategies, efficient use of energy and water, and other environmental enhancements.

d. Develop and implement a guideline for the public and private sector for incorporating tourism sustainability criteria in the analysis and approval of all tourism activities and infrastructure.

e. Investigate the feasibility of establishing a special line of green credit for tourism businesses to support businesses to access funding for purchasing equipment or modernising infrastructure to enhance sustainability and environmental efficiency (e.g., low-flow showerheads, water filtering systems, solar panels, efficient lighting systems, etc.).

Strategy 4.2 Climate Resilience

Actions

a. Commit and develop a climate action plan for tourism aligned with the Glasgow Declaration

b. Develop and publish guidelines for mitigating and adapting to climate change in:

(i) tourism planning

(ii) the design and diversification of tourism products

(iii) tourism security processes; and

(iv) services and operations in different types of tourism, particularly coastal and marine activities.

c. Incorporate climate change mitigation and adaptation guidelines into the Tourism Department's technical assistance processes for planning, product design, tourism security and services and operations.

d. Continue building local adaptation capacity in the tourism sector, and work with tertiary education institutions such as the University of Seychelles and the Seychelles Tourism Academy to integrate climate adaptation and sustainable coastal and marine tourism -related content.

GOAL 5: Strengthening Information to Support Sustainable Tourism

This goal aims to improve the availability and reliability of information to monitor the progress of Seychelles' transition towards sustainable tourism practices and to support evidence-based decision making for sustainable tourism development.

These strategies and actions contained in this section specifically support the following SDGs:
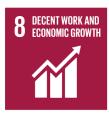

What problem does it solve?

The lack of reliable information and data on the sector's sustainability efforts to inform sustainable tourism decision-making.

What are its causes?

*   Despite the advances in tourism statistics and monitoring frameworks, the limited availability and quality of data collection and analysis of the tourism sector continues to be a major challenge. The lack of evidence on the contribution and impacts of tourism across a range of areas hampers efforts to identify the priorities for interventions.
*   The main indicators used to measure growth in the industry are based on the number of visitors, and neglect vital aspects such as the quality of visits, the net socioeconomic benefits of tourism, its impact in terms of job creation, and its contribution to social development and the conservation of the natural assets that form the basis of the industry's competitiveness.
*   The country does not have an estimate of the industry's environmental footprint, nor tools for its continuous monitoring, nor specific sectoral studies on tourism's environmental performance.
*   A lack of institutional tools that measure resident and tourist satisfaction.

How can it be addressed?

*   Development of an information system that includes baseline indicators to establish levels of sustainability, identify trends and areas for improvement, compare sustainability performance relative to similar destinations and track progress over time.
*   The information systems need to be connected to and compatible with the UN System of National Accounts (SNA), which is the internationally accepted framework for national income accounting (the comprehensive

tracking of national output and income), and the more recently developed System of Environmental Economic Accounting (SEEA) framework and Tourism Satellite Account.
- Comparison of economic, environmental and social indicators sets the stage for data-driven policy actions, such as spatial planning, and creating economic incentives to shift behaviour to sustainable outcomes.

Strategy 5.1. Information for Measuring Sustainable Tourism Outcomes

This strategy focusses on improving the quality of data collection and analysis of tourism performance, impact and sustainability to facilitate more effective decisions on managing sustainable tourism.

ESTABLISH SUSTAINABLE TOURISM INDICATORS:

This strategy has three main objectives. The first is to adjust the performance indicators and goals used to measure the tourism sector's development and growth, take them beyond just the number of visitors to the country, and focus on aspects favouring quality tourism. The second objective of this project is to design and implement new sustainable tourism indicators that measure the impact of tourism on the natural environment an generate reliable, standardised and pertinent information on environmental performance in the industry, at a national and regional level.

Actions

a) Review, adjust and complement the indicators used to measure tourism growth in Seychelles, and the national development goals for the sector utilising UNWTO's Statistical Framework for Measuring Sustainable Tourism (MST Framework) to assess, measure, monitor, model and predict the environmental, social and cultural dimensions of sustainable tourism including:
   o The environmental impacts of tourism, in terms of carbon emissions, solid waste, wastewater, and the disruption of ecosystems and biodiversity;
   o The dependency of tourism on the environment, in terms of water and energy requirements; healthy; and good quality ecosystems (beaches, reefs, forests, etc.);
   o The expenditure on environmental protection and environmental taxes; and
   o Certain socio-economic impacts and dependencies of tourism, such as employment.
b) Implement the use of a Tourism Satellite Account (TSA) to assess, the present and future importance of tourism in contributing to meeting national social and economic needs and national growth targets.
c) Make informed, evidence -based decisions on all aspects of tourism development and management based on the analysis of accurate data and the development of a rigorous, statistical approach to its measurement.
d) Align self - assessment indicators for business sustainability as part of Sustainable Seychelles Framework and the tourism licensing process that tourism service suppliers must complete.

A Sustainable Tourism Monitoring and Evaluation Framework

A National Framework

The Monitoring and Evaluation (M&E) Framework provides a structured approach for the Tourism Department to assess and measure the progress, outcomes, and impacts of activities and interventions contained in the SSTPF.

Specifically, the M&E Framework provides measurable indicators that enable the Department to translate its activities and interventions into measurable progress.

A national sustainable tourism monitoring and evaluation framework with the right balance of indicators is a critical component for creating, nurturing and evaluating the implementation of the SSTPF. Measuring economic contribution, prosperity and social and environmental integrity are all critically important.

While each government agency works independently within their portfolio, the M&E Framework and standardised core indicators will track how the portfolio of funded work is contributing to the desired ecological, social, and financial outcomes of the SSTPF. Working towards reporting on a set of core indicators that are common across the Seychelles Government will also allow for improved opportunities for learning and exchange between the agencies involved in the implementation of the SSTPF.

The M&E Framework assists the Seychelles government to:

- Meets its objectives
- Actively shape and co-create appropriate tourism markets and products
- Ensure policy responses are fit for the future
- Maintain competitiveness
- Understand market failures.

Integration and alignment of performance information within and across Government agencies will assist in strengthening its value and ensuring a common understanding about accountability and deliveryof the SSTPF. This can aid in the process of policy integration across departmental agencies as identified in Goal 1.

Build on Existing Data

The M&E Framework should build on a core set of indicators where data and information are already available or could be available in the short-term. This enables the framework to be delivered quickly, whilst at the same time identifying work streams to address data gaps and indicators that need further development.

Consideration must also be given to the selection of indicators – too many indicators may result in overlapping coverage or contradictory information, leading to policy confusion. A relatively even distribution of indicators can help ensure an optimum balance.

Lagging indicators are excellent at assessing past performance in relation to the strategy and its targets, but they offer little insight as to what the future holds in store. Leading indicators are less precise but provide guidance on future trends and expectation (forecasts).

Principles for Performance Indicators

A robust approach to indicator selection is important to ensure they are useful and can inform Seychelles transition to sustainable tourism practices. The following five guiding principles are useful to assist with indicator selection for the monitoring framework:

1. Relevant – reflect what the SSTPF is trying to achieve, not simply what is easy to measure.

2. Repeatable and timely – produced regularly enough to track progress and timely to be of value to government and the sector.

3. Reliable – produce data that is accurate for its intended use and able to be measured consistently.

4. Credible – improve public services and be supported by research and stakeholders.

5. Well defined and understandable **–** unambiguous and easy to understand and use, comparable with past periods and providing a benchmark against which future performance can be compared.

Potential indicators that can be explored for the framework

Subject to consultation and further investigation the table below provides examples of the types of indicators that can be used to measure progress toward sustainable tourism and implementation of the SSTPF. It provides a comprehensive set of consistent indicators for understanding economic, social/community and environmental outcomes, while incorporating forecasts. It also aligns with best practice globally, allowing to understand the dynamic interaction of tourism with wider issues and the rest of the economy. In combination, these allow policy analysis to identify potential challenges for the sector and the economy in advance.[16] It is noted that governance implementation of standard accounting tools to monitor the economic and environmental aspects of tourism sustainability is directly relevant to SDG indicator 12b.1.

There are three types of relevant performance indicators related to the framework as set out in Table 2:

1. Economic Indicators: The volume and value of tourism visits, including length of stay and spending per head, and its spatial and temporal distribution. Business performance (including occupancy levels, spending and other indicators of profitability and viability), levels of investment, levels of employment in tourism.

2. Social Indicators – perspective of host communities, tourism suppliers and visitor satisfaction.

3. Environmental Indicators – Environmental footprint of tourism activities: waste, water, energy, biodiversity.

There is no expectation that all indicators should be compiled immediately. Compiling agencies are encouraged to use a flexible and modular approach that takes into consideration the context, resources and priorities.

While the development of tourism statistics for some of these topics is less advanced, for many of the topics there are existing statistical standards, infrastructures, and methods in place, which indicate that implementation is not starting from zero.

Even with a suite of broad-based indicators, there is the risk that more emphasis is given to the economic indicators as these tend to be more easily measured and people are generally more familiar with the meaning of these measures. To avoid this, it is critical that all indicators are monitored and reported collectively.

Getting Started

Review and Confirm Indicators (or Performance Measures)

The first step is to review the suggested indicators for the framework through a consultative process in partnership with stakeholders, including government agencies and industry. This would build on work already done in Seychelles and extend international best practice, to ensure appropriate and complete coverage. Indicators will be identified in accordance with the principles described, covering the different aspects of the industry and against the three categories of Economy, Social/Community and Environment.

Identify Data Sources and Select Data Collection Methods

It is important to consider if data is already available or if it can be readily collected to inform the indicator.

Existing data: Data needed to inform indicators may already exist e.g. it may be routinely collected through a partner agency or another process. It is important to establish who owns the data, how rigorous the collection of the data is and the quality of the data. It may be necessary to negotiate a data sharing agreement with the 'owners' of that data and the ethics and appropriateness of using that data, which has been collected for another purpose.

Collecting new data : If establishing new data collection arrangements, a range of qualitative and quantitative data collection methods should be considered. The preferred data collection method will depend on:

- The actual indicator
- The importance of the indicator – how important is it to collect this data? For whom? What use?

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[16] https://unstats.un.org/UNSDWebsite/statcom/session_55/documents/BG-4a-SF-MST-E.pdf

- The resources required compared to those available to collect data or information – e.g. people with appropriate technical knowledge (internal/ external), funds, existing systems, and urgency of collection.
- The reliability of various methods

Implementation

The third stage is implementation, to develop and deliver the working indicator framework, which would include collating and presenting the data. Although this will build on existing and readily available data, it is likely that adjustments will need to be made to existing processes for data capture, as well as setting up new indicators and data capture mechanisms. Interpretation and reporting, and training delivered to enable effective application and use will also be needed.

Implementation will require involvement from a range of agencies including data producing/supplying entities and data using entities. It is expected that National Bureau of Statistics and the Tourism Department will provide leading roles. It will require the availability of good data. This is also necessary for effective planning as well as assessment of actions and is relevant to the implementation of all parts of the framework policy.

Engagement of industry stakeholders is an important part of the process for developing and designing a more useful performance measurement framework and indicator suite. This aids in understanding the limitations and opportunities for the various audiences, and how they can be directly engaged in improving and using the outcomes.

Learning and Adaptive Management

Creating opportunities to enable learning will be key to yielding meaningful M&E processes and results for Seychelles.

The M&E Framework should be a means to adaptively manage tourism at the national level in a way that engages various government, non-government and private sector stakeholders across sectors. For example, the national tourism M&E system could be used to inform the prioritisation of investments and financing.

Such a M&E system would also support the sector transition and support the implementation of the nationally determined contributions (NDCs).

The emphasis on adaptive management is particularly important in the context of country reporting towards the NDCs, given the reporting requirements on lesson-sharing and how lessons have been incorporated into adaptation, mitigation and climate financing.

Stages in the Monitoring and Evaluation Framework

Stage 1	Stage 2
Review and identify indicators	Develop and implement the framework
Assess availability and potential	Collate and analyse the data
Detail and design	Interpretation and training
Consultative process	Maintenance and Monitoring
	Learning and Adaption

Table 2 Headline Indicators /Performance Measures for SSTPF

HEADLINE INDICATOR ECONOMIC IMPACT Goal 1 and Goal 2	HEADLINE INDICATOR SOCIAL IMPACT Goal 2 and Goal 3	HEADLINE INDICATOR ENVIRONMENTAL IMPACT Goal 3 and Goal 4
Visitor Flows Tourism visitor dependency: • Number of inbound visitors (total/tourist/same day) relative to total internal visitors (total/tourist/same day) • Arrivals Air/Cruise/yacht	Host community perspective • Overall perception of host communities of visitors	GHG emissions • Internal tourism GHG emissions per visitor • Internal tourism GHG emissions per unit of tourism direct GDP
Tourism seasonality: • Variations in visitor arrivals (total/ inbound/tourist/same day) on a regular time horizon and in regular frequencies	Tourism suppliers' perspective: Decent work • Share of compensation of employed persons relative to tourism direct value added in the tourism industries. • Share of employed persons in tourism industries who are informally employed.	Solid waste flows • Tourism Solid waste generated by tourism industries per visitor/tourist • Tourism solid waste generated per unit of tourism direct GDP • Share of Tourism solid waste generated by tourism industries and relative to total solid waste
Length of stay: • Average length of stay of inbound and domestic tourists	Business Demographics for tourism • Number of businesses • Employment • Ownership	Water flows • Tourism water use per visitor/tourist and per visitor overnight • Tourism water use per unit of tourism value added Wastewater • Tourism wastewater per visitor overnight • Annual tourism water use by tourism industries as a proportion of the net change in stock of water resources
Visitor expenditure • Average internal tourism expenditure per visitor (total/inbound/domestic/tourist/same day) • As above -air/cruise/ yacht	Accommodation Industry • Number of businesses • Number of beds • Rooms with Accessibility Considerations • Occupancy	Energy flows • Total tourism end-use of energy products by tourism industries Ecosystem extent (for tourism areas) Share of tourism-related ecosystem assets to the total tourism area

HEADLINE INDICATOR ECONOMIC IMPACT Goal 1 and Goal 2	HEADLINE INDICATOR SOCIAL IMPACT Goal 2 and Goal 3	HEADLINE INDICATOR ENVIRONMENTAL IMPACT Goal 3 and Goal 4
	• Employment by gender • Income by gender	
Tourism economic structure: • Share of large and SME tourism establishments • Share of resident owned tourism establishments relative to all tourism establishments	Tourism income distribution • Local • International • Income • Education • Gender • Nationality	• Changes in ecosystems due to the tourism activity resulting in a loss of natural ecosystems. • Changes in the quality of ecosystems including losses in species and biodiversity due to tourism activity
Tourism economic performance: • Tourism direct GDP • Tourism share of total output for each tourism industry • Distribution of economic benefits • Share of compensation of employees relative to tourism direct value added in the tourism industries	Culture • Visitors -international and domestic • Participation in Cultural activities • Cultural activity expenditure	
Employment in tourism • Total employment in tourism industries (jobs/ employed persons/ employees) • Share of employed persons in tourism industries relative to total economy • Share of women in jobs/employed persons/employers in the tourism industry. • Number of nationals (men and woman working in the industry) • As above in managerial positions	Businesses involved in cultural activities • Number of businesses • Employment • Revenue Businesses involved in marine /yachting sector • Number of businesses • Employment • Revenue	Sustainable tourism programme • Businesses enrolled in Sustainable Seychelles program • Number and type of businesses participating in training programs
Tourism investment	Visitor Perspective Measures • Share of visitors satisfied with overall experience	

HEADLINE INDICATOR ECONOMIC IMPACT Goal 1 and Goal 2	HEADLINE INDICATOR SOCIAL IMPACT Goal 2 and Goal 3	HEADLINE INDICATOR ENVIRONMENT AL IMPACT Goal 3 and Goal 4
• Total gross fixed capital formation (GFCF) in tourism specific fixed assets relative to total GFCF of tourism industries • Total GFCF by tourism industries and relative to total economy GFCF Government tourism-related transactions • Total tourism related government final consumption expenditure	• Number of repeat visitors • Extent to which visitors would recommend Seychelles	
Tourism concentration: • Number of visitors (per 100 residents)		
Leakage • Number of SMEs • Number of large establishments > 100 employees) • Number of resident owned establishments • Number of non -resident owned establishments		
Tourism Use • Accommodation Occupancy		